Creating Classes

Classes are categories that you can create to track records such as financials, transactions, and employees. For example, you own a janitorial service and you want to track income and expenses separately for household and commercial accounts. You set up a class for each account type and track the financial performance of each class over any time period.

To enable classes, go to Setup > Company > Setup Tasks > Enable Features. On the Company subtab, check the Classes box and then click Save.

To create a class record:

1. Go to Setup > Company > Classifications > Classes > New.
2. Enter up to 60 alphanumeric characters for the name of the class.
3. If this class is a subclass of another, in the **Subclass of** field, select the parent class.
4. If you use NetSuite OneWorld, in the **Subsidiary** field, select one or multiple subsidiaries.

   To select multiple subsidiaries, hold down Ctrl and click each subsidiary.

   A subsidiary must be associated with a class for the class to be selected on a transaction or record related to that subsidiary.
5. If you use NetSuite OneWorld, check the **Include Children** box to associate the class with all the child subsidiaries of each subsidiary selected in the **Subsidiary** field.
6. Check the **Class is Inactive** box to inactivate this class record.

   Inactive classes do not appear in lists of classes on records and transactions.

   > **Note:** To inactivate classes from the Classes list at Setup > Company > Classifications > Classes, check the **Show Inactives** box, check one or more boxes in the **Inactive** column, and then click **Submit**.
7. Click **Save**.

You can restrict access to transaction, employee, partner, and optionally item records based on their assigned class values. You can also limit the classes that users can assign to these records. Class restrictions can be defined per user role and then applied to all users logged in with that role. For more information, see Restricting Access to Records by Class.

You also can apply class restrictions to custom records, if the custom record type includes a Class field. You can add this field directly from the Class record by clicking the New Field button. For more information, see Applying Role-Based Restrictions to Custom Records.

Related Topics