ORACLE NetSuite

Managing Users & Roles

2025.2

January 7, 2026

Copyright © 2005, 2025, Oracle and/or its affiliates.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, and MySQL are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

If this document is in public or private pre-General Availability status:

This documentation is in pre-General Availability status and is intended for demonstration and preliminary use only. It may not be specific to the hardware on which you are using the software. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to this documentation and will not be responsible for any loss, costs, or damages incurred due to the use of this documentation.

If this document is in private pre-General Availability status:

The information contained in this document is for informational sharing purposes only and should be considered in your capacity as a customer advisory board member or pursuant to your pre-General Availability trial agreement only. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, timing, and pricing of any features or functionality described in this document may change and remains at the sole discretion of Oracle.

This document in any form, software or printed matter, contains proprietary information that is the exclusive property of Oracle. Your access to and use of this confidential material is subject to the terms and conditions of your Oracle Master Agreement, Oracle License and Services Agreement, Oracle PartnerNetwork Agreement, Oracle distribution agreement, or other license agreement which has been executed by you and Oracle and with which you agree to comply. This document and information contained herein may not be disclosed, copied, reproduced, or distributed to anyone outside Oracle without prior written consent of Oracle. This document is not part of your license agreement nor can it be incorporated into any contractual agreement with Oracle or its subsidiaries or affiliates.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at https://www.oracle.com/corporate/accessibility.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Sample Code

Oracle may provide sample code in SuiteAnswers, the Help Center, User Guides, or elsewhere through help links. All such sample code is provided "as is" and “as available”, for use only with an authorized NetSuite Service account, and is made available as a SuiteCloud Technology subject to the SuiteCloud Terms of Service at www.netsuite.com/tos.

Oracle may modify or remove sample code at any time without notice.

No Excessive Use of the Service

As the Service is a multi-tenant service offering on shared databases, Customer may not use the Service in excess of limits or thresholds that Oracle considers commercially reasonable for the Service. If Oracle reasonably concludes that a Customer’s use is excessive and/or will cause immediate or ongoing performance issues for one or more of Oracle’s other customers, Oracle may slow down or throttle Customer’s excess use until such time that Customer’s use stays within reasonable limits. If Customer’s particular usage pattern requires a higher limit or threshold, then the Customer should procure a subscription to the Service that accommodates a higher limit and/or threshold that more effectively aligns with the Customer’s actual usage pattern.

Beta Features

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software" or “commercial computer software documentation” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government’s use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

This documentation is in pre-General Availability status and is intended for demonstration and preliminary use only. It may not be specific to the hardware on which you are using the software. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to this documentation and will not be responsible for any loss, costs, or damages incurred due to the use of this documentation.

The information contained in this document is for informational sharing purposes only and should be considered in your capacity as a customer advisory board member or pursuant to your pre-General Availability trial agreement only. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described in this document remains at the sole discretion of Oracle.

This document in any form, software or printed matter, contains proprietary information that is the exclusive property of Oracle. Your access to and use of this confidential material is subject to the terms and conditions of your Oracle Master Agreement, Oracle License and Services Agreement, Oracle PartnerNetwork Agreement, Oracle distribution agreement, or other license agreement which has been executed by you and Oracle and with which you agree to comply. This document and information contained herein may not be disclosed, copied, reproduced, or distributed to anyone outside Oracle without prior written consent of Oracle. This document is not part of your license agreement nor can it be incorporated into any contractual agreement with Oracle or its subsidiaries or affiliates.

Table of Contents

NetSuite Users & Roles 1
- NetSuite Access Overview 1
  - Users 1
  - Roles 2
  - NetSuite Account Access 2
  - Internal Controls for NetSuite Access 2
- Standard Roles Permissions Table 3
- Roles and Permission Considerations for APIs 62
- Permissions Documentation 63
- Feature Permissions Documentation 64
- NetSuite Roles Overview 67
  - Manage Roles Page 68
  - Show Permission Differences Between Roles Page 69
  - Role Search 69
  - NetSuite Account Administration 69
  - Separate Administration Permissions 71
  - Full Access Role (Deprecated) 71
  - Permissions Requiring Two-Factor Authentication (2FA) 72
  - Customizing or Creating NetSuite Roles 72
  - Changing Custom Roles 83
  - Inactivating Roles 85
  - Setting Default Forms for Roles 85
  - Restricting Accounts for Roles 86
  - Customizing the Customer Center Role 88
  - Retail Clerk Roles 89
  - Specialized User: View and Approve Role 90
  - Specialized User: CRM Role 91
  - Specialized User: Site Operator 91
  - Showing Role Permission Differences 92
  - Use Searches to Audit Roles and Permissions 93
  - Use Searches to Audit Roles 93
  - Use Searches to Audit Permissions By Employee 94
  - Mass Updating a Permission on Custom Roles 95
  - Mass Updating the Role Assigned to Customers 98
- NetSuite Users Overview 99
  - Employee Users 100
  - Vendor Users 101
  - Partner Users 102
  - Customer Users 102
  - Giving Customers Access 102
  - Changing a User's NetSuite Password 107
  - Viewing Your NetSuite Users List 109
  - Login Audit Trail Overview 110
  - Inactivating Users 113
  - Restricting an Individual User View 115
- NetSuite Permissions Overview 115
  - Permissions and Restrictions 116
  - Reviewing Permissions Assigned to Roles 117
  - Access Levels for Permissions 118
  - Core Administration Permissions 119
  - Using the Global Permissions Feature 121
  - Giving Access to the Transactions Subtab on Entity Records 121
  - Giving Access to Financial Statements 123

Hiding Employee Information on Financial Reports 123
Setting Permissions for Custom Records 123
Permissions for Inbound Single Sign-on Methods 124

NetSuite Users & Roles

Learn how to manage NetSuite roles and permissions
to provide your account users with the access they need

NetSuite Access

NetSuite Roles

NetSuite Users

NetSuite Permissions

Lists of Permissions

Standard Roles Permissions Table

Permissions Documentation

Feature Permissions Documentation

Roles

NetSuite Account Administration

Customizing or Creating NetSuite Roles

Inactivating Roles

Users

Giving Customers Access

Login Audit Trail Overview

Inactivating Users

Permissions

Permissions and Restrictions

Access Levels for Permissions

Using the Global Permissions Feature

Note: The following link provides access to a Microsoft Excel worksheet listing the usage of most NetSuite permissions: NetSuitePermissionsUsage.xls. You can use this list to see what happens when you assign a specific permission, or to find the permission required to provide access to a specific task or page. For more information, see Permissions Documentation.

NetSuite Access Overview

Access to NetSuite data and to the NetSuite user interface is based on users, roles, and permissions:

- Users
- Roles
- NetSuite Account Access
- Internal Controls for NetSuite Access

Users

A user is an individual who has access to a NetSuite account.

- Generally, most users are employees, but vendors, partners, and customers also can be users.
- Users need to be set up in NetSuite by creating employee, vendor, partner, or customer records. To access NetSuite, users' records must include an email address, which acts as their user ID. Users also need a password to access NetSuite. Users with the Administrator role can send an access notification email with a link so users can create their own passwords.

For information about creating and setting up different user types, see Manage Different Types of Users.

Roles

A role is a defined access configuration that can be assigned to users.

- Each role comes with permissions that decide what data users can see and what tasks they can do. For example, the A/P Clerk role lets users enter bills and vendor credits, pay bills and sales tax, and view A/P and inventory reports.
- Each role is linked to a center, which is a set of tabbed pages in the NetSuite interface. Each center is set up to the business needs of users in a specific area, such as accounting or sales. A role's center decides which pages users see when they log into NetSuite.
- One user can have multiple roles. The user can select a default role for logging in. Users can switch between roles and accounts using the Change Roles list in NetSuite. For more information, see the help topic Roles and Accounts.

NetSuite Account Access

Whoever signs up for a NetSuite account is automatically assigned the Administrator role. The user with the Administrator role has full privileges to all aspects of the system and usually sets up account access by assigning roles to users.

- The first step for setting up account access is to create roles. See NetSuite Roles Overview to understand the different types of roles, as well as how to create and manage them.
- After you set up roles, you can give users access and assign roles. See NetSuite Users Overview for information about how to manage different types of users and monitor users' login activity using the Login Audit Trail.
- NetSuite has a complex permission structure with permissions divided into different types and different access levels. See NetSuite Permissions Overview to understand the different types of permissions and how to enable the Global Permissions feature. Please note that you should avoid using the Global Permissions feature. For more information, see Using the Global Permissions Feature.
- You can enable the NetSuite's Advanced Employee Permissions feature which will give you more flexibility and control over the employee information that users with certain roles can access in NetSuite. When this feature is enabled, users with the Administrator role can customize or create roles to use the Employee Self, Employee Public, Employee Confidential, Employee Compensation, Employee System Access, Employee Record Full, and Employee Administration permissions. For more information, see the help topic Advanced Employee Permissions Overview. Users with the Administrator role can also create custom employee permissions and custom restrictions when this feature is enabled. For more information, see the help topics Custom Advanced Employee Permissions and Custom Restrictions for Advanced Employee Permissions.
- In addition to permissions, NetSuite has role restrictions that control which record instances of a record type can a role access. See Permissions and Restrictions.

> **Note:** Users need the SuiteAnalytics Connect permission to access the NetSuite SuiteAnalytics Connect schema. See the help topic Connect Permissions.

Internal Controls for NetSuite Access

To have effective internal controls, you'll need a combination of both automated and manual controls that both prevent and detect misstatements or misappropriation of assets. Companies have several responsibilities for setting up good general controls for NetSuite.

- Make sure logical access and application security are in place. Users should have only the information that they need to do their jobs.
- Segregate duties and transaction processing.
- Make sure your organization has user administration controls in place, including:
  - The process for requesting and approving access. If possible, different people should handle the request, approval, and granting of access to make sure the process is followed correctly.
  - Review access regularly to check for changes in responsibilities, make sure former employees' access is revoked, and confirm that only the right people have sensitive or critical permissions.
  - Make sure you end access quickly when needed.
- Keep a record of which roles go with each job function and job title.
- Audit the permissions in each role regularly to make sure they're still appropriate.
- The Administrator role is powerful, so access to this role should be extremely limited. Ideally, your organization should have one administrator and one back-up administrator.

Standard Roles Permissions Table

The following table lists the permissions and permission levels for each standard role.

It's best to start with a copy of the standard roles built into NetSuite before you customize them. Giving users only the access they need helps avoid showing restricted pages, records, and data. You can then add or remove permissions from the roles as needed. See Permissions Documentation for an updated list of permissions and their corresponding usage.

The standard roles available in your account may differ, depending on the modules you've purchased, and the features you've enabled. You can see the roles available in your account at Setup > Users/Roles > Manage Roles, and you can review a role's details by clicking its link on the Manage Roles page.

You can't modify standard roles. You should create a custom version of any standard role before assigning it, so you can change it later if needed, even after it has been assigned.

The Administrator role has **all** permissions available in your NetSuite account at **all** levels. To see the full list of permissions assigned to the Administrator role, go to Setup > Users/Roles > Manage Roles, click **Administrator** and see the list of permissions on the Permissions subtab. For more information about the Administrator role, see NetSuite Account Administration.

The Data Warehouse Integrator role allows Connect users to have access to all NetSuite data through the NetSuite2.com data source, except for sensitive data. For more information, see the help topic Role and Permission Considerations for NetSuite2.com.

> **Important:** If you have the Advanced Employee Permissions feature enabled, see the help topic Advanced Employee Permissions and Standard NetSuite Roles for a list of the employee permissions that are assigned to standard NetSuite roles when this feature is enabled.

There are three main groups of standard roles in NetSuite: executive, managerial, and operational.

- Executive roles include top-level and senior roles that let them see everything happening in their areas.
- Managerial roles, in general, have fewer permissions than executive and operational roles, but they include the key permissions needed to manage their areas.

- Operational roles let users support their customers or colleagues.

Executive	Managerial	Operational
CEO	Engineering Manager	A/P Clerk
CEO (Hands Off)	Intranet Manager	A/R Clerk
CFO	Marketing Manager	Accountant
Chief People Officer (CPO)	Payroll Manager	Accountant (Reviewer)
Sales Vice President	PM Manager	Bookkeeper
	Product Manager	Buyer
	QA Manager	Consultant
	Resource Manager	Customer Center
	Revenue Manager	Developer
	Sales Manager	Employee Center
	Store Manager	Engineer
	Support Manager	Full Access (deprecated)
	Warehouse Manager	Human Resources Generalist
		Issue Administrator
		Marketing Administrator
		Marketing Assistant
		Partner Center
		Payroll Setup
		QA Engineer
		Retail Clerk
		Retail Clerk (Web Services Only)
		Revenue Accountant
		Sales Administrator
		Sales Person
		Support Administrator
		Support Person
		System Administrator
		Specialized User: CRM
		Specialized User: Project Manager
		Specialized User: Site Operator
		Specialized User: View and Approve

Executive	Managerial	Operational
		Specialized User: WMS
		Tax Engine
		Vendor Center

A/P Clerk

A/P Clerk				
View	**Create**	**Edit**		**Full**
Accounts Payable Accounts Payable Graphing Amortization Schedules Bill Of Materials Inquiry Bulk Processing Submissions Contact-Subsidiary relationship Custom Recognition Event Type Deferred Expense Reports Employee Public Employee Record Entity-Subsidiary relationship Expense Amortization Plan Expense Amortization Rule Financial History Inventory Non Posting Registers Notes Tab Purchase Order Reports SaaS Metric Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report System Journal Tax Records Tax Reports	Export Lists Kudos Resource Tableau® Workbook Export	Accounting Lists Accounts Payable Register Bill Purchase Orders Bill of Materials Bills Classes Credit Returns Departments Email Template Enter Vendor Credits Item Receipt Items Locations Memorized Transactions Other Lists	Pay Bills Pay Sales Tax Purchase Order Receive Order Requisition Statistical Account Registers SuiteAnalytics Workbook Tax Details Tab Tax Liability Payment Track Messages Units Vendor Prepayment Vendor Prepayment Application Vendor Return Auth. Approval Vendor Return Authorization Vendor Returns Vendors	Address List in Search Analytical Impact Automated Clearing House Calendar Contacts Deleted Records Documents and Files Events Find Transaction General Token Inbound Shipment Log in using Access Tokens Mobile Device Access Notifications Ownership Transfer Payment Card Payment Card Token Payment Instruments Perform Search Phone Calls Posting Period on Transactions Price Books Price Plans Product Analytics Records Report Customization Report Scheduling REST Web Services Scanned Vendor Bills SOAP Web Services Subscription Plan Tasks Template Categories Usage Vendor Automated Clearing House Vendor Bill Approval Vendor Payment Approval Vendor Prepayment Approval Vendor Payment Instruments

A/R Clerk

A/R Clerk			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Accounts Receivable Accounts Receivable Graphing Bill Of Materials Inquiry Bulk Processing Submissions Contact-Subsidiary relationship Custom Recognition Event Type Employee Public Employee Record Entity-Subsidiary relationship Fair Value Dimension Fair Value Formula Fair Value Price Financial History Generate Price Lists Generate Statements Inventory Item Revenue Category Lead Snapshot/Reminders Notes Tab Project Profitability Project Revenue Rules Project Templates Recognition Treatment Recognition Treatment Rule Revenue Arrangement Revenue Arrangement Approval Revenue Commitment Revenue Commitment Reversal Revenue Element Revenue Management VSOE Revenue Recognition Field Mapping Revenue Recognition Plan Revenue Recognition Rule Revenue Recognition Schedules SaaS Metric System Journal Tax Records Tax Reports Time Tracking Transaction Detail View Gateway Asynchronous Notifications View Payment Events Work Calendar	Export Lists Kudos Recognize Gift Certificate Income Resource Tableau® Workbook Export	Accounting Lists Accounts Receivable Register Bill of Materials Cash Sale Charge Charge Rule Classes Competitors Customer Deposit Customer Payment Customer Payment Authorization Customers Departments Deposit Application Email Template Fulfill Orders Gift Certificate Invoice Invoice Sales Orders Item Fulfillment Items Locations Memorized Transactions Other Lists Override Payment Hold Print Shipment Documents Projects Sales Order Shipping Partner Package Shipping Partner Shipment Subscriptions Subscription Change Orders SuiteAnalytics Workbook Tax Details Tab Track Messages Transfer Order Unbilled Receivable Registers Units	Address List in Search Analytical Impact Automated Clearing House Calendar Charge – Run Rules Contacts Deleted Records Documents and Files Events Find Transaction General Token Invoice Approval Log in using Access Tokens Mobile Device Access Notifications Payment Card Payment Card Token Payment Instruments Perform Search Phone Calls Posting Period on Transactions Price Books Price Plans Product Analytics Records Project Tasks Report Customization Report Scheduling REST Web Services SOAP Web Services Subscription Plan Tasks Template Categories Track Time Usage

Accountant

Accountant				
View	**Create**	**Edit**		**Full**
Access Payment Audit Log Account Detail Accounts Payable Accounts Payable Graphing Accounts Receivable Accounts Receivable Graphing Amortization Reports Balance Sheet Bill Of Materials Inquiry Bulk Processing Submissions Check Item Availability Commit Orders Component Where Used Contact-Subsidiary relationship Costed Bill Of Materials Inquiry Deferred Expense Reports Employee Public Employee Reminders Entity-Subsidiary relationship Expenses Fair Value Dimension Fair Value Formula Fair Value Price Financial Statements General Ledger Generate Price Lists Generate Statements Income Income Statement Inventory Item Revenue Category Lead Snapshot/ Reminders Net Worth Notes Tab Period End Financial Statements Project Budget Project Profitability Project Revenue Rules Project Templates Purchase Order Reports Purchases Recognition Treatment Recognition Treatment Rule Revenue Arrangement	Balance Transactions by Segments Balancing Journals Export Lists Kudos Recognize Gift Certificate Income Resource Tableau® Workbook Export	Accounting Lists Accounting Management Accounts Accounts Payable Register Accounts Receivable Register Adjust Inventory Amortization Schedules Bank Account Registers Bill of Materials Bill Purchase Orders Bills Build Assemblies Build Work Orders Cash Sale Charge Charge Rule Check Classes Close Work Orders Competitors Create Allocation Schedules Credit Card Credit Card Refund Credit Card Registers Credit Memo Credit Returns CRM Groups Currency Revaluation Custom Recognition Event Type Customer Deposit Customer Payment Customer Payment Authorization Customers Departments Deposit Deposit Application Distribute Inventory Email Template Employees Enter Completions Enter Opening Balances Enter Vendor Credits Equity Registers	Fixed Asset Registers Generate Revenue Commitment Generate Revenue Commitment Reversals Gift Certificate Invoice Invoice Sales Orders Issue Components Items Locations Long Term Liability Registers Make Journal Entry Mark Work Orders Built Mark Work Orders Firmed Mark Work Orders Released Mass Updates Memorized Transactions Non Posting Registers Other Asset Registers Other Current Asset Registers Other Current Liability Registers Other Lists Other Names Pay Bills Pay Sales Tax Period End Journals Post Time Projects Purchase Order Reconcile Reconcile Reporting Requisition Revenue Commitment Revenue Commitment Reversal Revenue Management VSOE Revenue Recognition Schedules Sales Order Statistical Account Registers Subscription Change Orders Subscriptions	Address List in Search Allocate Orders Approve Order Reservation Analytical Impact Automated Cash Application Bills Bill Of Distribution Blanket Purchase Order Calendar Contacts Count Inventory Create Inventory Counts Deleted Records Distribution Network Documents and Files Earliest Availability Employee Record Events Financial Exception Management Financial Narratives Find Transaction Global Inventory Relationship Charge - Run Rules Inventory Cost Template Invoice Approval Item Demand Plan Item Revisions Item Supply Plan Log in using Access Tokens Manufacturing Cost Template Manufacturing Routing Material Requirements Planning Mobile Device Access Notifications Order Allocation Strategy Order Management Dashboard Order Reservation Pay Tax Liability Perform Search Phone Calls

Accountant				
View	**Create**	**Edit**		**Full**
Revenue Arrangement Approval Revenue Element Revenue Recognition Field Mapping Revenue Recognition Plan Revenue Recognition Rule Revenue Recognition Reports Saas Metric Sales Sales By Partner Sales By Promotion Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Subsidiary Settings Manager System Journal Tax Time Tracking Transaction Detail Trial Balance View Gateway Asynchronous Notifications View Payment Events Work Breakdown Structure Work Calendar		Expense Amortization Plan Expense Amortization Rule	SuiteAnalytics Workbook Tax Details Tab Tax Liability Payment Tax Records Tax Reports Track Messages Track Time Transfer Funds Transfer Inventory Unbilled Receivable Registers Unbuild Assemblies Units Vendor Return Auth. Approval Vendor Return Authorization Vendor Returns Vendors Work Order Work Order Close Work Order Completion Work Order Issue	Planned Standard Cost Post Vendor Bill Variances Posting Period on Transactions Price Books Price Plans Product Analytics Records Project Tasks Purchase Contract Reallocate Order Item Report Customization Report Scheduling REST Web Services Request For Quote Revalue Inventory Cost Sales Channel SOAP Web Services Standard Cost Version Subscription Plan Tasks Tegata Accounts Tegata Payable Tegata Receivables Template Categories Transfer Order Transfer Order Approval Usage Vendor Bill Approval Vendor Payment Approval Vendor Request For Quote

Accountant (Reviewer)

Accountant (Reviewer)				
View		**Create**	**Edit**	**Full**
Access Payment Audit Log Accounting Lists Accounting Management Accounts Accounts Payable Accounts Payable Graphing Accounts Payable Register	Income Statement Inventory Invoice Issue Components Item Revenue Category Items Lead Snapshot/Reminders Locations Long Term Liability Registers	Export Lists Kudos Resource Tableau® Workbook Export	Bills Email Template Mass Updates Override Payment Hold SuiteAnalytics Workbook Track Messages	Address List in Search Allocate Orders Analytical Impact Approve Order Reservation Bill Of Distribution Blanket Purchase Order Calendar Charge - Run Rules

Accountant (Reviewer)				
View		**Create**	**Edit**	**Full**
Accounts Receivable Accounts Receivable Graphing Accounts Receivable Register Adjust Inventory Amortization Reports Amortization Schedules Balance Sheet Balance Transactions by Segments Balancing Journals Bank Account Registers Bill Of Materials Inquiry Bill of Materials Bulk Processing Submissions Build Assemblies Build Work Orders Cash Sale Charge Charge Rule Check Check Item Availability Classes Close Work Orders Commit Orders Competitors Component Where Used Contact-Subsidiary relationship Costed Bill Of Materials Inquiry Create Allocation Schedules Credit Card Credit Card Refund Credit Card Registers Credit Memo Credit Returns CRM Groups Currency Revaluation Custom Recognition Event Type Customer Deposit Customer Payment Customer Payment Authorization Customers Deferred Expense Reports Departments Deposit Deposit Application Distribute Inventory Employee Public Employee Reminders Employees	Make Journal Entry Mark Work Orders Built Mark Work Orders Firmed Mark Work Orders Released Memorized Transactions Net Worth Non Posting Registers Notes Tab Other Asset Registers Other Current Asset Registers Other Current Liability Registers Other Lists Other Names Pay Sales Tax Period End Financial Statements Period End Journals Price Books Price Plans Project Budget Project Profitability Project Revenue Rules Projects Purchase Contract Purchase Order Purchases Recognition Treatment Recognition Treatment Rule Reconcile Reporting Request For Quote Requisition Revalue Inventory Cost Revenue Arrangement Revenue Arrangement Approval Revenue Commitment Revenue Commitment Reversal Revenue Element Revenue Management VSOE Revenue Recognition Field Mapping Revenue Recognition Plan Revenue Recognition Reports Revenue Recognition Rule Revenue Recognition Schedules SaaS Metric Sales Sales By Partner Sales By Promotion Sales Order			Contacts Count Inventory Create Inventory Counts Deleted Records Distribution Network Documents and Files Employee Record Events Financial Narratives Find Transaction Global Inventory Relationship Inventory Cost Template Item Demand Plan Item Revisions Item Supply Plan Log in using Access Tokens Manufacturing Cost Template Manufacturing Routing Material Requirements Planning Mobile Device Access Notifications Order Allocation Strategy Order Management Dashboard Order Reservation Perform Search Phone Calls Planned Standard Cost Posting Period on Transactions Product Analytics Records Project Tasks Reallocate Order Item Report Customization Report Scheduling REST Web Services Sales Channel SOAP Web Services Standard Cost Version Subsidiary - Tax Engine selection Tasks Tegata Accounts Tegata Payable Tegata Receivables Template Categories Vendor Bill Approval

Accountant (Reviewer)				
View		**Create**	**Edit**	**Full**
Enter Completions Enter Opening Balances Enter Vendor Credits Entity-Subsidiary relationship Equity Registers Expense Amortization Plan Expense Amortization Rule Expenses Fair Value Dimension Fair Value Formula Fair Value Price Financial Statements Fixed Asset Registers General Ledger Generate Price Lists Generate Statements Gift Certificate Income	Sales Order Reports Sales Order Transaction Report Statistical Account Registers Subscription Plan Subscription Change Orders Subscriptions System Journal Tax Tax Details Tab Tax Liability Payment Tax Records Tax Reports Time Tracking Track Time Transaction Detail Transfer Funds Transfer Inventory Transfer Order Trial Balance Unbilled Receivable Registers Unbuild Assemblies Units Usage Vendor Request For Quote Vendor Return Auth. Approval Vendor Return Authorization Vendor Returns Vendors View Gateway Asynchronous Notifications View Payment Events View Breakdown Structure Work Calendar Work Order Work Order Close Work Order Completion Work Order Issue			Vendor Payment Approval

Advanced Partner Center

Advanced Partner Center			
View	**Create**	**Edit**	**Full**
Bill Of Materials Inquiry Bill of Materials Credit Memo Customer Refund Customer Payment	Export Lists Kudos Notes Tab Promotion	Campaign History Cases CRM Groups Cases Estimate	Calendar Contacts Custom Record Entries Customers Events

Advanced Partner Center			
View	**Create**	**Edit**	**Full**
Email Template Financial History Invoice Items Knowledge Base Lead Snapshot/Reminders Marketing Campaigns Non Posting Registers Partner Commission Reports Project Templates Return Authorization Sales Sales By Partner Sales Force Automation Sales Order Reports Sales Order Transaction Report Subscriptions Subscription Plan Subsidiaries Support Support Case Snapshot/Reminders Tax Details Tab Tax Records Units Work Calendar	Tableau® Workbook Export	Gift Certificate Opportunity Sales Order SuiteAnalytics Workbook Track Messages	Find Transaction Log in using Access Tokens Mobile Device Access Notifications Partners Perform Search Price Books Price Plans Phone Calls Project Tasks Report Customization Report Scheduling REST Web Services SOAP Web Services Tasks Template Categories Usage

Bookkeeper

Bookkeeper			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Accounting Management Accounts Accounts Payable Accounts Payable Register Accounts Receivable Accounts Receivable Register Bank Account Registers Bill Of Materials Inquiry Bulk Processing Submissions Check Item Availability Commit Orders Component Where Used Contact-Subsidiary relationship Credit Card Registers Deferred Expense Reports Employee Public Employee Reminders Entity-Subsidiary relationship Equity Registers Fixed Asset Registers Generate Price Lists Generate Statements Inventory	Export Lists Kudos Recognize Gift Certificate Income Resource Tableau® Workbook Export	Accounting Lists Address List in Search Adjust Inventory Bill Purchase Orders Bill of Materials Bills Cash Sale Charge Charge Rule Check Classes Competitors Credit Card Credit Card Refund Credit Memo Credit Returns CRM Groups Currency Revaluation Customer Deposit Customer Payment Customer Payment Authorization Customers Departments	Allocate Orders Analytical Impact Approve Order Reservation Automated Cash Application Bill Of Distribution Calendar Charge – Run Rules Contacts Count Inventory Create Inventory Counts Deleted Records Distribution Network Documents and Files Earliest Availability Employee Record Events Find Transaction Global Inventory Relationship Inventory Cost Template Invoice Approval Item Demand Plan

Bookkeeper			
View	**Create**	**Edit**	**Full**
Lead Snapshot/Reminders Long Term Liability Registers Non Posting Registers Notes Tab Other Asset Registers Other Current Asset Registers Other Current Liability Registers Project Profitability Project Templates Purchase Order Reports Revalue Inventory Cost SaaS Metric Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Statistical Account Registers System Journal Tax Tax Records Tax Reports Time Tracking Transaction Detail Unbilled Receivable Registers View Gateway Asynchronous Notifications View Payment Events Work Calendar		Deposit Deposit Application Email Template Employees Enter Opening Balances Enter Vendor Credits Gift Certificate Invoice Invoice Sales Orders Item Revisions Items Locations Make Journal Entry Memorized Transactions Other Lists Other Names Pay Bills Pay Sales Tax Projects Purchase Order Reconcile Reconcile Reporting Requisition Sales Order Subscriptions Subscription Change Orders SuiteAnalytics Workbook Tax Details Tab Tax Liability Payment Track Messages Transfer Funds Transfer Order Units Vendor Return Auth. Approval Vendor Return Authorization Vendor Returns Vendors	Item Supply Plan Log in using Access Tokens Manufacturing Cost Template Manufacturing Routing Material Requirements Planning Mobile Device Access Notifications Order Allocation Strategy Order Management Dashboard Order Reservation Perform Search Phone Calls Planned Standard Cost Price Books Price Plans Product Analytics Records Post Vendor Bill Variances Posting Period on Transactions Project Tasks Reallocate Order Item Report Customization Report Scheduling REST Web Services Sales Channel SOAP Web Services Standard Cost Version Subscription Plan Tasks Tegata Accounts Tegata Payable Tegata Receivables Template Categories Track Time Usage Vendor Bill Approval Vendor Payment Approval

Buyer

Buyer			
View	**Create**	**Edit**	**Full**
Accounts Payable Accounts Payable Graphing Amortization Schedules Bill Of Materials Inquiry Bulk Processing Submissions Contact-Subsidiary relationship Custom Recognition Event Type Employee Public	Export Lists Kudos Resource Tableau® Workbook Export	Accounting Lists Accounts Payable Register Bill Purchase Orders Bill of Materials Bills Classes Departments Email Template	Address List in Search Blanket Purchase Order Blanket Purchase Order Approval Calendar Contacts Deleted Records Documents and Files

Buyer			
View	**Create**	**Edit**	**Full**
Employee Record Entity-Subsidiary relationship Expense Amortization Plan Expense Amortization Rule Financial History Inventory Non Posting Registers Notes Tab Purchase Order Reports Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report		Item Receipt Items Locations Memorized Transactions Other Lists Receive Order Requisition Statistical Account Registers SuiteAnalytics Workbook Track Messages Units Vendor Returns Vendors	Employee Record Events Find Transaction Inbound Shipment Log in using Access Tokens Mobile Device Access Notifications Ownership Transfer Perform Search Phone Calls Product Analytics Records Purchase Contract Purchase Contract Approval Purchase Order Report Customization Report Scheduling Request For Quote Requisition Approval REST Web Services SOAP Web Services Tasks Template Categories Vendor Return Auth. Approval Vendor Return Authorization

CEO

CEO					
View	**Create**	**Edit**	**Full**		
Access Payment Audit Log Accounts Payable Accounts Payable Graphing Accounts Receivable Accounts Receivable Graphing Amortization Reports Amortization Schedules Balance Sheet Bill Of Materials Inquiry Bulk Processing Submissions Check Item Availability Commission Reports Commit Orders	Export Lists Kudos Recognize Gift Certificate Income Tableau® Workbook Export	Email Template Fax Messages Fax Template Letter Messages Letter Template Mail Merge Mass Updates PDF Messages PDF Template Reconcile SuiteAnalytics Workbook Track Messages	Accounting Lists Accounting Management Accounts Accounts Payable Register Accounts Receivable Register Address List in Search Adjust Inventory ADP Import Data Allocate Orders Analytical Impact Approve Order Reservation Audit Trail Automated Cash Application Automated Clearing House Bank Account Registers	Edit Forecast Employee Commission Transaction Employee Commission Transaction Approval Employee Record Employees Enter Completions Enter Opening Balances Enter Vendor Credits Enter Year-To-Date Payroll Adjustments Equity Registers Events Expense Report Finance Charge Financial Narratives Find Transaction	Pay Bills Pay Sales Tax Payment Card Payment Card Token Payment Instruments Payroll Liability Payments Perform Search Phone Calls Planned Standard Cost Post Vendor Bill Variances Posting Period on Transactions Presentation Categories Price Books Price Plans Print Shipment Documents

CEO					
View	**Create**	**Edit**	**Full**		
Component Where Used Contact-Subsidiary relationship Costed Bill Of Materials Inquiry Create Allocation Schedules Custom Recognition Event Type Employee Public Employee Reminders Entity-Subsidiary relationship Expense Amortization Plan Expense Amortization Rule Expenses Fair Value Dimension Fair Value Formula Fair Value Price Financial History Financial Statements General Ledger Generate Price Lists Generate Statements Imported Employee Expenses Income Income Statement Individual Paycheck Inventory Item Revenue Category Lead Snapshot/ Reminders Net Worth Notes Tab Partner Authorized Commission Reports Partner Commission Reports Project Budget Project Profitability Project Revenue Rules Project Templates			Bill Of Distribution Bill Purchase Orders Bill of Materials Bills Blanket Purchase Order Blanket Purchase Order Approval Build Work Orders Calculate Time Calendar Cash Sale Cash Sale Refund Check Classes Close Work Orders Competitors Contacts Count Inventory Create Inventory Counts Credit Card Credit Card Refund Credit Card Registers Credit Memo Credit Returns CRM Groups Currency Revaluation Customer Deposit Customer Payment Customer Payment Authorization Customer Refund Customers Deleted Records Departments Deposit Deposit Application Distribution Network Documents and Files Earliest Availability	Fixed Asset Registers Fulfill Orders General Token Gift Certificate Global Inventory Relationship Import Online Banking File Inbound Shipment Internal Publisher Inventory Cost Template Invoice Invoice Approval Invoice Sales Orders Issue Components Item Fulfillment Item Receipt Item Revisions Item/Category Layouts Items Locations Log in using Access Tokens Long Term Liability Registers Mail Merge Make Journal Entry Manufacturing Cost Template Manufacturing Routing Mark Work Orders Built Mark Work Orders Firmed Mark Work Orders Released Matching Rules for Online Banking Memorized Transactions Mobile Device Access Non Posting Registers Notifications Opportunity Order Allocation Strategy Order Management Dashboard Order Reservation Other Asset Registers	Process GST Refund Product Analytics Records Project Tasks Projects Publish Forms Purchase Contract Purchase Contract Approval Purchase Order Quote Reallocate Order Item Receive Order Receive Returns Reconcile Reporting Refund Returns Report Customization Report Scheduling Request For Quote Requisition Requisition Approval Resource Resource Allocation Approval REST Web Services Return Auth. Approval Return Authorization Sales Channel Sales Order Sales Order Approval Scanned Vendor Bills Set Up Budgets Shipping Partner Package Shipping Partner Shipment SOAP Web Services Standard Cost Version Statement Charge Statistical Account Registers Store Account Registers Store Categories Store Content Categories

CEO					
View	**Create**	**Edit**	**Full**		
Purchase Order Reports Purchases Quota Reports Recognition Treatment Recognition Treatment Rule Resource Allocations Return Authorization Reports Revalue Inventory Cost Revenue Arrangement Revenue Arrangement Approval Revenue Commitment Revenue Commitment Reversal Revenue Element Revenue Management VSOE Revenue Recognition Field Mapping Revenue Recognition Plan Revenue Recognition Reports Revenue Recognition Rule Revenue Recognition Schedules SaaS Metric Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report System Journal Tax Tax Details Tab Tax Records Tax Reports				Other Current Asset Registers Other Current Liability Registers Other Lists Other Names Outlook Integration 2.0 Ownership Transfer	Store Content Items Store Tabs Subscription Change Orders Subscription Plan Subscriptions Tasks Tegata Accounts Tegata Payable Tegata Receivables Template Categories Timer Track Time Transfer Funds Transfer Order Transfer Order Approval Unbilled Receivable Registers Units Usage Vendor Bill Approval Vendor Payment Approval Vendor Request For Quote Vendor Return Auth. Approval Vendor Return Authorization Vendor Returns Vendors Work Order Work Order Close Work Order Completion Work Order Issue

CEO					
View	**Create**	**Edit**	**Full**		
Time Tracking Trial Balance View Gateway Asynchronous Notifications View Payment Events Web Site Report Web Store Report Work Breakdown Structure Work Calendar					

CEO (Hands Off)

CEO (Hands Off)						
View				**Create**	**Edit**	**Full**
Access Payment Audit Log Accounting Lists Accounting Management Accounts Accounts Payable Accounts Payable Graphing Accounts Payable Register Accounts Receivable Accounts Receivable Graphing Accounts Receivable Register Adjust Inventory ADP Import Data Amortization Reports Audit Trail Balance Sheet Bank Account Registers Bill of Materials Bill Of Materials Inquiry Bill Purchase Orders Build Work Orders Calculate Time Cash Sale	Bulk Processing Submissions Credit Memo Credit Returns Currency Revaluation Customer Deposit Customer Payment Customer Payment Authorization Customer Refund Customers Departments Deposit Deposit Application Edit Forecast Employee Commission Transaction Approval Employee Public Employee Reminders Employees Enter Completions Enter Opening Balances Enter Vendor Credits Enter Year-To-Date Payroll Adjustments Entity-Subsidiary relationship Equity Registers	Inventory Invoice Invoice Sales Orders Issue Components Item Fulfillment Item Receipt Items Lead Snapshot/ Reminders Locations Long Term Liability Registers Make Journal Entry Mark Work Orders Built Mark Work Orders Firmed Mark Work Orders Released Memorized Transactions Net Worth Non Posting Registers Notes Tab Opportunity Other Asset Registers Other Current Asset Registers Other Current Liability Registers Other Lists Other Names	Receive Order Receive Returns Reconcile Reporting Refund Returns Request For Quote Requisition Resource Allocations Return Auth. Approval Return Authorization Return Authorization Reports Revenue Recognition Reports SaaS Metric Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Sales Order Approval Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Set Up Budgets	Export Lists Kudos Tableau® Workbook Export	Bills Email Template Fax Messages Fax Template Letter Messages Letter Template Mail Merge PDF Messages PDF Template SuiteAnalytics Workbook Track Messages	Address List in Search Analytical Impact Automated Clearing House Blanket Purchase Order Calendar Contacts Deleted Records Documents and Files Employee Commission Transaction Employee Record Events Financial Narratives Find Transaction General Token Inbound Shipment Log in using Access Tokens Mobile Device Access Notifications Outlook Integration 2.0 Ownership Transfer Payment Card Payment Card Token Payment Instruments Perform Search

CEO (Hands Off)						
View				**Create**	**Edit**	**Full**
Cash Sale Refund Check Classes Close Work Orders Commission Reports Competitors Contact-Subsidiary relationship Credit Card Credit Card Refund Credit Card Registers	Expense Report Expenses Finance Charge Financial History Financial Statements Fixed Asset Registers Fulfill Orders General Ledger Generate Price Lists Generate Statements Gift Certificate Imported Employee Expenses Import Online Banking File Income Income Statement Individual Paycheck	Partner Authorized Commission Reports Partner Commission Reports Pay Bills Pay Sales Tax Payroll Liability Payments Posting Period on Transactions Price Books Price Plans Print Shipment Documents Print Shipping Documents Process GST Refund Projects Project Profitability Purchase Contract Purchase Order Purchase Order Reports Purchases Quota Reports Quote	Shipping Partner Package Shipping Partner Shipment Statement Charge Statistical Account Registers Subscription Plan Subscriptions Subscription Change Orders System Journal Tax Tax Details Tab Tax Records Tax Reports Tegata Accounts Tegata Payable Tegata Receivables Time Tracking Timer Track Time Transfer Funds Transfer Order Trial Balance Unbilled Receivable Registers Units Usage Vendor Request For Quote Vendor Return Auth. Approval Vendor Return Authorization Vendor Returns Vendors View Gateway Asynchronous Notifications View Payment Events Web Site Report Web Store Report Work Calendar Work Order Work Order Close Work Order Completion Work Order Issue			Phone Calls Product Analytics Records Project Tasks Report Customization Report Scheduling Resource Resource Allocation Approval REST Web Services SOAP Web Services Tasks Template Categories Transfer Order Approval Vendor Bill Approval Vendor Payment Approval

CFO

CFO					
View	**Create**	**Edit**	**Full**		
Access Payment Audit Log Account Detail Accounts Payable Accounts Payable Graphing Accounts Receivable Accounts Receivable Graphing Amortization Reports Balance Overview Balance Sheet Bill Of Materials Inquiry Budget Build Assemblies Bulk Processing Submissions Check Item Availability Commission Reports Commit Orders Component Where Used Contact-Subsidiary relationship Costed Bill Of Materials Inquiry Cross Charge Journal Custom Record Types Deferred Expense Reports Employee Commission Schedules/Plans Employee Public Employee Reminders Entity-Subsidiary relationship Expenses Fair Value Dimension Fair Value Formula Fair Value Price Financial Statements General Ledger	Balance Transactions by Segments Export Lists Kudos Tableau® Workbook Export Vendor Request For Quote	Netting Settlement Approval Override Payment Hold Subsidiary Settings Manager SuiteAnalytics Workbook Tax Details Tab Tax Reports	Accounting Book Accounting Lists Accounting Management Accounts Accounts Payable Register Accounts Receivable Register Address List in Search Adjust Inventory Allocate Orders Amortization Schedules Analytical Impact Approve Order Reservation Approve Vendor Payments Audit Trail Automated Cash Application Balance Location Costing Group Accounts Balancing Journals Bank Account Registers Bill Of Distribution Bill of Materials Bill Purchase Orders Bills Blanket Purchase Order Blanket Purchase Order Approval Build Work Orders Calculate Time Calendar Cash Sale Cash Sale Refund Charge Charge Rule Charge - Run Rules Check Class Mapping Classes Close Work Orders	Events Expense Amortization Plan Expense Amortization Rule Expense Report Fax Messages Fax Template Finance Charge Financial Exception Management Financial History Financial Narratives Find Transaction Fixed Asset Registers Foreign Currency Variance Mapping Fulfill Orders Generate Revenue Commitment Generate Revenue Commitment Reversals Gift Certificate Global Account Mapping Global Inventory Relationship Import Online Banking File Inbound Shipment Intercompany Adjustments Inventory Cost Template Invoice Invoice Approval Invoice Sales Orders Issue Components Item Account Mapping Item Revisions Items Journal Approval Letter Messages Letter Template Location Costing Group Location Mapping Locations	Perform Search Period End Journals Phone Calls Planned Standard Cost Post Time Post Vendor Bill Variances Posting Period on Transactions Price Books Price Plans Process GST Refund Product Analytics Records Projects Project Budget Project Intercompany Cross Charge Request Project Tasks Publish Search Purchase Contract Purchase Contract Approval Purchase Order Quote Reallocate Order Item Receive Order Receive Returns Reconcile Reconcile Reporting Refund Returns Report Customization Report Scheduling Request For Quote Requisition Requisition Approval Resource Resource Allocation Approval REST Web Services Return Auth. Approval Return Authorization

CFO					
View	**Create**	**Edit**	**Full**		
Generate Price Lists Generate Statements Imported Employee Expenses Income Income Statement Individual Paycheck Inventory Item Fulfillment Item Receipt Item Revenue Category Lead Snapshot/ Reminders Net Worth Partner Authorized Commission Reports Partner Commission Reports Period End Financial Statements Print Shipment Documents Project Profitability Project Revenue Rules Project Templates Purchase Order Reports Purchases Quota Reports Recognition Treatment Recognition Treatment Rule Resource Allocations Return Authorizati on Reports Revenue Arrange ment Revenue Arrange ment Approval Revenue Element Revenue Recognition Field Mapping Revenue Recognition Plan			Competitors Contacts Copy Budgets Count Inventory Create Allocation Schedules Create Inventory Counts Credit Card Credit Card Refund Credit Card Registers Credit Memo Credit Returns CRM Groups Currency Revaluation Custom Recognition Event Type Customer Deposit Customer Payment Customer Payment Authorization Customer Refund Customers Deleted Records Department Mapping Departments Deposit Deposit Application Distribution Network Documents and Files Earliest Availability Email Template Employee Commission Transaction Employee Commission Transaction Approval Employee Record Employees Enter Completions Enter Opening Balances	Log in using Access Tokens Long Term Liability Registers Mail Merge Make Journal Entry Manage Cross Charge Automation Manufacturing Cost Template Manufacturing Routing Mark Work Orders Built Mark Work Orders Firmed Mark Work Orders Released Mass Updates Matching Rules for Online Banking Memorized Transactions Mobile Device Access Netting Settlement Non Posting Registers Notes Tab Notifications Opportunity Order Allocation Strategy Order Management Dashboard Order Reservation Other Asset Registers Other Current Asset Registers Other Current Liability Registers Other Lists Other Names Outlook Integration 2.0 Override Estimated Cost on Transactions Ownership Transfer Partner Commission Transaction	Revalue Inventory Cost Revenue Commitment Revenue Commitment Reversal Revenue Management VSOE Revenue Recognition Schedules Sales Channel Sales Order Sales Order Approval Scanned Vendor Bills Set Up Budgets SOAP Web Services Standard Cost Version Statement Charge Statistical Account Registers Subscription Change Orders Subscription Plan Subscriptions Subsidiary - Tax Engine selection Tasks Tax Liability Payment Tegata Accounts Tegata Payable Tegata Receivables Template Categories Timer Track Messages Track Time Transaction Detail Transfer Funds Trial Balance Unbilled Receivable Registers Units Usage Vendor Bill Approval Vendor Payment Approval

CFO					
View	**Create**	**Edit**	**Full**		
Revenue Recognition Reports Revenue Recognition Rule Saas Metric Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Shipping Partner Package Shipping Partner Shipment System Journal Tax Tax Records Time Tracking Unbuild Assemblies View Gateway Asynchronous Notifications View Payment Events Work Calendar			Enter Vendor Credits Enter Year-To-Date Payroll Adjustments Entity Account Mapping Equity Registers	Partner Commission Transaction Approval Pay Bills Pay Sales Tax Pay Tax Liability Payroll Liability Payments PDF Messages PDF Template	Vendor Return Auth. Approval Vendor Return Authorization Vendor Returns Vendors Work Breakdown Structure Work Order Work Order Close Work Order Completion Work Order Issue

Chief People Officer (CPO)

Chief People Officer (CPO)			
View	**Create**	**Edit**	**Full**
Bulk Processing Submissions Commission Reports Employee Commission Transaction Employee Commission Transaction Approval Employee Public Employee Reminders Entity-Subsidiary relationship Expense Categories Find Transaction Imported Employee Expenses Individual Paycheck Payroll Check Register	Export Lists Resource Tableau® Workbook Export Vendors	Email Template Form W-2 – Wage and Tax Statement Kudos SuiteAnalytics Workbook Track Messages	Address List in Search Advanced Government Issued IDs Amend W-4 Basic Government Issued IDs Calendar Departments Documents and Files Edit Profile Employee Effective Dating Employee Change Reason Employee Change Requests

Chief People Officer (CPO)			
View	**Create**	**Edit**	**Full**
Payroll Hours & Earnings Payroll Items Payroll Summary & Detail Reports Personal Banking Information Purchase Order Reports Tax Details Tab Tax Reports Workforce Analytics			Employee Change Request Types Employee Effective Dating Employee Record Employee Social Security Numbers Employees Events Expense Report Generic Resources Government Issued ID Types Job Management Job Requisitions Locations Manage Users News Item Notes Tab Notifications Onboarding Administration Onboarding Plan Onboarding Task Organization Value Other Lists Perform Search Phone Calls Positions Product Analytics Records Report Customization Report Scheduling Talent Administration Tasks Template Categories Termination Reasons Time-Off Administration Track Time View Login Audit Trail Work Calendar Workplaces

Consultant

Consultant			
View	**Create**	**Edit**	**Full**
Accounts Receivable Un-Billed Bulk Processing Submissions Classes Customers Departments Entity-Subsidiary relationship Imported Employee Expenses Locations Non Posting Registers Price Books Price Plans	Kudos Project Tasks	Calendar Cases Documents and Files Find Transaction Perform Search Purchase Order Requisition SuiteAnalytics Workbook	Address List in Search Events Expense Report Notification Phone Calls Product Analytics Records Report Scheduling Resource Allocations Tasks Track Time

Consultant			
View	**Create**	**Edit**	**Full**
Project Profitability Projects Statistical Account Registers Subscriptions Subscription Change Orders Time Tracking			

Customer Center

Customer Center			
View	**Create**	**Edit**	**Full**
Accounts Receivable Register Cash Sale Cardholder Authentications Charge Charge Rule Credit Memo Customer Deposit Customer Payment Authorization Estimate Fulfill Orders Invoice Issues Items Non Posting Registers Perform Search Price Plans Return Authorization Reports Sales Order Transaction Report Subscription Change Orders Subscriptions Track Messages	Deposit Application Export Lists Generate Statements Item Fulfillment Print Shipment Documents Return Authorization Shipping Partner Package Shipping Partner Shipment Tableau® Workbook Export	Automated Clearing House Cases Cardholder Authentication Contacts Customer Payment Customer Profile Gift Certificate General Token Payment Card Payment Card Token Sales Order	Charge – Run Rules Deleted Records Find Transaction Perform Search Log in using Access Tokens Notifications Payment Instruments REST Web Services SOAP Web Services

Developer

Developer			
View	**Create**	**Edit**	**Full**
—	—	SuiteAnalytics Workbook	Address List in Search Advanced PDF/HTML Templates Allow JS / HTML Uploads Bulk Manage Roles Create HTML Formulas in Search CRM Lists Custom Address Form Custom Body Fields Custom Center Categories Custom Center Links Custom Center Tabs Custom Centers

Developer			
View	**Create**	**Edit**	**Full**
			Custom Column Fields Custom Entity Fields Custom Entry Forms Custom Event Fields Custom Fields Custom Item Fields Custom Item Number Fields Custom Lists Custom PDF Layouts Custom Record Entries Custom Record Types Custom Segments Custom Sublist Custom Sublists Custom Subtabs Custom Transaction Fields Custom Transaction Forms Custom Transaction Types Documents and Files Email Template Enable Features Import CSV File KPI Scorecards Log in using Access Tokens Log in using OAuth 2.0 Access Tokens Manage Custom Permissions Manage Translation Marketing Template Other Custom Fields PDF Template Perform Search Product Analytics Records Publish Dashboards Publish Search REST Web Services Set Up CSV Preferences Set Up Web Site SOAP Web Services SuiteApp Deployment SuiteApp Marketplace SuiteScript SuiteScript Scheduling User Access Tokens Vicarious emails Website (External) publisher Workflow

Employee Center

Employee Center			
View	**Create**	**Edit**	**Full**
Amend W-4 (Payroll) Bonus (SuitePeople HR)	Export Lists Kudos (SuitePeople HR)	Contacts Edit Profile Employee Record	Address List in Search Bills Calendar

Employee Center			
View	**Create**	**Edit**	**Full**
Commission Reports (Incentive Compensation) Employee Compensation (SuitePeople HR) Employee Confidential (SuitePeople HR) Employee Public (SuitePeople HR) Employee Reminders Employee Self (SuitePeople HR) Employee Social Security Numbers Expense Report Policies Financial History Imported Employee Expenses Individual Paycheck (Payroll) Non Posting Registers Personal Banking Information Project Profitability (Project Management) Resource Allocations Sales Order Transaction Report Time Tracking Vendor Prepayment (Procurement) Work Calendar	Resource Tableau® Workbook Export	Notes Tab Onboarding Plan (SuitePeople HR) Onboarding Task (SuitePeople HR) SuiteAnalytics Workbook	Cases Deleted Records Documents and Files Events Expense Report Find Transaction Log in using Access Tokens Mobile Device Access Notifications OAuth 2.0 OpenID Connect (OIDC) Single Sign-on OpenID Single Sign-on Perform Search Phone Calls Print/Email/Fax Project Tasks (Project Management) Purchase Order Request For Quote (Procurement) Requisition (Procurement) Requisition Approval (Procurement) Resource Allocation Approval REST Web Services SAML Single Sign-on SOAP Web Services Talent Employee (Performance Management) Tasks Tax Details Tab Tax Registrations Tab Tax Reports Track Messages Track Time User Access Tokens Vendor Bill Approval Vendor Prepayment Approval (Procurement) Vendor Request For Quote (Procurement)

Permissions enabled by modules indicated as follows:

- Payroll = NetSuite SuitePeople US Payroll Cloud Service
- Project Management = NetSuite SuiteProject Management Mid-Market Cloud Service
- SuitePeople HR = NetSuite SuitePeople HR Cloud Service
- Incentive Compensation = NetSuite Incentive Compensation Mid Market Cloud Service
- Procurement = NetSuite Procurement Management Mid-Market Cloud Service
- Performance Management = NetSuite SuitePeople Performance Management Cloud Service

Employee Center with Highest Access Levels Shown

Employee Center			
View	**Create**	**Edit**	**Full**
Bills Bonus (SuitePeople HR) Commission Reports (Incentive Compensation) Employee Reminders Employee Social Security Numbers Financial History Imported Employee Expenses Individual Paycheck (Payroll) Non Posting Registers Project Profitability (Project Management) Resource Allocations Sales Order Transaction Report Time Tracking Vendor Prepayment (Procurement) Work Calendar	Export Lists Kudos (SuitePeople HR) Resource Tableau® Workbook Export	Contacts Employee Record Notes Tab SuiteAnalytics Workbook Tax Details Tab	Amend W-4 (Payroll) Address List in Search Calendar Cases Deleted Records Documents and Files Edit Profile Employee Compensation (SuitePeople HR) Employee Confidential (SuitePeople HR) Employee Public (SuitePeople HR) Employee Self (SuitePeople HR) Events Expense Reports Expense Report Policies Find Transaction Log in using Access Tokens Mobile Device Access Notifications OAuth 2.0 Onboarding Plan (SuitePeople HR) Onboarding Task (SuitePeople HR) OpenID Connect (OIDC) Single Sign-on OpenID Single Sign-on Perform Search Personal Banking Information Phone Calls Print/Email/Fax Project Tasks (Project Management) Purchase Orders Request For Quote (Procurement) Requisition (Procurement) Requisition Approval (Procurement) Resource Allocation Approval REST Web Services SAML Single Sign-on SOAP Web Services Talent Employee (Performance Management) Tasks Tax Registrations Tab Tax Reports Track Messages Track Time User Access Tokens Vendor Bill Approval

Employee Center			
View	**Create**	**Edit**	**Full**
			Vendor Prepayment Approval (Procurement) Vendor Request For Quote (Procurement)

Permissions enabled by modules indicated as follows:

- Payroll = NetSuite SuitePeople US Payroll Cloud Service
- Project Management = NetSuite SuiteProject Management Mid-Market Cloud Service
- SuitePeople HR = NetSuite SuitePeople HR Cloud Service
- Incentive Compensation = NetSuite Incentive Compensation Mid Market Cloud Service
- Procurement = NetSuite Procurement Management Mid-Market Cloud Service
- Performance Management = NetSuite SuitePeople Performance Management Cloud Service

Engineer

Engineer			
View	**Create**	**Edit**	**Full**
Cases Contacts Contact-Subsidiary relationship Email Template Employee Public Employee Record Entity-Subsidiary relationship Template Categories Track Messages	Export Lists Kudos Tableau® Workbook Export	Issue Reports Issues Mail Merge Mark Issue As Showstopper SuiteAnalytics Workbook	Address List in Search Admindocs Calendar Deleted Records Documents and Files Events Log in using Access Tokens Mobile Device Access Notes Tab Notifications Perform Search Product Analytics Records Report Scheduling REST Web Services SOAP Web Services Tasks

Engineering Manager

Engineering Manager			
View	**Create**	**Edit**	**Full**
Cases Contacts Contact-Subsidiary relationship Employee Compensation Employee Confidential Employee Public Employee Record Entity-Subsidiary relationship	Export Lists Kudos Tableau® Workbook Export	Issues Perform Search SuiteAnalytics Workbook	Address List in Search Admindocs Calendar Deleted Records Documents and Files Events Issue Reports Log in using Access Tokens Mark Issue As Showstopper

Engineering Manager			
View	**Create**	**Edit**	**Full**
Track Messages			Mobile Device Access Notes Tab Notifications Product Analytics Records Report Scheduling REST Web Services SOAP Web Services Tasks

Full Access (deprecated)

Full Access (deprecated)					
View		**Full**			
Account Detail Report Accounts Payable Graphing Accounts Payable Report Accounts Receivable Graphing Accounts Receivable Report Accounts Receivable Un-Billed Balance Sheet Budget Bulk Processing Submissions Cash Flow Report Certificate access Certificate management Employee Confidential Employee Public Entity-Subsidiary relationship Expenses Form 1099 Form 940 Form 941 Form W-2 General Ledger Income Income Statement Inventory Lead Snapshot/ Monthly Summary Reports by Employee	Net Worth Payroll Check Register Payroll Journal Report Payroll Liability Report Payroll Reports Purchases Reconcile Reporting Reminders Sales Sales By Partner Sales By Promotion Code Sales Force Automation Sales Graphing Support Support Case Snapshot/ Reminders Tax Time Tracking Transaction Detail Trial Balance Web Site Report Web Store Report	Access Token Management (TBA) Accounting Lists Accounting Management Accounting Preferences Accounts Accounts Payable Register Accounts Receivable Register Address List in Search Adjust Inventory Adjust Inventory Worksheet Advanced Government Issued IDs Allow JS / HTML Uploads Allow Non GL Changes Analytical Impact Approve Direct Deposit Approve EFT Audit Trail Bank Account Registers Bill Purchase Orders Bill Sales Orders Billing Setup Bills Blanket Purchase Order Approval Calculate Time	Customer Payment Customer Profile Customer Refund Customers Departments Deposit Direct Deposit Status Distribute Inventory Direct Invoice Payment Setup Documents and Files Edit Forecast EFT Status Email Template Employee Change Reason Employee Effective Dating Employee Related Lists(Other Lists) Employees Enter Opening Balances Enter Vendor Credits Enter Year-to-date Payroll Adjustments Equity Registers Establish Quotas Estimate Events Expense Categories	Individual Paycheck Internal Publisher Installment Payment Links Invoice Item/Category Layouts Items Jobs Job Management Job Requisitions Journal Approval Knowledge Base Kudos Locations Log in using Access Tokens (TBA) Long Term Liability Registers Mail Merge Make Journal Entry Marketing Template Mass Updates MCP Server Connection Media Items Memorized Transactions Merge Prolong Timeout Messages for Analytics and REST Non Posting Registers Notes Tab	Process Payroll Product Analytics Records Promotion Code Prompts Purchase Order Receive Items Receive Purchase Orders Receive Returns Reconcile Record Custom Field Records Catalog Refund Returns Related Items Report Customization Resource Resource Allocation Approval Return Auth. Approval Return Authorization Revenue Commitment Revenue Commitment Reversal Run Payroll SaaS Metric Sales Order Sales Order Approval Save historical metrics Scanned Vendor Bills Set Up Budgets Set Up Company

Full Access (deprecated)					
View		**Full**			
Monthly Summary Reports by Item Period End Financial Statements Resource Allocations Suppliers Tax Reports View Gateway Asynchronous Notifications		Calendar Campaign Campaign History Cases Cash Sale Cash Sale Refund Categories Check Classes Color Themes Companies Competitors Contacts Cost of Goods Sold Registers Create HTML Formulas in Search Credit Card Credit Card Refund Credit Card Registers Credit Memo CRM Group CRM Lists (Other Lists) Currency Currency Revaluation Custom Record Entries	Expense Registers Expense Report Finance Charge Financial History Financial Narratives Find Transaction Fixed Asset Registers Form W-2 Fulfill Sales Orders Generate Revenue Commitment Generate Revenue Commitment Reversals Generate Statements Gift Certificate Global Inventory Relationship Government Issued ID Types Import CSV File Import Online Banking (QIF) File Import XML Transaction Income Registers	Online Bank Statement Opportunity Order Reservation Organization Value Other Asset Registers Other Current Asset Registers Other Current Liability Registers Other Expense Registers Other Income Registers Other Names Outlook Integration 2.0 Outlook Integration 3.0 Partners Pay Bills Pay Sales Tax Paychecks Payment Methods Payroll Items Payroll Liability Payments Period End Journals Period End Journals Deleted Transactions Posting Period on Transactions Presentation Print Shipment Documents	Ship Items Shipping Items Shortcuts Statement Charge Store Categories Store Content Categories Store Content Items Store Tabs Subsidiary - Tax Engine selection SuiteAnalytics Workbook System Notes for Analytics and REST Tasks Tax Details Tab Tax Items Termination Reasons Time-Off Administration Timer Track Messages Track Time Transfer Funds Transfer Inventory Two-Factor Authentication base Units for Pick Decomposition Unrestricted Analytics Audit Trail User Access Tokens (TBA) Vendor Automated Clearing House Vendor In-Transit Payment Approval Vendor Payment Instruments Vendors View Unencrypted Vendor ACH Account Numbers Website (External) publisher Workplaces

Human Resources Generalist

Human Resources Generalist			
View	**Create**	**Edit**	**Full**
Bulk Processing Submissions Commission Reports Employee Commission Transaction Employee Commission Transaction Approval Employee Public Employee Reminders Entity-Subsidiary relationship Expense Categories Find Transaction Imported Employee Expenses Individual Paycheck Payroll Chek Register Payroll Hours & Earnings Payroll Items Payroll Summary & Detail Reports Purchase Order Reports Workforce Analytics	Export Lists Resource Tableau® Workbook Export Vendors	Email Template Form W-2 - Wage and Tax Statement Kudos SuiteAnalytics Workbook Track Messages	Address List in Search Advanced Government Issued IDs Amend W-4 Basic Government Issued IDs Bonus Bonus Types Calendar Departments Documents and Files Edit Profile Employee Effective Dating Employee Change Reason Employee Change Request Employee Change Request type Employee Record Employees Employee Social Security Numbers Events Expense Report Generic Resources Government Issued ID Types Job Management Job Requisitions Locations Manage Users Mass Updates News Items Notes Tab Notifications Onboarding Administration Onboarding Plan Onboarding Task Organization Value Other Lists Perform Search Personal Banking Information Phone Calls Positions Product Analytics Records Report Customization Report Scheduling Talent Administration Tasks Template Categories Termination Reasons Time-Off Administration Track Time View Login Audit Trail Work Calendar Workplaces

Intranet Manager

Intranet Manager			
View	**Create**	**Edit**	**Full**
Bill Of Materials Inquiry Bulk Processing Submissions Employee Compensation Employee Confidential Employee Public Employee Record Find Transaction Notes Tab Web Site Report Web Store Report	Export Lists Kudos Resource Tableau® Workbook Export	Email Template SuiteAnalytics Workbook Track Messages	Address List in Search Allow JS / HTML Uploads Bill of Materials Calendar Color Themes Custom Item Fields Deleted Records Documents and Files Events Internal Publisher Item/Category Layouts Items Log in using Access Tokens Mobile Device Access Notifications Online Customer Form Perform Search Phone Calls Presentation Categories Publish Employee List Publish Forms Publish RSS Feeds Product Analytics Records Related Items Report Scheduling REST Web Services Set Up Image Resizing Set Up Web Site SOAP Web Services Store Categories Store Content Categories Store Content Items Store Tabs Tasks Template Categories Units Website (External) publisher

Issue Administrator

Issue Administrator			
View	**Create**	**Edit**	**Full**
Cases Employee Public Employee Record	Export Lists Kudos Tableau® Workbook Export	SuiteAnalytics Workbook	Address List in Search Calendar CRM Groups Deleted Records Documents and Files Events Import CSV File Issue Reports Issue Setup

Issue Administrator			
View	**Create**	**Edit**	**Full**
			Issues Log in using Access Tokens Mark Issue As Showstopper Mass Updates Mobile Device Access Notes Tab Notifications Perform Search Product Analytics Records Publish Dasboards Publish Search Report Scheduling REST Web Services SOAP Web Services Tasks

Marketing Administrator

Marketing Administrator					
View	**Create**	**Edit**	**Full**		
Bulk Processing Submissions Cases Contact-Subsidiary relationship Employee Public Employee Reminders Entity-Subsidiary relationship Financial History Find Transaction Lead Snapshot/ Reminders Marketing Campaign Reports Price Books Price Plans Project Templates Quota Reports Sales Sales By Partner Sales By Promotion Sales Force Automation Subscription Plan Web Site Report Work Calendar	Export Lists Kudos Tableau® Workbook Export	Classes Departments Email Template Locations SuiteAnalytics Workbook Track Messages Vendors	Address List in Search Backup Your Data Bulk Manage Roles Calendar Campaign History Color Themes Companies Competitors Contact Roles Contacts CRM Groups CRM Lists Custom Body Fields Custom Column Fields Custom Entity Fields Custom Entry Forms Custom Event Fields Custom Fields Custom Item Fields Custom Lists Custom PDF Layouts Custom Record Entries	Duplicate Detection Setup Duplicate Entity Management Employee Record Employees Events Fax Messages Fax Template Import CSV File Intelligent Recommendations Internal Publisher Item Collection Knowledge Base KPI Scoreboards Letter Messages Letter Template Log in using Access Tokens Mail Merge Manage Users Marketing Campaigns Marketing Template Mass Updates Mobile Device Access Notes Tab Notifications Online Custom Record Form	PDF Template Perform Search Phone Calls Presentation Categories Product Analytics Records Project Tasks Projects Promotion Public Template Categories Publish Dashboards Publish Knowledge Base Publish Search Record Custom Field Report Customization Report Scheduling Resource REST Web Services Sales Force Automation Setup Sales Order Reports Setup Campaign Email Addresses Set Up Domains Setup Campaigns Shortcuts SOAP Web Services

Marketing Administrator					
View	**Create**	**Edit**	**Full**		
			Custom Record Types Custom Subtabs Custom Transaction Fields Custom Transaction Forms Customer Profile Customer Segments Manager Customer Status Customers Delete Event Deleted Records Documents and Files	Online Customer Form Other Names Partners PDF Messages	Subscriptions Subscription Change Orders Tasks Template Categories Two-Factor Authentication base Upsell Assistant Upsell Setup Upsell Wizard Users & Passwords

Marketing Assistant

Marketing Assistant			
View	**Create**	**Edit**	**Full**
Bill Of Materials Bill of Materials Inquiry Bulk Processing Submissions Contact-Subsidiary relationship Employee Public Employee Record Entity-Subsidiary relationship Financial History Items Lead Snapshot/Reminders Marketing Campaign Reports Price Books Price Plans Project Templates Quota Reports Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Reports Subscription Plan Units Work Calendar	Export Lists Kudos Knowledge Base Tableau® Workbook Export	CRM Lists Email Template Fax Messages Fax Template Letter Messages Letter Template Mail Merge Partners PDF Messages PDF Template Promotion SuiteAnalytics Workbook Track Messages	Address List in Search Allow JS / HTML Uploads Calendar Campaign History Companies Competitors Contacts CRM Groups Customers Deleted Records Documents and Files Duplicate Entity Management Events Find Transaction Intelligent Recommendations Log in using Access Tokens Marketing Campaigns Marketing Template Mass Updates Mobile Device Access Notes Tab Notifications Perform Search Phone Calls Product Analytics Records Project Tasks Projects Publish RSS Feeds Report Customization Report Scheduling

Marketing Assistant			
View	**Create**	**Edit**	**Full**
			Resource REST Web Services SOAP Web Services Subscriptions Subscription Change Orders Tasks Template Categories Upsell Assistant Upsell Setup Upsell Wizard Website (External) Publisher

Marketing Manager

Marketing Manager			
View	**Create**	**Edit**	**Full**
Bill Of Materials Inquiry Bill of Materials Bulk Processing Submissions Contact-Subsidiary relationship Employee Compensation Employee Confidential Employee Public Employee Record Entity-Subsidiary relationship Financial History Items Lead Snapshot/Reminders Marketing Campaign Reports Price Books Price Plans Project Templates Quota Reports Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Reports Subscription Plan Units Web Site Report Web Store Report Work Calendar	Export Lists Knowledge Base Kudos Tableau® Workbook Export	CRM Lists Custom Body Fields Custom Column Fields Custom Entity Fields Custom Event Fields Custom Fields Custom Lists Email Template Fax Messages Fax Template Letter Messages Letter Template Mail Merge PDF Messages PDF Template Publish Knowledge Base SuiteAnalytics Workbook Track Messages	Address List in Search Calendar Campaign History Companies Competitors Contact Roles Contacts CRM Groups Custom Transaction Forms Customer Segments Manager Customer Status Customers Deleted Records Documents and Files Duplicate Entity Management Events Find Transaction Intelligent Recommendations Internal Publisher Item Collection Log in using Access Tokens Marketing Campaigns Marketing Template Mass Updates Mobile Device Access Notes Tab Notifications Online Customer Form Outlook Integration 2.0 Partners Perform Search Phone Calls Product Analytics Records Project Tasks Projects Promotion Public Template Categories Report Customization

Marketing Manager			
View	**Create**	**Edit**	**Full**
			Report Scheduling REST Web Services Resource Sales Territory Rule Set Up Campaign Email Addresses Set Up Image Resizing Setup Campaigns SOAP Web Services Subscriptions Subscription Change Orders Tasks Template Categories Upsell Assistant Upsell Setup Upsell Wizard

Partner Center

Partner Center			
View	**Create**	**Edit**	**Full**
Cases Find Transaction Notes Tab Partner Commission Reports Price Books Price Plans Project Templates Resource Allocations Sales By Partner Sales By Promotion	Export Lists Tableau® Workbook Export	Competitors Customers Jobs Projects Subscriptions Subscription Change Orders SuiteAnalytics Workbook	Deleted Records Log in using Access Tokens Notifications Partners Perform Search Promotion Resource Allocation Approval REST Web Services SOAP Web Services

Payroll Manager

Payroll Manager			
View	**Create**	**Edit**	**Full**
Bulk Processing Submissions Contact-Subsidiary relationship Employee Compensation Employee Confidential Employee Public Employee Reminders Entity-Subsidiary relationship Financial History Find Transaction Form 940 – Employer's Annual Federal Unemployment Tax Return Form 941 – Employer's Quarterly Federal Tax Return	Export Lists Kudos Posting Period on Transactions Resource Tableau® Workbook Export	Email Template Form W-2 - Wage and Tax Statement SuiteAnalytics Workbook Track Messages	Address List in Search Calendar Contacts Deleted Records Documents and Files Employee Record Employee Social Security Numbers Employees Enter Year-To-Date Payroll Adjustments Events Individual Paycheck

Payroll Manager			
View	**Create**	**Edit**	**Full**
Form W4 – Employee's Withholding Allowance Certificate Make Journal Entry Manage Payroll Notes Tab Payroll Hours & Earnings Payroll Check Register Payroll Journal Report Payroll Liability Report Payroll Summary & Detail Reports Project Profitability Time Tracking			Log in using Access Tokens Mobile Device Access Notifications Paychecks Payroll Items Payroll Liability Payments Perform Search Phone Calls Process Payroll Product Analytics Records Report Customization Report Scheduling REST Web Services Run Payroll Set Up Payroll SOAP Web Services Tasks Template Categories Track Time Vendors Workplaces

Payroll Setup

Payroll Setup			
View	**Create**	**Edit**	**Full**
Bulk Processing Submissions Contact-Subsidiary relationship Employee Public Employee Reminders Entity-Subsidiary relationship Financial History Find Transaction Form 940 – Employer's Annual Federal Unemployment Tax Return Form 941 – Employer's Quarterly Federal Tax Return Form W4 – Employee's Withholding Allowance Certificate Make Journal Entry Manage Payroll Notes Tab Payroll Check Register Payroll Journal Report Payroll Liability Report Payroll Summary & Detail Reports Project Profitability Time Tracking	Export Lists Kudos Posting Period on Transactions Resource Tableau® Workbook Export	Email Template Form W-2 - Wage and Tax Statement SuiteAnalytics Workbook Track Messages	Address List in Search Calendar Contacts Deleted Records Documents and Files Employee Record Employee Social Security Numbers Employees Enter Year-To-Date Payroll Adjustments Events Individual Paycheck Locations Log in using Access Tokens Mobile Device Access Notifications Paychecks Payroll Items Payroll Liability Payments Perform Search Phone Calls Process Payroll Product Analytics Records Report Customization Report Scheduling

Payroll Setup			
View	**Create**	**Edit**	**Full**
			REST Web Services Run Payroll Set Up Payroll SOAP Web Services Tasks Template Categories Track Time Vendors Workplaces

PM Manager

PM Manager			
View	**Create**	**Edit**	**Full**
Bulk Processing Submissions Contact-Subsidiary relationship Employee Compensation Employee Confidential Employee Public Employee Record Entity-Subsidiary relationship Find Transaction Lead Snapshot/Reminders Partners Project Templates Provisioning Support Support Case Snapshot/Reminders Work Calendar	Export Lists Kudos Resource Tableau® Workbook Export	Companies Contacts CRM Groups Email Template Issue Reports Issues Mark Issue As Showstopper Opportunity Perform Search SuiteAnalytics Workbook Track Messages	Address List in Search Admindocs Calendar Cases Competitors Customers Documents and Files Events Financial History Jobs Knowledge Base KPI Scoreboards Mail Merge Mass Updates Mobile Device Access Notes Tab Notifications Phone Calls Product Analytics Records Project Budget Project Tasks Publish Dashboards Publish Knowledge Base Report Customization Report Scheduling Resource Allocation Approval Resource Allocations Subscriptions Tasks Template Categories Work Breakdown Structure

Product Manager

Product Manager			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Bulk Processing Submissions Charge Charge Rule Contact-Subsidiary relationship Credit Memo Employee Public Employee Record Entity-Subsidiary relationship Find Transaction Gift Certificate Invoice Lead Snapshot/Reminders Partners Price Books Price Plans Project Templates Provisioning Sales Order Support Support Case Snapshot/Reminders View Gateway Asynchronous Notifications View Payment Events Work Calendar	Export Lists Kudos Resource Tableau® Workbook Export	Companies Contacts CRM Groups Email Template Issues Opportunity Perform Search SuiteAnalytics Workbook Track Messages	Address List in Search Admindocs Calendar Cases Competitors Customers Deleted Records Documents and Files Events Financial History Charge - Run Rules Issue Reports Knowledge Base Log in using Access Tokens Mail Merge Mark Issue As Showstopper Mass Updates Mobile Device Access Notes Tab Notifications Outlook Integration 2.0 Phone Calls Product Analytics Records Project Tasks Projects Publish Knowledge Base Report Customization Report Scheduling REST Web Services SOAP Web Services Subscriptions Subscription Change Orders Tasks Template Categories

QA Engineer

QA Engineer			
View	**Create**	**Edit**	**Full**
Cases Employee Public Employee Record	Kudos	Issue Reports Issues Mark Issue As Showstopper Perform Search SuiteAnalytics Workbook Track Messages	Address List in Search Admindocs Calendar Documents and Files Events Mobile Device Access Notes Tab Notifications

QA Engineer			
View	**Create**	**Edit**	**Full**
			Product Analytics Records System Status Tasks

QA Manager

QA Manager			
View	**Create**	**Edit**	**Full**
Cases Employee Compensation Employee Confidential Employee Public Employee Record	Kudos	Issues Perform Search SuiteAnalytics Workbook Track Messages	Address List in Search Admindocs Calendar Documents and Files Events Issue Reports Issue Setup KPI Scorecards Mark Issue As Showstopper Mobile Device Access Notes Tab Notifications Product Analytics Records Publish Dashboards System Status Tasks

Resource Manager

Resource Manager				
View		**Create**	**Edit**	**Full**
Audit Trail Bill of Materials Calendar Contact-Subsidiary relationship Contacts Custom Entity Fields Custom Entry Forms Custom Event Fields Custom Fields Custom HTML Layouts Custom Item Fields Custom Item Number Fields Custom Lists Custom PDF Layouts Custom Record Entries Custom Record Types	Import CSV File Items KPI Scorecards Locations Mass Updates Notes Tab Other Custom Fields Outlook Integration 2.0 Price Books Price Plans Project Profitability Project Templates Report Customization Report Scheduling Subscription Plan Subsidiaries SuiteScript SuiteSignOn Tasks	Custom Body Fields Custom Center Categories Custom Center Links Custom Centers Custom Column Fields Custom Transaction Forms Kudos Perform Search Publish Forms Publish Search	Customers Events SuiteAnalytics Workbook	Address List in Search Deleted Records Documents and Files Employee Record Mobile Device Access Notifications Product Analytics Records Project Tasks Projects Resource Allocation Approval Resource Allocations Review Custom GL Plug-in Executions Subscriptions Subscription Change Orders Vicarious emails

Resource Manager				
View		**Create**	**Edit**	**Full**
Custom Sublists Custom Subtabs Email Template Employee Public Employee Reminders Employees Entity-Subsidiary relationship Generic Resources	Template Categories Time Tracking Two-Factor Authentication Two-Factor Authentication base Usage Vendors Work Calendar Workflow			

Retail Clerk

Note that this role cannot be customized. See Retail Clerk Roles.

Retail Clerk (Note that this role cannot be customized. See Retail Clerk Roles.)			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Bill Of Materials Inquiry Bill of Materials Bulk Processing Submissions Calendar Contact-Subsidiary relationship Edit Profile Employee Public Employee Record Employee Reminders Entity-Subsidiary relationship Events Fulfill Orders Item Fulfillment Items Locations Personal Banking Information Print Shipment Documents Project Profitability Purchase Order Requistion Sales Order Fulfillment Reports Shipping Partner Package Shipping Partner Shipment Tasks Time Tracking Track Messages Track Time Transaction Detail View Gateway Asynchronous Notifications View Payment Events	Kudos Phone Calls	Contacts SuiteAnalytics Workbook	Address List in Search Cases Charge Charge Rule Charge – Run Rules Credit Memo Customer Deposit Customer Payment Customer Payment Authorization Customer Refund Customers Deposit Application Documents and Files Find Transaction Gift Certificate Invoice Invoice Approval Invoice Sales Orders Mobile Device Access Notes Tab Notifications Perform Search Product Analytics Records Sales Order Transfer Order Transfer Order Approval

Retail Clerk (Web Services Only)

Note that this role cannot be customized. See Retail Clerk Roles

Retail Clerk (Web Services Only) (Note that this role cannot be customized. See Retail Clerk Roles.)			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Bill Of Materials Inquiry Bulk Processing Submissions Currency Employee Public Employees Locations View Gateway Asynchronous Notifications View Payment Events	Kudos	SuiteAnalytics Workbook	Address List in Search Bill of Materials Charge Charge Rule Charge – Run Rules Credit Memo Custom Record Entries Customer Deposit Customer Payment Customer Payment Authorization Customer Refund Customers Deleted Records Deposit Application Documents and Files Employee Record Find Transaction Gift Certificate Invoice Invoice Approval Items Log in using Access Tokens Mobile Device Access Notifications Product Analytics Records REST Web Services Sales Order SOAP Web Services Set Up SOAP Web Services Track Time Transfer Order Transfer Order Approval View Unencrypted Credit Cards View Unencrypted General Tokens View Unencrypted Payment Card Tokens View SOAP Web Services Logs

Revenue Accountant

Revenue Accountant				
View	**Create**	**Edit**	**Full**	
Account Detail Balance Sheet Bill Of Materials Billing Schedules Bulk Processing Submissions Create Allocation Schedules	Kudos Resource	Accounts Accounts Receivable Cash Sale Cash Sale Refund Credit Memo Customers Email Template Fair Value Dimension	Address List in Search Amortization Reports Amortization Schedules Calendar Custom Recognition Event Type Deferred Expense Reports	Revenue Management VSOE Revenue Recognition Plan Revenue Recognition Reports Revenue Recognition Rule

Revenue Accountant				
View	**Create**	**Edit**	**Full**	
Currency Customer Deposit Customer Payment Customer Payment Authorization Customer Refund Employee Public Employee Reminders Employees Entity-Subsidiary relationship Financial Statements Fulfill Orders General Ledger Income Income Statement Item Fulfillment Item Revisions Items Projects Project Profitability Purchase Order Reconcile Reporting Sales Order Fulfillment Reports Sales Order Reports Tax Details Tab Time Tracking Trial Balance Units		Fair Value Formula Fair Value Price Gift Certificate Invoice Invoice Sales Orders Item Revenue Category Non Posting Registers Recognition Treatment Recognition Treatment Rule Return Authorization Revenue Recognition Field Mapping Sales Order SuiteAnalytics Workbook	Documents and Files Employee Record Events Expense Amortization Plan Expense Amortization Rule Financial Narratives Find Transaction Generate Revenue Commitment Generate Revenue Commitment Reversals Make Journal Entry Mass Updates Notes Tab Notifications Perform Search Phone Calls Product Analytics Records Project Revenue Rules Project Tasks Report Customization Report Scheduling Revenue Arrangement Revenue Arrangement Approval Revenue Commitment Revenue Commitment Reversal Revenue Element	Revenue Recognition Schedules Tasks Template Categories

Revenue Manager

Revenue Manager				
View	**Create**	**Edit**	**Full**	
Account Detail Balance Sheet Bulk Processing Submissions Create Allocation Schedules Customer Deposit Customer Payment Customer Payment Authorization Customer Refund Employee Public Employee Reminders Employees Entity-Subsidiary relationship Financial Statements	Kudos Resource	Accounts Accounts Receivable Bill Of Materials Billing Schedules Cash Sale Cash Sale Refund Credit Memo Currency Customers Email Template Gift Certificate Invoice Invoice Sales Orders Item Revisions Items Non Posting Registers	Accounting Lists Accounting Management Accounting Preferences Address List in Search Amortization Reports Amortization Schedules Calendar Custom Body Fields Custom Column Fields Custom Entity Fields Custom Entry Forms Custom Event Fields Custom Fields Custom Item Fields	Enable Features Events Expense Amortization Plan Expense Amortization Rule Fair Value Dimension Fair Value Formula Fair Value Price Financial Narratives Find Transaction Generate Revenue Commitment Generate Revenue Commitment Reversals Item Revenue Category Make Journal Entry Mass Updates Notes Tab

Revenue Manager				
View	**Create**	**Edit**	**Full**	
Fulfill Orders General Ledger Income Income Statement Item Fulfillment Project Profitability Projects Purchase Order Reconcile Reporting Sales Order Fulfillment Reports Sales Order Reports Time Tracking Trial Balance Units		Return Authorization Sales Order SuiteAnalytics Workbook	Custom Lists Custom PDF Layouts Custom Recognition Event Type Custom Record Types Custom Subtabs Custom Transaction Fields Custom Transaction Forms Deferred Expense Reports Documents and Files Employee Record	Notifications Other Lists Perform Search Phone Calls Product Analytics Records Project Revenue Rules Project Tasks Recognition Treatment Recognition Treatment Rule Report Customization Report Scheduling Revenue Arrangement Revenue Arrangement Approval Revenue Commitment Revenue Commitment Reversal Revenue Element Revenue Management VSOE Revenue Recognition Field Mapping Revenue Recognition Plan Revenue Recognition Reports Revenue Recognition Rule Revenue Recognition Schedules Tasks Template Categories

Sales Administrator

Sales Administrator				
View	**Create**	**Edit**	**Full**	
Access Payment Audit Log Accounts Receivable Accounts Receivable Register Bill Of Materials Inquiry Bill of Materials Commission Reports Contact-Subsidiary relationship Employee Public Employee Reminders Entity-Subsidiary relationship Financial History Items Lead Snapshot/ Reminders	Export Lists Kudos Resource Tableau® Workbook Export	Cash Sale CRM Lists Custom Body Fields Custom Column Fields Custom Entity Fields Custom Event Fields Custom Fields Custom Lists Custom Subtabs Custom Transaction Fields Mass Updates SuiteAnalytics Workbook	Address List in Search Analytical Impact Bulk Manage Roles Calendar Commission Feature Setup Companies Competitors Contact Roles Contacts CRM Groups Custom Entry Forms Custom Transaction Forms Customer Segments Manager Customer Status Customers Deleted Records	Find Transaction Gift Certificate Intelligent Recommendations Internal Publisher Item Collection KPI Scorecards Lead Conversion Lead Conversion Mapping Letter Messages Letter Template Log in using Access Tokens Mail Merge Manage Users Marketing Template Mobile Device Access Notes Tab

Sales Administrator				
View	**Create**	**Edit**	**Full**	
Marketing Campaign Reports Non Posting Registers Project Templates Quota Reports Resource Allocations SaaS Metric Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Shipping Items Shipping Partner Registration Statistical Account Registers Subscription Plan Unbilled Receivable Registers Units Usage View Gateway Asynchronous Notifications View Payment Events Work Calendar			Documents and Files Duplicate Detection Setup Duplicate Entity Management Edit Forecast Edit Manager Forecast Email Template Employee Commission Schedules/Plans Employee Commission Transaction Employee Record Employees Establish Quotas Events Fax Messages Fax Template	Notifications Online Customer Form Opportunity Outlook Integration 2.0 Override Estimated Cost on Transactions Partner Authorized Commission Reports Partner Commission Reports Partner Commission Schedules/Plans Partner Commission Transaction Partner Contribution PDF Messages PDF Template Perform Search Phone Calls Price Books Price Plans Product Analytics Records Project Tasks Projects Promotion Publish Dashboards Publish Search Quote Report Customization Report Scheduling Resource Allocation Approval REST Web Services Sales Campaigns Sales Force Automation Setup Sales Order Sales Order Approval Sales Territory Sales Territory Rule Set Up Domains SOAP Web Services Subscriptions Subscription Change Orders Tasks Team Selling Contribution Telephony Integration Template Categories Track Messages Two-Factor Authentication base Upsell Assistant Upsell Setup Upsell Wizard

Sales Manager

Sales Manager				
View	**Create**	**Edit**	**Full**	
Access Payment Audit Log Accounts Receivable Accounts Receivable Register Bill Of Materials Inquiry Bill of Materials Bulk Processing Submissions Cases Check Item Availability Commission Reports Commit Orders Contact-Subsidiary relationship Employee Compensation Employee Confidential Employee Public Employee Record Entity-Subsidiary relationship Item Revisions Items Lead Snapshot/ Reminders Marketing Campaigns Marketing Campaign Reports Non Posting Registers Project Templates Quota Reports Resource Allocations SaaS Metric Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Statistical Account Registers Subscription Plan Unbilled Receivable Registers Units Usage View Gateway Asynchronous Notifications View Payment Events Web Site Report Web Store Report	Export Lists Kudos Resource Tableau® Workbook Export	Campaign History Cash Sale CRM Lists Custom Body Fields Custom Column Fields Custom Entity Fields Custom Fields Custom Lists Custom Subtabs Custom Transaction Fields Fax Messages Fax Template Letter Messages Letter Template Mail Merge Mass Updates Override Payment Hold PDF Messages PDF Template SuiteAnalytics Workbook	Address List in Search Allocate Orders Analytical Impact Approve Order Reservation Bill Of Distribution Calendar Commission Feature Setup Companies Competitors Contact Roles Contacts CRM Groups Custom Entry Forms Custom Transaction Forms Customer Segments Manager Customer Status Customers Deleted Records Distribution Network Documents and Files Earliest Availability Edit Forecast Edit Manager Forecast Email Template Employee Commission Schedules/Plans Employee Commission Transaction Establish Quotas	Events Find Transaction Gift Certificate Global Inventory Relationship Internal Publisher Intelligent Recommendations Item Collection Lead Conversion Lead Conversion Mapping Log in using Access Tokens Marketing Template Mobile Device Access Notes Tab Notifications Online Customer Form Opportunity Order Allocation Strategy Order Management Dashboard Order Reservation Outlook Integration 2.0 Override Estimated Cost on Transactions Partner Commission Schedules/Plans Partner Commission Transaction Partner Contribution Perform Search Phone Calls Price Books Price Plans Product Analytics Records Projects Project Tasks Promotion Quote Reallocate Order Item Report Customization Report Scheduling Resource Allocation Approval REST Web Services Sales Campaigns Sales Channel Sales Order Sales Order Approval Sales Territory Sales Territory Rule Set Up Image Resizing

Sales Manager				
View	**Create**	**Edit**	**Full**	
Work Calendar				SOAP Web Services Subscriptions Subscription Change Orders Tasks Team Selling Contribution Template Categories Track Messages Upsell Assistant Upsell Setup Upsell Wizard

Sales Person

Sales Person			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Bill Of Materials Inquiry Bill of Materials Bulk Processing Submissions Cases Commission Reports Contact-Subsidiary relationship CRM Lists Duplicate Entity Management Employee Commission Transaction Employee Public Employee Record Entity-Subsidiary relationship Items Lead Snapshot/Reminders Marketing Campaigns Marketing Campaign Reports Non Posting Registers Project Templates Quota Reports Resource Allocations Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Subscription Plan Units Usage View Gateway Asynchronous Notifications View Payment Events Work Calendar	Export Lists Kudos Notes Tab Resource Tableau® Workbook Export	Campaign History Cash Sale Edit Forecast Fax Messages Fax Template Gift Certificate Letter Messages Letter Template Mail Merge Mass Updates Opportunity PDF Messages PDF Template Sales Order SuiteAnalytics Workbook	Address List in Search Calendar Competitors Contacts CRM Groups Customers Deleted Records Documents and Files Email Template Events Find Transaction Lead Conversion Lead Conversion Mapping Log in using Access Tokens Marketing Template Mobile Device Access Notifications Outlook Integration 2.0 Perform Search Phone Calls Price Books Price Plans Product Analytics Records Projects Project Tasks Quote Report Customization Report Scheduling Resource Allocation Approval REST Web Services Sales Campaigns SOAP Web Services Subscriptions Subscription Change Orders

Sales Person			
View	**Create**	**Edit**	**Full**
			Tasks Template Categories Track Messages Upsell Assistant

Sales Vice President

Sales Vice President			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Accounts Receivable Accounts Receivable Register Bill Of Materials Inquiry Bill of Materials Bulk Processing Submissions Cases Check Item Availability Commission Reports Commit Orders Component Where Used Contact-Subsidiary relationship Costed Bill Of Materials Inquiry Employee Public Employee Record Entity-Subsidiary relationship Item Revisions Items Lead Snapshot/Reminders Marketing Campaigns Non Posting Registers Price Books Price Plans Quota Reports SaaS Metric Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Statistical Account Registers Subscription Change Orders Subscriptions Subscription Plan Usage View Gateway Asynchronous Notifications View Payment Events Web Site Report Web Store Report	Export Lists Kudos Tableau® Workbook Export	Campaign History Cash Sale Fax Messages Fax Template Letter Messages Letter Template Mail Merge Mass Updates Override Payment Hold PDF Messages PDF Template SuiteAnalytics Workbook	Address List in Search Allocate Orders Analytical Impact Approve Order Reservation Bill Of Distribution Calendar Companies Competitors Contact Roles Contacts CRM Groups Customers Distribution Network Documents and Files Earliest Availability Edit Forecast Edit Manager Forecast Email Template Establish Quotas Events Find Transaction Gift Certificate Global Inventory Relationship Manufacturing Cost Template Manufacturing Routing Mobile Device Access Notes Tab Notifications Opportunity Order Allocation Strategy Order Management Dashboard Order Reservation Perform Search Phone Calls Product Analytics Records Quote Reallocate Order Item Report Customization Report Scheduling Sales Campaigns Sales Channel Sales Order

Sales Vice President			
View	**Create**	**Edit**	**Full**
			Sales Order Approval Subsidiary - Tax Engine selection Tasks Template Categories Track Messages

Specialized User: CRM

Specialized User: CRM			
View	**Create**	**Edit**	**Full**
Accounts Receivable Accounts Receivable Register Adjust Inventory Bulk Processing Submissions Companies Contact Roles Credit Returns Custom Center Categories Custom Center Link Custom Center Links Custom Center Tabs Custom Centers Custom Column Fields Custom Entity Fields Custom Entry Forms Custom Event Fields Custom Fields Custom HTML Layouts Custom Item Fields Custom Item Number Fields Custom Lists Custom PDF Layouts Custom Record Types Custom Segments Custom Sublist Custom Sublists Custom Subtabs Custom Transaction Fields Custom Transaction Forms Custom Transaction Types Customer Deposit Customer Payment Customer Segments Manager Customer Status Customize Field Level Help Delete Event Delete Records Email Template Employee Reminders Entity-Subsidiary relationship Fax Messages Fax Template Fulfill Orders	Cash Sale Cash Sale Refund Customer Refund Export Lists Other Lists Upsell Setup Work Order	Campaign History Commit Orders Invoice Override Payment Hold PDF Messages PDF Template SuiteAnalytics Workbook	Address List in Search Calendar Case Alerts Cases Competitors Contacts Credit Memo CRM Groups CRM Lists Customers Documents and Files Edit Forecast Edit Manager Forecast Establish Quotas Estimate Events Find Transaction Gift Certificate Import CSV File Internal Publisher Invoice Approval Lead Conversion Lead Conversion Mapping Mail Merge Marketing Campaigns Marketing Template Mass Updates Mobile Device Access Notes Tab Online Case Form Online Custom Record Form Online Customer Form Opportunity Partners Perform Search Phone Calls Promotion Publish Dashboards Report Customization Report Scheduling Return Auth. Approval Return Authorization Sales Campaigns

Specialized User: CRM			
View	**Create**	**Edit**	**Full**
Generate Price Lists Generate Statements Installment Payment Links Inventory Item Fulfillment Items KPI Scorecards Lead Snapshot/Reminders Letter Messages Letter Template Locations Marketing Campaign Reports Other Custom Fields Purchase Order Quantity pricing Schedules Quota Reports Refund Returns Return Authorization Reports Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Schedule Mass Updates Statement Charge Support Support Case Snapshot/Reminders Unbilled Receivable Registers Update Prices Vendors View Payment Events Work Calendar			Sales Force Automation Setup Sales Order Sales Order Approval Sales Territory Sales Territory Rule SAML Single Sign-on Set Up Image Resizing Support Case Issue Support Case Origin Support Case Priority Support Case Status Support Case Territory Support Case Territory Rule Support Case Type Support Setup Tasks Track Messages Upsell Assistant Upsell Wizard

Specialized User: Project Manager

Specialized User: Project Manager			
View	**Create**	**Edit**	**Full**
Account Detail Accounts Accounts Payable Accounts Payable Graphing Accounts Receivable Accounts Receivable Graphing Accounts Receivable Register Accounts Receivable Un-Billed Bill Purchase Orders Bills Bulk Processing Submissions Calculate Time Classes Contact Roles Contact-Subsidiary relationship	Contacts Credit Memo Estimate Export Lists Notes Tab	Accounting Lists Billing Schedules Employee Record Employees Financial History Find Transaction Fulfill Orders Item Fulfillment Other Lists Project Revenue Rules Purchase Orders Receive Order Report Customization Sales Order SuiteAnalytics Workbook	Address List in Search Bulk Manage Roles Bulk Time Entry Modification Calendar Charge Charge - Run Rules Charge Rule Copy Project Tasks Create Jobs from Sales Transactions Custom Segments Documents and Files Events Expense Report Expense Report Policies

Specialized User: Project Manager			
View	**Create**	**Edit**	**Full**
Currency Custom Record Entries Custom Record Types Customer Payment Customer Profile Customers Departments Employee Reminders Enter Vendor Credits Entity-Subsidiary relationship Expense Categories Expenses Imported Employee Expenses Installment Payment Links Inventory Invoice Items Locations Make Journal Entry Non Posting Registers Opportunity Pay Bills PDF Messages Project Profitability Purchase Order Reports Purchases Resource Allocation Reports Revenue Arrangement Revenue Element Revenue Recognition Plan Revenue Recognition Reports Revenue Recognition Rule Revenue Recognition Schedules Sales Sales Force Automation Sales Order Reports Sales Order Transaction Report Subsidiaries Time Tracking Timer Unbilled Receivable Registers		Track Messages Vendors Work Calendar	Generic Resources Import CSV File Jobs Mobile Device Access Perform Search Phone Calls Project / Project Template Conversion Project Budget Project Profitability Setup Project Tasks Project Templates Publish Dashboards Report Scheduling Resource Resource Allocation Approval Resource Allocations Resource Groups Sales Order Approval SuiteScript Scheduling Tasks Track Time Vendor Bill Approval Work Breakdown Structure

Specialized User: Site Operator

Specialized User: Site Operator				
View		**Create**	**Edit**	**Full**
Accounts Payable Accounts Payable Graphing Accounts Payable Register Accounts Receivable Accounts Receivable Graphing	Installment Payment Links Inventory Inventory Status Inventory Status Change Invoice Invoice Approval Issue Reports Issues	Expense Report Export Lists Persist Search Phone Calls Tasks	Cases Count Inventory Create Inventory Counts Documents and Files Scanned Vendor Bills	Address List in Search Control SuiteScript and Workflow Triggers in Web Services Request Control SuiteScript and Workflow Triggers per CSV Import Custom Centers

Specialized User: Site Operator				
View		**Create**	**Edit**	**Full**
Accounts Receivable Register Accounts Receivable Un-Billed Adjust Inventory Adjust Inventory Worksheet Balance Sheet Bill of Materials Bill of Materials Inquiry Bill Purchase Orders Bills Bin Putaway Worksheet Bin Transfer Bins Blanket Purchase Order Blanket Purchase Order Approval Budget Bulk Processing Submissions Calendar Campaign History Cash Sale Cash Sale Refund Check Check Item Availability Classes Component Where Used Contacts Copy Budgets Cost of Goods Sold Registers Credit Card Credit Card Refund Credit Memo Credit Returns CRM Groups Custom Record Entries Customer Deposit Customer Payment Customer Refund Customers Departments Deposit Deposit Application Distribute Inventory Duplicate Entry Management Employee Reminders Enter Vendor Credits Estimate	Item Fulfillment Item Receipt Item Revisions Items Jobs Knowledge Base Kudos Lead Conversion Make Journal Entry Media Folders Non Posting Registers Notes Tab Opportunity Order Management Dashboard Organizational Value Other Names Perform Search Promotion Publish Search Purchase Order Purchase Order Reports Purchases Receive Order Receive Returns Record Custom Field Report Customization Requisition Requisition Approval Return Auth. Approval Return Authorization Sales Sales Order Sales Order Approval Schedule Mass Updates Sent Email Set Up Budgets Shipping Items Statistical Account Registers SuiteScript Support Support Case Snapshot/ Reminders Tax Reports Termination Reasons Time Tracking Time-Off Administration Track Messages Track Time Unbuild Assemblies Undelivered Emails Units Vendor Prepayment Vendor Prepayment Application Vendor Return Auth. Approval		Shortcuts SuiteAnalytics Workbook Transfer Inventory Transfer Order Transfer Order Approval	Duplicate Case Management Find Transaction Import CSV File Mobile Device Access Publish Dashboards Report Scheduling SAML Single Sign-on SuiteScript Scheduling

Specialized User: Site Operator				
View		**Create**	**Edit**	**Full**
Events Expense Categories Expense Registers Fulfill Orders Gift Certificate Income Income Statement	Vendor Return Authorization Vendor Returns Vendors Work Order			

Specialized User: View and Approve

Specialized User: View and Approve				
View				**Full**
Access Payment Audit Log Access to transaction numbering audit log Account Detail Accounting Lists Accounts Accounts Payable Accounts Payable Graphing Accounts Receivable Accounts Receivable Graphing Accounts Receivable Un-Billed Address List in Search Adjust Inventory Adjust Inventory Worksheet Advanced PDF/ HTML Templates Allocation Schedules Amortization Reports Amortization Schedules Approve Vendor Payments Audit Trail Automated Cash Application Balance Sheet Balancing Journals Bill Inbound Shipment	Custom Segments Custom Sublist Custom Sublists Custom Subtabs Custom Transaction Fields Custom Transaction Forms Custom Transaction Types Customer Deposit Customer Payment Customer Payment Authorization Customer Profile Customer Refund Customer Segments Manager Customer Status Customers Customize Field Level Help Deferred Expense Reports Deleted Records Departments Deposit Deposit Application Direct Deposit Status Distribute Inventory Distribution Network Documents and Files Earliest Availability Edit Forecast Edit Manager Forecast Edit Profile EFT Status Employee Commission Transaction Employee Reminders Employees Enter Completions	Kudos Labor Costing Lead Conversion Lead Snapshot/ Reminders Letter Messages Letter Template Locations Make Journal Entry Manufacturing Cost Template Manufacturing Routing Mark Work Orders Built Mark Work Orders Firmed Mark Work Orders Released Marketing Campaign Reports Marketing Campaigns Marketing Template Matching Rules for Online Banking Material Requirements Planning Media Folders Memorized Transactions Net Worth Netting Settlement News Items Notes Tab Online Case Form Online Custom Record Form Online Customer Form Opportunity Order Management Dashboard Order Reservation Organizational Value Other Custom Fields	Resource Resource Allocation Approval Resource Allocation Reports Resource Allocations Resource Groups Return Authorization Return Authorization Reports Revenue Arrangement Revenue Arrangement Approval Revenue Commitment Revenue Commitment Reversal Revenue Contracts Revenue Element Revenue Management VSOE Revenue Recognition Plan Revenue Recognition Reports Revenue Recognition Rule Revenue Recognition Schedules Sales Sales By Partner Sales By Promotion Sales Campaigns Sales Force Automation Sales Order Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Sales Roles Scanned Vendor Bills Schedule Mass Updates	Blanket Purchase Order Approval Employee Commission Transaction Approval Invoice Approval Journal Approval Partner Commission Transaction Approval Purchase Contract Approval Requisition Approval Return Auth. Approval Sales Order Approval SAML Single Sign-on Transfer Order Approval Vendor Bill Approval Vendor Payment Approval Vendor Return Auth. Approval

Specialized User: View and Approve				
View				**Full**
Bill Of Distribution Bill of Materials Bill Of Materials Inquiry Bill Purchase Orders Billing Schedules Bills Bin Putaway Worksheet Bin Transfer Bins Blanket Purchase Order Budget Build Assemblies Build Work Orders Calculate Time Calendar Campaign History Case Alerts Cases Cash Flow Statement Cash Sale Cash Sale Refund Charge Charge - Run Rules Charge Rule Check Check Item Availability Classes Color Themes Commission Reports Commit Orders Companies Competitors Component Where Used Contact Roles Contacts Cost of Goods Sold Registers Costed Bill Of Materials Inquiry Count Inventory Create Allocation Schedules Create Inventory Counts Credit Card Credit Card Refund Credit Memo Credit Returns CRM Groups CRM Lists	Enter Opening Balances Enter Vendor Credits Enter Year-To-Date Payroll Adjustments Entity-Subsidiary relationship Equity Registers Establish Quotas Estimate Events Expense Categories Expense Report Expenses Fair Value Dimension Fair Value Formula Fair Value Price Fax Messages Fax Template Finance Charge Financial History Financial Statements Find Transaction Fulfill Orders Fulfillment Request General Ledger General Token Generate Price Lists Generate Statements Gift Certificate Global Inventory Relationship Granting access to Reports Inbound Shipment Income Income Statement Individual Paycheck Installment Payment Links Integration Intelligent Recommendations Intercompany Adjustments Inventory Inventory Status Inventory Status Change Invoice Invoice Sales Orders Issue Components Issue Reports Issues Item Collection Item Demand Plan Item Fulfillment Item Process Family	Other Names Override Estimated Cost on Transactions Override Payment Hold Ownership Transfer Partner Authorized Commission Reports Partner Commission Reports Partner Commission Transaction Partners Pay Bills Pay Sales Tax Pay Tax Liability Paycheck Journal Payment Instruments Payment Methods Payroll Liability Payments PDF Messages PDF Template Perform Search Period End Financial Statements Period End Journals Persist Search Phone Calls Pick Strategy Pick Task Planned Revenue Planned Standard Cost Positions Post Time Post Vendor Bill Variances Posting Period on Transactions Presentation Categories Print Shipment Documents Process GST Refund Process Payroll Project Budget Project Profitability Project Revenue Rules Project Tasks Project Templates Promotion Public Template Categories Publish Forms Publish RSS Feeds Publish Search Purchase Contract Purchase Order Purchase Order Reports	Sent Email Shipping Items Shortcuts Standard Cost Version Statement Charge Statistical Account Registers Store Categories Store Content Categories Store Content Items Store Pickup Fulfillment Store Tabs Subscription Change Orders Subscription Plan Subscriptions Subsidiaries SuiteAnalytics Workbook Supply Chain Snapshot List Support Support Case Snapshot/ Reminders Tasks Tax Tax Details Tab Tax Records Tax Reports Tax Schedules Tegata Payable Tegata Receivable Template Categories Time Codes Time Tracking Time-Off Administration Timer Track Messages Track Time Transaction Detail Transaction Receive Inbound Shipment Transfer Funds Transfer Inventory Transfer Order Trial Balance Unbuild Assemblies Units Vendor Payment Status Vendor Prepayment Vendor Prepayment Application Vendor Request For Quote Vendor Return Authorization Vendor Returns	

Specialized User: View and Approve				
View				**Full**
Cross Charge Request Currency Currency Adjustment Journal Currency Revaluation Custom Address Form Custom Body Fields Custom Center Categories Custom Center Link Custom Center Links Custom Center Tabs Custom Centers Custom Column Fields Custom Entity Fields Custom Entry Forms Custom Event Fields Custom Fields Custom HTML Layouts Custom Item Fields Custom Item Number Fields Custom Lists Custom PDF Layouts Custom Record Entries Custom Record Types	Item Process Group Item Receipt Item Revenue Category Item Revisions Item Supply Plan Item Templates Item/Category Layouts Items Jobs Knowledge Base KPI Scorecards	Purchases Quantity pricing Schedules Quota Reports Receive Order Receive Returns Recognition Treatment Reconcile Reporting Record Custom Field Refund Returns Related Items Report Customization Report Scheduling Request For Quote Requisition	Vendors View Gateway Asynchronous Notifications Wave Web Site Report Web Store Report Work Breakdown Structure Work Calendar Work Order Work Order Close Work Order Completion Work Order Issue Workflow	

Specialized User: WMS

Specialized User: WMS			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Bulk Processing Submissions Cash Sale Currency Departments Entity-Subsidiary relationship Expense Report Fiscal Calendars	Export Lists	SuiteAnalytics Workbook	Accounting Lists Accounting Preferences Accounts Address List in Search Adjust Inventory Allow JS / HTML Uploads Audit Trail Bin Transfer

Specialized User: WMS			
View	**Create**	**Edit**	**Full**
Installment Payment Links Inventory Invoice Manage Accounting Periods Notes Tab Pay Sales Tax Sales Order Fulfillment Reports Sales Order Transaction Report Set Up Company Subsidiaries Tax Schedules			Bins Build Assemblies Build Work Orders Bulk Manage Roles Classes Companies Contacts Count Inventory Create HTML Formulas in Search Custom Body Fields Custom Column Fields Custom Entity Fields Custom Entry Forms Custom Event Fields Custom Fields Custom Lists Custom Record Entries Custom Record Types Custom Transaction Fields Custom Transaction Forms Customer Profile Customers Distribute Inventory Documents and Files Employee Record Employees Find Transaction Fulfill Orders Generate Statements Gift Certificate Import CSV File Inbound Shipment Inventory Status Inventory Status Change Item Fulfillment Item Process Family Item Process Group Item Receipt Item/Category Layouts Items Locations Perform Search Pick Strategy Pick Task Publish Dashboards Publish Forms Publish Search Purchase Order Receive Order Receive Returns Record Custom Field Report Customization Return Authorization Sales Force Automation Setup Sales Order SAML Single Sign-on Schedule Mass Updates Shipping Items

Specialized User: WMS			
View	**Create**	**Edit**	**Full**
			Shipping Partner Package SuiteScript SuiteScript Scheduling Tasks Track Time Transfer Inventory Transfer Order Transfer Order Approval Units Vendor Return Authorization Vendor Returns Vendors Vicarious emails Wave Work Order Zone

Store Manager

Store Manager				
View	**Create**	**Edit**	**Full**	
Access Payment Audit Log Accounts Receivable Bill Of Materials Inquiry Bulk Processing Submissions Contact-Subsidiary relationship Employee Compensation Employee Confidential Employee Public Employee Record Entity-Subsidiary relationship Inventory Lead Snapshot/Reminders Non Posting Registers Price Books Price Plans Project Templates Purchase Order Reports Resource Allocations Sales Sales By Partner Sales By Promotion Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Subscription Plan Usage	Export Lists Kudos Resource Tableau® Workbook Export	Companies Competitors Custom Item Fields Custom Lists Customers Email Template Notes Tab Override Payment Hold Projects Shipping Items Shipping Partner Registration Subscriptions Subscription Change Orders SuiteAnalytics Workbook Track Messages Vendors	Address List in Search Allow JS / HTML Uploads Bill of Materials Calendar Cash Sale Cash Sale Refund Color Themes Commerce Categories Contacts CRM Groups CRM Lists Customer Segments Manager Deleted Records Documents and Files Duplicate Entity Management Events Find Transaction Gift Certificate Intelligent Recommendations Internal Publisher Item Collection Item Demand Plan Item Supply Plan Item/Category Layouts Items Log in using Access Tokens Material Requirements Planning Mobile Device Access	Project Tasks Publish Forms Publish RSS Feeds Purchase Order Related Items Report Customization Report Scheduling Requisition Resource Allocation Approval REST Web Services Sales Order Sales Order Approval Set Up Domains Set Up Image Resizing Set Up Web Site Site Search SOAP Web Services Store Content Items Store Tabs System Email Template Tasks Template Categories Transfer Order Transfer Order Approval Uncategorized Presentation Items Units Upsell Assistant Upsell Setup

Store Manager				
View	**Create**	**Edit**	**Full**	
View Gateway Asynchronous Notifications View Payment Events Web Site Report Web Store Report Work Calendar			Notifications Online Customer Form Perform Search Phone Calls Presentation Categories Product Analytics Records	Upsell Wizard Website (External) publisher Web Site Management

Support Administrator

Support Administrator					
View	**Create**	**Edit**	**Full**		
Access Payment Audit Log Bill Of Materials Inquiry Bulk Processing Submissions Contact-Subsidiary relationship Employee Public Employee Reminders Entity-Subsidiary relationship Financial History Lead Snapshot/ Reminders Memorized Transactions Price Books Price Plans Project Templates Promotion Quota Reports Resource Allocations Return Authorization Reports Sales Force Automation Subscription Plan Usage Vendors View Gateway Asynchronous Notifications View Payment Events Web Site Report Work Calendar	Export Lists Kudos Receive Returns Refund Returns Return Auth. Approval Return Authorization Tableau® Workbook Export	Bill of Materials Classes Color Themes Departments Email Template Items Locations Marketing Template SuiteAnalytics Workbook Track Messages Units	Address List in Search Admindocs Audit Trail Backup Your Data Bulk Manage Roles Calculate Time Calendar Case Alerts Cases Companies Competitors Contact Roles Contacts Create Public Search CRM Groups CRM Lists Custom Body Fields Custom Column Fields Custom Entity Fields Custom Entry Forms Custom Event Fields Custom Fields Custom Item Fields Custom Lists Custom PDF Layouts Custom Record Entries Custom Record Types Custom Subtabs Custom Transaction Fields	Delete Event Deleted Records Documents and Files Duplicate Entity Management Employee Record Employees Escalation Assignment Escalation Assignment Rule Events Fax Messages Fax Template Find Transaction Import CSV File Internal Publisher Knowledge Base KPI Scoreboards Letter Messages Letter Template Log in using Access Tokens Mail Merge Manage Users Mass Updates Mobile Device Access Notes Tab Notifications Online Case Form Other Names Partners PDF Messages PDF Template Perform Search Phone Calls Product Analytics Records Projects Project Profitability Project Tasks	Publish Search Record Custom Field Report Customization Report Scheduling Resource Resource Allocation Approval REST Web Services Shortcuts SOAP Web Services Subscriptions Subscription Change Orders Support Support Case Issue Support Case Origin Support Case Priority Support Case Snapshot/ Reminders Support Case Status Support Case Territory Support Case Territory Rule Support Case Type Support Setup System Email Template Tasks Telephony Integration Template Categories Time Tracking Timer Track Time Two-Factor Authentication base Users & Passwords

Support Administrator				
View	**Create**	**Edit**	**Full**	
			Custom Transaction Forms Customer Profile Customers	Publish Dashboards Publish Knowledge Base

Support Manager

Support Manager				
View	**Create**	**Edit**	**Full**	
Bill Of Materials Inquiry Bill of Materials Bulk Processing Submissions Contact-Subsidiary relationship CRM Lists Employee Compensation Employee Confidential Employee Public Employee Record Entity-Subsidiary relationship Items Lead Snapshot/Reminders Price Books Price Plans Project Templates Resource Allocations Sales Sales By Partner Sales By Promotion Sales Order Reports Subscription Plan Support Support Case Snapshot/ Reminders Units Usage Work Calendar	Export Lists Kudos Resource Tableau® Workbook Export	Competitors Customers Email Template Fax Messages Fax Template Issues Letter Messages Letter Template Mail Merge Mass Updates PDF Messages PDF Template Projects Subscriptions Subscription Change Orders SuiteAnalytics Workbook Track Messages	Address List in Search Admindocs Calendar Case Alerts Cases Companies Contact Roles Contacts CRM Groups Deleted Records Documents and Files Duplicate Entity Management Escalation Assignment Escalation Assignment Rule Events Find Transaction Internal Publisher Knowledge Base Log in using Access Tokens Mobile Device Access Notes Tab Notifications	Online Case Form Perform Search Phone Calls Product Analytics Records Project Tasks Publish Knowledge Base Report Customization Report Scheduling Resource Allocation Approval REST Web Services SOAP Web Services Support Case Issue Support Case Origin Support Case Priority Support Case Status Support Case Territory Support Case Territory Rule Support Case Type Support Setup System Email Template Tasks Template Categories Track Time

Support Person

Support Person			
View	**Create**	**Edit**	**Full**
Bill Of Materials Inquiry Bill of Materials Bulk Processing Submissions Contact-Subsidiary relationship CRM Lists Duplicate Entity Management	Export Lists Knowledge Base Kudos Notes Tab Resource	Companies Competitors Customers Email Template Fax Messages Fax Template	Address List in Search Admindocs Calendar Cases Contacts Deleted Records

Support Person			
View	**Create**	**Edit**	**Full**
Employee Public Employee Record Entity-Subsidiary relationship Items Lead Snapshot/Reminders Price Books Price Plans Project Templates Publish Knowledge Base Publish RSS Feeds Resource Allocations Subscription Plan Support Support Case Snapshot/Reminders Units Usage Website (External) publisher Work Calendar	Tableau® Workbook Export	Issues Letter Messages Letter Template Mail Merge Mass Updates PDF Messages PDF Template Projects Subscriptions Subscription Change Orders SuiteAnalytics Workbook Track Messages	Documents and Files Events Find Transaction Log in using Access Tokens Mobile Device Access Notifications Perform Search Phone Calls Product Analytics Records Project Tasks Report Customization Report Scheduling Resource Allocation Approval REST Web Services SOAP Web Services Tasks Template Categories Track Time

System Administrator

System Administrator				
View	**Create**	**Edit**	**Full**	
Bulk Processing Submissions Employee Public Employee Reminders Find Transaction Notes Tab SaaS Metric Sent Email System Status Undelivered Emails	Kudos	Email Template Override Payment Hold SuiteAnalytics Workbook Track Messages	Address List in Search Admindocs Analytical Impact Auto-Generated Numbers Billing Information Bulk Manage Roles Classes Credit Card Processing Custom Body Fields Custom Column Fields Custom Entity Fields Custom Entry Forms Custom Event Fields Custom Fields Custom Item Fields Custom Lists Custom PDF Layouts Custom Record Types Custom Sublist Custom Subtabs Custom Transaction Fields	Custom Transaction Forms Customer Segments Manager Deleted Records Departments Duplicate Detection Setup Employee Record Employee Social Security Numbers Employees Enable Features Events Financial Institution Records Internal Publisher Item Collection KPI Scorecards Locations Log in using Access Tokens Manage Custom Permissions Manage Custom Restrictions Manage Users Notifications Price Books Price Plans Product Analytics Records Publish Dashboards Publish Search REST Web Services Set Up Company

System Administrator				
View	**Create**	**Edit**	**Full**	
				SOAP Web Services Subscription Change Orders Subscription Plan Subscriptions Tasks Template Categories Two-Factor Authentication base Usage Web Services

Tax Engine

Tax Engine			
View	**Create**	**Edit**	**Full**
Accounts Auto-Generated Numbers Bills Bulk Processing Submissions Cash Sale Cash Sale Refund Companies Credit Card Credit Card Refund Credit Memo Credit Returns Currency Customer Deposit Customer Payment Customer Refund Customers Deposit Deposit Application Enter Vendor Credits Entity-Subsidiary relationship Expense Categories Expense Report Finance Charge Find Transaction Gift Certificate Imported Employee Expenses Invoice Item Fulfillment Item Receipt Items Make Journal Entry Opportunity Other Names Perform Search Posting Period on Transactions Projects Promotion Purchase Order Quote	—	—	Address List in Search Product Analytics Records Tax Records

Tax Engine			
View	**Create**	**Edit**	**Full**
Return Authorization Sales Order Set Up Company Shipping Items Subsidiaries Subsidiary Tax Registrations Tab Tax Details Tab Vendor Return Authorization Vendors			

Vendor Center

Vendor Center			
View	**Create**	**Edit**	**Full**
Accounts Payable Register Find Transaction Non Posting Registers Notes Tab Purchase Order Requisition Sales Order Transaction Report	—	—	Deleted Records Log in using Access Tokens Notifications REST Web Services SOAP Web Services Track Time Vendor Request For Quote

Warehouse Manager

Warehouse Manager			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Bill Of Materials Inquiry Bill of Materials Bulk Processing Submissions Check Item Availability Commit Orders Component Where Used Contact-Subsidiary relationship Costed Bill Of Materials Inquiry Customers Employee Compensation Employee Confidential Employee Public Employee Record Entity-Subsidiary relationship Gift Certificate Inventory Item Revisions Non Posting Registers Notes Tab Purchase Order Reports Price Books Price Plans Revalue Inventory Cost	Export Lists Kudos Resource Tableau® Workbook Export	Bills Email Template Items Shipping Items Shipping Partner Registration SuiteAnalytics Workbook Track Messages	Address List in Search Adjust Inventory Allocate Orders Approve Order Reservation Bill Of Distribution Build Work Orders Calendar Close Work Orders Contacts Count Inventory Create Inventory Counts Deleted Records Distribution Network Documents and Files Enter Completions Events Find Transaction Fulfill Orders Global Inventory Relationship Inbound Shipment Inventory Cost Template Issue Components Item Demand Plan

Warehouse Manager			
View	**Create**	**Edit**	**Full**
Sales Order Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Subscription Plan Units Vendors View Gateway Asynchronous Notifications View Payment Events			Item Fulfillment Item Process Family Item Process Group Item Receipt Item Supply Plan Log in using Access Tokens Manufacturing Cost Template Manufacturing Routing Mark Work Orders Built Mark Work Orders Firmed Mark Work Orders Released Material Requirements Planning Mobile Device Access Notifications Order Allocation Strategy Order Management Dashboard Order Reservation Ownership Transfer Perform Search Phone Calls Pick Strategy Pick Task Planned Standard Cost Print Shipment Documents Product Analytics Records Purchase Order Reallocate Order Item Receive Order Receive Returns Report Customization Report Scheduling Requisition Requisition Approval REST Web Services Sales Channel Shipping Partner Package Shipping Partner Shipment SOAP Web Services Standard Cost Version Supply Chain Snapshot List Tasks Template Categories Transfer Order Transfer Order Approval Units for Pick Decomposition Vendor Bill Approval Wave Work Order Work Order Close Work Order Completion Work Order Issue Zone

Roles and Permission Considerations for APIs

When you work with the following NetSuite APIs, you must consider which permissions you need. In addition to main permissions, REST and SOAP Web Services, SuiteAnalytics Connect, and SuiteScript need other permissions to access forms, sublists, fields, and other components.

- REST Web Services
- SuiteAnalytics Connect
- SuiteScript
- SOAP Web Services

REST Web Services

The following permissions must be assigned to roles, or people, who work with REST Web Services:

- REST Web Services
- Log in using Access Tokens
- SuiteAnalytics Workbook

To learn about standard roles that have these permissions enabled by default, see the help topic Prerequisites and Setup for REST Web Services.

SuiteAnalytics Connect

To use SuiteAnalytics Connect, you can either have the Full level of the **SuiteAnalytics Connect** permission, or the **SuiteAnalytics Connect – Read All** permission, which gives you read-only access to all NetSuite data through the Connect Service.

Warning: Note that the SuiteAnalytics Connect – Read All permission improves performance when running queries, but exposes sensitive data such as employee and customer records to the user. For more information, see the help topic Connect Permissions.

Depending on which data source you use to access the Connect Service, consider the following:

- Role and Permission Considerations for NetSuite.com
- Role and Permission Considerations for NetSuite2.com

SuiteScript

To use SuiteScript, you must have the SuiteScript permission assigned to your role. You'll also need to consider what other permissions you may need. For example, if you work with records, you may need the **Find Transaction** permission to retrieve a record using the GET operation. Or if you work with employees, you'll need to check the subsidiary restrictions.

For more information, see Feature Permissions Documentation.

SOAP Web Services

To log in to **SOAP Web Services**, you need the Full level of the **SOAP Web Services** permission. You should also have the correct access and operations permissions that the SOAP Web Services application

needs. Another role-related consideration is the preferred custom forms of some roles may not have access to certain fields or sublists that a SOAP application requires. When you use SOAP to set fields that you cannot access, you receive permission errors.

For example, when you work with records, you may need the **Find Transaction** permission to retrieve a record using the GET operation. Or when you work with employees, you'll need to check the subsidiary restrictions. For more information, see the help topics Roles and Permissions in SOAP Web Services and Permissions and Restrictions.

Permissions Documentation

The following link provides access to a Microsoft Excel worksheet that lists how most NetSuite permissions are used. You can use this list to see what happens when you assign a specific permission, or to find the permission required to provide access to a specific task or page. The spreadsheet format lets you search and sort fields however works best for you. Each column has autofilters you can use.

To access the worksheet, click this link: NetSuitePermissionsUsage.xls.

For information about standard roles and their associated permission levels, see Standard Roles Permissions Table. For information about permissions required to access specific NetSuite features, see Feature Permissions Documentation.

> **Note:** Most browsers will download this file in "Protected View" mode to your Downloads folder. If the Autofilters aren't working, click the **Enable Editing** button on the yellow bar in the worksheet header.

The NetSuitePermissionsUsage.xls file includes the following columns:

- **SUBTAB** – Subtab of the Roles page Permissions subtab where each permission is listed: Lists, Reports, Setup, and Transactions (sorted alphabetically)
- **PERMISSION NAME** – Name of each permission (sorted alphabetically)
- **USAGE DESCRIPTION** – Description of how each permission is used, meaning the record types, tasks, and pages that each permission makes accessible (sorted alphabetically)
- **MINIMUM SELECTABLE LEVEL** – The minimum selectable level (view, create, edit, or full) for each permission.
- **MINIMUM SYSTEM LEVEL** – Contains the minimum valid level of permissions in the system. This level takes precedence in case it differs from the level in the Minimum Selectable Level column. This column is blank from most rows.

> **Note:** This worksheet doesn't show how different access levels affect each permission usage; it simply lists the minimum level required. Some permissions follow an access model where each level (view, create, edit, full) gives you more access to the related record type, task, or page, as described in Access Levels for Permissions. But some permissions don't fit exactly into this model. For some permissions, you only need the minimum view level, and other levels don't give you any additional capabilities. In general, any user with at least VIEW access to a transaction type on the Transactions subtab, or to a record type on the Lists subtab, can print records of that type.

The worksheet lists some permissions multiple times because they give access to different record types, tasks, and pages. Note that some permissions depend on other permissions, and this spreadsheet doesn't include these dependencies.

Important: The contents of NetSuitePermissionsUsage.xls are subject to change. Data is current as of the date listed in the worksheet footer. This worksheet shows how each permission works on its own. But since most roles include many different permissions, it's important to review permission changes in the context of each role and to test them before deploying them to users in your account.

For a list of permission IDs to use with SuiteScript, see the help topic Permission Names and IDs.

Two-Factor Authentication (2FA) is Required for Specific Permissions

Standard and custom roles with certain permissions need 2FA. For more information, see Permissions Requiring Two-Factor Authentication (2FA)..

Feature Permissions Documentation

The following link provides you with Microsoft Excel worksheet listing the permissions associated with NetSuite features. You can use this list to see which roles have the permissions needed to access specific features. The spreadsheet format lets you search and sort fields however works best for you.

To access the worksheet, click this link: FeaturesStandardRoles.xlsx.

The following topics contain information about permissions you need to access specific NetSuite features. The listings isn't a complete set of permissions help topics. You can find more permissions documentation in the Help Center, including details about the permissions needed to access different records or features. For general permissions documentation, see NetSuite Permissions Overview.

Accounting (ERP) and Banking

- Roles and Permissions for Balancing Segments
- Permissions for Banking Features
- Setting Fixed Assets Management Permission Levels
- Roles and Permissions for NFP Financials
- Roles and Permissions for Period End Journal Entries
- Assigning Revenue Commitment Permissions
- Revenue Management Roles and Permissions
- Required Permissions for Subsidiary Hierarchy Modification
- Subsidiary Settings Manager Permissions
- Tax Permissions
- Intercompany Framework Permissions
- Intercompany Netting Permissions

Administrator Features

- Add SAML Single Sign-on Permissions to Roles
- Required Permissions for CSV Imports

- Permissions Requiring Two-Factor Authentication (2FA)

Advanced Employee Permissions

- Before Enabling the Advanced Employee Permissions Feature
- Advanced Employee Permissions Overview
- Setting Employee Access for Advanced Employee Permissions
- Custom Advanced Employee Permissions
- Custom Restrictions for Advanced Employee Permissions

Country Specific Features

Roles and Permissions for Using Japanese Invoicing

SCM (Supply Chain Management)

Vendors, Purchasing, and Receiving

- Configuring Vendor Bill Approvals in the Employee Center
- Configuring Permissions for Vendor Prepayments

SuiteCloud Platform

Customization

- Configuring Permissions by Editing the Role
- Granting a Role Permission to Manage Custom Segments
- Granting Roles Permission to Use Segments in Searches and Reports
- Required Permissions for Editing Custom Segments
- Permissions for Custom Transaction Instances
- Permissions for Managing Custom Segments and Values

SuiteCloud Development Framework

- Assigning the Developer Role (Administrator Only)
- Roles and Permissions as an XML Definition
- Setting Roles and Permissions for SuiteScript

REST Web Services

- Prerequisites and Setup for REST Web Services

SOAP Web Services

- Assigning the SOAP Web Services Permission to a Role
- Project Task Permissions
- Role and Permission Considerations When Developing in SOAP Web Services
- Roles and Permissions in SOAP Web Services

SuiteFlow

Required Permissions for SuiteFlow

SuiteScript

- Permission Names and IDs
- Script Debugger Metering and Permissions

NetSuite for Mobile

Mobile Device Access Permission

NetSuite for Outlook

Outlook Integration

Order Management

- Dunning Permissions and Access
- Electronic Invoicing Permissions and Access Levels
- Granting the Override Estimated Costs on Transactions Permission
- Roles and Permissions for Contract Renewals
- Roles and Permissions for Grid Order Management
- Setting Up Payments Tab Permissions
- Setting Up Electronic Bank Payments
- SuiteBilling Roles and Permissions
- Recurring Billing — this is a PDF. For permissions information in this document, see Roles and Permissions for Recurring Billing.

SuiteAnalytics

- Access to Reports
- Permissions for Searches
- Providing Users with SuiteAnalytics Connect Permissions
- Publish Dashboards Permission

- Report Customization Permission
- Connect Permissions
- Record Names, Permissions, and Features Required for NetSuite2.com data source.
- The Analytics Administrator Permission

SuiteCommerce

- Set Execute as Role Permissions for .ss and .ssp Files
- Audience Permissions for Hosted Sites
- Customer Center Custom Permissions
- Feature Access Permissions
- My Account Menu Permissions
- SCIS Roles and Permissions
- SuiteCommerce InStore Permissions

SuitePeople

- SuitePeople Permission Requirements

NetSuite Roles Overview

A role is a defined access configuration. To set up and manage user access in NetSuite, you need the Administrator role so you can create roles to assign to users. Roles include sets of permissions for viewing and editing data. Roles and their permissions determine the pages users can see in NetSuite and the tasks that they can complete. Each role is linked to a center, a user interface designed for a specific business area.

See the following articles about roles:

- Standard Roles
- Custom Roles
- Manage Roles Page
- Show Permission Differences Between Roles Page
- Role Search

Note: You can set a user's role as Web Services Only. When a user logs in with a Web Services Only role, validation is performed to ensure that the user is logging in through web services and not through the user interface. For details, see the help topic Setting a Web Services Only Role for a User.

Standard Roles

NetSuite offers many standard roles with predefined permissions. Most of these roles match common employee positions, such as Accountant and Sales Rep. There are also standard roles for vendors, partners, and customers who have account access. For more information, see Standard Roles Permissions Table.

Custom Roles

You can't modify standard roles, so it's a good idea to use these roles as templates to create your own customized roles you assign to users in your account. Customizing a standard role is easier than creating a new role. If you assign custom roles instead of standard roles to users, you can update permissions to users' roles as needed. Being able to modify a role without updating each users' role assignments makes maintenance easier.

- For instructions for customizing roles, see Customizing or Creating NetSuite Roles.

> **Note:** Because they're intended as limited access roles, Retail Clerk roles, unlike other standard NetSuite roles, can't be customized. For details, see Retail Clerk Roles.

- For information about changes you can make to roles, see the following:
  - Changing Custom Roles
  - Inactivating Roles
  - Setting Default Forms for Roles
  - Restricting Accounts for Roles
  - Customizing the Customer Center Role
  - Setting Role-Based Preferences
  - Translating Custom Role Names

Manage Roles Page

To see a list of roles available in your account, go to Setup > Users/Roles > Manage Roles to open the Manage Roles page. This page shows the center associated with each role and whether the role is standard or custom. For information about center types, see the help topic Centers Overview.

Click **Customize** to create a custom version of a standard role. Click **Edit** to make changes to a custom role.

Figure 1. Manage Roles Page

Show Inactives | 2fa — Engineer | Total: 107

Edit	Internal ID	Name	Custom/Standard	Center Type
Customize	4	A/P Clerk	Standard	Accounting Center
Customize	5	A/R Clerk	Standard	Accounting Center
Customize	1	Accountant	Standard	Accounting Center
Customize	2	Accountant (Reviewer)	Standard	Accounting Center
Edit	1188	Activities Coordinator	Custom	Test Center
	3	Administrator	Standard	Classic Center
Customize	29	Advanced Partner Center	Standard	Advanced Partner Center
Edit	1080	Approver	Custom	Accounting Center
Customize	6	Bookkeeper	Standard	Accounting Center
Customize	50	Buyer	Standard	Accounting Center
Edit	1064	CC Accountant 15	Custom	Accounting Center
Edit	1046	CC TR Custom Payroll Setup	Custom	Classic Center
Customize	8	CEO	Standard	Executive Center
Customize	7	CEO(Hands Off)	Standard	Executive Center
Customize	41	CFO	Standard	Accounting Center
Customize	49	Chief People Officer (CPO)	Standard	Accounting Center
Customize	46	Consultant	Standard	Project Center
Edit	1070	Copy_to_account_test	Custom	Accounting Center
Edit	1008	Custom A/P Clerk	Custom	Accounting Center

Show Permission Differences Between Roles Page

NetSuite provides a management tool that lets you quickly see the differences among multiple roles' permissions. Go to Setup > Users/Roles > Show Role Differences to open the Show Permission Differences Between Roles page. For more information, see Showing Role Permission Differences.

Figure 2. Role Permission Difference Results

Category	Permission (Restrictions)	Custom A/P Clerk	A/P Clerk
Lists	Accounts Payable Register	Edit	Edit
Lists	Address List in Search	Full	Full
Lists	Amortization Schedules	View	View
Lists	Automated Clearing House	None	Full
Lists	Bill of Materials	None	Edit
Lists	Bill Of Materials Inquiry	None	View
Lists	Bulk Processing Submissions	View	View
Lists	Calendar	Full	Full
Lists	Classes	Edit	Edit
Lists	Contact-Subsidiary relationship	View	View
Lists	Contacts	Full	Full
Lists	Custom Record Entries	View	None
Lists	Departments	Edit	Edit
Lists	Documents and Files	Full	Full
Lists	Email Template	Edit	Edit
Lists	Employee Record	None	View
Lists	Entity-Subsidiary relationship	View	View
Lists	Eventevents	Full	Full
Lists	Export Lists	Create	Create

Role Search

You can use the role search to find a particular role or set of roles, or to get a list of roles and their details. To use this search, go to Setup > Users/Roles > Manage Roles > Search. You can also use role fields as criteria filters and results for Employee searches. For more information, see Use Searches to Audit Roles.

Note: To see a list of all users assigned a particular role, go to Setup > Users/Roles > Manage Users, and select the role from the Role dropdown list at the bottom of the Manage Users page.

NetSuite Account Administration

The person who manages NetSuite for your organization is the main contact for NetSuite and your users. This person:

- Oversees the initial setup of NetSuite
- Manages the on-going administration of NetSuite

Key administrator tasks may include:

- Handles daily account maintenance and management

- Takes care of technical and system administration, including configuration and integration
- Acts as the point of contact for end users and NetSuite Support
- Helps users adopt the system and stay satisfied through training, support, and meeting their needs
- Plans, reviews, and customizes NetSuite to meet user needs
- Helps with data extraction through reporting and searches
- Monitors usage and system performance
- Makes sure account data is high quality, runs regular data audits, and fixes data integrity issues
- Develops tests, does functional testing, and rolls out customizations, custom objects, new enhancements, application releases, and system integration based on user or business needs

The person who administers NetSuite uses The Administrator Role.

The Administrator Role

The person that signs up for a NetSuite account automatically gets the Administrator role. It's a powerful role and should only go to people who require full NetSuite functionality for their job. Usually, this is a small number of people. The Administrator role should be given to at least two people on an account. With at least two Administrator roles on an account, you can handle NetSuite tasks if someone's out of office or leaves the company. Even though you should have more than one administrator for an account, you should also choose your administrators wisely. Users with the Administrator role should have their transactions checked through audit trails in system notes.

As with other standard roles, you can't customize the standard Administrator role. You should create and use a custom administrator role instead of using the standard role.

The Administrator role gives you access to all tasks and pages in NetSuite, including:

- Full visibility into all areas of the NetSuite account
- Complete access to the Setup Manager, where you can handle common administrator tasks

Users with the Administrator role have to use two-factor authentication in new accounts. For information, see the help topic 2FA in the NetSuite Application.

You can find the standard Administrator role in the list of roles on the Manage Roles page. But since you can't customize the standard Administrator role, the **Customize** and **Edit** buttons are not available. The Administrator role page shows all system permissions with access level set to Full, or the highest access level available for the given permission. This provides a quick way to see everyone who has the Administrator role.

The Administrator role is a global role that applies to your entire NetSuite account. Other localized administrator roles, such as the Issues Administrator, Marketing Administrator, and Sales Administrator, only apply to certain areas of NetSuite.

> **Note:** Several administration permissions are separate from the Administrator role so that you can assign them to non-administrator roles. For more information, see Separate Administration Permissions.

If you need a role that behaves like the standard Administrator role but limits access to sensitive information, consider using Core Administration Permissions. Core Administration Permissions is a set of permissions that mimics what the Administrator role can do. You can assign Core Administration Permissions to any role and restrict them as needed. For more information, see Core Administration Permissions.

Separate Administration Permissions

You can assign several setup-type administration permissions to users who don't have the Administrator role. With these permissions, you can limit the number of Administrator roles by assigning these administrative tasks to other users. The available Setup permissions are:

- Enable Features
- Set Up Company
- View Billing
- View SOAP Web Services Logs
- Integration Application
- SuiteScript Scheduling

You can find these permissions on the role record's Permissions Setup tab.

Note: If you need a role that behaves like the standard Administrator role but limits access to sensitive information, consider using Core Administration Permissions. Core Administration Permissions is a set of permissions that mimics what the Administrator role can do. You can assign Core Administration Permissions to any role and restrict them as needed. For more information, see Core Administration Permissions.

Full Access Role (Deprecated)

Important: The Full Access role was deprecated in the 2021.1 release as a security enhancement. You cannot assign the Full Access role to new users.

The Full Access role was deprecated because it became a redundant role as the roles and permissions options have greatly expanded. Here are a few tips for how to replace the Full Access role:

- If any users have another existing role in your account, which they can use instead of the Full Access role, assign this other role to them. For more information, see the help topic Assigning Roles to an Employee.
- Analyze the needs of other users to determine the access granted by the Full Access role that is not available through existing roles or global permission assignments.
  - You can customize standard roles or create new custom roles as needed to provide users with the specific access they require. For more information, see Customizing or Creating NetSuite Roles.
  - If you need a high-access role that you can assign to users, you can use the Administrator role. For more information, see NetSuite Account Administration
  - A new permission called Core Administration Permissions is available. This permission provides access to some of the same functions that were available to users with the Full Access role. You may be able to use Core Administration Permissions as an alternative to the Full Access role. For more information, see Core Administration Permissions.
  - If the Global Permissions feature is enabled in your account, you can also assign additional global permissions to users as needed. Please note that usage of the Global Permissions feature is not preferred. For more information, see Using the Global Permissions Feature.

The Full Access role is now inactive for users who had this role assigned before it was deprecated. The Full Access role no longer appears in the list of roles available for users who had this role assigned. A user with the Administrator role can make this role active again for a user, but the use of this role is not preferred.

Permissions Requiring Two-Factor Authentication (2FA)

Important: As of 2018.2, the requirement for 2FA for these administrative permissions is enforced in all NetSuite accounts. See the help topic Mandatory Two-Factor Authentication (2FA) for NetSuite Access.

Administrative permissions that require 2FA include:

- Access Token Management (for Token-based Authentication)
- OAuth 2.0 Authorized Applications Management
- Core Administration Permissions (for more information, see Core Administration Permissions)
- Two-Factor Authentication base (permission to designate roles as 2FA authentication required and specify the duration of trusted devices for those roles)

  Note: Standard roles with the Two-Factor Authentication base permission include Marketing Administrator, Sales Administrator, Support Administrator, and System Administrator.
- Set Up OpenID Connect (OIDC) Single Sign-on
- Set Up OpenID Single Sign-on
- Set Up SAML Single Sign-on
- OIDC Provider Setup
- Integration Application
- Device ID Management
- View Unencrypted Credit Cards
- View Unencrypted ACH Account Numbers

For more information about required 2FA and Two-Factor Authentication, see the following:

- Two-Factor Authentication (2FA).
- 2FA in the NetSuite Application

Note: If a role is already designated as a SAML Single Sign-on (SSO) role, the 2FA requirement is ignored. The requirement for SAML SSO authentication takes precedence.

Customizing or Creating NetSuite Roles

To create a custom role with the access you want users to have, you can either customize a standard role or make a new one. Complete the following tasks:

- Customizing and Creating Roles
- Entering Basic Role Information
- Assigning Core Administration Permissions
- Restricting Role Access to Accounting Books
- Restricting Role Access to Subsidiaries (OneWorld Only)
- Setting Employee Restrictions
- Setting Department, Class, and Location Restrictions
- Setting a Role as Issue Role for Issue Management
- Setting a Role as Web Services Only Role

- Setting a Role as Single Sign-On Only Role
- Restricting a Role by Device ID
- Restricting a Role by IP Address
- Setting Two-Factor Authentication Requirements
- Setting Permissions
- Setting Default and Restricted Forms
- Setting Search Defaults for a Role
- Setting Role-Based Preferences
- Translating Custom Role Names
- Selecting a Dashboard for a Role

After you create a custom role, you can assign it to users. A role's assigned users are listed on the Users subtab of the role record. See NetSuite Users Overview.

Role customization options depend on which NetSuite product you've purchased and what features you've enabled. Some of the fields described in the steps below may not be available to you. For example, location restrictions aren't available for NetSuite Small Business users. Also, because they're limited access roles, Retail Clerk roles, unlike other standard NetSuite roles, can't be customized. For details, see Retail Clerk Roles.

You can apply the class, department, location, and subsidiary restrictions that you set here to custom records. See the help topic Applying Role-Based Restrictions to Custom Records.

Be aware that updates to the default role aren't pushed to custom instances of that role. You must manually update custom roles to include any new default role features. Additionally, when you enable a new feature for an account, permissions associated with that feature aren't automatically added to custom roles that existed prior to enabling the feature. You'll need to manually assign these permissions to any custom roles that existed before you enabled the feature.

Important: When the Advanced Employee Permissions feature is enabled, restrictions set on the Role page are only applicable to the Employee Record Full, Employee System Access, and Employee Administration permissions. The Employee Self, Employee Public, Employee Confidential, and Employee Compensation permissions ignore the restrictions set on this page. For more information, see the help topic Advanced Employee Permissions Overview.

Customizing and Creating Roles

The following procedure describes how to customize or create a role.

To begin customizing or creating a role:

1. To customize a standard role, go to Setup > Users/Roles > Manage Roles, and on the Manage Roles page, click **Customize** next to a standard role. This type of custom role inherits all of the standard role's permissions to start; you can make changes as necessary.
2. To create a new role that does not start with a list of associated permissions, go to Setup > Users/Roles > Manage Roles > New.

Entering Basic Role Information

1. In the **Name** field, enter a name for this custom role.

   This name should be something you recognize when assigning it to users.
2. If you use scripting, you can optionally enter an ID used for this role in scripts.

3. If you are creating a new role, select the center type to base the role on. The center type sets default permissions and access levels that you can customize below. (If you are customizing a standard role, the center type is predefined.)

The **Parent Role** field allows you to see from which standard role was your custom role created. When you click the parent role name, it opens in a new tab. You may not see the **Parent Role** field on older role records.

After you enter basic information for the role, set optional restrictions for the role.

To make a copy of an existing standard or a custom role:

1. As **Administrator**, go to Setup > Users/Roles > Manage Roles.
2. Click on **Customize** or **Edit** next to the role you want to copy.
3. Enter a different name in the **Name** field.
4. Click the drop down arrow for **Save** and click **Save As**.

Assigning Core Administration Permissions

You can use the Core Administration Permissions to customize a role so that it behaves almost like the Administrator role, while also restricting access to other areas of NetSuite with role permissions and restrictions. For example, with Core Administration Permissions you can create a role specifically for an IT administrator who's responsible for the general administration of the system, but who shouldn't have access to sensitive employee information.

The Core Administration Permissions feature is enabled on your account by default. For more information, see Core Administration Permissions.

- To assign Core Administration Permissions to a role, check the **Core Administration Permissions** box.

Warning: Use caution when assigning Core Administration Permissions to a role, because the role will become similar to the standard Administrator role in terms of exclusive administrator privileges.

Administrator – No HR/Employee Access SuiteApp

The Administrator – No HR/Employee Access SuiteApp gives you access to the Administrator – No HR/Employee Access role. This role has all of the permissions included with the standard Administrator role, except for any permissions associated with employee information. For example, the Administrator – No HR/Employee Access role doesn't include the Time-Off Administration, Payroll Items, and Employee Record permissions. You can use the Administrator – No HR/Employee Access SuiteApp as an alternative to customizing a standard role and as the starting point for creating a Core Administration Permissions administrator role.

Note: You don't need to install the Administrator – No HR/Employee Access SuiteApp to assign the Core Administration Permissions to a role.

Note: From June 2019, SuitePeople HR and U.S. Payroll include an Administrator – No HR/Employee Access role that allows administrative functionality while controlling access to sensitive employee data. Please see your SuiteSuccess SuitePeople Leading Practices for more information, and review the role in your environment.

You can search for the Administrator – No HR/Employee Access SuiteApp using the following information:

- Bundle name: Administrator – No HR/Employee Access
- Bundle ID: 387772

For more information about installing SuiteApps, see the help topic Installing a Bundle.

After you install the Administrator – No HR/Employee Access SuiteApp, you can customize the role on the Manage Roles page. You can assign the role to employees on the Employees page.

Restricting Role Access to Accounting Books

You can choose which accounting books users can access based on their role. Users with a role that has access to an accounting book can post transactions to that book or see its reports. You can use this feature to give a role access to all accounting books, and users with this role will automatically have access to new accounting books as they're created.

To set accounting book access by role:

1. Go to Setup > Users/Roles > User Management > Manage Roles and select or create a role.
2. In the role record, go to the Accounting Books section and select one of the following in the Selected Accounting Books field:
   - **All** - This role can see all accounting books
   - **Primary** - This role can see only the primary accounting book
   - **Primary and Selected** - This role can see the primary accounting book and any secondary books you select. When you select this option, an **Accounting Book** field appears where you can select which secondary books the role has access to.
3. Click **Save**.

Restricting Role Access to Subsidiaries (OneWorld Only)

If you have NetSuite OneWorld, you can use subsidiary restrictions to restrict what users with this role can access.

When you restrict role access to subsidiaries, consider the following:

- By default, the subsidiary restrictions is set to **User Subsidiary**.
- Only a role with access to all subsidiaries assigned for a department can edit that department.

To restrict role access to specific subsidiaries:

1. Go to Setup > Users/Roles > User Management > Manage Roles
2. Click **Edit** next to the role whose access you want to restrict.
3. Go to Subsidiary Restrictions, and choose one of the following options:
   - **All** – Grants the role access to all subsidiaries, including inactive subsidiaries.
   - **Active** – Grants the role access to the active subsidiaries only.
   - **User Subsidiary** – Restricts the role's access to the user's subsidiary only. When users log in with this role, they can only access their own subsidiary. A user's subsidiary is set on the employee record. For more information, see the help topic Assigning a Subsidiary to an Employee.

- **Selected** – Grants the role access to one or more subsidiaries.

4. If you choose **Selected**, in the auto-generated list of active and inactive subsidiaries, select the subsidiaries that you want the role to have access to. To select multiple subsidiaries, hold down the **Ctrl** key while selecting subsidiaries.
5. To allow users logged in with this role to see, but not edit, records for subsidiaries to which the role does not have access, check the **Allow Cross-Subsidiary Record Viewing** box. You cannot use this setting to view employee payroll or commissions data.

> **Note:** If the Book Record Restriction option is enabled for a user, this restriction overrides permissions granted by the Allow Cross-Subsidiary Record Viewing option.

The user with this edited role must log out of NetSuite and log in again to see the changes in the restrictions.

Setting Employee Restrictions

In the **Employee Restrictions** field, you can restrict this role's access to transaction, customer, and employee records, based on values in the employee, sales rep, and supervisor fields on these records. The restrictions you set here might also limit the values that users with this role can assign to these fields on records. These restrictions don't affect access to contact records.

- **none - no default** – There is no restriction on what can be selected. Record access is not determined by this field. A default selection does not appear.
- **none - default to own** – There is no restriction on what can be selected. Record access is not determined by this field. Fields of this type will select the user by default.
- **own, subordinate, and unassigned** – Users are restricted when selecting any of the employee, sales rep, or supervisor fields. Users are granted access to records belonging to their supervisor hierarchy. Users may only select themselves or their subordinates. If the select field is optional, then the user may leave the value unassigned. Note that unassigned is technically a null value when used for filtering.
- **own and subordinates only** – Users are restricted when selecting any of the employee, sales rep, or supervisor fields. Users are granted access to records belonging to their supervisor hierarchy with the exception of unassigned records. Consequently, unassigned records are filtered and denied access. Users may only select themselves or their subordinates.

> **Note:** In some cases, a role might include both the own and subordinates only restriction and the process payroll and commit payroll permissions. In this case, to ensure that the user can create a payroll batch and view all the employees who are included in the payroll batch, the process payroll and commit payroll permissions override the own and subordinates only restriction.

> **Important:** These restrictions can also be used to restrict access to custom records, based on values in an Employee list/record custom field, if the **Apply Role Restrictions** box is checked for the field. See the help topic Applying Role-Based Restrictions to Custom Records.

Check the **Allow Viewing** box to allow users logged in with this role to see, but not edit, data for employees to which the role does not have access.

- Note that this setting does not allow viewing of employee payroll or commissions data. Also, users cannot view non-subordinate employee records other than their own record when the **Employee Restrictions** field is set to **own and subordinates only**.

Check the **Do Not Restrict Employee Fields** box to allow users with this role to select any employee in employee fields.

- For example, a sales manager could select any sales rep in the **Sales Rep** field on a customer record even if that sales rep is part of another team.

Check the **Restrict Time and Expenses** box to restrict the time and expenses employees with this role can enter, edit, and view when you add the Track Time and Expense Report permissions.

- Employees with this role will not be able to enter or edit expense reports or time transactions on behalf of other employees.
- Employees with this role will be able to view expense reports and time transactions for their subordinates.
- Reports and searches will only return time or expense transactions entered by the employee or their subordinates. Class, department, location, and subsidiary restrictions will not be applied for expense and time transactions.

> **Note:** Clearing the **Restrict Time and Expenses** box enables this role to enter, edit, and approve time transactions and expense reports for all other employees when you add the Track Time and Expense Report permissions.

If you have set restrictions in the **Employee Restrictions** field, check the **Sales Role** box if employees using this role should be restricted based on the **Sales Rep** field on records and transactions.

If you use the Customer Service and Support feature and have set restrictions in the **Employee Restrictions** field, check the **Support Role** box if employees using this role should be restricted based on the **Assigned To** field on cases.

If you use the Partner Relationship Management feature and have set restrictions in the **Employee Restrictions** field, check the **Partner Role** box to restrict partners to records and transactions based on the **Partner** field.

Setting Department, Class, and Location Restrictions

If your account has the respective feature enabled, you can restrict this role's access to transaction, employee, partner, and optionally item records, based on the values in the Department, Class, and Location fields on these records. Limit the set of available values of Department, Class, and Locations that users can assign to these records using restrictions. Department, Class, and Location restrictions can be defined per role and then applied to all users logged in with that role.

To set Department, Class, and Location restrictions, click the **Restrictions** subtab. On the Restrictions subtab, set the following fields:

- **Segment** – Select the Segment by which to restrict the role. Select either Class, Department, or Location.
- **Restrictions** – Select the appropriate restriction level for the role:
  - **none - default to own** – There is no restriction on what can be selected. Record access is not determined by this field. Fields of this type will select the user by default.
  - **own, subordinate, and unassigned** – Users are restricted to records with their own location/department/class, children records of their location/department/class, and records with unassigned location/department/class field. For example, if your role has access to department A, you can only see accounts in department A, as well as its children or unassigned accounts.
  - **own and subordinates only** – Users are restricted to records with their own location/department/class and children records of their location/department/class. For example, if your role has access to location B, you can only see records with location B, as well as its children.

- **Allow Viewing** – Check this box to allow users logged in with this role to see, but not edit, data for departments, classes and locations to which the role does not have access. Note that this setting does not allow viewing of employee payroll or commissions data. Also, users cannot view non-subordinate records other than their own department, class or locations records when the **Restrictions** field is set to **own and subordinates only.**
- **Apply To Items** – Check this box to apply the department, class and locations restrictions defined here to item records, in addition to transaction, employee, and partner records.

Important: Any account in the Chart of Accounts list that does not have an assigned department is not subject to the **own, subordinate, and unassigned** or **own and subordinates only** restrictions.

Important: In NetSuite OneWorld, subsidiary restrictions automatically apply to departments. For example, if Department A is assigned to only Subsidiary X and a role is restricted to Subsidiary X, users with that role have access to only Department A, even if that role does not have any department restrictions.

You can also apply role-based, class restrictions to custom records. For more information, see the help topic Applying Role-Based Restrictions to Custom Records.

Setting a Role as Issue Role for Issue Management

If you use the Issue Management feature and want employees with this role to work with issues, select the issue role in the **Issue Role** field.

Setting a Role as Web Services Only Role

If a role is designed to be used by programs that integrate with NetSuite through web services, check the **Web Services Only Role** box to allow NetSuite account access but disallow UI access and privileges.

This setting prohibits a user from accessing the user interface with permissions and privileges that are created specifically for web services development, adding to the security of your integration. For more details, see the help topic Setting a Web Services Only Role for a User.

Setting a Role as Single Sign-On Only Role

If the role is designed to be used by users accessing NetSuite through inbound single sign-on from an external user-authenticating application, check the **Single Sign-On Only** box to allow NetSuite account access only through an inbound single sign-on mechanism (either certificate-based or OpenID).

This setting prohibits a user from accessing NetSuite through web services or the user interface without going through inbound single sign-on. This type of role supports strict control of credentials from the external application.

Important: You cannot use NetSuite for Outlook with a Single Sign-on Only role.

Restricting a Role by Device ID

If you use the Restrict by Device ID feature, check the **Restrict by Device ID** box at Setup > Users/Roles > Manage Roles to allow access to this role only from the listed devices.

For more information, see the help topic Device ID Authentication.

Restricting a Role by IP Address

If you use the IP Address Rules feature, check the **Restrict this role by IP Address** box at Setup > Users/Roles > Manage Roles to allow access to this role only from the IP addresses listed at .

For more information, see the help topic Enabling and Creating IP Address Rules.

> **Note:** Oracle NetSuite does not support traffic that is routed through a split-tunnel Virtual Private Network (VPN) to control user access to NetSuite. For more information, see the help topic VPN Configuration for User Access to NetSuite.

Setting Two-Factor Authentication Requirements

If the role requires two-factor authentication, enter the following settings:

- Select the type of authentication required in the **Two-Factor Authentication Required** field.
- In the **Duration of Trusted Device** field, select the length of time before a device a user has marked as trusted will be subject to a two-factor authentication request.

For more information about two-factor authentication, see the help topic Two-Factor Authentication (2FA).

Setting Permissions

> **Important:** If you have enabled the Advanced Employee Permissions feature in your NetSuite account, see the help topic Advanced Employee Permissions for more information.

- From the Role page, you can set permissions on the **Permissions** subtab. Permissions are divided into four different types on the **Transactions**, **Reports**, **Lists**, **Setup**, and **Custom Record** subtabs.
  - To view the permissions for a role, log in as an Administrator and go to Setup > Users/Roles > User Management > Manage Roles. On the Manage Roles page, choose a role. Click **Edit** to add permissions to a custom role or click **Customize** to create a custom role from a standard role. On the Role page, the Permissions subtab displays the role's permissions.
  - To add a permission, click a line in a list, click **Insert**, and select a permission. Or you can click the blank line at the bottom of a list, select a permission, and click **Add**.
  - To remove a permission, click it in a list, and click **Remove**.
  - To set the level of access for a permission, click a line in a list and select from the **Level** column. For information about these levels, see Access Levels for Permissions.
  - For Custom Record permissions only, you can select a value in the **Restrict** column to limit this role's access to custom records. (Each custom record permission provides access to a custom record type.)
    - Select **Viewing and Editing** to restrict users with this role to viewing or editing only the records of this type that they or their subordinates created.
    - Select **Editing Only** to restrict users with this role to editing only the records of this type that they or their subordinates created. They can view all records of this type.
    - Leave this column blank to allow users with this role to view and edit all records of this type.

    The custom record restrictions you set on this subtab are also available on the record for each custom record type. Changes made on custom record type records related to this role's permissions are reflected here. See the help topic Setting Permissions for a Custom Record Type.

Important: When you newly enable a feature in your account, you must consider permissions associated with the added feature. Customized roles that you have already assigned to users may need to be updated to reflect the proper permissions associated with the added feature. See the help topic Enabling Features.

For general information about permissions, see NetSuite Permissions Overview. For access to a list of NetSuite permissions and their related tasks and records, see Permissions Documentation.

A mass update is available to add, remove, or change the level of a permission for multiple custom roles simultaneously. See Mass Updating a Permission on Custom Roles.

Important: If you have enabled the Advanced Employee Permissions feature in your NetSuite account, see the help topic Advanced Employee Permissions for more information.

Setting Default and Restricted Forms

- Click the **Forms** subtab to set default forms for a role, or to restrict a role to only using certain forms. On each of the following subtabs, **Transaction**, **Entity**, **CRM**, **Item**, **Other Record**, **Custom Record**, **Time**, **Bill of Materials**, and **Inventory Detail**, you can do the following:
  - Check the box in the **Enabled** column next to the forms you want to make available to users with this role. (Not available for Customer Center roles.)

    If you disable all forms for a record or transaction type, users with this role will use the standard form.
  - Check the box in the **Preferred** column next to the forms you want the role to use by default.
  - If you want to restrict the role to only the forms you mark as preferred, check the box in the **Restricted** column. (Not available for Customer Center roles.)

  Note the following about marking a transaction or CRM form Preferred for the Customer Center role:
- External forms, meaning forms with names appended with (External), can be marked Preferred for the Customer Center roles, but not for other roles.
- Forms that are not external cannot be marked as Preferred for Customer Center roles, so they are not listed on the Forms tab of Customer Center role records.

Setting Search Defaults for a Role

Click the **Searches** subtab to set saved search definitions to be used as defaults for the search forms, search results, list views, sublist views, and dashboard views available to a role. For each kind of view, you also can make the selected saved search the only one available for a record type.

You make these selections by record type. When you select a record type on the Standard or Custom Record subtab, you can do the following:

1. In the **Search Form** column, select a saved search to simplify the default search form for the selected record type.

   By default, the simple search form for each record type displays a system-defined set of fields that can be used as filters. Selecting a saved search here applies the saved search's available filters to be the only fields on this form for this role.

   A preferred search form also can be defined on a saved search record. See the help topic Defining a Saved Search as a Preferred Search Form.
2. In the **Search Results** column, select a saved search to be applied to the default global and quick search results for the selected record type.

This option applies all saved search settings, including criteria, results, and available filters, to the global and quick search results for the selected record type, for this role.

Preferred search results also can be defined on a saved search record. See the help topic Defining a Saved Search as Preferred Results.

3. In the **List View** column, you can select a saved search to be the default list view for the selected record type. To make that saved search the only list view available, check the **Restricted** box.

   For each record type that is available in a list, a system-defined set of columns displays by default. The displayed set of records and fields is called a list view. The selection of a saved search here overrides the system default definitions.

4. In the **Sublist View** column, you can select a saved search to be the default sublist view for the selected record type. To make that saved search the only sublist view available, check the **Restricted** box.

   Some record lists may be displayed on a subtab of another record. For example, a list of transactions may display on the **History** subtab of an item record. This type of list is called a sublist. The selection of a saved search here overrides the system default definitions.

5. In the **Dashboard View** column, you can select a saved search to be the default view in a dashboard List portlet for the selected record type. To make that saved search the only dashboard view available, check the **Restricted** box.

   A record list displayed in a List portlet on the dashboard is called a dashboard view. The selection of a saved search here overrides the system default definitions.

For general information about views, see the help topic Working with List Views, Sublist Views, and Dashboard Views . For information about saved searches as views, see the help topic Using a Saved Search as a View.

Setting Role-Based Preferences

Users with the Administrator role can set preferences that tailor NetSuite accounts to the needs of a particular role. The preferences set for a role serve as the defaults for any account users who log in with that role. Role-based preferences are defined on the Preferences subtab of a custom role record.

To set role-based preferences:

1. Click **Edit** next to a custom role or Customize next to a standard role.
2. On the **Preferences** subtab, select a preference, choose the desired value in the popup, and click Add.

   Note: If a customer who has only the Customer Center role assigned to them specifies a color theme, this color scheme is not used and the theme set up as the default is used instead.

3. Repeat step 3 to set additional preferences as desired.
4. Click **Save**.

Role-Based Preferences vs. Other Preference Levels

The same preferences that can be set for roles also can be set by individual users for themselves only at Home > Set Preferences. Role-based preferences are not intended to override any preferences explicitly set by an individual user. If a user has set a preference to a value other than the system default, company

default, or subsidiary default, the corresponding role-based preference is not applied when that user logs in with that role.

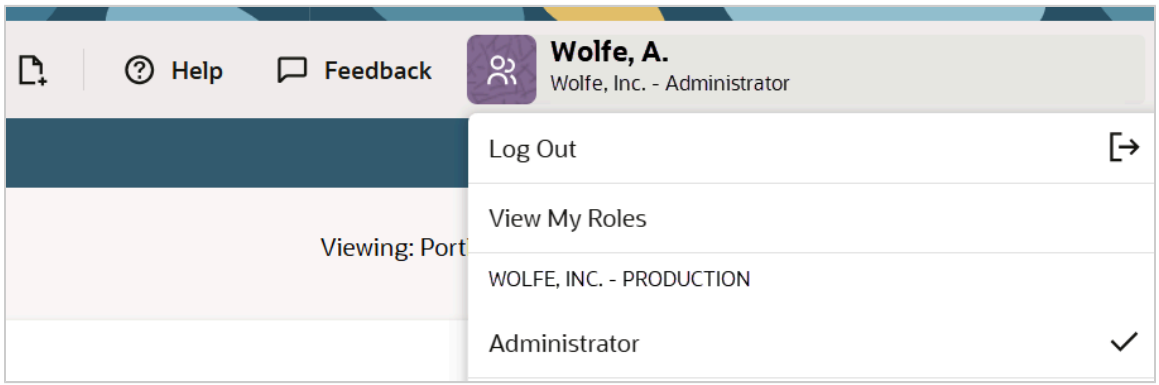
Some role-based preferences are also available at the company level, and in NetSuite OneWorld accounts, at the subsidiary level. A role-based preference overrides the system default setting, the corresponding company-level preference, if any, and the corresponding subsidiary-level preference, if any. Note that if a company preference has been set not to allow override, it is not available to be set as a preference on role records.

For more information, see the help topic NetSuite Preference Levels Overview.

Translating Custom Role Names

If the Multi-Language feature is enabled in an account, users with the Administrator role can define translations for custom role names so they match the language of the NetSuite user interface. Note that NetSuite provides translations for standard role names.

When the NetSuite user interface is set to a different language, translated role names display in roles lists, including the popup that displays when a user clicks the icon next to the current role in the upper right corner.



Before you can translate roles names, you need to select translation languages at Setup > Company > General Preferences, on the Languages subtab. For details, see the help topic Configuring Multiple Languages.

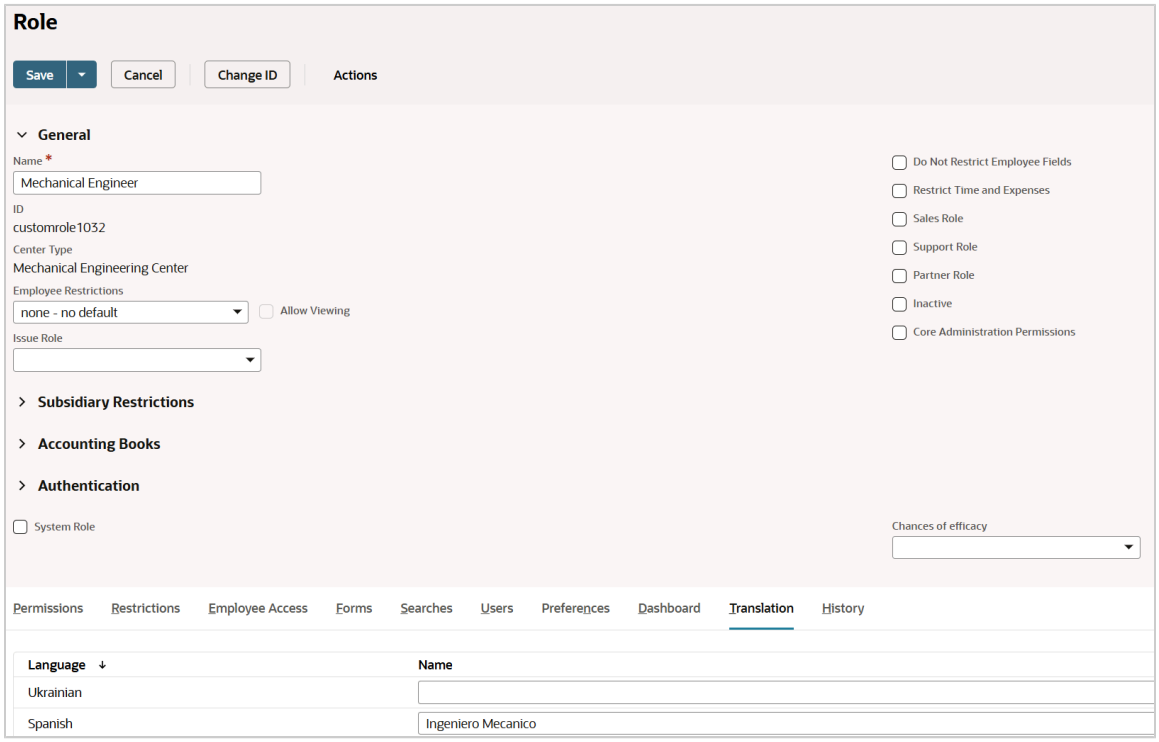
> **Note:** The Languages subtab at Setup > Company > General Preferences lists both system-supported languages that can be used for the NetSuite user interface (and are available at Home > Set Preferences), and additional languages that can be used for website translations only (and are not available at Home > Set Preferences). You should only enter translations for role names in system-supported languages, because these are the only languages that can be displayed in the user interface.

After you have selected languages, you can enter translations on custom role pages, either when you first create a role, or when you later edit it.

To define translations for an existing custom role name:

1. Go to Setup > Users/Roles > Manage Roles.
2. Click **Edit** next to the role name that needs translations.
3. On the role page, enter translated role names on the **Translation** subtab.

Note: The name of a custom role in the Name field is always displayed in the default language of your company.



Note: The maximum length for a role name's translation is 80 characters.

Selecting a Dashboard for a Role

Consider the following information when you select a dashboard for a role.

- For a standard role, click the **Dashboard** subtab to select a published dashboard to be used by the role.

  Only dashboards that have been published to the role's assigned center are available. See the help topic Publishing Dashboards.
- For a custom role, click the **Dashboard** subtab to view the dashboard currently published to the role. Dashboards cannot be published from the Dashboard tab of a custom role. Publishing a dashboard to a custom role can only be done from the Publish Dashboard link in the Home Settings portlet.

Changing Custom Roles

After you customize a role, you may later decide that you want to edit or inactivate it.

Note: If you assign an additional role to a user who is currently logged in to NetSuite, that user will need to log out and log back in to NetSuite to see the newly assigned role. The same is true if you add permissions to an existing role while a user is currently logged in to NetSuite. The user needs to log out and log back in to exercise the new permissions.

To edit a custom role:

1. Go to Setup > Users/Roles > Manage Roles.
2. Click **Edit** next to the role you want to change.
3. On the **Role** page, make desired changes, including:
   - Restricting Role Access to Accounting Books
   - Restricting Role Access to Subsidiaries (OneWorld Only)
   - Setting Employee Restrictions
   - Setting Department, Class, and Location Restrictions
   - Setting a Role as Issue Role for Issue Management
   - Setting a Role as Web Services Only Role
   - Restricting a Role by IP Address
   - Setting Permissions
   - Setting Default and Restricted Forms
   - Setting Search Defaults for a Role
   - Setting Role-Based Preferences
   - Translating Custom Role Names
   - Selecting a Dashboard for a Role
4. Click **Save**.

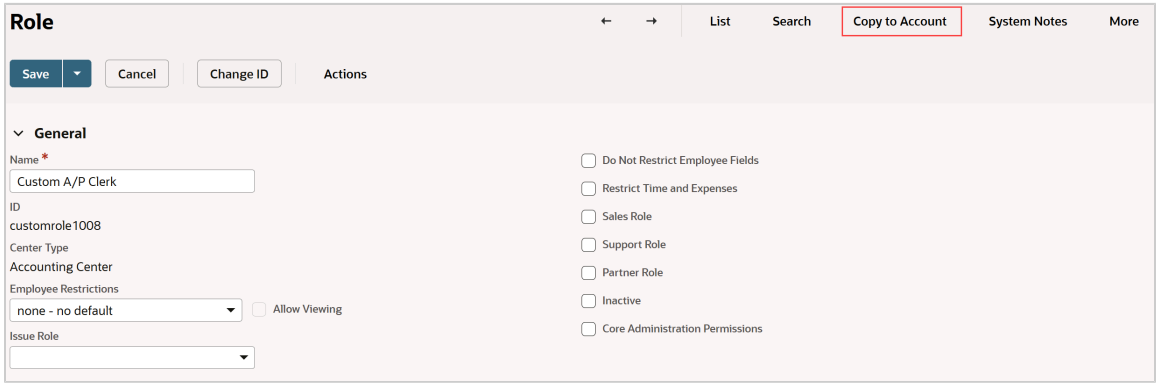
If you edit a custom role after you've assigned it to employees or vendors, the changes are automatically updated.

Note: A mass update is available to add, remove, or change the level of a permission for multiple custom roles simultaneously. See Mass Updating a Permission on Custom Roles.

Using SDF and Copy to Account to Copy Customized Roles

You can use SuiteCloud Development Framework (SDF) to manage custom objects as part of file-based customization projects. For information about SDF, see .

You can use the Copy to Account feature to copy a customized role to another of your accounts. To copy a customized role, follow the instructions to edit a custom role, and click **Copy to Account** on the **Role** page.



For information about Copy to Account, see the help topic Copy to Account.

Inactivating Roles

You can inactivate custom or standard roles that you do not want to use in your account.

When you inactivate a role, you can no longer select it in the Role field on records, and those assigned to the role can no longer access your account with that role.

Warning: If you inactivate the only role an employee is assigned, you can lock that person out of your account. Before inactivating a role, go to Setup > Users/Roles > Manage Users to view who may be assigned to that role.

To inactivate a custom or standard role:

1. Go to Setup > Users/Roles > Manage Roles.
2. Check the **Show Inactives** box at the top of the list.
3. In the **Inactive** column, check the box next to any role you want to inactivate.

   To prevent errors in the website, you cannot inactivate the standard Customer Center role after you enable the Web Site feature.

   If this role was inactivated before the Web Site feature was enabled, you must temporarily disable the Web Site feature, activate the standard Customer Center role again, and enable the Web Site feature again.

   You will not lose website data in this process.
4. Click **Submit**.

You can delete a custom role if it is not currently assigned to any users AND if has never been used to log in to NetSuite. If a role has previously been used to log in, or is currently assigned to any users, you need to inactivate the role rather than delete it.

Setting Default Forms for Roles

You can set default forms for your users by customizing roles and assigning them to your users. This lets you tailor the level of access you want to give to users.

A role is a set of permissions that lets customers, vendors, and employees access specific areas of your data. You assign roles on customer, vendor, and employee records.

By setting a default form for your users you can control the entry and transaction forms they use to enter data. Note that Employee Center roles are given limited access to forms such that only one form is ever made available to this type of role. For other types of roles, in addition to setting a default, you can also restrict access to particular forms.

For example, you can set a custom case entry form as the only form your support reps can use. This maintains consistency in your company and lets you capture the information that is most important for your business.

Note: To make a custom transaction or entry form a default form, you must first customize and save your forms.

See To Set a Default Form for Roles for the procedure.

To Set a Default Form for Roles

1. Go to Setup > Users/Roles > Manage Roles.

2. Click **Customize** next to the role you want to set a form for.
3. Enter a name for your custom role.
4. Click the **Forms** subtab.
5. Click the section you want to set default forms for.
   - **Transaction** – Set default forms for transactions such as cash refunds, cash sales, invoices, and sales orders.
   - **Entity** – Set default forms for the records you keep for people and companies in NetSuite, such as employees and customers.
   - **CRM** – Set default forms for CRM-related activities and records such as campaigns, cases, events, and tasks
   - **Time –** Set default forms for time entries.
   - **Item** – Set default forms for item records.
   - **Other Record** – Set default forms for other types of records, such as competitor records.
6. In the **Enabled** column, clear any boxes for forms this role should not have access to. (not available for Customer Center roles)

   If you disable all forms for a record or transaction type, users with this role will use the standard form.
7. Check the box in the **Preferred** column next to any form that should be the default for this role.

   > **Note:** Be aware of the following about marking a transaction or CRM form Preferred for Customer Center roles: External forms, meaning forms with names appended with (External), can be marked Preferred for Customer Center roles, but not for other roles. Forms that are not external cannot be marked as Preferred for Customer Center roles, so they are not listed on the Forms tab of Customer Center role records.
8. To have this form to be the only form available to this role, check the box in the **Restricted** column.
9. Click **Save**.

If you set default forms and do not make the defaults restricted, your users can still change the form they use when they are entering transactions or records.

After you have set default forms, you need to assign your customized roles to your employees. You can assign roles on the Access subtab of employee records.

Restricting Accounts for Roles

You can restrict your accounts by classes, departments, or locations, to control the accounts with which employees work. If you use NetSuite OneWorld, you also can restrict roles by subsidiary. For more information, see Customizing or Creating NetSuite Roles.

For example, Jennifer Sawyer, A/R manager for Wolfe Electronics' Japan location, has her accounts restricted to include only her local bank account. This account appears by default when she accepts customer payments. This increases Sawyer's efficiency and reduces her chances of making data-entry errors.

To restrict access to accounts, you first set restrictions on account records. By default, NetSuite roles do not restrict users by class, department, or location. To restrict accounts, you must set up both account restrictions and role restrictions.

See the following procedures:

- To Set Account Restrictions

- To Set Role Restrictions

To Set Account Restrictions

1. Go to Lists > Accounting > Accounts.
2. Click **Edit** next to the account you want to restrict.
3. To restrict the account by department, select a department in the **Restrict to Department** dropdown list.
4. To restrict the account by class, select a class in the **Restrict to Class** dropdown list.
5. To restrict the account by location, select a location in the **Restrict to Location** dropdown list.
6. If you use NetSuite OneWorld, to restrict the account by subsidiary, select a subsidiary in the **Subsidiaries** dropdown list.
7. Click **Save**.

To Set Role Restrictions

1. Go to Setup > Users/Roles > Manage Roles.
2. Do one of the following:
   - To customize a standard role, click **Customize** next to the role you want to change.
   - To edit a customized role, click **Edit** next to the role you want to change.
3. Click the **Restrictions** subtab.
4. In the **Segment** dropdown list, select **Class**, **Department**, or **Location**.
5. In the **Restrictions** dropdown list, select one of the following restrictions:
   - **none - default to own** – There is no restriction on what can be selected. Record access is not determined by this field. Fields of this type will select the user by default.
   - **own, subordinate, and unassigned** – Users are restricted to records with their own location/department/class, children records of their location/department/class, and records with unassigned location/department/class field. For example, if your role has access to department A, you can only see accounts in department A, as well as its children or unassigned accounts.
   - **own and subordinates only** – Users are restricted to records with their own location/department/class and children records of their location/department/class. For example, if your role has access to location B, you can only see records with location B, as well as its children.

     Important: Any account in the Chart of Accounts list that does not have an assigned department is not subject to the **own, subordinate, and unassigned** or **own and subordinates only** restrictions.
6. To allow users logged in with this role to see, but not edit, data for departments to which the role does not have access, check the **Allow Viewing** box. You cannot use this setting to view employee payroll or commissions data. Also, users cannot view non-subordinate department records other than their own department records when the **Department Restrictions** field is set to **own and subordinates only**.
7. To apply the department restrictions defined here to item records (in addition to transaction, employee, and partner records), check the **Apply to Items** box.
8. If you have NetSuite OneWorld, you can use subsidiary restrictions to restrict what users with this role can access. Under **Subsidiary Restrictions**, select one of the following options:
   - **All** – Grants the role access to all subsidiaries, including inactive subsidiaries.
   - **Active** – Grants the role access to the active subsidiaries only.

- **User Subsidiary** – Restricts the role's access to the user's subsidiary only. When users log in with this role, they can only access their own subsidiary. A user's subsidiary is set on the employee record. For more information, see the help topic Assigning a Subsidiary to an Employee.
- **Selected** – You select the subsidiaries to which you want to restrict the role's access. When you choose Selected, you need to select the subsidiaries from an autogenerated list of all of the active and inactive subsidiaries. You must select at least one subsidiary. To select multiple subsidiaries, hold down the **Ctrl** key while selecting subsidiaries.

9. To allow users logged in with this role to see, but not edit, records for subsidiaries to which the role does not have access, check the **Allow Cross-Subsidiary Record Viewing** box. You cannot use this setting to view employee payroll or commissions data.

   Note: If the Book Record Restriction option is enabled for a user, this restriction overrides permissions granted by the Allow Cross-Subsidiary Viewing option.

10. Click **Save**.

Customizing the Customer Center Role

Customize the Customer Center role to adjust the level of access customers have in the center. You can remove links to transactions or records or limit access to only viewing instead of editing or creating.

The Customer Center role is also applied to the My Accounts section of your website. For information about setting forms to use in your website, see the help topic Shopping Preferences.

Customizing this role also enables you to ensure a customer uses a custom form when entering sales orders or making payments in the center.

Note: After you create a custom Customer Center role, you will need to manually assign this role to each customer that you want to use it, on the Access subtab of each customer record.

Note: Users with NetSuite specialized center roles can see only files on records they have access to, and files with the Company-Wide Usage, or the Available Without Login preferences enabled. For more information, see the help topics NetSuite Specialized Centers and Permissions and File Cabinet Files.

See To Customize the Customer Center Role for the procedure.

To Customize the Customer Center Role

1. Go to Setup > Users/Roles > Manage Roles.
2. Click **Customize** next to Customer Center.
3. In the **Name** field, enter a name for this new custom role.

   You select this name when you assign the role on customer records.
4. Click the **Permissions** subtab.
   a. On the **Transactions**, **Lists**, and **Setup** subtabs, click the name of the task to which you want to change access.
   b. In the **Level** column, adjust the permission level for the task.
   c. Click **Edit**.
   d. Repeat these steps for each task you want to edit the access level for.

5. Click the **Forms** subtab, and on the **Transaction** and **CRM** subtabs, check the box in the **Preferred** column next to the form you want customers to use in the Customer Center. This overrides the preferred form selected on the Transaction Forms page.
   - The Customer Center and My Account section of your website use the transaction and entry forms marked as (External) in the Custom Forms list. Note the following:
     - External forms, meaning forms with names appended with (External), can be marked Preferred for Customer Center roles, but not for other roles.
     - Forms that are not external cannot be marked as Preferred for Customer Center roles, so they are not listed on the Forms tab of Customer Center role records.
     - When a non-online order form is marked Preferred for Customer Center, it is saved as the form for the order. However, an online form is not saved as the form for an order, even if it is preferred; instead the preferred non-online order form is used.

   Note: To create custom forms for transactions, go to Customization > Forms > Transaction Forms. Custom transaction forms must use Basic printing for Customer Center roles. To create custom forms for records, go to Customization > Forms > Entry Forms.

6. Click the **Searches** subtab.
   a. To publish a custom search form or custom search results in the Customer Center, select the type of record or transaction to search.

      You must already have a public saved search to publish a search form or results in the Customer Center. The fields you select on the **Filters** subtab of the saved search record are used by the customer to set criteria on search forms.

   b. To publish a search form, select the name of the saved search in the **Search Form** column.
   c. To allow customers to view search results as a list, select the name of the saved search in the **List View** column. Searches must be marked both Public and Available as List View to be selected here.

      For example, a public transaction saved search marked Available as List View allows customers to view transactions matching the criteria of the search in their transaction lists.

   d. To allow customers to view search results in a list on the Customer Center dashboard, select the name of the saved search in the **Dashboard View** column. Searches must be marked both Public and Available as Dashboard View to be selected here.
   e. To allow customers to view search results in subtab lists, select the name of the saved search in the **Sublist View** column. Search must be marked both Public and Available as Sublist View to be selected here.
   f. Check the box in the **Restricted** column to only allow customers to view the results of this search in the list view, dashboard view or sublist view, respectively.

      If you clear this box, customers can select this view in a View filter at the bottom of the list, and the list of all the customer's transactions or records for that page is shown by default.

7. Click the **Preferences** tab to set preferences for the custom center role. The preferences set here are applied to new users assigned to a role and to existing users in a role who have not previously set that preference. See the help topic Setting Personal Preferences.

Retail Clerk Roles

The Retail Clerk and Retail Clerk (Web Services Only) roles are specialized roles intended to provide limited access for users to implement point-of-sale workflows.

Users can be assigned the Retail Clerk role to complete point-of-sale tasks in the NetSuite user interface. The Retail Clerk (Web Services Only) is intended for use in web services transactions and is marked as a Web Services Only role. For details about Web services roles, see the help topic Setting a Web Services Only Role for a User.

Because they are intended for limited access, these roles differ from other NetSuite standard roles in the following respects:

- The permissions for these roles cannnot be customized. To review the permissions assigned to these roles, see the following roles in Standard Roles Permissions Table:
  - Retail Clerk
  - Retail Clerk (Web Services Only)
- These roles are provisioned differently than other standard roles. Users assigned these roles may be counted differently than users assigned other roles, as described below:
  - If a user is assigned the Retail Clerk role or Retail Clerk (Web Services Only) roll and any other full access role, the user counts as one Retail Clerk.
  - If a user is assigned the Retail Clerk role or Retail Clerk (Web Services Only) role and any other non-Employee Center role, the user counts only as a full access user, but not as a Retail Clerk.
  - If a user is assigned the Retail Clerk role or Retail Clerk (Web Services Only) role and an employee center role, the user counts as both a Retail Clerk and Employee Center.

Specialized User: View and Approve Role

The Specialized User: View and Approve standard role gives users limited access to NetSuite. Users with this role can do basic tasks, such as viewing or approving of reports, but cannot view payroll or employees' records. Users with this role also cannot transact within NetSuite but can approve the following transactions:

- Invoice Approval
- Journal Approval
- Return Authorization Approval
- Sales Order Approval
- Transfer Order Approval
- Vendor Bill Approval
- Vendor Payment Approval
- Vendor In-Transit Payment Approval
- Vendor Return Authorization Approval
- Blanket Purchase Order Approval (Procurement Management Cloud Service license required)
- Purchase Contract Approval (Procurement Management Cloud Service license required)
- Requisition Approval (Procurement Management Cloud Service license required)

For example, this role could be granted to a manager who needs to view the team's performance and approve requisitions but doesn't need to do any other task within NetSuite.

For information about how to assign this role to an employee, see the help topic Assigning Roles to an Employee

Customizing the Specialized User: View and Approve Role

You can customize this role by creating a custom role based on the Specialized User: View and Approve role. For more information, see Customizing and Creating Roles

You can remove permissions but cannot add any permissions outside the standard role. Additionally, you cannot grant greater access than the standard permissions allow. However, you can reduce access levels as needed. If users need to access permissions that are not available in this user type, please contact your NetSuite account manager to purchase a general access license. To see which permissions are included in the Specialized User: View and Approve role, see Specialized User: View and Approve.

Specialized User: CRM Role

The Specialized User: CRM role is a standard role with predefined permissions which enables you to manage sales, CPQ, marketing, support, and other CRM activities.

CRM users, such as marketing employees, sales reps, and support reps, who only need to access the functionalities relevant to their roles can benefit from using this role.

For a detailed list of the default permissions and their access levels, see Specialized User: CRM.

To assign this role to an employee, see the help topic Assigning Roles to an Employee.

Customizing the Specialized User: CRM Role

You will need to customize this role by creating a custom role based on the Specialized User: CRM role. This allows you to limit or modify the standard permissions to fit user needs. For more information, see Customizing and Creating Roles and Setting Permissions.

You can remove permissions but cannot add any permissions outside the standard role. Additionally, you cannot grant greater access than the standard permissions allow. However, you can reduce access levels as needed. If users need to access permissions that are not available in this user type, please contact your NetSuite account manager to purchase a general access license.

It is best practice to distinguish custom roles by including "Specialized User: CRM" in the name.

Important: If you do not use SAML SSO to access NetSuite, you must customize the role to remove the **SAML Single Sign-on** permission. Otherwise, you may encounter an error since the role has full access to **SAML Single Sign-on**.

Managing the Specialized User: CRM Role

Assigning only the standard or a custom Specialized User: CRM role to an employee counts toward Specialized User: CRM usage. Assigning it along with other general access roles counts toward general access usage instead.

You can assign multiple Specialized User: CRM roles based on your company's purchased licenses. Check the number of assignable users on the Billing Information page.

Access this page by going to Setup > Company > NetSuite Account Information > View Billing Information. Click the **Billable Components** subtab and look for **Specialized User: CRM** in the **Component** column. The **Current Provisioned Qty** column shows the number of users to whom you can assign this role

This user-friendly role setup ensures that your team has the necessary access to manage CRM activities efficiently while allowing customization to meet specific needs.

Specialized User: Site Operator

The Specialized User: Site Operator role is a standard role with predefined permissions which grants users access to features within NetSuite necessary to perform operational functions. You can assign

this role to managers who oversee specific physical locations within a larger business network, such as franchises or hospitality groups, including restaurants, retail stores, or clinics.

A user with the Specialized User: Site Operator role has the ability to:

- Enter or scan bills and credits for processing and approve bills.
- Review store sales data from Point of Sale (POS) systems.
- View selected financial reports, such as store-level profit and loss statements, and enter budgets specific to each location.
- View items and pricing and record physical inventory counts.

For a detailed list of the default permissions and their access levels, see Specialized User: Site Operator.

To assign this role to an employee, see the help topic Assigning Roles to an Employee.

Customizing the Specialized User: Site Operator Role

You can customize this role by creating a custom role based on the Specialized User: Site Operator role. This allows you to limit or modify the standard permissions to fit user needs. For more information, see Customizing and Creating Roles and Setting Permissions.

You can remove permissions but cannot add any permissions outside the standard role. Additionally, you cannot grant greater access than the standard permissions allow. However, you can reduce access levels as needed. If users need to access permissions that are not available in this user type, please contact your NetSuite account manager to purchase a general access license.

Managing the Specialized User: Site Operator Role

Assigning only the standard or a custom Specialized User: Site Operator role to an employee counts toward the Specialized User: Site Operator license. Assigning it along with other general access roles counts toward the general access license instead.

You can assign multiple Specialized User: Site Operator roles based on your company's purchased licenses. See the number of purchased and used licenses on the Billing Information page.

Access this page by going to Setup > Company > View Billing Information. Click the **Billable Components** subtab and look for **Specialized User: Site Operator** in the **Component** column. The **Current Provisioned Qty** column shows the number of purchased licenses. The **Current Used Qty** column shows how many licenses are currently in use.

Showing Role Permission Differences

Use the Show Role Differences feature to quickly review the differences in permissions between roles. You can view all of the roles' permissions or only the permissions that are different. You can also export the list of role permission differences as a .CSV or .XLS file. You should select less than 100 roles for comparison to avoid issues with processing your request.

> **Note:** You need the Bulk Manage Roles permission assigned to use the Show Role Differences feature. For more information, see Permissions Documentation.

To compare permissions for two or more roles:

1. Go to Setup > Users/Roles > Show Role Differences.
2. In the **Base Role** dropdown list, select the role that will be the basis for comparison to other roles.

3. In the **Compare To** dropdown list, select one or more roles to compare to the base role.
4. Do one of the following:
   - To view all of the permissions associated with the selected roles, clear the **Only Show Differences** box.
   - To view only the permissions that are different between the roles, select the **Only Show Differences** box.
5. Click **Show**.

   On the **Role Permission Differences** page, the permissions are arranged alphabetically and by category.
6. To export the list as a .CSV or .XLS file, click one of the export options at the top of the list.
7. To compare permissions for another set of roles, click **New**.

Use Searches to Audit Roles and Permissions

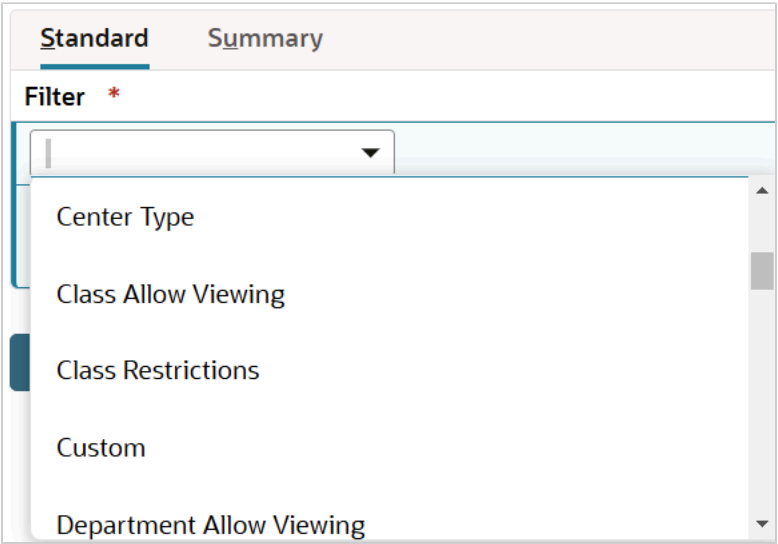
You can use searches to audit your NetSuite role permissions. NetSuite provides a simple role search you can use to find a particular role or set of roles, or to return a list of roles and their characteristics. For information about running simple searches, see the help topic Defining a Simple Search. You can also create advanced employee and role record saved searches to find information about role permissions. For example, you can verify permissions assigned to a role, or verify permissions assigned to an employee or an employee's role. For information about auditing permissions, see Use Searches to Audit Roles and Use Searches to Audit Permissions By Employee. In addition to user interface searches, you can use the SuiteScript Search APIs to create and automate searches. For more information see the help topic N/search Module.

Use Searches to Audit Roles

You can run role and employee record saved searches to gather information about the roles in your NetSuite account.

You can do role record searches for general information about roles in your account, such as permissions assigned to a custom role. Role record body fields are available for role record searches.

Figure 3. Role Record Search Fields



Related record fields are also available; see the help topic Related Records Fields Available for Advanced Searches. Additionally, the following permissions fields are available:

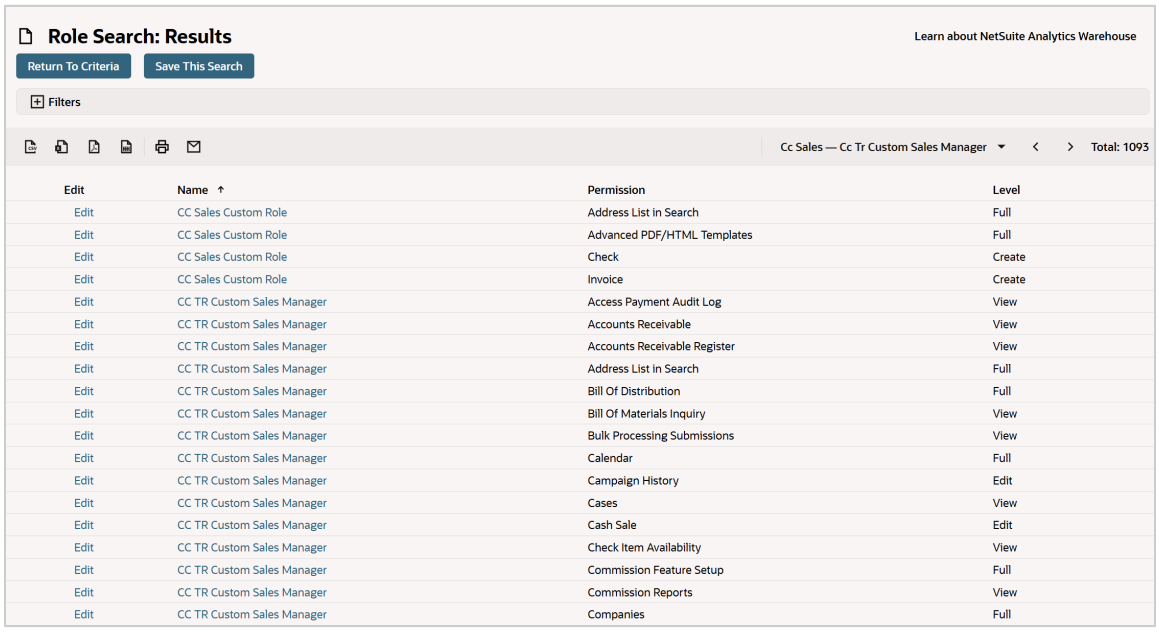
- Permission: Provides the name of each permission assigned to a role. If you include this field in a search with the permission change fields, results information for the permission change fields is displayed in every row that a permission name exists. To display search results efficiently, create separate searches to return values for for the permission name field and the permission change fields.
- Permission Change: Provides the name of a permission to which a change was made.
- Permission Change Date: Provides the date a change was made to a permission.
- Permission Change Level: Provides the level a permission was changed to.

Role Search Example

You need to audit permissions and levels assigned to sales roles.

To see this list, you would create a Role record advanced search. For the search criteria, you would add a **Is Sales Role** filter set to **Yes**. For the results, you would select **Name**, **Permission** and **Level**.

Figure 4. Role Record Search Results



Edit	Name	Permission	Level
Edit	CC Sales Custom Role	Address List in Search	Full
Edit	CC Sales Custom Role	Advanced PDF/HTML Templates	Full
Edit	CC Sales Custom Role	Check	Create
Edit	CC Sales Custom Role	Invoice	Create
Edit	CC TR Custom Sales Manager	Access Payment Audit Log	View
Edit	CC TR Custom Sales Manager	Accounts Receivable	View
Edit	CC TR Custom Sales Manager	Accounts Receivable Register	View
Edit	CC TR Custom Sales Manager	Address List in Search	Full
Edit	CC TR Custom Sales Manager	Bill Of Distribution	Full
Edit	CC TR Custom Sales Manager	Bill Of Materials Inquiry	View
Edit	CC TR Custom Sales Manager	Bulk Processing Submissions	View
Edit	CC TR Custom Sales Manager	Calendar	Full
Edit	CC TR Custom Sales Manager	Campaign History	Edit
Edit	CC TR Custom Sales Manager	Cases	View
Edit	CC TR Custom Sales Manager	Cash Sale	Edit
Edit	CC TR Custom Sales Manager	Check Item Availability	View
Edit	CC TR Custom Sales Manager	Commission Feature Setup	Full
Edit	CC TR Custom Sales Manager	Commission Reports	View
Edit	CC TR Custom Sales Manager	Companies	Full

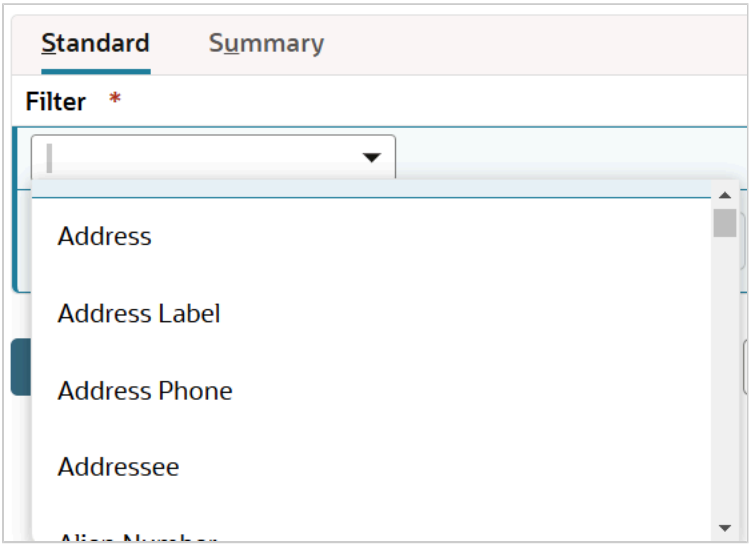
Use Searches to Audit Permissions By Employee

In addition to role record searches, you also can run employee record saved searches to gather information about the roles and permissions in your NetSuite account.

For example, you can do an employee record search to obtain a historical list of changes to an employee's roles.

All employee record fields are available for employee record searches.

Figure 5. Employee Record Filter Fields



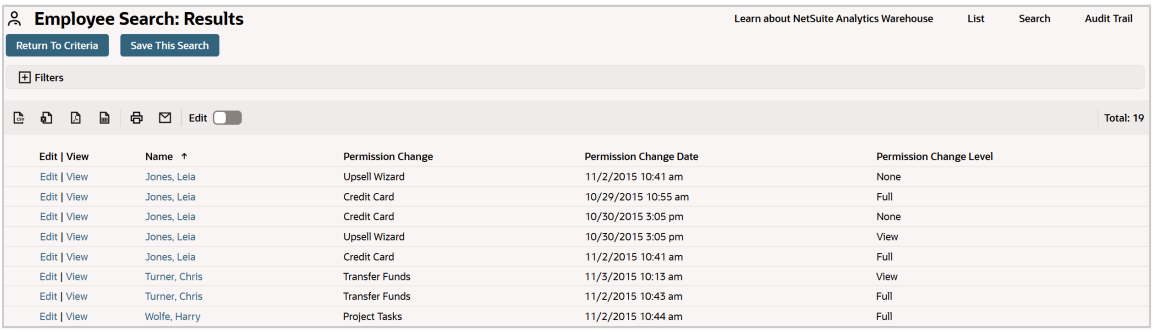
Related record fields are also available, see the help topic Related Records Fields Available for Advanced Searches. Additionally, the following role fields are available:

- Role: Provides a role's name.
- Role Change: Provides the name of a role to which a change was made.
- Role Change Action: Provides the action taken on a role.
- Role Change Date: Provides the date an action took place.

Employee Search Example

You need to see changes made to roles of employees at a specific location.

To gather this information, you would create an Employee record saved search. For the search criteria, you would add a **Location** filter equaling the office location. For the search results, you would select the **Name**, **Permission Change**, **Permission Change Date**, and **Permission Change Level** fields.



Edit | View	Name	Permission Change	Permission Change Date	Permission Change Level
Edit | View	Jones, Leia	Upsell Wizard	11/2/2015 10:41 am	None
Edit | View	Jones, Leia	Credit Card	10/29/2015 10:55 am	Full
Edit | View	Jones, Leia	Credit Card	10/30/2015 3:05 pm	None
Edit | View	Jones, Leia	Upsell Wizard	10/30/2015 3:05 pm	View
Edit | View	Jones, Leia	Credit Card	11/2/2015 10:41 am	Full
Edit | View	Turner, Chris	Transfer Funds	11/3/2015 10:13 am	View
Edit | View	Turner, Chris	Transfer Funds	11/2/2015 10:43 am	Full
Edit | View	Wolfe, Harry	Project Tasks	11/2/2015 10:44 am	Full

Mass Updating a Permission on Custom Roles

You can use a specialized mass update to add, remove, or change the level of a permission for multiple roles at the same time, instead of editing each role individually. This mass update is available to users with the Manage Roles permission.

Users cannot modify permissions for standard roles, so this mass update can only be applied to custom roles. Also, this mass update is not available to customized Customer Center, Employee Center, Partner Center, or Vendor Center roles.

For general information about mass updates, see the help topic Mass Updates.

See the following articles for more information:

- To Mass Update a Permission for Multiple Roles
- Adding Custom Role Fields to be Mass Update Filter Criteria

To Mass Update a Permission for Multiple Roles

1. Go to List > Mass Update > Mass Updates, expand Roles & Permissions, and select Add/Edit Permission on Roles.
2. In the **Title of Action** field, enter a name for this update.
3. In the **Permission** field, select the permission that you want to change for selected roles.
   - Click the icon at the right of this field to see a list.
   - Note that all permissions are listed in alphabetical order; they are not divided into Transactions, Reports, Lists, Setup, and Custom Records, as they are on role records.
4. In the **Level** field, choose the permission access level to be applied to selected roles.
   - Choose **None** to remove the permission from selected roles.
   - Note that the available access levels vary according to the permission selected. See Access Levels for Permissions.
5. For custom record permissions only, you can select a value in the **Restrict** field, to limit the selected roles' access to custom records of the type indicated by the permission.
   - Select **Viewing and Editing** to restrict users with selected roles to viewing or editing only the records of this type that they or their subordinates created.
   - Select **Editing Only** to restrict users with selected roles to editing only the records of this type that they or their subordinates created but allow them to view all records of this type.
   - Leave this column blank to allow users with selected roles to view and edit all records of this type.

   For information about custom record type permissions, see the help topic Setting Permissions for a Custom Record Type.
6. To limit the roles where the selected permission should be modified, define a filter or filters on the **Criteria** subtab.
   - If existing role fields do not provide needed filtering, you can create one or more custom field(s) of the Other Custom Field type, and add them to role records, to be used as filter criteria for this mass update. See Adding Custom Role Fields to be Mass Update Filter Criteria.
   - If you do not define any filter criteria, the permission change is applied to all custom roles in the account, other than customized Customer Center, Employee Center, Partner Center, and Vendor Center roles.
7. Define display options for mass update results on the **Results** subtab.
8. Define the users who can run the update on the **Audience** subtab, if available.
9. If you have the Administrator role and you want to run the mass update on a recurring basis, set up this recurrence on the **Schedule** subtab. See the help topic Scheduling a Mass Update.
10. View audited changes and actions respective to the update on the **Audit Trail** subtab.

11. Click **Preview** to see which records the mass update will change, and review the Mass Update Preview page.
    - To modify the mass update, click **Return to Criteria**, and repeat the previous steps as necessary.
    - If your list has less than 1000 entries, an **Apply** column is shown. If any record listed should not be updated, clear the box in the **Apply** column.
12. Choose one of the following options: **Perform Update**, or **Save**.

    you click **Perform Update**, you cannot stop or cancel the mass update, so proceed with caution!

Adding Custom Role Fields to be Mass Update Filter Criteria

To increase the effectiveness of the Add/Edit Permission on Roles mass update, you can add one or more custom fields to the role record. This kind of field can be used to categorize roles and provide filter criteria for the mass update. The type of custom field that can be added to role records is the Other Custom Field type.

The steps below provide steps for creating this type of field. For further details, see the help topics Creating a Custom Field and Creating Other Record Fields.

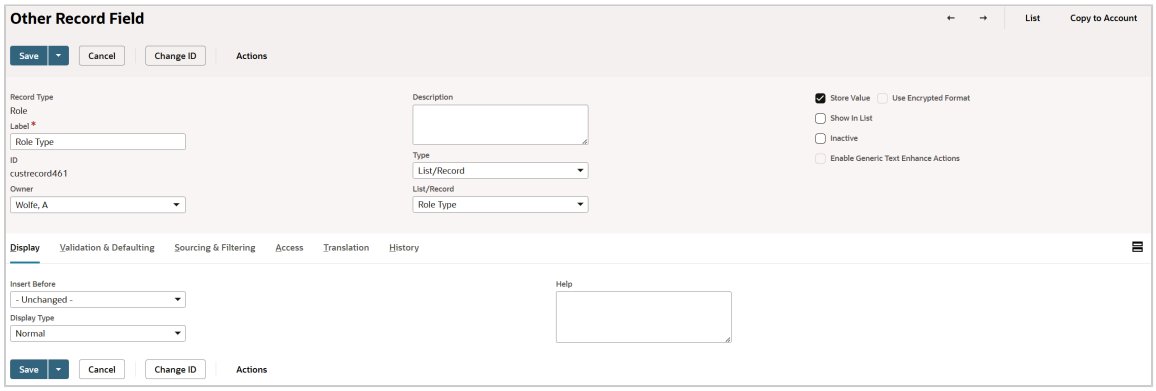
To create a custom field to be added to the role record:

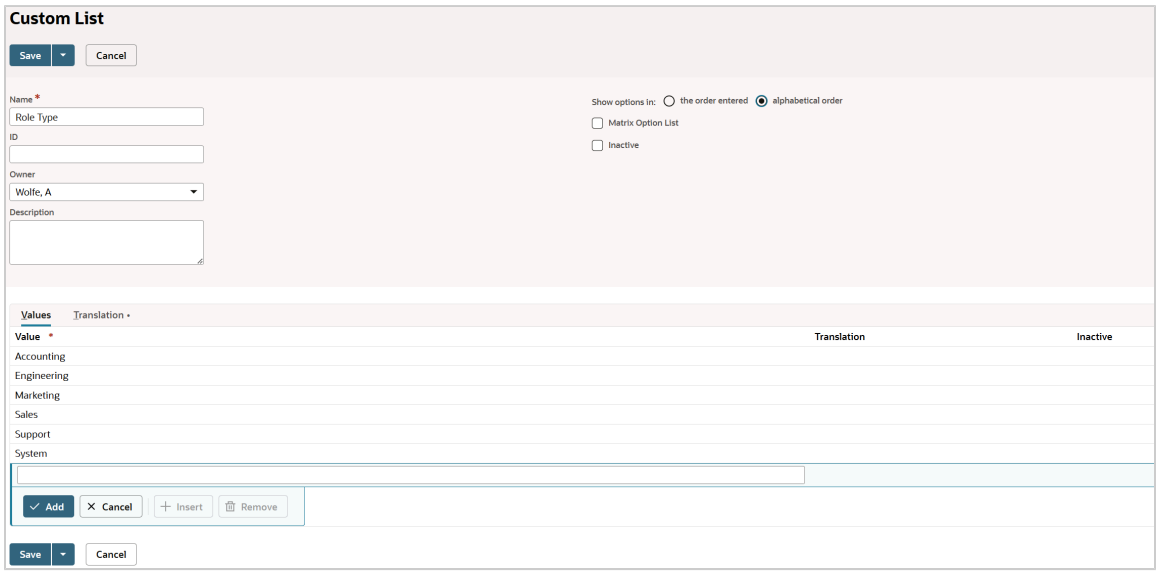
1. Go to Customization > Lists, Records, & Fields > Other Custom Fields > New.
2. From the **Record Type** dropdown list, select **Role**.
3. In the **Label** field, enter a name for the field.
4. From the **Type** dropdown list, select the type of field.

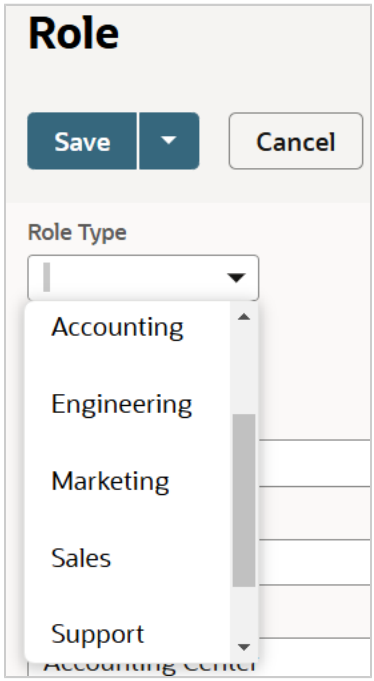
   For example, you can choose **List/Record** if you want the field to be a dropdown list with multiple options. For this choice, you need to select the list or record that supplies dropdown list options. You may need to first create a custom list of these options, then return to creating this custom field. See the help topic Custom Lists.
5. To add the field to the role page, select a value in the **Insert Before** field.
6. Complete other fields as necessary.
7. Click **Save**.

After you have created this custom field, you can set its values on role records as desired, then use it as a filter criteria for the Add/Edit Permission on Roles mass update.

The following screenshots show the record for a sample custom field, its associated custom list, and the field on the role record:







Mass Updating the Role Assigned to Customers

You can update the role assigned to your customers using a mass update. When you mass update customer roles, a change you indicate is made for many customer records at the same time, instead of changing the records one at a time.

For example, if you customize your Customer Center role and want to assign the new custom role to all of your customers, you can use the mass update to do so.

To mass update the customer role:

1. Go to List > Mass Update > Mass Updates, expand Customer Support and Service and select Change Customer Role.
2. In the **Title of Action** field, enter a name for this update.
3. In the **Change Role** field, select the role you previously assigned that you now want to change.
4. In the **to** field, select the role you want the update to assign in place of the role selected in the **Change Role** field.

   For example, in the **Change Role** field, you select Customer Center. In the **to** field, you select Customer Role Alpha, a custom role you created. When you run the mass update, selected customers are assigned the Customer Role Alpha role instead of the Customer Center role. These customers no longer have access to the Customer Center role.
5. Define a filter or filters on the **Criteria** subtab to limit the customers whose role should be modified.
6. Define display options for mass update results on the **Results** subtab.
7. Define the users who can run the update on the **Audience** subtab, if available.
8. If you have the Administrator role and you want to run the mass update on a recurring basis, set up this recurrence on the **Schedule** subtab. See the help topic Scheduling a Mass Update.
9. View audited changes and actions respective to the update on the **Audit Trail** subtab.
10. Click **Preview** to see which records the mass update will change, and review the Mass Update Preview page.
    - To modify the mass update, click **Return to Criteria**, and repeat the previous steps as necessary.
    - If your list has less than 1000 entries, an **Apply** column is shown. (If you want to show the **Apply** column, select search criteria that return results with less than 1000 entries.) If any record listed should not be updated, clear the box in the **Apply** column.
11. Choose one of the following options: **Return to Criteria**, **Perform Update**, or **Save**.

    you click **Perform Update**, you cannot stop or cancel the mass update, so proceed with caution!

For general information about mass updates, see the help topic Mass Updates.

NetSuite Users Overview

To set up users with access to your NetSuite account, you must have the Administrator role to set up records for them, either employee, vendor, partner, or customer records, depending on the type of users. To add a user, you need to set up a record for that user and on that record, explicitly indicate that access to NetSuite should be provided

On each record, you need to provide an email address, which serves as the user ID. Each record has an Access subtab, where you can enable the Give Access option and assign roles. For users to have access to NetSuite, they must also have a password. Users with the Administrator role can send an access notification email that includes a link that lets users create their own passwords.

For links to instructions for adding NetSuite users, see the topics in Manage Different Types of Users**.**

If you assign an additional role to a user who is currently logged in to NetSuite, that user will need to log out and log back in to NetSuite to see the newly assigned role. The same is true if you add permissions to an existing role while a user is currently logged in to NetSuite. The user needs to log out and log back in to exercise the new permissions.

Note: When the Advanced Employee Permissions feature is enabled, the Employee System Access permission must be assigned to a role to give access and assign roles to employees. For more information, see the help topic Employee Access Tab Permission Overview.

To review users' roles, go to Setup > Users/Roles > Manage Users. The Manage Users page lists all users by name, with their email addresses and roles.

The Manage Users Page

1. Click a user name to open his or her record. You can then click the **Edit** button in the record to make changes.
2. Click an email address to send mail to the user.

For more information, see Viewing Your NetSuite Users List.

The Login Audit Trail

The Login Audit Trail is a specialized search that returns a list of account login and logout activity, that can be filtered by date, user, role, or IP address. This search helps keep track of account users, when they have logged in or logged out, and from where. Search results indicate whether each login or logout attempt was successful. This search is available at Setup > Users/Roles > View Login Audit Trail.

Note: In some cases, users' login to NetSuite is ended when they have not explicitly logged out of NetSuite. For example, this situation occurs when a user's NetSuite session times out. If the logout is not explicit, the system does not create a logout entry in the Login Audit Trail.

For more information, see Login Audit Trail Overview.

Manage Different Types of Users

See the following topics for information about setting up and maintaining access for different types of NetSuite users.

- Employee Users
- Vendor Users
- Partner Users
- Customer Users

Note: Only active users with access count against the Full User Count purchased for your account. Inactive users that have access do not count. For details about making users inactive, see the help topic Employee Termination.

Employee Users

You can give NetSuite access to employees by checking the Give Access box on the Access subtab of the Employee record. You assign roles to an employee on the Roles subtab of the Access subtab. Most roles in the system are available to employees, and you can assign multiple roles to each employee.

- For instructions for setting up NetSuite access for employees, see the help topic Giving an Employee Access to NetSuite.
- For instructions for assigning roles, see the help topic Assigning Roles to an Employee.

- For instructions for limiting employees' ability to enter time records, see the help topic Restricting Employee Time Tracking Entries.
- For instructions for adding employees, see the help topic Adding an Employee.

After you have set up employees with access and one or more roles each, you can return to their records and make changes to their assigned roles as necessary. The Access subtab includes a History subtab that lists changes made to role assignments.

If the Global Permissions feature is enabled, you also can assign permissions directly to employees, on a Global Permissions subtab of the Access subtab. These permissions supersede permissions for the employee's assigned role, in the event of a conflict. Please note that usage of the Global Permissions feature is not preferred. For more information, see Using the Global Permissions Feature.

You can use employee searches to track employees' roles and changes to them. The following role fields are available to be used as filters for employee searches:

- Center Type
- Custom
- Inactive
- Internal ID
- Level
- Name
- Permission
- Permission Change
- Permission Change Date

The following role fields are available to be displayed as results for employee searches:

- Center Type
- Custom/Standard
- Inactive
- Internal ID
- Level
- Name
- Permission
- Permission Change
- Permission Change Date
- Permission Change Level

Important: When an employee leaves your company, you should modify the person's record to reflect the termination date and remove any previously granted user roles and access permissions. You can also inactivate the employee record if you want to prevent it from appearing in lists or as choices anywhere in your account. For more information, see the help topic Employee Termination.

Vendor Users

Vendor access is supported if you have enabled the Vendor Access option on the Web Presence subtab at Setup > Company > Setup Tasks > Enable Features. If this feature is disabled, Vendor records do not include an Access subtab.

You can give vendors access by checking the Give Access box on the Access subtab of the Vendor record. You assign roles to a vendor on the Roles subtab of the Access subtab. Most roles in the system are available to vendors, and you can assign multiple roles per vendor. There may be a Vendor Center role available.

After you have set up vendors with access, you can return to their records and make changes to their assigned roles as necessary. The Access subtab includes a History subtab that lists changes made to role assignments.

For more information about setting up vendors, see the help topics Creating a Vendor Record, Assigning a Role to a Vendor, and The Vendor Center Role.

Partner Users

Partner access to your account is supported if you have enabled the following features at Setup > Company > Setup Tasks > Enable Features:

- Partner Relationship Management on the CRM subtab
- Partner Access and/or Advanced Partner Access on the Web Presence subtab

You can give partners access by checking the Give Access box on the Access subtab on the Partner record. You can assign one role per partner. Available roles may include the Partner Center, the Advanced Partner Center, or your customized versions of these roles. You also can grant access to individual partner contacts based on their email addresses.

Customer Users

Customer access to your account is supported if you have enabled the Customer Access option on the Web Presence subtab at Setup > Company > Setup Tasks > Enable Features. If this feature is disabled, Customer records do not include an Access subtab. For more information, see Giving Customers Access.

You can give customers access by checking the Give Access box on the Access subtab of the Customer record. You can assign one role per customer, usually the Customer Center role, or your customized version of it. You also can grant access to individual customer contacts based on their email addresses.

Giving Customers Access

NetSuite provides a standard role for customers. The Customer Center role lets customers view their estimates, orders, invoices, and payments. You can customize this role to adjust the level of permission for certain tasks in the center. For example, if you do not want customers to make payments from the Customer Center, you can set the level for Customer Payments to None instead of Edit.

For more information about giving access to customers, see the following:

- Enable the Customer Access Feature
- Provide Access to Individual Customers
- Use CSV Import to Provide Access to Multiple Customers
- Set the Customer Center Sales Order Form

Enable the Customer Access Feature

To allow customer access to NetSuite, a user with the Administrator role must first enable the Customer Access feature.

To enable the Customer Center:

1. Go to Setup > Company > Setup Tasks > Enable Features.
2. On the Enable Features page, click the **Web Presence** subtab.
3. Check the **Customer Access** box.
4. Click **Save**.

When customer access has been enabled, roles can be assigned to customer users individually or by CVS import to give access to multiple customers.

Provide Access to Individual Customers

You can use customer records in NetSuite to give access to customers and assign roles.

Important: Do not give access to unknown email addresses, or unknown customers. It is also unsafe to use generic email addresses like test@test.com.

You should use the **Send New Access Notification Email** feature that lets customers set up a NetSuite password for themselves. However, if you prefer to set their passwords yourself, use the procedure in Set a Customerâ€™s Password Manually instead.

See the following topics and procedures:

- To assign a customer a role and provide access to NetSuite
- Set a Customer's Password Manually

To assign a customer a role and provide access to NetSuite

1. Go to Lists > Relationships > Customers.
2. Click **Edit** next to the customer that you want to assign a role to.
3. In the **Email** field, enter the customer's email address.

   The customer uses this email address to log in to NetSuite.
4. Click the **Access** subtab.
5. Click the **Give Access** box.
6. If you run multiple websites, you can restrict a customer's login access to a specific website (for example, the website that the customer registered on). To assign a customer to a website, in the **Assigned Web Site** field, select a website. For more information, see the help topic Assign Customers to Websites.
7. To assign the standard Customer Center role, in the **Role** field, select **Customer Center**. If you customized the Customer Center role, select the name of the custom role. For more on customizing this role, see Customizing or Creating NetSuite Roles.
8. Check the **Send New Access Notification Email** box to notify your customer of this new access. As of 2018.2, the new access notification email includes the user's email address (used for logging in to NetSuite), the administrator's email address, and explains login procedures. It also contains a URL so that the customer can set up a NetSuite password. The email containing the link is sent as secure email, and comes from NetSuite `<nlmailer@netsuite.com>`.

   Note: The URL sent in the notification email expires, by default, in 24 hours after sending. A user with the Administrator role can change the number of hours of expiration. For more information, see the Help for the **User Registration Link Expiration In Hours** field at Setting General Display Preferences.

   To customize the email message, go to Setup > Company > System Email Templates. Next to **Standard Customer Center Access Email**, click **Edit**.

9. To assign individual logins to the customer's contacts, on the **Access** subtab, check the **Access** box next to the contacts you want to grant access to.

   Note: If this is a new customer, you might need to save the record before you can view contacts on the **Access** subtab.

   a. Make sure that an email address is listed for each of the contacts that you want to assign login access to.
   b. Check the Manually Assign Password box and enter a password for each of the contacts.
   c. Check the Notify box for the contacts that you want to notify by email.

      For security reasons, the contact's password is not included in the email message.
10. Click **Save**.

Important: To revoke access, you should clear the **Give Access** box. If you want to inactivate all roles of the customer, and the customer is also a vendor, partner, or employee, you must revoke access and inactivate those records, too.

Set a Customer's Password Manually

You should use the **Send New Access Notification Email** feature that lets customers set up a NetSuite password for themselves. However, if you prefer to set their passwords yourself, use the following procedure instead.

To set a customer's password manually:

1. Go to Lists > Relationships > Customers.
2. Click **Edit** next to the customer that you want to assign a role to.
3. In the **Email** field, enter the customer's email address.

   The customer uses this email address to log in to NetSuite.
4. Click the **Access** subtab.
5. Check the **Give Access** box.
6. If you run multiple websites, you can restrict a customer's login access to a specific website (for example, the website that the customer registered on). To assign a customer to a website, in the **Assigned Website** field, select a website. For more information, see the help topic Assign Customers to Websites.
7. To assign the standard Customer Center role, in the **Role** field, select **Customer Center**. If you customized the Customer Center role, select the name of the custom role. For more on customizing this role, see Customizing or Creating NetSuite Roles.
8. Do not check the **Send New Access Notification Email**
9. Check the **Manually Assign or Change Password** box.
10. Enter and confirm the customer's password.

    Note: When customers register on your website, the passwords they enter are saved here.

    For details about password requirements, see the help topic NetSuite Password Requirements.
11. Click **Save**.

12. Next, tell your customer to go to your customer center login page. To find the URL, go to Setup > Company > Company Information in the Customer Center Login field. Your customer can log in with the email address and the password you entered on the customer's record. Do not send the customer the password by email.

The customer can now use the email address and password to log in to your NetSuite account with the Customer Center role. Customers can log in to see their own sales orders, invoices, estimates, and payments.

Note: After you save the record, you can preview the account. To preview the account, go to the **Access** subtab, and click the **Log in as customer** link.

You can use the preview to ensure the role given to the customer is set up correctly.

Use CSV Import to Provide Access to Multiple Customers

You can use the Import Assistant to provide access to your NetSuite account to a large set of customers at Setup > Import/Export > Import Tasks > Import CSV Records, without needing to individually update each customer record.

You must have the Import CSV File permission to complete this task. For general instructions for using the Import Assistant, see the help topic Importing CSV Files with the Import Assistant. For general information about setting up CSV files for import, see the help topic Guidelines for CSV Import Files. See also Boolean Values in CSV Files.

Important: There are two procedures in this section. The preferred procedure uses CSV import to provide access to your NetSuite account to multiple customers without assigning passwords. The other procedure also uses CSV import to provide access to your NetSuite account, but requires that you assign a password for each customer.

Users with the Administrator role no longer need to create the initial passwords when giving access to users. You should use the following procedure to provide access, setting the value for the Send New Access Notification Email field to Yes. The standard access notification email includes a link that lets users create their own passwords for accessing NetSuite.

You should follow this procedure to provide access to your NetSuite account for multiple customers.

See the following procedures:

- To provide access for existing customers
- To provide access and assign passwords for existing customers

To provide access for existing customers

1. Create a CSV file of customer data, with (at minimum) the following fields. You can include other fields in the CSV file, if necessary.
   - **Unique ID** – You should use the Internal ID for the customer record. For information about obtaining internal ID values, see the help topic Displaying Internal IDs. However, using the Customer ID is supported.
   - **Email address** – Required for NetSuite access. You can omit the value for customers whose email address is already populated in their NetSuite records.
   - **Give Access** – Set the value of this field to Yes for all customers included in your CSV file to which you want to provide access.

- **Send New Access Notification Email** – Set this value to Yes. The notification email includes a link that lets customers create their own passwords for accessing NetSuite.
- **Role** – For most customers, this value should be Customer Center.

2. Go to Setup > Import/Export > Import CSV Records.
3. In the Import Assistant, do the following:
   a. Select an **Import Type** of **Relationships**.
   b. Select a **Record Type** of **Customers Only**.
   c. Click the **Select** button and browse to the CSV file you created.
   d. Click **Next**.
4. Choose a **Data Handling** value of **Update** and click Next.
5. Map all of the fields listed in step 1 and any other required fields. Click **Next**.
   - For information about importing customer records, see the help topic Customers Only Import.
   - For information about mapping import fields, see the help topic CSV Field Mapping Tasks.
6. Give the import map a name and click **Save & Run**.

If you prefer to assign passwords to customers, as well as give them access to your NetSuite account, follow this procedure.

To provide access and assign passwords for existing customers

1. Create a CSV file of customer data, with (at minimum) the following fields. You can include other fields in the CSV file, if necessary.
   - **Unique ID** – You should use the Internal ID for the customer record. For information about obtaining internal ID values, see the help topic Displaying Internal IDs. However, using the Customer ID is supported.
   - **Email address** – Required for NetSuite access. You can omit the value for customers whose email address is already populated in their NetSuite records.
   - **Give Access** – Set the value of this field to Yes for all customers included in your CSV file to which you want to provide access.
   - **Manually Assign or Change Password** – Set the value of this field to Yes.
   - **Password** – The minimum password length for customers is eight characters.
   - **Confirm Password** – The value must match the value set for **Password**.
   - **Role** – For most customers, this value should be Customer Center.
2. Go to Setup > Import/Export > Import CSV Records.
3. In the Import Assistant, do the following:
   a. Select an **Import Type** of **Relationships**.
   b. Select a **Record Type** of **Customers Only**.
   c. Click the **Select** button and browse to the CSV file you created.
   d. Click **Next**.
4. Choose a **Data Handling** value of **Update** and click Next.
5. Map all of the fields listed in step 1 and any other required fields. Click **Next**.
   - For information about importing customer records, see the help topic Customers Only Import.
   - For information about mapping import fields, see the help topic CSV Field Mapping Tasks.
6. Give the import map a name and click **Save & Run**.

Note: After the CSV import completes successfully, you must tell each customer the password you assigned. Do not send passwords by email.

Set the Customer Center Sales Order Form

When a customer views a sales order in the Customer Center, the form used to display the order depends on how the order was originally entered in NetSuite. You can determine the sales order form that is shown to Customer Center users.

- For a sales order created in the Customer Center or entered directly into NetSuite, the order is displayed using the preferred sales order form defined at Customization > Forms > Transaction Forms at the time the order was saved.
- For a sales order created through the Web Store, the order is displayed using the form that was defined at the time the order was saved in the Sales Order Type field on the Website record at Commerce > Websites > Website List on the Shopping subtab, Checkout Preferences.

Important: If this form preference is changed, sales orders saved prior to the change are displayed using the originally saved form.

If your default external form is an invoice form instead of a cash sale, perform the following procedure to determine which fields show on the form.

To determine which fields show on the form:

1. Go to Customization > Forms > Transaction Forms.
2. Click **Customize** next to Standard Sales Order — Invoice.
3. Go to the **Printing Fields** subtab and check (or clear) the **Print/Email** box for fields you want to show (or not show.) The Printing Field subtab is displayed if you have the Basic printing type selected. For information about printing types, see the help topic Creating Custom Entry and Transaction Forms.

   The **Screen Fields** subtab controls the appearance of the form when it is viewed from an internal role, such as Administrator.
4. Click **Save**.

Note: Be aware of the following about marking a transaction or CRM form Preferred for Customer Center roles: External forms, meaning forms with names appended with (External), can be marked Preferred for Customer Center roles, but not for other roles. Forms that are not external cannot be marked as Preferred for Customer Center roles.

Changing a User's NetSuite Password

Users can change their own NetSuite passwords, but there are occasions when an administrator must reset a user's password. For example, when users forget the answers to their security questions.

The procedures in this section are for users with the Administrator role.

- For instructions written for users to change their own passwords, see the help topic Change Password Link.

- For more information written for Administrators about passwords, see the help topic Password Reset Tips for Administrators. See also Password Requirements and Policies in NetSuite.

As of 2019.2, the User Access Reset Tool is the preferred method for changing a user's NetSuite password. You can also perform other actions to assist users: clear security questions, unlock NetSuite access, and reset (clear) the user's two-factor authentication (2FA) settings.

> **Important:** To initiate a password reset for a user who has access to multiple NetSuite accounts, you must be an Administrator in all of those accounts.

See the following procedures:

- To change a user's NetSuite password with the User Access Reset Tool
- To manually change a user's NetSuite password on the entity record

To change a user's NetSuite password with the User Access Reset Tool

1. In your Administrator role, go to Setup > Users/Roles > User Management > User Access Reset Tool.
2. On the User Access Reset page, enter the email address of the user who requires your help.
3. Check the appropriate box or boxes. You can check multiple boxes if the user needs help with more than one thing.
   a. **Initiate Password Reset** - check this box to send an email to the user containing a link so that the user can reset the NetSuite password.
   b. **Clear User's Security Questions** - check this box to clear the user's security questions. The user will be prompted to set up new security questions and answers after the next login to NetSuite.
   c. **Unlock The User's Access** - check this box to unlock NetSuite access for a user who is locked out of NetSuite after submitting five consecutive incorrect passwords.
   d. **Reset 2FA Settings** - check this box to reset (or clear) the user's settings for 2FA. The user will be prompted to enter new 2FA settings after the next login to NetSuite with a 2FA required role.
4. Click **Save**.

To manually change a user's NetSuite password on the entity record

1. Do one of the following:
   - If the user is an employee, go to Lists > Employees > Employees.
   - If the user is not an employee, go to List > Relationships, and then click **Customers**, **Partners**, or **Vendors**.
2. Next to the user's name, click **Edit**.
3. Click the **Access** subtab.
4. Verify that the **Give Access** box is checked.
5. Check the **Manually Assign or Change Password** box.

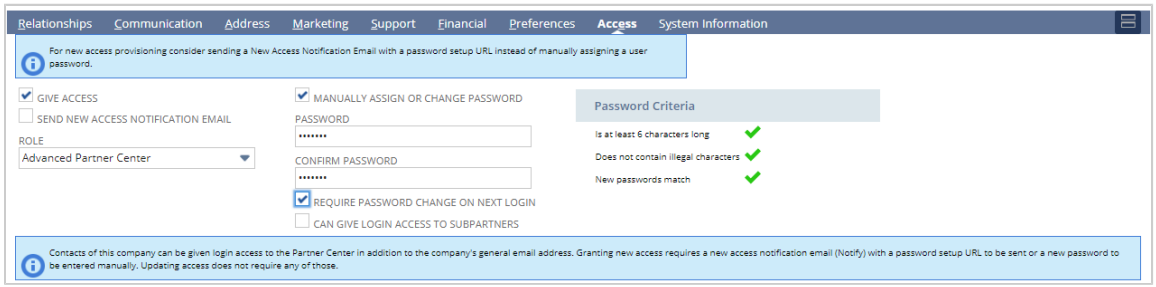
6. Enter a password in the **Password** field. As you type, the characters are validated against password policy criteria and the results are displayed.
7. Enter the password in the **Confirm Password** field.
8. Do not check the **Send New Access Notification Email** box.
9. To require the user to create and save a new password, check the **Require Password Change on Next Login** box. For security reasons, you should select this option.

   Note: The **Require Password Change on Next Login** box is not available on Customer records.

10. Click **Save**.

    Important: If a message appears saying that only the user can change this password, click **OK** to close the message. Some users access multiple NetSuite accounts with the same email address and you might not have management over all of the accounts.

11. You must tell the user the password you created. For security reasons, do not send the password by email or in a chat application.



NetSuite permits each user a maximum of five failed login attempts. When a user exceeds this maximum (usually because of an incorrect password), an email message is sent to notify users with the Administrator role, and the user is locked out of NetSuite for 30 minutes.

Viewing Your NetSuite Users List

Your Users list gives you quick access to records for the customers, vendors, partners or employees who have access to your NetSuite account.

To view your Users list:

1. Go to Setup > Users/Roles > Manage Users.
2. Here are some procedures you can use with the Users list:
   - Click a column heading to sort the list by that column.

     For example, if you click **Name**, the page will show the alphabetical list of users. If you click **Role**, it will show the alphabetical list of roles.
   - Click a user's name to go to that person's record.
   - Click a user's email address to send email to that user.
   - Select a role from the **Role** dropdown list in the page filter at the top left to list only users for the selected role.
   - Click **Print** to print your list.

- Click **Export** to export this list as a CSV file or Microsoft Excel file.

  Note: If your page does not include the Export button, your account administrator may not have assigned you the Export Lists and Perform Search permissions. Contact the person in your company who manages NetSuite.

- The **Total:** at the top of the list on the right indicates the total number of records.

Note: Inactive users do not appear in the Users list, but they can appear in the different Entity Lists if the Show Inactives box is checked. For example, you can get a list of all Employee records at Lists > Employees > Employees and if you check the Show Inactives box, you can see the inactive Employee records too.

Login Audit Trail Overview

The Login Audit Trail is a specialized search that helps keep track of account users, when they have logged in, and from where. It is available at Setup > Users/Roles > View Login Audit Trail.

The Login Audit Trail captures and records the IP address at the beginning of the user's session. It does not capture changes in IP addresses that might occur during a session, such as when a user connects to a Virtual Private Network (VPN) while the session is active. If the user logs out of NetSuite, then logs back in while the VPN is still open, the IP address of the VPN will be captured for that session.

Note: Oracle NetSuite does not support traffic that is routed through a split-tunnel Virtual Private Network (VPN) to control user access to NetSuite. For more information, see the help topic VPN Configuration for User Access to NetSuite.

This search returns a list of login activity, that can include each session listed by date and time of initial login, the user's name, and the IP address from which the user logged in. When you drill down on individual login entries, you view a list of the transactions completed during the user's session. If no data appears, then the user did not complete any transactions during the period you are viewing.

Note: The Login Audit Trail search also is available from general search task links, like Reports > New Search, and Reports > Saved Searches > All Saved Searches > New.

Login Audit Trail Search Capabilities

The Login Audit Trail offers the same capabilities as other NetSuite searches, including:

- Simple search mode, where you can select from a limited set of filters, including IP address, user name, date range, and role.
- Advanced search mode, with more options, including filtering by formulas and join fields, display of formula and join fields as results, and sorting and grouping of results. Available join fields include Role, Employee, and in some cases, Customer, Partner, and Vendor fields.
- Saved searches that you can define and run repeatedly. Saved searches offer all advanced search options, and more, including defining audiences and sending emails of search results.

When you open the Login Audit Trail Search page it displays in the mode last used, initially simple search.

For instructions for using the Login Audit Trail, see the following:

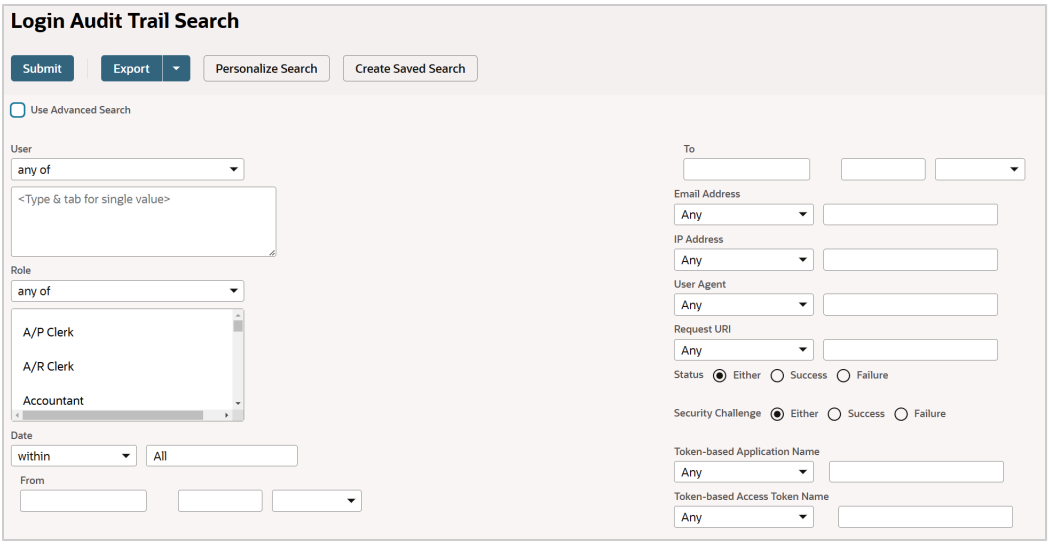
- Defining a Simple Login Audit Trail Search
- Defining an Advanced Login Audit Trail Search

Defining a Simple Login Audit Trail Search

Important: By default, the Administrator role has the View Login Audit Trail permission that allows managing the Login Audit Trail. You can add this permission to any role that can make changes on the Manage Roles page.

To define a simple Login Audit Trail search:

1. Go to Setup > Users/Roles > View Login Audit Trail.



2. Define filters for searching login activity:
   - **User** – Select one or more users, holding down the **CTRL** key to select more than one. To search by exclusion, change the dropdown list to **none of**.
   - **Role** – Select one or more roles.
   - **Date Range** – Select a named time period (such as last fiscal year), or enter a start date and end date to define a custom date range.
   - **Email Address** – Enter an email address in the field.
   - **IP Address** – Select search logic in the dropdown list, and enter an IP address or part of an IP address.
   - **User Agent** – Select search logic, and enter a value like "Mozilla" to find the client browser used to access your account.
   - **Request URI** – Select search logic, and then enter a URI (or any part of a URI) for a NetSuite page used for login.

     The list below includes examples you might use to find the services used to access your account:

     - /app/center/mobile/iphone.nl
     - /app/reporting/webquery.nl
     - /app/site/hosting/restlet.nl

- /app/webservices/wslogin.nl
- /internal/admin/acctrepl.nl

- **Status** – Select an option: Success, Failure, or Either.

> **Note:** If a user enters an incorrect 2FA verification code, it is counted as a login Failure.

- **Security Challenge** – Select an option: Success, Failure, or Either.
- **Token-based Application Name** – Select a parameter to use, and then type the name.
- **Token-based Access Token Name** – Select a parameter to use, and then type the name.

NOTES ABOUT USER AND EMAIL ADDRESS FILTERS FOR CUSTOMER CENTER ROLES:

- Generally, a user is determined by a combination of email address and password. There is not necessarily a one-to-one mapping between email addresses and users, because two users might share the same email address but use different passwords.
- If an email address is used by only one user, then a login audit trail search filtered by that email address and a search filtered by the matching user produce the same results.
- If an email address can be matched to more than one user, then a login audit trail search filtered by that email address and a search filtered by one of the matching users would produce different results sets.

3. Choose one of the following actions:
   - Click **Submit** to run the search and open a NetSuite page with a list of results.
   - Click **Export** button to run the search and save results to a .csv file that you can save to disk or open on your desktop. For more information about exporting search results, see the help topic Exporting Search Results.
   - Click **Personalize Search** to open a saved search page with no filters defined, where you can define a personalized search form to be your default search form for audit trail.
   - Click **Create Saved Search** to open a saved search page that includes the filters you defined. For more information, see the help topic Saved Searches.

Defining an Advanced Login Audit Trail Search

To define an advanced Login Audit Trail search:

1. Go to Setup > Users/Roles > View Login Audit Trail.
2. Check the **Use Advanced Search** box.
3. Click the **Criteria** subtab to define filters.
   - Select a field from the **Filter** dropdown list, select a value in the field popup, and click **Add**, repeating to define additional filter fields.
   - Available filter fields include: Date, formulas, IP Address, Role, User, Employee fields, Role fields, and in some cases Customer, Partner, or Vendor fields.
   - For more information, see the help topic Advanced Search Criteria Filters.
4. Click the **Results** subtab to define columns to appear in search results.
   - Select a field from the **Field** dropdown list and click **Add**, repeating to define additional results fields.
   - Available results fields include: Date, Email Address, formulas, IP Address, Request URI, Role, Security Challenge, Status, User, User Agent, Employee fields, Role fields, token-based

Authentication fields (Detail, Token-based Access Token Name, Token-based Application Name) and in some cases Customer, Partner, or Vendor fields.

- You also can set up sorting and summarizing options for results. For more information, see the help topic Search Results Display Options.

5. After you have defined criteria and results display options for an advanced search, you can:
   - Click **Submit** to run the search and open a NetSuite page with a list of results.
   - Click **Export** to run the search and save results to a .csv file that you can save to disk or open on your desktop. For more information about exporting search results, see the help topic Exporting Search Results.
   - Click **Personalize Search** to open a saved search page with no criteria or results options defined, where you can define a personalized search form to be your default search form for the record type.
   - Click **Create Saved Search** to open a saved search page that includes the criteria and results options you defined. For more information, see the help topic Saved Searches.

Logout Entries in the Login Audit Trail

The Logout Entries for the Login Audit Trail feature tracks successful logouts of your users. Every time the users explicitly log out of NetSuite, the Login Audit Trail creates a new entry with one of the following values in the Detail column:

- **ExplicitLogout** - A value in the Detail column that indicates the user clicked the Log Out link in the NetSuite UI and the active session was terminated.
- **RoleSwitchLogout** - A value in the Detail column that indicates the user switched to a different role in the account, or to a role in a different account. Switching roles terminates the session and is considered a logout.
- **SAMLIdPInitiatedLogout** - A value in the Detail column that indicates the SAML Identity Provider initiated a logout and the NetSuite UI active session was terminated.

In some cases, a user's NetSuite session is ended even when the user has not explicitly logged out of NetSuite. For example, this situation occurs when a user's NetSuite session times out. If the logout is not explicit, the system does not create a logout entry in the Login Audit Trail.

Important: If you use the data from the Login Audit Trail to count the number of successful logins, you should not include the successful logout entries. You can do this by filtering out the new values for successful logout occurrencess.

For more information about the Login Audit Trail, see Login Audit Trail Overview.

Inactivating Users

If an employee is terminated, or you revoke a customer's access, you might also want to inactivate the record. Inactive users do not appear in record lists.

Here are some cases in which you would want to inactivate a user record:

- You do not want to delete the record because it contains information that you might need in the future for record-keeping or auditing purposes. Also, the user could return (employee might be rehired or a vendor might sign a new contract) and you could make the record active again.
- You want to temporarily remove the user’s access to NetSuite and restore it later.

When you inactivate a user:

- The user's login credentials and role assignments are saved. If the record is later made active again, the user can access NetSuite as they did before being inactivated.
- If the user set up schedules to run reports, the reports are not run. The schedule definition is still available, but the task stops running because one part of the schedule was deleted.
- If the user owns calendar events, those events remain in the calendar.
- If the user owns saved searches, they remain in the list of saved searches.

Inactive users do not appear in entity lists unless the Show Inactives box is checked.

Any jobs, for example, reports or scripts, that were scheduled by a user who is now inactive are not run. The jobs are still available, but the schedule is deleted.

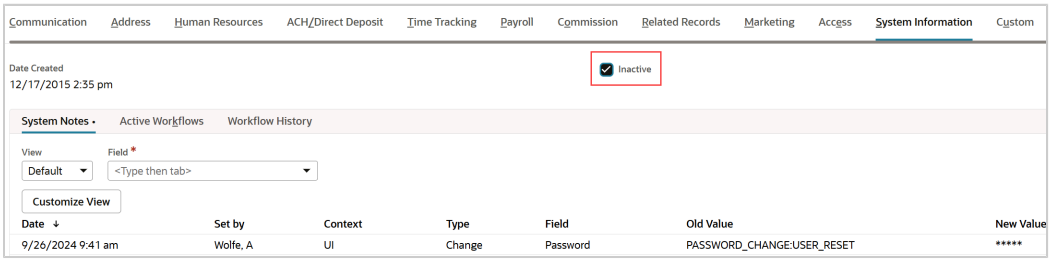
Mass Updates process inactive records unless criteria is added to the update to exclude inactive records.

See the following procedures:

- To inactivate a user
- To activate an inactivated user

To inactivate a user

1. Open the record list page.
   - Lists > Employees > Employees
   - Lists > Relationships > Vendors
   - Lists > Relationships > Partners
   - Lists > Relationships > Customers
2. Click **Edit** beside the user record you want to inactivate.
3. Click the **System Information** subtab.
4. Check the **Inactive** box.



5. Click **Save**.

To see inactivated users, go to the appropriate list of records and check the **Show Inactives** box at the top of the list.

To activate an inactivated user

1. Open the record list page.
   - Lists > Employees > Employees
   - Lists > Relationships > Vendors

- Lists > Relationships > Partners
- Lists > Relationships > Customers

2. Check the **Show Inactives** box at the top of the list.
3. Click **Edit** beside the user record you want to activate.
4. Click the **System Information** subtab.
5. Clear the **Inactivate** box.
6. Click **Save**.

Restricting an Individual User View

Although users with the Administrator role can restrict a users' access to data by department, class, location or for NetSuite OneWorld, subsidiary, by customizing the roles they use to log in, there are situations when a user might want to artificially restrict the information seen for a particular login session.

For example, a bookkeeper might want to approve purchase orders for a single location. Restricting her view allows her to view only the purchase orders for that location. Additionally, reports and search results only show records and transactions associated with that location.

You can restrict your view for the current login session at Home > Set Preferences. The next time you log in, the normal restrictions set for your role are restored.

To restrict your view:

1. Go to Home > Set Preferences.
2. Click the **Restrict View** subtab.
3. In the **Subsidiary**, **Department**, **Location**, or **Class** fields, select the classification for which you want to restrict your view in this login session.

   Important: If you restrict your subsidiary view, the departments, locations, and classes available to you are limited to those associated with the selected subsidiary.

4. Check the **Include Sub** box if you want to also see records and transactions associated with child subsidiaries, departments, locations, or classes of the selections.
5. Check the **Include Unassigned** box if you want to see those records and transactions that have not been associated with a department, location, or class.
6. Click **Save**.

NetSuite Permissions Overview

NetSuite provides a large number of permissions that govern the data and interface that users can access. Role permissions are used to define usage of record types, tasks, and pages. Permissions are associated with roles, and roles are assigned to users, who can be employees, vendors, partners, or customers.

Standard roles for specific business functions include predefined sets of permissions. Users with the Administrator role can create custom roles to vary from these standard sets. For information about setting up roles, see NetSuite Roles Overview. For information about assigning roles to users, see NetSuite Users Overview.

You can use the following sources to understand permissions:

- Each role definition page lists permissions already assigned to that role, and other permissions that can be assigned. Permissions are divided into different types: Transactions, Reports, Lists, Setup, and Custom Records. To see this page, go to Setup > Users/Roles > Manage Roles, and click **Customize** for a role. For more information, see Reviewing Permissions Assigned to Roles. For many permissions, different access levels are available. For information, see Access Levels for Permissions.
- NetSuite provides a page where you can compare the permissions assigned to two or more roles and identify differences. To access this page, go to Setup > Users/Roles > Show Role Differences.
- The Help Center provides a link to a spreadsheet listing how permissions are used, meaning the record types, pages, and/or tasks to which permissions provide access. To access this spreadsheet, click here: NetSuitePermissionsUsage.xls For more information, see Permissions Documentation.

Be aware of the following:

- If the Advanced Employee Permissions feature is enabled in your account, you can customize or create roles to use the Employee Self, Employee Public, Employee Confidential, Employee Compensation, Employee System Access, Employee Record Full, and Employee Administration permissions. For more information, see the help topic Advanced Employee Permissions Overview.
- If the Global Permissions feature is enabled in your account, you can assign permissions directly to employees. Employees retain these global permissions with all of their roles. If there is a conflict between role-based permissions and global permissions, global permissions take precedence. Please note that usage of the Global Permissions feature is not preferred. For more information, see Using the Global Permissions Feature.
- A special permission is required to see unmasked credit card numbers, the View Unencrypted Credit Card Numbers permission. To make this permission available to be assigned to roles in your account, you need to complete a signed agreement.
- A special permission is available that masks employee information about financial reports. For more information, see Hiding Employee Information on Financial Reports.
- When you newly enable a feature in your account, you must consider permissions associated with the added feature. Customized roles that you have already assigned to users may need to be updated to reflect the proper permissions associated with the added feature. See Customizing or Creating NetSuite Roles.

Permissions and Restrictions

- A permission grants access to a specific record type. Some permissions grant access to tasks rather than record types, but for the purposes of understanding the difference between permissions and restrictions, only record type access is relevant.
- A restriction defines, after you have the necessary permissions, which instances of that record type can be accessed.

Note that users with create or full permissions to a restricted record type are able to create and submit new instances of that record type. However, these users are not able to view these newly created restricted records. In other words, users cannot view records to which they are restricted, regardless of their permissions and levels.

Permissions and Restrictions Example

As the manager of a team of employees your role might be granted the View access level for the Employees permission. This level would enable you to view, but not edit, all employee records.

In addition, a restriction might be applied to your role so you can only access employee records of members of your team.

Permissions are generally assigned to roles, and apply to users to which roles are assigned. If the global permissions feature is enabled, permissions can also be assigned to employees, independently of roles. For details about NetSuite permissions, see NetSuite Permissions Overview.

For instructions for setting restrictions on a role, see Customizing or Creating NetSuite Roles.

For available types of restrictions, see Types of Restrictions.

You can audit assigned permissions through searches of role and employee records. You can audit assigned restrictions through searches of role records.

Types of Restrictions

Restrictions are defined on roles, and apply to users to which roles are assigned. The following types of restrictions are available:

- **Employee Restrictions:** You can restrict a role's access to transaction, customer, and employee records, based on values in the employee, sales rep, and supervisor fields on these records. These restrictions may also limit the values that users logged in with this role can assign to these fields on records. These restrictions do not affect access to contact records. You can choose an option to allow viewing of records that are not available for editing due to these restrictions.
- **Department Restrictions:** You can restrict this role's access to transaction, employee, partner, and optionally item records, based on values in the department field on these records. These restrictions may also limit the values that users logged in with this role can assign to the department field on records. You can choose an option to allow viewing of records that are not available for editing due to these restrictions.
- **Class Restrictions**: You can restrict this role's access to transaction, employee, partner, and optionally item records, based on values in the class field on these records. These restrictions may also limit the values that users logged in with this role can assign to the class field on records. You can choose an option to allow viewing of records that are not available for editing due to these restrictions.
- **Location Restrictions:** You can restrict this role's access to transaction, employee, partner, and optionally item records, based on values in the location field on these records. These restrictions may also limit the values that users logged in with this role can assign to the location field on records. You can choose an option to allow viewing of records that are not available for editing due to these restrictions.
- **(OneWorld only) Subsidiary Restrictions:** You can limit the subsidiary values that users with this role can select for customer and vendor records, and to limit the transaction, customer, and vendor records that users with this role can edit, based on these records' selected subsidiaries. You can choose an option to allow viewing of records that are not available for editing due to these restrictions.

Reviewing Permissions Assigned to Roles

You can review lists of permissions on any role definition page, including the permissions assigned to each role, and other available permissions. To review these lists:

1. Go to Setup > Users/Roles > Manage Roles.
2. On the Manage Roles page, click **Customize** for a role.

The **Permissions** subtab on each role definition page has four subtabs that list different types of permissions already assigned to the role: **Transactions**, **Reports**, **Lists**, and **Setup**.

3. Scroll through the **Permissions** dropdown list on each of these subtabs to see other available permissions. Notice that each permission has a level of access selected.

For information about assigning permissions to roles, see Customizing or Creating NetSuite Roles.

Important: When you newly enable a feature in your account, you must consider permissions associated with the added feature. Customized roles that you have already assigned to users may need to be updated to reflect the proper permissions associated with the added feature. See the help topic Enabling Features.

Unsupported Permissions

Since the 2025.1 release, permissions for certain standard roles were updated, therefor some of the permissions assigned to your customized roles are no longer supported. You can see the unsupported permissions in the Unsupported column at the Permissions subtab of the custom roles. These unsupported permissions are still assigned to the roles, but you should consider updating permission assignment for this role.

Standard roles with updated permissions:

- Advanced Partner Center
- Employee Center
- Partner Center
- Vendor Center
- Customer Center
- Specialized User: CRM
- Specialized User: View and Approve
- Specialized User: WMS

Access Levels for Permissions

The following are general definitions of possible access levels for permissions.

- **NONE** - User doesn't have access to existing files. The user cannot create new, view existing, edit existing, or delete existing files. This access level makes the Restrict column in the Custom Record subtab invalid. For more information, see Setting Permissions.
- **VIEW** - User has access to view existing files only. The user cannot create new, edit existing, or delete existing files.
- **CREATE** - User can create new and view existing files. The user cannot edit or delete existing files.
- **EDIT** - User has access to create new, view existing, and edit existing files. The user cannot delete existing files.
- **FULL** - User has access to create new files and view, edit, and delete existing files.

Note that for some permissions, only the minimum view level is required for usage, and other levels do not provide any additional capabilities. In the model defined by the above access level definitions, each successive level (view, create, edit, full) of a permission provides increased usage of the related record

type, task, or page, but the usage of some permissions does not fit exactly into this model. Generally, any user with at least VIEW access to a record type has the ability to print records of that type.

Core Administration Permissions

SuiteCloud: Core Administration Permissions

Access to various features, records, transactions, or reports in NetSuite is primarily controlled by permissions associated with roles that are assigned to end users. This way the user logged in under a given role can be granted full permissions to one record, while having read-only access to another record, and no access to a third record. Unfortunately, not every kind of access in NetSuite can be granted to the user by giving the right permission. Most likely this is because such a permission is missing in the system, and access to this functionality is only available for a user with the Administrator role.

Core Administration Permissions is a feature that can be enabled for a role and gives the role access to a functionality that is currently only accessible to the standard Administrator role. You can use Core Administration Permissions to customize a role so that it behaves almost like the Administrator role, while also restricting access to other areas of NetSuite using role permissions and restrictions. For example, with Core Administration Permissions you can create a role specifically for an IT administrator who is responsible for the general administration of the system, but who should not have access to sensitive employee information.

See Differences Between Core Administration Permissions and Administrator Role for more information.

By default, Core Administration Permissions is not assigned to any roles. The Core Administration Permissions feature is enabled by default. For more information, see Customizing or Creating a Role with Core Administration Permissions.

Important: Use caution when assigning a role with Core Administration Permissions to a user, because the role will become similar to the standard Administrator role in terms of exclusive administrator privileges.

Differences Between Core Administration Permissions and Administrator Role

Although Core Administration Permissions is designed to behave like the standard Administrator role, the following table outlines some of the differences between these two roles.

Functionality	Core Administration Permissions	Administrator Role
Searches	▪ Can only view saved searches through the user interface ▪ Can only view private and saved searches by entering an URL	▪ Can view, edit, make inactive, and delete ALL saved searches, including: ▫ Shared searches, with or without the Allow Audience to Edit option enabled, whether they include the administrator as the audience ▫ Public searches, with or without the Allow Audience to Edit option enabled ▫ Private searches owned by users other than the administrator
Account administration	▪ Cannot edit employees that are assigned the Administrator role	▪ Can edit employees that are assigned the Administrator role

Functionality	Core Administration Permissions	Administrator Role
	▪ Cannot approve Employee change request ▪ Cannot assign the Administrator role ▪ Cannot close a NetSuite account ▪ Cannot provide access to a demo account ▪ Cannot create payment instruments ▪ Role with Core Administration Permissions assigned can be edited by users with non-administrator roles	▪ Can approve Employee change request ▪ Can assign the Administrator role ▪ Can close a NetSuite account ▪ Can provide access to a demo account ▪ Can create payment instruments ▪ Administrator role can only be edited by a user with an Administrator role
Contact Records	▪ When the Advanced Employee Permissions feature is not enabled, any role using Core Administration Permissions must include the Lists > Employees permission when the **Show Employees as Contacts** box on the General Preferences page is checked ▪ When the Advanced Employee Permissions feature is enabled, **Show Employees as Contacts** is not supported ▪ For details, see the help topic Advanced Employee Permissions and Contact Records.	—

Customizing or Creating a Role with Core Administration Permissions

Consider the following when you are customizing or creating a role with Core Administration permissions:

- Use caution when assigning Core Administration Permissions to a role, because the role will become similar to the standard Administrator role in terms of exclusive administrative privileges.
- When you assign Core Administration Permissions to a role, you should consider making two-factor authentication required for the role. For more information, see the help topic Two-Factor Authentication (2FA).

The Core Administration Permissions feature is enabled on all accounts by default.

You can assign Core Administration Permissions to any role, and then configure the role to restrict access to areas of NetSuite.

> **Note:** To assign Core Administration Permissions to a role, you must be logged in using the Administrator role or a role with Core Administration Permissions and Manage Roles permissions assigned.

To assign Core Administration Permissions to a role:

1. Go to Setup > Users/Roles > Manage Roles.
2. On the **Manage Roles** list page, next to the role that you want to add Core Administration Permissions to, click **Customize**.
3. On the Role record, check the **Core Administration Permissions** box.
4. To make two-factor authentication required for the role, in the **Two-Factor Authentication Required** dropdown list, select **2FA authentication required**.
5. Click **Save**.

Important: If you are logged in with a role where two-factor authentication (2FA) is required and you select **Not required** in the **Two-Factor Authentication Required** dropdown list, the required 2FA policy supersedes the role setting. This means that two-factor authentication is required for the role even though it says two-factor authentication is not required on the Role record. For more information, see the help topics Mandatory Two-Factor Authentication (2FA) for NetSuite Access and Two-Factor Authentication (2FA).

Using the Global Permissions Feature

The Global Permissions feature allows users with the Administrator role to assign permissions that apply across all of assigned roles of employees. With global permissions, users with the Administrator role can make changes to each employee's permissions directly on the employee record. Please note that usage of the Global Permissions feature is not preferred.

Note: Not all permissions that are supported for assignment to roles are available for assignment as global permissions.

To enable the Global Permissions feature:

1. Go to Setup > Company > Setup Tasks > Enable Features, and on the Employees tab, check the Global Permissions box.

When this feature is enabled, each employee record includes the Global Permissions subtab on the Access subtab.

To assign global permissions to an employee:

1. After the Global Permissions feature has been enabled, open an employee record.
2. Click the **Access** subtab, and the **Global Permissions** subtab.
3. Select a permission from the **Permission** dropdown list, select an access level for that permission (**View**, **Create**, **Edit**, **Full**, **None**) from the **Level** dropdown list, and click **Add**.

   Note: For more information about the permission access levels, see Access Levels for Permissions.
4. Repeat step 3 until you have added all desired permissions.
5. Click **Save**.

You still need to assign one or more role to each employee on the Access subtab's Roles subtab. When an employee logs in, the applicable permission set is a combination of the employee's global permissions and the currently used role's permissions. Where conflicts between an employee's role-based permissions and global permissions occur, global permissions take precedence, even if global permissions are at a lower level.

The global permissions are not taken into account for the Administrator role. It is not possible to downgrade access for the Administrator role by using the global permissions.

Giving Access to the Transactions Subtab on Entity Records

If a user cannot see the Transactions subtab on customer or vendor records, an administrator can make this subtab visible by adding the Financial History permission to a role assigned to the user.

The Financial History permission gives a role access to the Transactions subtab. Additionally, the role must be given access to the specific types of transactions shown on the Transactions subtab.

For examples of where to find the Transactions subtab, see Transactions Subtab on Entity Records.

See the following procedures and topics:

- To create a custom role with access to the Transactions subtab
- To assign employees this custom role
- Transactions Subtab on Entity Records

To create a custom role with access to the Transactions subtab

1. Go to Setup > Users/Roles > Manage Roles.
2. Click **Customize** next to the name of the role you want to customize.
3. In the **Name** field, enter the name for this new role.

   This name is selected in employee records on the **Access** subtab.
4. On the **Permissions** tab, click the **Lists** subtab.
5. In the **Role** column, select **Financial History**.
6. In the **Level** column, select **View** (or higher).
7. Click **Add**.
8. Click the **Transactions** subtab.
9. Select the name of the type of transaction you would like this role to view.
10. In the **Level** field, select **View**.

    This level of access allows employees to view the transaction but not edit it.
11. Click **Add**.
12. Repeat these steps for each type of transaction you want this role to view.
13. Click **Save**.

Now, users assigned this customized role can view the **Transactions** subtab on entity records and click the links to view those transactions.

To assign employees this custom role

1. Go to Lists > Employees > Employees.
2. Click **Edit** beside the employee you want to assign the role.
3. Click the **Access** subtab.
4. Select the new role in the **Role** field, and click **Add/Edit**.
5. Click **Save**.

When the employee logs in again, they will see the **Transactions** subtab on entity records.

Transactions Subtab on Entity Records

On Customer records, the Transactions subtab is located on the Sales subtab.

On Vendor records, the Transactions subtab is located on the Financial subtab.

Giving Access to Financial Statements

You can assign one permission, Financial Statements, to grant the ability to run all financial statement reports. The Financial Statements permission is a Reports type permission with only a View level possible.

Users also must have the Report Customization permission to be able to customize financial statements in the Financial Report Builder and to rename, delete, or reassign financial statement layouts. The View level of this permission is sufficient.

For information about assigning permissions, see NetSuite Permissions Overview.

For information about financial statement reports, see the help topic Financial Statements Overview.

Hiding Employee Information on Financial Reports

If a user requires access to financial reports, but should not be able to view personal employee information on these reports, an administrator can mask this information by adding the Hide Employee Information on Financial Reports permission to a role assigned to the user. This permission prevents a role from seeing employee information, such as the employee name on the following financial reports:

- Financial Statements Overview
- Expense Account Register
- Other Current Liability Account Register
- Income Statement Detail Report
- Balance Sheet Report
- General Ledger Report
- Trial Balance Report
- Viewing the Chart of Accounts
- Transaction Detail Report
- Account Detail Report

Important: The Payroll feature must be enabled on your account to use the Hide Employee Information on Financial Reports permission.

To hide employee information on financial reports:

1. Go to Setup > Users/Roles > Manage Roles and select a role from the list.
2. On the **Permissions** tab, click the **Reports** subtab.
3. In the **Permission** column, select **Hide Employee Information on Financial Reports**, and click **Add**.
4. Click **Save**.

Now users with roles that have this permission will not be able to see personal employee information on financial reports.

Setting Permissions for Custom Records

Each custom record includes a Permissions subtab where you can restrict access by role to your custom records and the forms used to enter the records. Setting permissions within custom records themselves is the most flexible way to provide access to custom records.

1. Go to Customization > Lists, Records, & Fields > Record Types, and select a record type from the list.
2. On the **Permissions** subtab, choose a role and set the access level.
3. Repeat to provide access to additional roles, then **Save**.

You also can add the Custom Record Entries permission to a role, to provide users with that role access to all custom records.

1. Go to Setup > Users/Roles > Manage Roles, and select a role from the list.
2. Click the **Lists** subtab, select **Custom Record Entries** from the dropdown list, set the access level, and click **Save**.

If you make either of these changes, users may need to log out and log back in for the changes to take effect.

For more information about custom record permissions, see the help topic Setting Permissions for a Custom Record Type.

Permissions for Inbound Single Sign-on Methods

The correct permission to assign to a role for single sign-on (SSO) inbound access to NetSuite depends on the SSO feature enabled in your account.

OpenID Connect (OIDC) Single Sign-on Permission

OpenID Connect (OIDC) Single Sign-on is an inbound single sign-on (SSO) method to access NetSuite. OIDC is an identity layer on top of the OAuth 2.0 protocol. OIDC uses JavaScript Object Notation (JSON) as the data format, and uses JSON Web Tokens (JWT) to transfer claims between parties.

If the OIDC configuration is shared between different NetSuite accounts, users can switch between OpenID Connect (OIDC) Single Sign-on roles without requiring a separate login. User credentials and policies are managed by the OIDC provider (OP). NetSuite is the client, or relying party (RP).

When this feature is enabled, you can provide OIDC SSO access to your account users by assigning the OIDC Single Sign-on permission to their roles.

See the help topics Customize Roles for OpenID Connect and OpenID Connect Permissions for more information about the OpenID Connect (OIDC) Single Sign-on permission and granting OIDC access to center roles.

For more information about the OIDC feature in NetSuite, see the help topic OpenID Connect (OIDC) Single Sign-on.

SAML Single Sign-on Permission

The SAML Single Sign-on feature supports inbound single sign-on access to NetSuite using authentication from a third-party identity provider. This feature allows users who have logged in to an external application to go directly to NetSuite. Users do not need to log in separately to NetSuite, because authentication from the same identity provider is used for login to both the external application and NetSuite.

When this feature is enabled, you can provide SAML Single Sign-on access to your account users by assigning the SAML Single Sign-on permission to their roles.

See the help topic Add SAML Single Sign-on Permissions to Roles for more information about the SAML Single Sign-on permission, granting SAML access to center roles, and limitations and restrictions that apply to SAML permissions.

For more information about the SAML feature in NetSuite, see the help topic SAML Single Sign-on.