System Notes Guide

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System Notes Overview

> **Note:** System Notes and System Notes v2 are separate systems. There is no change to the existing System Notes. For more information about System Notes v2, see System Notes v2 Overview. For information about the records that are supported, see Records Supported in System Notes v2.
>
> Throughout the help center, topic content specific to System Notes v2 is identified with “v2”. Any content that does not have the “v2” identification refers to System Notes only.

System Notes Overview

This is the first video in a 4–part series of videos about System Notes. To watch the other parts of the series, see:

- Removing Personal Information from System Notes
- System Notes v2 Overview
- Using the System Notes v2 Workbook

NetSuite uses System Notes to track any changes made to a record. A system note for a change on a record captures the date and time when the change was made, who made the change, the interface from which the change was initiated, the type of change, the field that was changed, and the old and new value in the record. System Notes cannot be edited by any system user, script or app. System notes are logged on custom records as well as standard records.

> **Note:** Anyone with view access to a record and the Notes Tab permission can view the system notes for that record.

When searching system notes, you can search for certain records, use advanced search filters, create a saved search, or export the information for additional analysis.

System notes are also logged on changes to general configuration settings that have a financial impact. Setting changes that are logged include:

- Company information
- General preferences
- Enable features
- Accounting lists
- Tax setup

An audit trail is a search for system note records related to a certain record type. The Transaction Audit Trail enables you to produce a report that provides a detailed history of all transactions entered into NetSuite, or you can view system notes for multiple transactions. The audit trail provides information about the transaction, who entered the transaction, and when the transaction was created or modified. By default, the Transaction Audit Trail report is available to the CEO, CEO (Hands Off), CFO, and Support Administrator roles. Other users with a custom role can access the Transaction Audit Trail report if they have the audit trail permission assigned to their role.

Perform a review of system notes and audit trails regularly. As part of an Activity Logging Review, users with appropriate permission should review items like system notes in addition to reviewing specific field changes, script changes, and expired access, and any other ongoing auditing that is required by your organization.

You can search for system notes using SuiteScript. For details, see the help topic System Note.

Viewing System Notes on Configuration Settings

To view system notes on configuration and setup pages, create a saved search. On the Standard subtab, specify the filter for system notes you want to view:

- To view system notes for enabled features, enter Record Type is Enable Features
- To view system notes for company preferences, enter Record Type is Company Preferences

On the Available Filters subtab, you can specify that the search results can be filtered by record type. For more information, see the help topic Creating Saved Searches for System Notes.

Viewing System Notes on a Record

To review changes made to a record, open the record and select System Information > System Notes. Details about every change related to the record are listed. For transactions, the System Notes subtab also shows system logs.

Use the Field dropdown list on the System Notes subtab to see changes for a certain field.

> **Note:** System notes descriptions are limited to 300 characters. Any additional characters are truncated.

For more information, see the help topic Auditing Primary Data and Configuration Changes in NetSuite.

System Notes v2 Overview

Note: System Notes v2 and System Notes are separate systems. There is no change to the existing System Notes. For more information, see System Notes v2 Overview. System Notes v2 captures audit trail information for supported records. For more information, see Records Supported in System Notes v2.

Throughout the help center, topic content specific to System Notes v2 is identified with “v2”. Any content that does not have the “v2” identification refers to System Notes only.

System Notes v2 Overview

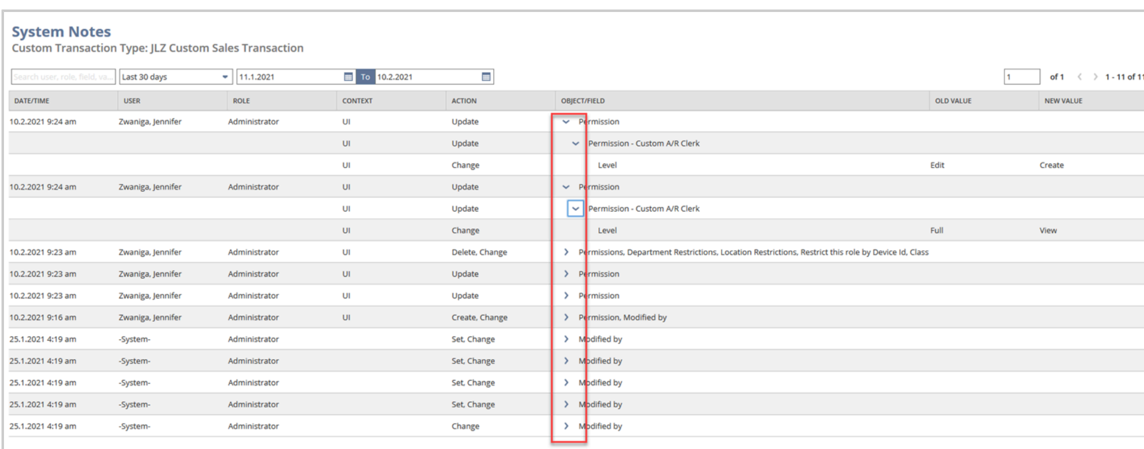
This is the third video in a 4–part series of videos about System Notes. To watch the other parts of the series, see:

- System Notes Overview
- Removing Personal Information from System Notes
- Using the System Notes v2 Workbook

System Notes v2 captures detailed changes such as sublist information and groups the changes under high-level actions. The audit trail enables you to see the types of changes performed on record fields, such as create, update, change, and so on. You can also see the date and time each change was performed and by whom. System Notes v2 retains information for deleted transactions and records, whereas in existing System Notes the details of deleted transactions and records are lost.

System Notes v2 lists the most recent changes at the top of the page. To view details of the action, use the arrows in the Object column to expand the information. This expandable format reduces the amount of data first displayed when you browse the audit trail so that you can get an overview of the history and then view the details to investigate specific changes.

The following screenshot shows the arrows you click to expand and collapse system notes v2 details:



The following table describes the actions System Notes v2 captures on an object and its values.

Action	Description
Create	New object created.
Change	Existing object changed.

Action	Description
Delete	Existing object deleted.
Set	Default value of new object set.
Update	Value of existing object updated.
Unset	Value of existing object removed.

For more information, see the following:

- Records Supported in System Notes v2
- Viewing System Notes v2
- Searching and Filtering System Notes v2
- System Notes v2 Example

Records Supported in System Notes v2

System Notes v2 supports the following record types and configuration pages:

- Authorization Consent
- Custom Transaction Types
- Expense Report Policy
- Imported Employee Expense
- Manage Roles
- Netting Statement

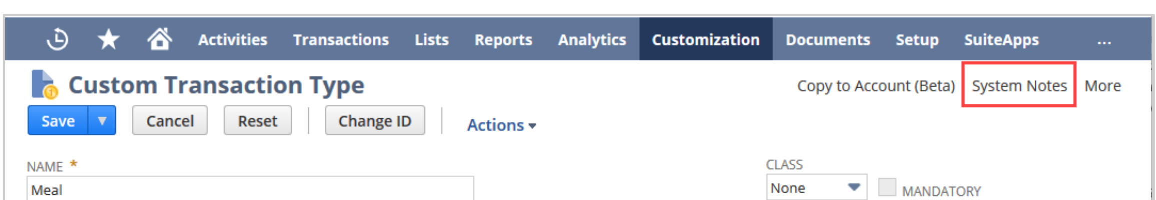
For information about viewing System Notes v2, see Viewing System Notes v2.

Viewing System Notes v2

> **Note:** System notes updates run as a background process. You may experience a short delay between the time an action is performed and when the details appear in the system notes.

Administrators can view and search all system notes in System Notes v2. Other users can view only their own system notes for a record if they have the view permission.

For supported records, you can access System Notes v2 using the System Notes link located on the upper right of the pages. The following screenshot shows an example of the System Notes link on a custom transaction type:



To see a list of supported records, see Records Supported in System Notes v2.

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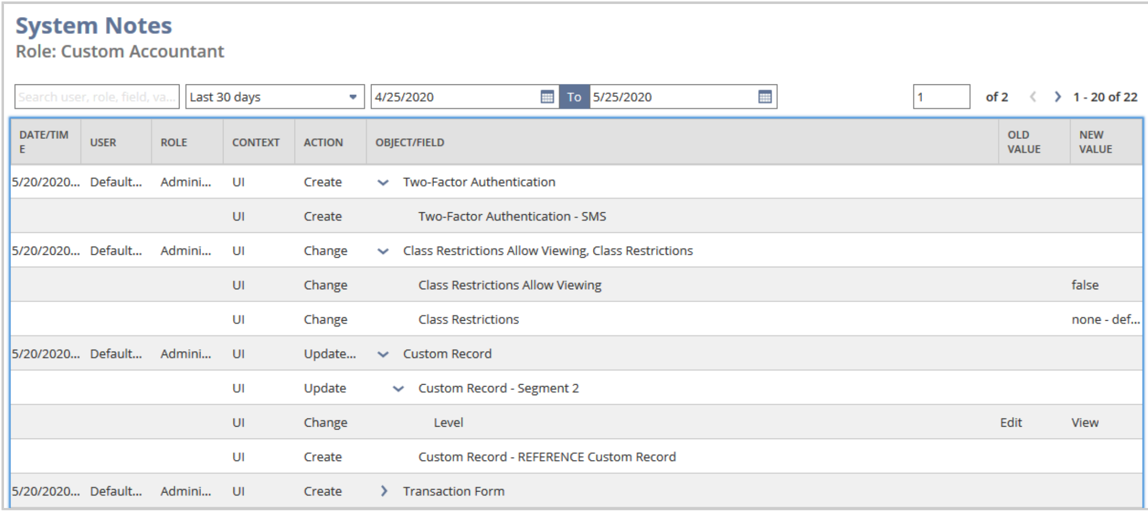
The following screenshot shows a System Notes v2 example with audit data grouped by action:



Use the date filter fields and the search fields in the header to filter and search through record contents. For more information, see Searching and Filtering System Notes v2.

Page number information appears on the upper right and consists of the following types of display details:

- Page numbers
- Records numbers

Page numbers appear as # of X, where # is the page number displayed and X is the total number of pages available. To advance and go back through the pages, click the arrows. To go directly to a specific page, enter the page number in the field.

Records numbers appear as # - # of X, where # - # is the range of record numbers displayed, and X is the total number of records available. For example, 1 - 20 of 22 means that records 1 to 20 are currently displayed, out of the 22 total records available.

The following table describes the System Notes v2 headings.

Heading	Description
Date/Time	Date and time the action took place. Point to this field for the complete time, including seconds.
User	User who performed the action. ▪ For a managed bundle, this is the user who installed the bundle. ▪ If the user is no longer active, the oldest (based on date) active administrator-user is used. ▪ For system events, which have no user connected to the change, System is used.
Role	The user's role at the time of the change.
Content	The interface from where the change was initiated, for example, UI.
Action	The action performed. Actions can be create, change, delete, set, update, or unset.
Object	The object that was changed, for example, a permission or role.
Old Value	The old value of the object, before the change was made.
New Value	The new value of the object, after the change was made.

For information about searching and filtering system notes v2 information, see Searching and Filtering System Notes v2.

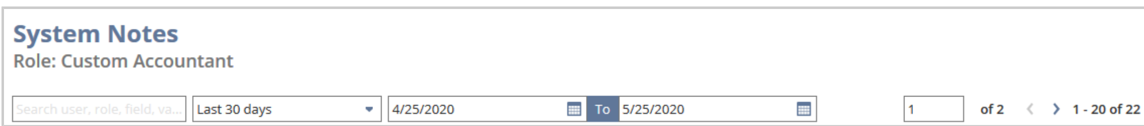
System Notes v2 tracks significant changes only. For example, if you create a new object, the initial default setting is not shown. To see the initial value, you must go to the record. You see old value and new value details only in the system notes for updates and changes. When you make changes, values in previous action rows can also change to display new details. For example, when an object's value changes, a previously blank New Value field on an existing row may update to show the initial default value.

For More information, see System Notes v2 Example.

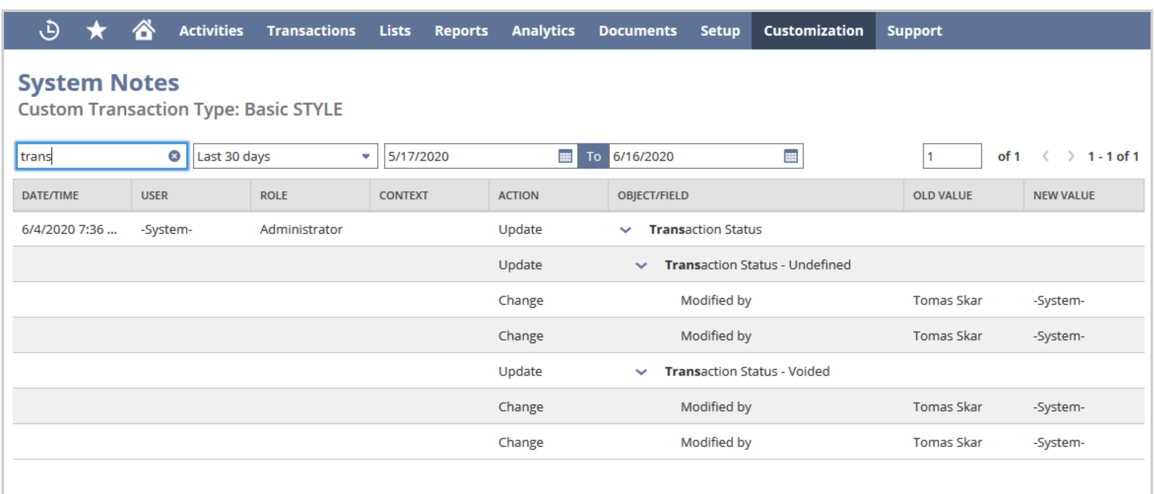
> **Note:** When viewing System Notes v2, long descriptions are truncated. To see the full details, hover over the truncated text.

Searching and Filtering System Notes v2

Use the filter and search fields in the System Notes v2 header to filter and search system notes record details. All data in the record history are filtered and searched. The following screenshot shows an example of the System Notes v2 header:



To search for a specific term in the system notes, enter the term in the Search field. Search results filter while you type the search term and display in real time as **prominent** text. Matching records populate at the same time as the query continues to run in the background, enabling you to review results while the search runs. The following screenshot shows an example of results for the search term **trans:**



To filter the system notes displayed, choose a predefined time interval or enter a custom date range. Data is immediately filtered based on the selected time interval. The default setting for the predefined time interval is Last 30 days.

To select a custom date range, click Custom, and then enter a start date and an end date.

Page numbers and record numbers included in the filter and search results display in the upper right of the page. For more information, see Viewing System Notes v2.

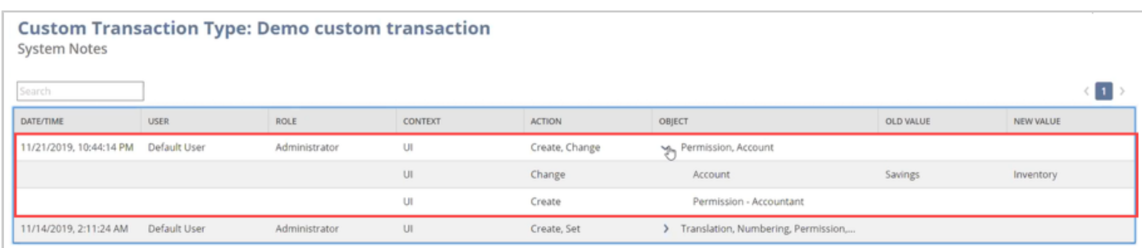
System Notes v2 Example

This topic describes an example of actions on the Custom Transaction Type System Notes page, and how previous action rows change to display new details.

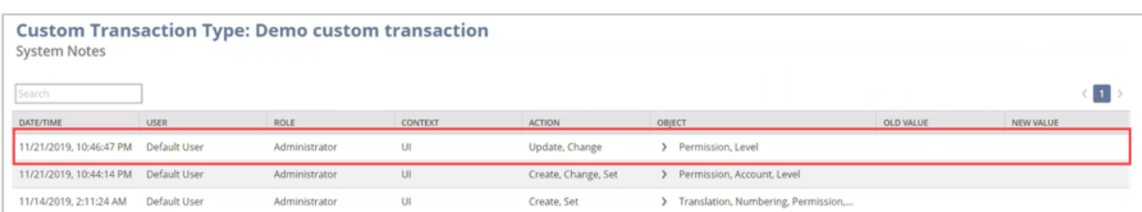
The following screenshot of a Custom Transaction Type System Notes page shows creation details of three new objects: Translation, Numbering, and Permission. To expand this entry to show details of the individual objects, click the arrow in the Object field. The default settings for the initial Create action are not shown but can be viewed in the record.

The following screenshot shows a new entry. The new row details include information about a Create action on the Permission object, and a Change action on the Account object. Also notice that the previous Create action has changed to Create, Set. The action of changing the permission caused the default value to be set and included in the system notes.

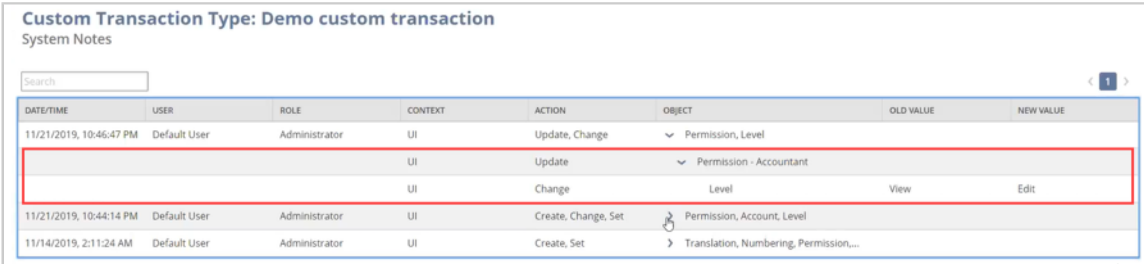
To view the Create and Change details, click the arrow to expand the top row. In the following screenshot, the Change row shows a change to the account from Savings to Inventory. The Create row shows the creation of the Accountant permission. Because there was no previous value, the value is not considered to be new or changed. Therefore, the Old Value and New Value fields are blank.



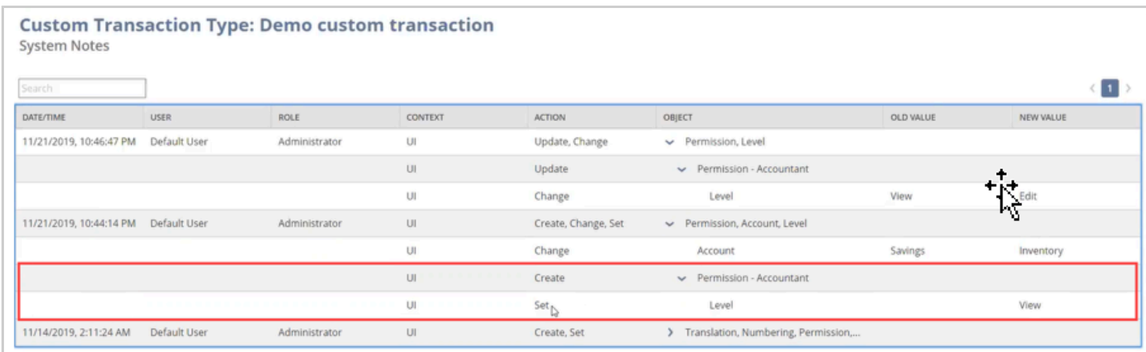
A change was made to the Accountant role to change the permission level from View to Edit. The system notes now show a new level of action. In the following screenshot, the top row shows an Update action on the Permission object and a Change action on the Level object.



Click the arrow to expand the details. The following screenshot shows that an update was made to the Permission - Accountant object. To further expand the details, click the arrow beside the Permission – Accountant object. The Change details show a permission level change from View to Edit.



The following screenshot shows that there is now an arrow beside the previous Create line for the Accountant permission. The expanded details show that the original action to create Permission - Accountant has a Set action of the Level object. The New Value field that was previously blank now shows a New Value of View.



System Notes v2 Workbook

SuiteAnalytics Workbook offers many workbook and dataset templates, each with predefined source data, criteria, pivot tables, and charts.

This section contains the information for the SuiteAnalytics System Notes v2 workbook in NetSuite. For more information about SuiteAnalytics Workbook, see the help topic Workbook and Dataset Templates.

- System Notes v2 Dataset Template
- System Notes v2 Workbook Template
- Using the System Notes v2 Workbook

This is the fourth video in a 4–part series of videos about System Notes. To watch the other parts of the series, see:

- System Notes Overview
- Removing Personal Information from System Notes
- System Notes v2 Overview

System Notes v2 Dataset Template

This dataset combines fields from the System Notes v2 record type and two custom formulas so you can view the change history in your account. It forms the source data for the System Notes v2 Workbook Template.

Dataset Configuration

The System Notes v2 dataset combines fields from one record type, multiple custom formulas and criteria filters. To edit the dataset, see the help topic Defining a Dataset.

Root Record Type	Joined Record Type	Custom Formula Field	Data Grid	Criteria Filters
System Notes v2	(none)	These custom formulas are included in the dataset: - New Display Value - Old Display Value	The following fields are included in the dataset. System Notes v2: - Author - Context - Date Changed - Element Full Name - Object Action Type - Object Name - Role ID - Root Object — Numeric Key #1 - Root Object Name - Value Action Type	The following criteria is used to filter the dataset: - **Date From** on or after same day last year

System Notes v2 Workbook Template

Use the System Notes v2 workbook to analyze system notes v2 data for your records. Create a custom workbook to add charts, pivots, and tables to view configuration details in your account.

The following records are supported in the System Notes v2 workbook:

- Roles and permissions
- Custom transaction record types – configuration only.

The System Notes v2 workbook provides administrators and compliance managers with a view of the change history in their account. The workbook information includes details about what changed, who made the change, and when the change was made. You can also create your own workbook System Notes v2 dataset.

System Notes Terminology

The following terms are used to refer to system notes in NetSuite.

Audit

A general examination and verification of NetSuite records.

Audit Trail

The Audit Trail is a NetSuite tool that you can use to search and investigate system notes related to a specific record

You can use the Transaction Audit Trail to produce a report that provides a detailed history of all transactions entered into NetSuite, or you can view system notes for multiple transactions. The audit trail provides general information about the transaction, the user who entered the transaction, and the dates when the transaction was created or modified. By default, the Transaction Audit Trail report is available to the CEO, CEO (Hands Off), CFO, and Support Administrator roles. Other users with a custom role can access the Transaction Audit Trail report if they have the audit trail permission assigned to their role.

System Notes

System notes track any changes made to a record. A system note for a change on a record captures the date when the change was made, who made the change, the role of the user who made the change, the type of change, and the old and new record values. System notes cannot be edited by any system user, script, or application. System notes are logged on custom records as well as standard records. Anyone with view access to a record and the List > Notes Tab permission can view the system notes for that record.

Transaction History

NetSuite stores data on each entry that a user makes to create, change, or delete a transaction. This data includes all users involved in the history of this transaction, each user's action, the date and time of that action, any account impact, and the amount after the change.

This historical data may be referred to as system notes, an audit trail, or as history. NetSuite provides a variety of methods for you to retrieve historical details about changes made to transaction records.

System Notes Documentation

The following topics contain information about Auditing, System Notes, and Transaction History.

The following listings do not represent an exhaustive set of system notes help topics. Additional system notes documentation is available throughout Help Center.

Auditing

The following section lists available help topics related to auditing.

Account Administration

- Audit Enablement
- Auditing Account Preferences
- Auditing Data Changes using Searches
- Auditing Primary Data and Configuration Changes in NetSuite
- Defining an Advanced Login Audit Trail Search
- Defining a Simple Login Audit Trail Search

Authentication

- Login Audit Trail Overview
- TBA and the Login Audit Trail

Commerce

- SCIS Audit Log

Order Management

- E-Document Audit Trail and Statuses
- Viewing the Bulk Operations Summary Page and Audit Trail Records

SuiteAnalytics

- Auditing Changes to Saved Searches
- Audit Trail for Saved Searches, Reports and Schedules
- Using the Login Audit Trail

SuiteCloud Platform

- Transaction Numbering Audit Log

- Using the Login Audit Trail

Transactions

- Line-Level Audit Trail for Transactions
- Transaction Numbering Audit Log
- Tracking Financial Account Changes
- Using the Transaction Audit Trail
- Viewing an Audit Trail for a Record Type

Users and Roles

- Use Searches to Audit Permissions By Employee
- Use Searches to Audit Roles
- Use Searches to Audit Roles and Permissions

System Notes

The following section lists available help topics related to system notes.

Accounting

- General Ledger Tracking in Transaction System Notes

Account Administration

- Checking PI Removal Results in the System Notes
- Log System Notes For Custom Fields
- Password Changes Are Logged in System Notes on Entity Records
- Searching System Notes
- Viewing Transaction System Notes

Commerce

- Website System Notes

SuiteAnalytics

- Creating Saved Searches for System Notes

SuiteCloud Platform

- Execution Contexts in System Notes

- Custom GL Lines Plug-in Implementation System Notes
- System Notes for Custom Transaction Type Configuration
- System Note
- Viewing Script and Deployment System Notes
- Viewing System Notes

General System Notes

- System Notes Overview
- System Notes Terminology
- System Notes v2 Overview
- System Notes v2 Workbook
- Viewing System Notes v2
- System Notes v2 Example

Transaction History

The following section lists available help topics related to transaction history.

Account Administration

- Granting User Access to Transaction History
- Reviewing Transaction History
- Transaction Line-Level History Window
- Transaction System Information and Communication Subtabs

Commerce

- Printing Receipts from the Transaction History

Comparison of System Notes and System Notes v2

System Notes and System Notes v2 are separate systems for tracking changes made to NetSuite records.

System Notes are the original NetSuite system notes used to track changes made to a record. These system notes are available for records or groups of configuration settings where a System Notes subtab is available on the NetSuite page. For more information about System Notes, see System Notes Overview.

System Notes v2 is a newer version of system notes. For supported records, you can access System Notes v2 using the System Notes link located on the upper right of the page. System Notes v2 captures audit trail information for specific record types. For a complete list of records currently supported in System Notes v2, see Records Supported in System Notes v2. For more information about System Notes v2, see System Notes v2 Overview.

The following table provide a comparison of System Notes and System Notes v2.

System Notes	System Notes v2
Available for records or configuration settings where a System Notes subtab is available on the NetSuite record page at System Information > System Notes.	Captures audit trail information for records supported in System Notes v2. System Notes v2 are available through a link available on the upper right of the page. For more information, see Viewing System Notes v2.
Captures changes made to a record. For transactions, the System Notes subtab also shows system logs.	Captures detailed changes and groups the changes under high-level actions. You can expand a change to see more details about the change, including the level of actions that have been performed. These actions include create, change, delete, set, update, unset.
System notes are logged on changes to general configuration settings that have a financial impact (company information, general preferences, enable features, accounting lists, tax setup).	Currently, System Notes v2 is not used to log changes to general company settings.
Tracks the date and time when the change was made, who made the change, the interface from which the change was initiated, the type of change, the field that was changed, and the old and new values in the record.	Tracks the date and time when the change was made, who made the change, the role of the user who made the change, the interface from which the change was initiated, the action performed, the object that was changed, and the old and new values in the record.
When viewing system notes for a record, you can use the Field dropdown list on the System Notes subtab to see changes for a certain field.	When viewing system notes v2 for a record, you can use the search and filter options to search all data in the record history. While you type your search term, the filtered results display in real time as **prominent** text. Matching records populate while the query continues to run in the background. For more information, see Searching and Filtering System Notes v2.
When searching system notes, you can search for certain records, use advanced search filters, create a saved search, or export information for additional analysis. Search system notes to retrieve system notes data by going to Reports > New Search and clicking System Note For more information, see the help topics Searching System Notes and Auditing Data Changes using Searches.	For System Notes v2, use the System Notes v2 workbook to search all System Notes v2 records. For more information, see System Notes v2 Workbook.

System Notes	System Notes v2
You can also search system notes information using SuiteAnalytics Workbook. For more information, see the help topic SuiteAnalytics Workbook Overview.	
In System Notes, deleted transactions and records are lost. For some record types, a log is created that provides general information about the deleted transaction or record, such as key, name, deletion date, and deleted by. The deleted record log is searchable. To use this search type, go to Reports > New Search and click Deleted Record. For more information, see the help topic Searching for Deleted Records.	System Notes v2 retains information for deleted transactions and records. The deleted information appears in System Notes v2 with a delete action. For more information, see Viewing System Notes v2