Creating a Custom Segment

> **WARNING**
> This feature is not currently enabled in your account. To enable this feature, please contact your administrator.

For information specific to Not-for-Profit (NFP), see Custom Segments for NFP Financials.

When you create a custom segment, you can choose a label for the segment, define its values, and configure other settings. Of the available fields, only Label is required for the segment to be saved.

To create a segment, you must have the appropriate permissions. Authorized users include the following:

- **Administrative users** – Users who belong to the Administrator role.
- **Other users** – Users who belong to a role that has the Create, Edit, or Full level of the Custom Segments permission.

A completely defined custom segment must contain one custom record component, and one each of the following five custom field component types: Body, Column, Entity, Event, and Item. For more information, see Custom Records and Custom Field Types.

To create a custom segment:

1. Go to Customization > Lists, Records, & Fields > Custom Segments > New (Administrator).
2. In the **Label** field, enter a label for the segment. This text will be used as the segment's label when it appears on records or as a transaction column.

   The name of the custom segment cannot be the same as any existing custom field name.

   > **Important:** This value must be unique across all classifications in your system. Consider the following restrictions when entering a label for your custom segment.

   - The label cannot be a duplicate of an existing segment label.
   - The label cannot be a duplicate of an existing custom record label.
   - The label cannot be a duplicate of an existing custom field label.
   - If you have classifications called Class, Department, Location, and Subsidiary, you cannot use any of those words as labels.
   - You cannot name a segment Account.
3. In the **ID** field, enter a unique alphanumeric ID for the transaction type. For information about best practices and naming conventions, see Conventions for Naming Custom Objects. This value cannot be changed after the new segment is saved.
4. As of 2019.1, any new custom segments that you create automatically use the unified ID, and the **Use as Field ID** box is not visible.

   If you are editing a custom segment definition that was created before 2019.1, the **Use as Field ID** box is available.

   To use a unified ID for the entire custom segment definition, check the **Use as Field ID** box. When the box is checked, no field ID fields or columns are shown on the Application & Sourcing subtabs because one ID is used for all fields.

> **Important:** If you change the **Use as Field ID** setting on existing custom segments, your scripting solutions can stop working, or may not work as expected. Verify SuiteScripts, CSV imports, SOAP web services, workflows, formula fields, bundles, SDF, searches, printing templates, and any other customizations that include custom segments. SuiteAnalytics Connect does **not** use the unified ID.

5. After the new custom segment is saved, the **Custom Record Type** field displays the custom record type associated with the custom segment. You can click the custom record type name to open the configuration page. For information see Custom Record Types Associated with a Custom Segment.
6. Optionally, change the **Type** list from its default of List/Record to Multiple Select. This choice determines whether a user setting a value for the segment can save multiple selections, as follows:
   - **List/Record** – The user can save only one selection.
   - **Multiple Select** – The user can save multiple selections.

   Some limitations exist with Multiple Select. For details, see Custom Segment Types.
7. If a custom segment is no longer needed, you can inactivate it by checking the **Inactive** box. For details, see Inactivating a Custom Segment.
8. Select the **Display Type**. Display types let you specify how your custom segments behave in NetSuite. You can use display types to make fields for informational purposes only that are not stored in your account. You can also create custom segments that are not editable or that have default information or custom code calculations.
   - **Normal**: A normal segment can be edited and can be used in defaulting and sourcing information.
   - **Disabled**: A disabled segment cannot be edited. You can use the custom segment with defaulting and sourcing information only. Any segment with a display type of disabled that does not have default or sourced information does not appear on forms.

     > **Note:** You cannot disable a required custom segment unless the segment has a default value.

   - **Hidden**: A hidden segment cannot be seen on the record or transaction you apply it to. You can perform a search to display the value of the segment. The information in the segment is the result of defaulting information. You must set a default for the field.

     If a custom segment is marked as hidden, it is not available to add to custom forms.

     Be aware that in SuiteScript, only user event, scheduled, and Suitelet scripts can set the value of a custom segment that has a display type of hidden.

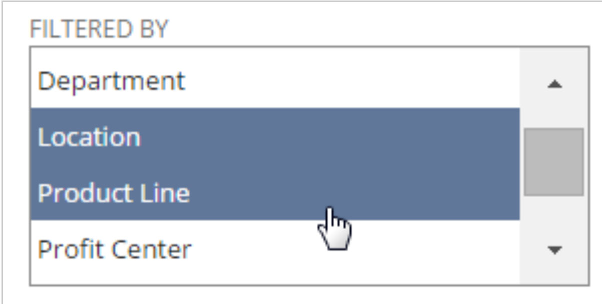
     > **Warning:** Hiding a custom segment is a display convenience only and is **not** field level security. Hidden custom segments are embedded in the page output and can be viewed in the page source.

9. Optionally, check the **Show In List** box to display the custom segment column on a custom record list or sublist.

CURRENCY	AMOUNT (FOREIGN CURRENCY)	AMOUNT	UNIT SIZE
USA	$0.00	0.00	Medium
Canadian Dollar	$0.00	0.00	Large
British pound	£0.00	0.00	Large

10. In some cases, you may want to set up filtering for a segment's values. With this option, you can specify that, for any of the segment's values, the value's availability is conditional based on selections the user made in other classification fields on the same record. For full details about filtering, see Filtering for a Custom Segment.

    If you want to use this capability, in the **Filtered by** list, select the classifications you will use to filter this segment's available values. Hold down Ctrl to select more than one option.



Later, you must manage the exact filtering configuration for each value by using the **Set Filters** button, as described later in this procedure.

11. If appropriate, check the **GL Impact** box. Checking this box means that, when the segment is used on a transaction, the segment's value is displayed on the GL Impact page.

> **Important:** After the segment is created, the value of the GL Impact option cannot be changed. For more details about GL impact, see Configure a Segment to Appear on the GL Impact Page.

12. Enter field-level help for the segment in the **Help** field. When you enter help information, a user working with the segment can click the segment's label to display a popup window containing your help text.
13. If required, enter notes about the segment in the **Description** field. This text is visible only on this page, for people who have permission to view or edit the segment.
14. Optionally, enter additional configuration settings on the segment's subtabs, as follows:
    - **Values** – Create values for the custom segment by adding lines to the Values sublist. Note that if you made a selection in the **Filtered by** box, you must populate the **Filtering** column for each value that you want to be available to users. For full details on configuring filtering for a value, see Setting Filters for Each of the Segment's Values. For more details about each column in the Values sublist, see Creating Values Within the Segment Definition.
    - **Application & Sourcing** – On this subtab, you can do both of the following:
        - Apply the segment to one or more record types by checking the record types. You can also make the segment available on another custom segment or as a column in a transaction sublist. For more details, see Applying a Custom Segment to Record Types.
        - If the segment applies to more than one record type, you can set up dynamic defaulting using the **Source List** field. With this approach, you can make the segment value on one record default to the segment value saved on another record. For full details on configuring dynamic defaulting, see Dynamic Default Value Sourcing for Custom Segments.
    - **Validation & Defaulting** – On this subtab, you can do both of the following:
        - Make the segment required when it appears on a record type by checking the **Mandatory** box. Be aware, however, that a custom form for the record type can be designed to prevent the field from being visible (and therefore prevent it from being required). For more details, see Making a Custom Segment Mandatory.
        - Choose a static default value for the segment by using the **Default Selection** list. If you have configured dynamic defaulting using the Source List field on the **Application & Sourcing** subtab, the dynamic defaulting overrides the default selection value specified. For more details, see Configuring Static Defaults for Custom Segments.
    - **Permissions** – Grant roles permission to work with this segment. You can configure the following:
        - **Value Management Access Level** – Specify which roles can create and edit values for the segment. For details, see Granting a Role Permission to Manage Custom Segment Values.
        - **Record Access Level** – Specify which roles can view and set values for a segment when it appears on a record. For details, see Granting Roles Permission to Set Segment Values on

Records.

- **Search/Reporting Access Level** – Specify which roles can do the following: search based on segment values, customize reports to include segment values as columns and filters, and view segment values on custom reports. For details, see Granting Roles Permission to Use Segments in Searches and Reports.

- **Dependent Segments** – When editing an existing segment, use this subtab to see a list of the segments that use the current segment for filtering their values.

> **Note:** The **Dependent Segments** subtab lists custom segments that are configured to have their values filtered by the current segment. When you create a new segment, this subtab is empty.

- **Display Order** – Specify the order in which custom segments appear in the body and lines of transactions, on other records, and on the GL Impact page, if applicable. You can set the display order to reflect the priority and dependencies of custom segments. For details see Setting Display Order of All Custom Segments.
- **Translation** – Define translations for the segment's label and help text. Be aware that the Translation subtab is displayed only if the Multi-Language option is enabled, at Setup > Company > Setup Tasks > Enable Features, on the Company subtab.

15. Click **Save**.

    The custom segment and an associated custom record type are created. The custom record type has the same name as the custom segment and is available on the Custom Record Types list page. You can edit the custom record type directly to add values to the custom segment.

    You can use SuiteCloud Development Framework (SDF) to manage custom segments as part of file-based customization projects. For information about SDF, see SuiteCloud Development Framework Overview. You can use the Copy to Account feature to copy an individual custom segments to another of your accounts. Each custom segment page has a clickable Copy to Account option in the upper right corner. For information about Copy to Account, see Copy to Account Overview.

Related Topics