



ORACLE
NETSUITE

Account Setup Guide



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Centers Overview


The flexible NetSuite user interface adjusts automatically to different users' business needs. For each user, NetSuite displays a variable set of tabbed pages, called a **center**, based on the user's assigned role. Each NetSuite center provides, for users with related roles, the pages and links they need to do their jobs.

Each tabbed page of each center displays a collection of real-time data called a **dashboard**. Dashboard data is displayed in a variety of dynamic data display windows called **portlets**. NetSuite allows individual users to personalize their own dashboards, and allows administrators to publish personalized dashboards to other users.

When a user logs in to NetSuite, the system determines the user's last used role and account, or the user's default role if indicated, and displays the associated center. If a user has multiple assigned roles, the user's roles are displayed under the Change Roles list in the upper right corner of the page. For more information, see the help topic [Roles and Accounts](#). When a user changes roles, the interface refreshes to display a different center as needed.

NetSuite includes several standard centers. Each standard center is designed to make the most-used links easy to find for the roles that use that center. For example, the Accounting Center's tabbed pages provide data and links that are relevant for Accountants, Bookkeepers, Payroll Managers, and Clerks.

- To review a list of standard centers and their related roles, see [NetSuite Standard Centers](#).
- To understand the special NetSuite Account Center and the special roles that can access it, see [The NetSuite Account Center](#).
- To understand the design of standard centers, see the following:
 - [The Classic Center](#)
 - [The Sales Center](#)

 **Note:** If the standard Sales Center does not meet your needs, see the help topic [The Enhanced Sales Center SuiteApp](#).

- [The E-Commerce Management Center](#)
- [Pages Common to all Centers](#)

For users with business needs that do not match the setup of the standard centers, NetSuite supports customization of the user interface in the following ways:

- Create custom centers with custom tabs and links. See the help topic [Creating and Editing Custom Centers](#).
- Add custom tabs to standard or custom centers. See the help topic [Creating Center Tabs](#).
- Add custom links to standard or custom centers. See the help topic [Creating Center Links](#).
- Create custom roles that use custom centers. See the help topic [Customizing or Creating NetSuite Roles](#).

NetSuite Standard Centers


When you open NetSuite for the first time, a default set of tabbed pages, called a center, displays. The tabbed pages included in the center are based on your default assigned role.

The following table lists the NetSuite standard centers and the roles they support. Click on the links in the table links to review information specific to that center. Also, see the help topic [Pages Common to all Centers](#) for more information about tabs that are included in all centers and are accessible for all roles.

Note: If these centers do not meet your needs, you can modify them by adding custom tabs and links. For more information, see the help topics [Creating Center Tabs](#) and [Creating Center Links](#).
Or you can create custom centers and custom roles. For information, see the help topic [Custom Centers](#).

Center	Standard Roles in this Center	Pages (Tabs) Displayed
The Accounting Center Note: The revenue roles and tab are available only when advanced revenue management (essentials) is enabled.	<ul style="list-style-type: none"> ■ A/P Clerk ■ A/R Clerk ■ Accountant ■ Accountant (Reviewer) ■ Bookkeeper ■ CFO ■ Payroll Manager ■ Revenue Accountant ■ Revenue Manager 	Activities Customers Revenue Vendors Payroll and HR (Except for A/P Clerk role) Financial Reports Documents Setup Payments (Payroll Manager role only) Support SuiteApps
The Classic Center	<ul style="list-style-type: none"> ■ Administrator ■ Payroll Setup 	Activities Payments (Payroll Setup role only) Transactions Lists Reports Documents Setup Customization Support SuiteApps
The E-Commerce Management Center	<ul style="list-style-type: none"> ■ Store Manager ■ Intranet Manager 	Activities Web Site Sales Contacts (Store Manager role only)

Center	Standard Roles in this Center	Pages (Tabs) Displayed
		Reports Documents Setup Support SuiteApps
Engineering *Only available with the Issue Management feature.	<ul style="list-style-type: none"> ■ Engineer ■ Engineering Manager ■ Issue Administrator ■ QA Engineer ■ QA Manager 	Activities Issues Reports Documents Support SuiteApps
The Executive Center	<ul style="list-style-type: none"> ■ CEO ■ CEO (Hands Off) 	Activities Sales Contacts Reports Documents Setup Customization Support SuiteApps
The Marketing Center	<ul style="list-style-type: none"> ■ Marketing Administrator ■ Marketing Manager ■ Marketing Assistant 	Activities Leads Campaigns Reports Documents Setup Support SuiteApps
The Project Center	Consultant	Activities Projects Time & Expenses Resources Reports Documents Support SuiteApps

Center	Standard Roles in this Center	Pages (Tabs) Displayed
<p>The Sales Center</p> <div>  Note: If the standard Sales Center does not meet your needs, see the help topic The Enhanced Sales Center SuiteApp. </div>	<ul style="list-style-type: none"> Sales Administrator Sales Manager Sales Person 	Activities Leads Opportunities Customers Forecast Reports Documents Setup Support SuiteApps
The Shipping Center	Warehouse Manager	Activities Shipping Receiving Inventory Reports Documents Setup Support SuiteApps
The Support Center	<ul style="list-style-type: none"> PM Manager Product Manager Support Administrator Support Manager Support Person 	Activities Cases Customers Issues Reports Documents Setup Support
The System Administrator Center	System Administrator	Activities Setup Support SuiteApps

The NetSuite Account Center

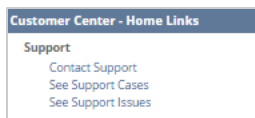
The NetSuite Account Center portlet (located on the Support tab) is the access point to the NetSuite Account Center. The NetSuite Account Center enables certain employees from your company to access the customer center for your NetSuite account.

The only employees who can access the NetSuite Account Center are those assigned one of two special roles: the NetSuite Support Center role and the NetSuite Support Center (Basic) role. The account administrator must exercise good judgement when deciding which users should be assigned these roles. Access should be limited to only those employees in your company who are required to perform specific tasks related to your NetSuite account.

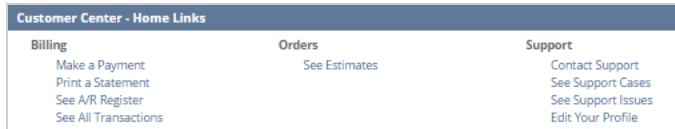
These special roles are not displayed in the results of a search for all roles in your account (Setup > Users/Roles > Manage Roles > Search). They are also not listed in the [Standard Roles Permissions Table](#).

However, these roles are available in the dropdown list when assigning roles to a user. Be very sure you understand the implications of the role permissions before you assign either of these roles to users.

- NetSuite Support Center (Basic) role has no transaction permissions. Users in this role see only cases, issues, and contact Support links in the Customer Center - Home Links portlet.



- The NetSuite Support Center role has transaction permissions. Users in this role see links to make payments, review statements, transactions, and estimates, review support cases and issues, edit the user profile, and contact Support in the Customer Center - Home Links portlet.



See the following tables to compare role permissions.

Permissions: NetSuite Support Center			
View	Create	Edit	Full
Transactions: <ul style="list-style-type: none"> Cash Sale Customer Deposit Deposit Application Estimate Invoice Lists: <ul style="list-style-type: none"> Accounts Receivable Register Non Posting Registers Reports: <ul style="list-style-type: none"> Return Authorization Reports 	Transactions: <ul style="list-style-type: none"> Generate Statements Item Fulfillment Return Authorization 	Transactions: <ul style="list-style-type: none"> Customer Payment 	Transactions: <ul style="list-style-type: none"> Find Transaction Setup: <ul style="list-style-type: none"> Deleted Records

Permissions: NetSuite Support Center			
View	Create	Edit	Full
■ Sales Order Transaction Report			

Permissions: NetSuite Support Center (Basic)			
View	Create	Edit	Full
None	None	None	None

The same permission comparison information is available through in the User Interface. See the help topic [Showing Role Permission Differences](#).

To give an employee access to the NetSuite Account Center portlet:

1. Go to Lists > Employees > Employees.
2. Click **Edit** next to the name of the employee you want to give access.
3. On the **Access** subtab, select **NetSuite Support Center** or **NetSuite Support Center (Basic)** in the **Role** field.
4. Click **Add**.
5. Click **Save**.

The employee might need to log out and log back in again to see the NetSuite Account Center link.

The NetSuite Account Center displays the following portlets and tabs:

- The **Customer Center - Home Links** portlet – users with the NetSuite Support Center role may make payments, review statements, transactions, and estimates, review support cases and issues, edit the user profile, and contact Support. Users with the NetSuite Support Center (Basic) role can view support cases and issues and contact Support.
- The **Multi Language Support** tab – NetSuite provides online case support in English, Chinese (Simplified), French, German, Japanese, Latin American Spanish, and Portuguese(Brazil). To submit a case in one of these languages, click **Cases** and select the preferred language from the dropdown or click the country logo.
- The **SuiteIdeas** tab – Click the link to launch the SuiteIdeas site and review and vote for NetSuite product enhancements. For information, see the help topic [Voting for Enhancements](#).

For more information, see the help topic [Accessing the NetSuite Account Center](#).

The Classic Center

The Classic Center is the set of pages seen by the Administrator and Payroll Setup roles.

The Lists Page

If you log in with the Administrator role or if you use the classic interface, all lists can be found on the Lists page.

A list is a group of records of a specific type. List records include customers, vendors, items, employees, partners, and more.

NetSuite requires you to enter records before you fill out transactions. After you enter a record, it is included in lists. For example, if you want to pay a bill for a new vendor, you must first create a new vendor record. Then, when you go to the Enter Bills page, you can choose the vendor from the list.

The Search link at the upper right of most list pages brings you to a search page for the list record type, where you can enter filter criteria to search for a specific record, or set of records.

To view a list:

1. Click **Lists Overview**.
2. On the Lists page, click the link for the type of list you want to see.

Here are some procedures you can use with most lists:

- Click a column heading to sort the list by that column.
- Click View link or a name to drill down to the detail record.
- Check the **Show Inactives** box to see inactive records.
If the **Show Inactives** box is checked, you can inactivate records on many lists by checking the boxes in the Inactive column and clicking **Save**.
- Select a different View to show only specific information.
- Select a different alphabetical group if you have a long list and want to see records that aren't showing.
If you view the list in report format, all records are included without breaking long lists into smaller lists.
- Click **Refresh** after you select new list options.
- Click **Print** to print the list.
- Click **New** to create a new record.
- Click **Export** to export this list as a CSV file that can be opened in a spreadsheet program.
- Click **Customize View** to create a custom view for the list.

The E-Commerce Management Center

The roles of Store Manager and Intranet Manager belong to the E-Commerce Management Center. Users with these roles can set up your website, configure your domain, and preview the site on the Setup tab.

For more information about the different options available for setting up and building a website, see the help topic [Commerce](#).

The Web Site page also displays in this center. It contains portlets that can be configured to display various statistics to help you analyze the effectiveness of your website. The E-Commerce Management Center - Links portlet provides an alternative method of accessing the same items that are listed in menu on the Web Site page.

The Support Center

Set up the Support Center specifying preferences for how you want to use the Customer Service feature and create case issues, types, origins, rules, and territories.

For more information, see the help topic [Setting Up Case Management](#). In particular, see the help topic [Setting Up Support Checklist](#).

The Sales Center

See the following pages you can find in the Sales Center:

- [The Opportunities Page](#)
- [The Prospects Page](#)
- [The Leads Page](#)
- [The Forecast Page](#)

The Opportunities Page

You can use the Opportunities tab to access your important lead, prospect, and customer records. You can then create opportunities, estimates, and sales orders for your customers to drive up sales.

View items and promotion codes that can help you create opportunities, and report your success with the Open Opportunities by Sales Rep, Open Estimates, and Prospect Analysis Summary reports.

Click the name of a record or transaction to go to the corresponding list. Click New next to the link to create a new record or transaction. Click Search next to the link to set criteria for searching records or transactions of that type.

You can personalize the Opportunities page by choosing to display customized portlets of information. Click Personalize Dashboard, and in the Add Content panel that appears, you can choose to display snapshots relevant to your opportunities and estimates, add reminders to display, and set up saved searches to display results, among other options.

The Prospects Page

From the Prospects page, you can access your calendar, view and create prospect and contact records, view reports on prospects, and create estimates or sales orders for prospects.

View your prospect and contact records under the Relationships heading. Records hold valuable communication information as well as CRM information such as events, tasks, and related documents.

Under the Transactions heading, create new Promotion Codes, prepare estimates, and enter sales orders.

Under the Other heading, conduct searches or conduct mass updates. Click CRM Lists to create new lead sources.

View reports on prospects under the Prospect Reports heading. You can print, email, or export reports or view them in separate applications like Microsoft® Excel.

You can personalize the Prospects page by choosing to display customized portlets of information. Click Personalize Dashboard, and in the Add Content panel that appears, you can choose to display snapshots relevant to your prospects, add reminders to display, and set up saved searches to display results, among other options.

The Leads Page

From the Leads page, you can access your calendar, view and create lead and contact records, view reports on leads, and create estimates or sales orders for leads.

View your lead and contact records under the Relationships heading. Records hold valuable communication information as well as CRM information such as events, tasks, and related documents.

Under the Transactions heading, create new Promotion Codes, prepare estimates, and enter sales orders.

Under the Other heading, conduct searches or conduct mass updates. Click CRM Lists to create new lead sources.

View reports on leads under the Lead Reports heading. You can print, email, or export reports or view them in separate applications like Microsoft® Excel.

You can personalize the Leads page by choosing to display customized portlets of information. Click Personalize Dashboard, and in the Add Content panel that appears, you can choose to display snapshots relevant to your leads, add reminders to display, and set up saved searches to display results, among other options.

The Forecast Page

You can set up the Forecast page to show snapshots and portlets to give you at-a-glance information on predicted future sales. In the Settings portlet, click Customize Page. Choose to display snapshots relevant to your sales probability, set up reminders and set up saved searches among other options.

In the Sales Center-Forecast portlet, you can prepare estimates, enter sales orders and enter cash sales under the Transactions heading. Under the Reports heading, view your Sales Forecast Summary Report, open estimates and sales orders and see which promotion codes and lead sources are bringing in the most business.

Enabling Features

The Enable Features page is where users with the Administrator role can turn on or off features in NetSuite.

Note: Changes made to feature settings are captured in system notes. For more information, see the help topic [Searching System Notes](#).

To enable features:

1. Go to Setup > Company > Enable Features.
2. Check the boxes next to features you want to use.
3. Assign any permissions related to the newly enabled features to custom roles as necessary.

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 [Customizing or Creating NetSuite Roles](#).

Note: Depending on the product you subscribe to, some features may not be available for you to use. If you have questions about the availability of the features mentioned below, please contact your account representative.

The following topics describe the features available on each subtab of the Enable Features page.

- [General Company Features](#)
- [Accounting Features](#)
- [Tax Features](#)
- [Transaction-Related Features](#)
- [Items and Inventory Features](#)
- [Employee and Payroll Features](#)
- [CRM and SFA Features](#)
- [Analytics Features](#)
- [Commerce Features](#)
- [SuiteCloud Features](#)

Important: You can click **Audit Trail** in this page header to review a list of changes to enabled features, including the users who made the changes, dates of the changes, and whether the feature was enabled or disabled. See the help topic [Auditing Account Preferences](#).





General Company Features


Users with the Administrator role can enable the following features on the **Company** subtab of the Enable Features page.

Feature	Description
Classifications	
Departments	Track and classify your transactions by category. This adds a link to Departments on your Lists page.

Feature	Description
Locations	Track activity by location. This adds a link to Locations on your Lists page.
Classes	Sort transactions in any way you find helpful. This adds a link to Classes on your Lists page.
Projects	
Projects	Track projects for customers. A project is a subrecord of a customer record that shows costs and revenues for a particular project.
Project Management	Track additional information about projects and keep them separate from customers.
Planned Work	Track projects by creating a fixed project plan. Project plans are not adjusted when work is tracked outside the original fixed plan.
Job Costing and Project Budgeting	Calculate costs for project labor and account for those costs in your general ledger, and create project specific cost and billing budgets.
Advanced Project Profitability	Create a customized project profitability report based on accounts and items instead of transactions.
Activity Codes	Use activity codes to classify transactions across projects and customers when using Advanced Project Budgets.
Advanced Project Budgets	Advanced Project Budgets enables businesses to create a custom hierarchical structure for tracking project expenses and costs.
Related SuiteApps <ul style="list-style-type: none"> Project Task Manager 	Manage and edit project task assignments using a graphical interface that displays project resources and assigned tasks. For more information about installing the Project Task Manager SuiteApp, see the help topic Project Task Manager .
ERP General	
Multiple Units of Measure	Define various units used to stock, purchase, and sell inventory items, and track non-monetary accounts. The Statistical Accounts feature must be enabled. (Go to Setup > Company > Enable Features. On the Accounting subtab, Statistical Accounts is listed under Advanced Features.)
Use Deletion Reason	Make it mandatory for users to provide a reason for deleting transaction records. All transactions listed at Setup > Company > Auto-Generated Numbers on the Transaction Numbers subtab are affected by this feature. This feature can be disabled after use.
Multi-Subsidiary Customer	In NetSuite OneWorld, assign one primary subsidiary and multiple secondary subsidiaries to a customer or subcustomer record. (Go to Lists > Relationships > Customers > New.) When you select a multi-subsidiary customer on a transaction, you can associate the transaction with any subsidiary assigned to the customer.
Advanced Numbering	The Advanced Numbering feature enables you to set up flexible document and transaction numbering that reflect the requirements of the countries you do business in. With this feature, you can create multiple complex numbering sequences per transaction type, fiscal year, and other selected criteria. Advanced Numbering automatically updates your document or transaction number sequence, for example, when a new fiscal year begins, or you create different types of transactions. The generated numbers use prefixes and suffixes that you set in each rule. You can also prioritize advanced numbering rules to run under different circumstances. NetSuite generates the number when you save the transaction. For more information, see Advanced Numbering .
Resource Management	



Feature	Description
Resource Allocations	Allocate resources to projects, view and manage resource allocations, and monitor utilization rates.
Related SuiteApps	For more information about installing the resource allocation SuiteApps, see: <ul style="list-style-type: none"> Resource Allocation Chart Resource Skill Sets Resource Allocation Approval Workflow <ul style="list-style-type: none"> Resource Allocation Chart/Grid SuiteApp Resource Skill Sets Resource Allocations Custom Approval Workflow
International	
Multi-Language	<p>Check this box to do the following:</p> <ul style="list-style-type: none"> Allow users to choose the language of the NetSuite user interface. See the help topic Choosing a Language for Your NetSuite User Interface. Allow customers to see item names, descriptions, and expense categories in the language selected on the customer's record on printed transaction forms. Allow translation of website elements to display in each visitor's language. These elements include website items, saved searches, tabs, categories, email forms, text, and images, and formatted website text. See the help topic Setting Up a Site for Multiple Languages. <p>Note that only the system-supported languages available as user preferences are supported for printed transaction forms. Additional languages are supported for website translations.</p> <p>At Setup > Company > General Preferences, you need to specify the languages for which you want to provide translation strings for items on printed transaction forms and/or your website. See Configuring Multiple Languages. After you have specified a language in General Preferences, you can translate item names and descriptions on item records or by going to Lists > Mass Update > Bulk Update Translation. See the help topic Working With Multi-Language Names and Descriptions.</p>
Multiple Currencies	<p>Use foreign currencies for sales and purchase transactions and account for the fluctuations in exchange rates. This feature enables the creation of sales transactions in multiple currencies for individual customers and to track open balances in each transaction currency. This feature also enables you to enter purchase transactions in multiple currencies for individual vendors, and keep track of open balances in each transaction currency. When you create a vendor record, you set a primary currency and additional currencies available for transactions with that vendor. See the help topic Currency Management.</p> <p>When the Foreign Currency Management feature of Multi-Book Accounting is enabled, this feature is also required and cannot be disabled.</p>


Feature	Description
	<div>  Important: In a past release, the functionality associated with the Multiple Currencies, Multi-Currency Customers, and Multi-Currency Vendors features were combined in the Multiple Currencies feature. If you are new to NetSuite, already using all three features, or not using all three features, only the Multiple Currencies box will appear on the Company subtab of the Enable Features page. You can enable or disable this feature. When you enable this feature, you gain access to support for multiple currency customers and vendors. If you are already using Multiple Currencies and Multi-Currency Customers or Multi-Currency Vendors but not all three features, you will continue to see and maintain three boxes on the Company subtab. Regardless of the number of boxes visible in your account, the functionality associated with these three features remains the same. </div> <div>  Note: After qualifying revaluation transactions, the system generates the Realized Gain/Loss, Unrealized Gain/Loss, Unrealized Matching Gain/Loss, Rounding Gain/Loss accounts. Depending on the year in which your NetSuite account was established, you may also have the Exchange Rate Variance account. </div>
Currency Exchange Rate Integration	<p>Automatically update currency exchange rates by the specified provider one time each day.</p> <p>Agree to the Notice, as required. NetSuite stores the user ID and time and date stamp of account changes in system notes.</p> <p>Click Forex Data provider to go to its website.</p> <div>  Note: To choose an exchange rate provider, method for obtaining exchange rates, and anchor currencies, go to Setup > Accounting > Preferences > Accounting Preferences. On the General subtab, under Exchange Rate Integration, select a Rate Provider. For more information, see the help topic Exchange Rate Integration. </div>
Currency Exchange Rate Types	<p>Store multiple currency exchange rates for a currency pair and date. Unless you enable this feature, you can have only one exchange rate for each currency pair and date combination. You cannot disable the Currency Exchange Rate Types feature after you enable it.</p> <p>For help with this feature, see the help topic Currency Exchange Rate Types.</p>
Worldwide Support for Phone Number Formatting	<p>Enable international and national phone number formatting for this role.</p>
Data Management	
Inline Editing	<p>Edit records directly from their corresponding lists and from search results.</p> <div>  Note: When this feature is enabled, inline editing is available by default for all search results in dashboard portlets. However, each Custom Search portlet has an Allow Inline Editing setup option that you can use to enable or disable inline editing for specific portlets. See the help topic Displaying Saved Search Results in Dashboard Portlets. </div>
File Cabinet	<p>Enable the ability to upload or link to documents and images, and then associate them with records your customers, vendors, and employees can view.</p>
Enhanced File Security –Employee Expense Report Folders	<p>Check this box to have expense file attachments automatically submit to a dedicated employee expenses folder, predefined by the system.</p> <p>If you have the Administrator role, you can see the contents of these folders, but employees can not locate or access these attachments from the File Cabinet. Employees must instead access their expense attachments from the expense report record.</p>




Feature	Description
Duplicate Detection & Merge	Have NetSuite to compare customer and contact records and notify you of possible duplicates.
Related SuiteApps	Click this link to install the Box.NET SuiteApp. This SuiteApp enables you to upload documents to your Box.NET account and associate those documents with your NetSuite account. To install the SuiteApp, you must first have a Box.NET account.
<ul style="list-style-type: none"> Box Document Management 	<div>  Note: This SuiteApp is maintained and supported directly by Box. </div>
Access	
IP Address Rules	Create access rules for employees based on the IP address of the computer used to log in. For more information about this feature, see the help topic Enabling and Creating IP Address Rules .
Core Administration Permission	Gives a role access to a functionality that is currently only accessible to the standard Administrator role. For more information about this feature, see the help topic Core Administration Permissions .
Mobile	
Mobile Push Notification	Enable users to receive push notifications on mobile devices.

Accounting Features

Users with the Administrator role can enable the following features on the **Accounting** subtab of the Enable Features page. Many of these features create system-generated accounts when enabled. These accounts are included in the descriptions. For a complete listing of system-generated accounts, see the help topic [Feature-Specific, System-Generated Accounts](#).

Feature	Description
Basic Features	
Accounting	Use NetSuite for your business's accounting. <div>  Note: Enabling this feature creates the system-generated Undeposited Funds and Refunds Payable accounts. If you are using NetSuite Canadian Edition, you will also have Payable and Expenses accounts. If you are using NetSuite (U.S.), you will have the additional Sales Tax Payable account. </div>
A/R (Accounts Receivable)	Maintain accounts receivables records and track invoices, receipts, cash sales, payments, and customer records. <div>  Note: Enabling this feature creates the system-generated Accounts Receivable account. </div>
A/P (Accounts Payable)	Maintain accounts payable records and track purchases, bills, vendors, and payee records.

Feature	Description
	 Note: Enabling this feature creates the system-generated Accounts Payable account.
Accounting Periods	Group transactions as they occur during periods of time, and to allow management of financials by these defined time periods.
GL Audit Numbering	<p>Apply gapless numbering sequences to all general ledger posting transactions. Gapless numbering sequences enables companies to meet international auditing requirements.</p> <p>When this feature is enabled, GL Audit Numbering is listed as a required task when you close the last month in an accounting period. You can set up and run numbering sequences as part of the required task. You can also perform a variety of GL Audit Numbering tasks on demand at Transactions > Management > GL Audit Numbering Sequences.</p> <p>The Accounting Periods feature is a requirement for using the GL Audit Numbering feature.</p> <p>GL Audit Numbering is independent of other transaction numbering you have set up at Setup > Company > Auto-Generated Numbers.</p>
Advanced Features	
Expense Allocation	Account for fixed expenses without splitting them among individual departments, classes or locations in advance of incurring the expenses.
Dynamic Allocation	<p>Dynamically calculate the weight of any statistical allocation, based on the balance of the statistical account through statistical journals, at the time the allocation journal is generated.</p> <p>This feature also enables you to run multiple dynamic allocation schedules in a specific sequence, or batch.</p> <p>This is an enhancement to the current fixed rate allocation where you must specify the fixed allocation weight for the entire life cycle of the allocation schedule.</p> <p>This feature cannot be disabled after it has been used.</p>
Advanced Revenue Management (Essentials)	<p>This feature supports the use of revenue arrangements and plans to automate revenue deferral, recognition, reclassification, forecasting, and auditing. It is compliant with the ASC 606 revenue standard.</p> <p>When you enable this feature, it cannot be disabled.</p> <p>The Accounting Periods feature must be enabled as a prerequisite for Advanced Revenue Management (Essentials).</p> <p>Enabling this feature creates the system-generated Deferred Revenue, Unbilled Receivables, and Revenue Arrangement (non-posting) accounts.</p> <p>If you currently use the classic Revenue Recognition features, contact your sales or account representative to find out how to get Advanced Revenue Management (Essentials). The assistance of NetSuite Professional Services or a qualified NetSuite partner is required to move from classic Revenue Recognition to Advanced Revenue Management (Essentials).</p>
Advanced Revenue Management (Revenue Allocation)	<p>This feature is an add-on to Advanced Revenue Management (Essentials). This feature supports the use of fair value pricing, range checking, and fair value formulas to allocate revenue across several performance obligations.</p> <p>This feature can only be enabled if the Advanced Revenue Management (Essentials) feature is enabled.</p> <p>When you enable this feature, it cannot be disabled.</p>
Rule-Based Recognition Treatment	This feature adds flexibility to Advanced Revenue Management (Essentials) by enabling you to define recognition attributes for revenue elements based on specified criteria. As a result, the same item can have different attribute values in different revenue elements.

Feature	Description
	You cannot enable this feature unless you also enable Advanced Revenue Management (Essentials).
Multiple Budgets	Create multiple budgets for the same combination of customer, item, class, location or department criteria.
Intercompany Time and Expense	<p>Allow intercompany time entries and expense transactions, and the transfer of time and/or expense charges from one subsidiary to another in a OneWorld account.</p> <div>  Warning: If this feature is disabled, users cannot enter intercompany time or expenses, meaning records that have different subsidiaries for employee and customer. </div> <p>When this feature is enabled, by default users can enter intercompany time and expenses. You can change related preferences to disallow either intercompany time or expenses, or to enable the creation of automated intercompany adjustments for expenses. These preferences are available at Setup > Accounting > Accounting Preferences, on the General subtab.</p> <div>  Note: If you enabled this feature after April 2014, when you created a qualifying journal entry the system created a single Intercompany Clearing Account of the Type: Other Current Asset. The account was set to the Root Subsidiary and included all child subsidiaries. Adjustment journal entries correctly posted to this new account, and no other currency-locked Intercompany Clearing Accounts were created. <p>If you enabled this feature prior to April 2014, when you created a new adjustment journal entry the system created a new Intercompany Clearing Account (no currency), which became the parent of all other existing clearing accounts. New adjustment journal entries use this parent account, and the existing currency-locked Intercompany Clearing Account remained intact. If you edit a transaction that originally posted to the existing currency-locked Intercompany Clearing Account, the GL Impact of that transaction affects that account.</p> </div>
Automated Intercompany Management	<p>Create intercompany sales orders from intercompany purchase orders, reconcile intercompany transactions, and generate intercompany elimination journal entries automatically using the Period Close Checklist.</p> <div>  Note: Enabling this feature creates the system-generated CTA Elimination account after a qualifying transaction. For example, a user must first run the Elimination process so that an Elimination Journal Entry is created that uses this account. </div>
Automated Intercompany Drop Ship	Enable the cross-subsidiary order and fulfillment process for external orders.
Intercompany Framework	Enable this feature to define criteria for intercompany business workflows. For more information, see the help topic Intercompany Framework .
Consolidated Payments	<p>Enable this feature to apply payments, credits, and deposits either through the top-level customer or through individual subcustomers and to print consolidated customer statements.</p> <p>For more information, see the help topic Consolidated Payments.</p>
In-Transit Payments	<p>Use the In-Transit Payments feature to match and clear in-transit vendor payments.</p> <p>Match and submit transactions for reconciliation on the Match Bank Data page. When you submit the matched in-transit transactions for reconciliation, NetSuite automatically</p>

Feature	Description
	<p>generates the final-stage (confirmed) payments for the match and clears them. Reconcile the payments on the Reconcile Account Statement page.</p> <p>For more information, see the help topics Matching Bank Data, Submitting Matched or User-Cleared Transactions, and Reconciling Transactions.</p>
Vendor Prepayments	<p>Enable this feature to record and track deposit amounts paid to vendors before they accept a purchase order for a good or service.</p> <p>You can apply these prepayment amounts against open bills for the vendor. You can record and track multiple prepayments and prepayment applications for your vendors.</p> <p>For more information, see the help topic Vendor Prepayments.</p>
Multiple Calendars	<p>Use the Multiple Calendars feature to create different accounting period and tax period rollups for your subsidiaries. Create fiscal calendars to define accounting and tax period rollups.</p>
Statistical Accounts	<p>Track non-monetary data and then use this information on reports and income statements to view its relationship with the financial activity of your organization.</p> <p>If you check the Dynamic Allocation box, located under Advanced Features, you can run any allocation schedule weighted by the balance of a statistical account.</p> <p>Multiple Units of Measure must be enabled to use this feature.</p> <p>This feature cannot be disabled after it has been used.</p>
Foreign Currency Variance Mapping	<p>Enable this feature to define posting rules that specify the accounts to which foreign currency variances post.</p> <p>For more information, see the help topic Foreign Currency Variance Mapping.</p>
Balancing Segments	<p>Enable this feature to balance transactions by segment through a process that creates balancing journals.</p> <p>For more information, see the help topic Balancing Segments and Journals.</p>
Installments	<p>Enable this feature to create installments for customers who pay for items over time using installment-based payments.</p> <p>For more information, see the help topic Creating Installments.</p>
Period End Journal Entries	<p>Enable this feature to process and post subsidiary consolidation and income statement closing using a transaction type called Period End Journal. Period end journals are generated automatically when you complete the Create Period End Journals task on the Period Close Checklist.</p> <p>When you enable this feature, you must also enable it for specific subsidiaries.</p> <p>For more information, see the help topic Period End Journal Entries</p>
Revenue Accounting	
Revenue Recognition	<p>Amortize revenue from your sales.</p>
Revenue Commitments	<p>Enable recognition of revenue prior to billing customers. Revenue commitments appear and behave like invoices; both cause revenue recognition, based on sales orders and returns. However, an invoice creates a customer liability, whereas a revenue commitment does not trigger an invoice and customer liability.</p> <p>Enabling this feature creates the system-generated Unbilled Receivables account.</p>
VSOE	<p>Defer revenue on products with multiple elements using Vendor Specific Objective Evidence (VSOE) capabilities. VSOE revenue recognition includes support for the residual method, SOP 98-9, as well as SOP 97-2.</p>

Feature	Description
Sales Order Revenue Forecasting	Forecast revenue based on sales order amounts and return authorization amounts. A revenue forecast gives a more complete picture using sales orders because it includes all orders whether they are billed, unbilled, or use multiple invoices.
Amortization	<p>Allocate an expense across a range of time and then recognize the expense in increments, only as goods or services are used. For example, defer a prepaid expense such as insurance and amortize the proper amount over the period the insurance is in effect.</p> <p>Enabling this feature creates the system-generated Deferred Expense and Accumulated Depreciation accounts.</p>

Multi-Book Accounting Features




Important: Multi-Book Accounting is available only in NetSuite OneWorld accounts. Please contact your sales or account representative to find out how to get Multi-Book Accounting. The assistance of NetSuite Professional Services is required to implement this feature

Multi-Book Accounting	
Adjustment Only Books	Check this box to enable adjustment-only accounting books. Adjustment-only books allow you to post book-specific adjustments to a secondary, adjustment-only book at closing. They serve as a light version of multi-book accounting, but you do not need the Full Multi-Book Accounting feature to use them.
Multi-Book Accounting	<p>Check this box to use multiple accounting books to manage your business.</p> <p>For more information, see the help topic Multi-Book Accounting Overview.</p>
Chart of Accounts Mapping	<p>Check this box to allow different account values to be used across accounting books. Multi-Book Accounting must also be checked.</p> <p>For more information, see the help topic Chart of Accounts Mapping.</p>
Foreign Currency Management	<p>Check this box to manage foreign currency transactions automatically across accounting books. Multi-Book Accounting must also be checked. The feature must be enabled on the Company tab.</p> <p>For more information, see the help topic Foreign Currency Management.</p>
Revenue and Expense Management	<p>Check this box to recognize revenue and amortize expenses per accounting book. Multi-Book Accounting must also be checked.</p> <p>For more information, see the help topic Revenue and Expense Management.</p>
Extended Accounting Period Close Process	<p>Check this box to use independent closure of accounting periods by accounting book. Multi-Book Accounting must also be checked.</p> <p>For more information, see the help topic Accounting Book Period Close Management.</p>

Tax Features

On the **Tax** subtab of the Enable Features page, users with the Administrator role can enable tax features and access the installation pages of related SuiteApps:




Feature	Description
Advanced Taxes	Use the Advanced Taxes feature. This feature enables you to use tax schedules to track taxes for each nexus in which your company is required to pay taxes.




Feature	Description
	 Warning: If you enable Advanced Taxes, then you cannot disable it in the future.
	For more information, see the help topic Advanced Taxes .
EU One Stop Shop	Check this box if your company is registered for the EU One Stop Shop (OSS) VAT scheme. The OSS feature in NetSuite enables you to charge the appropriate tax on B2C sales of digital services based on the VAT rate of the customer's EU member state. For more information, see the help topic EU One Stop Shop (OSS) .
SuiteTax	Check this box to define different tax engines for different tax jurisdictions and visualize tax details on each transaction. For more information, see the help topic General SuiteTax Topics .
Related SuiteApps	For more information about installing the tax SuiteApps, see the help topic Taxation Features Provided by SuiteApps from NetSuite .
<ul style="list-style-type: none"> ■ International Tax Reports ■ Tax Audit Files ■ Withholding Tax ■ Supplementary Tax Calculation 	


Transaction-Related Features



Users with the Administrator role can enable the following features on the **Transactions** subtab of the Enable Features page.

Processed lines for certain transaction types contribute to the Monthly Transaction Lines metric that counts toward maximum limits for your NetSuite service tier. For more information, see Transaction Types Included in [Transaction Types Included in Monthly Transaction Lines Metric](#).

Feature	Description
Basic Features	
Estimates	Provide estimates to your customers and then convert them into invoices. <div>  Note: Enabling this feature creates the system-generated Estimates account. </div>
Sales Orders	Track customer orders and then convert them into invoices. <div>  Note: Enabling this feature creates the system-generated Sales Orders account. </div>
Return Authorizations	Use return authorization numbers to track approved returns. <div>  Note: Enabling this feature creates the system-generated Return Authorizations account. </div>
Purchase Orders	Issue purchase orders, receive against those orders and create bills from those receipts.

Feature	Description
	 Note: Enabling this feature creates the system-generated Purchase Orders account.
Vendor Return Authorizations	<p>Use return authorization numbers to track items you return to vendors.</p>  Note: Enabling this feature creates the system-generated Vendor Return Authorizations and Purchases Returned Not Credited accounts.
Request for Quote	Send a request to one or more vendors asking them to provide specifics about their pricing, terms and conditions in regard to a purchase contract for a product they sell.
Requisitions	<p>Use Requisition transactions to initiate the purchasing process when an employee or company representative needs something that must be purchased using company funds. The person requesting the purchase (requestor) specifies which items, services or expenses they need a buyer to purchase. Buyers can then use requisitions to create the purchase orders necessary to fulfill the requisition requests.</p>  Note: Enabling this feature creates the system-generated Requisitions account.
Purchase Contracts	Allows purchasing managers and buyers to use contracted terms, pricing, and delivery schedules when purchasing materials for a company. For example, instead of having terms and pricing based only on a specific purchase order being placed, buyers can automatically take advantage of quantity-based terms and discounts based on an annual volume of goods or services purchased.
Blanket Purchase Orders	Improve buyer efficiency and accuracy and potentially reduce procurement spending. Blanket purchase orders define a pre-determined price for a set quantity of items you will buy from a vendor during a time period. The blanket purchase order specifies the item, price, quantity, terms and effective time period.
Related SuiteApps	<p>For more information, see the following:</p> <ul style="list-style-type: none"> ■ Advanced Procurement Approvals ■ Using Standard SuiteFlow Workflows (SuiteApps) for Approval Routing ■ Warranty and Repairs Management ■ NetSuite Approvals Workflow
Sales	
Multiple Prices	Set at least four different price levels for each item.
Quantity Pricing	Enable quantity pricing, which lets you automatically apply different sales prices to items that depend on the quantity being sold. This enables you to offer discounts to customers who buy in bulk.
Gross Profit	<p>Enable Gross Profit estimates and track gross profits at the item and transaction level.</p> <p>(Gross Profit = Sales – Costs)</p> <p>Gross profit estimates are based on a complex interaction of prices, discounts, costs, and ultimately gross profits at several levels.</p>

Feature	Description
	Gross profit estimates supply decision-making information to sales teams and executives throughout the sales process, from the opportunity stage early in the sales cycle on through to the issuance of an invoice.
Alternate Sales Amount	<p>Calculate alternate sales amounts on sales orders, estimates, opportunities, and return authorizations.</p> <p>Alternate sales amounts can be used to calculate commission and sales forecasts and can be used to measure quotas.</p>
Promotion Codes	<p>Create codes that can be used to associate customers and sales with partners and track campaign return on investment.</p> <p>If you associate a discount item with a promotion code, the code can be used as a coupon code for any item or for specific items that you select when creating the code.</p>
SuitePromotions	<p>Leverage some of NetSuite's multiple (stacked) promotions capabilities on your SuiteCommerce Advanced Site.</p> <p>Promotion Codes and Auto-Apply Promotions must also be enabled.</p> <p>For more information, see the help topic Promotions in Commerce Web Stores.</p>
Auto-Apply Promotions	Automatically apply multiple promotions to a transaction. For more information, see the help topic Promotions Overview .
Required Deposit Workflow	Require a customer deposit on sales orders. You can specify a percentage or an amount.
Related SuiteApps	For more information, see the help topic Promotions .
■ Advanced Promotions	
Shipping & Receiving	
Automatic Location Assignment	Gives your fulfillment manager the configuration tools to automatically set fulfillment locations on sales order lines.
Advanced Shipping	Fulfill and bill your sales orders in separate steps.
Pick, Pack and Ship	Allow greater flexibility to process orders by using separate transactions to pick items from inventory, pack them to be shipped, and then ship the items to the customer.
Fulfillment Request	Use fulfillment requests in your item fulfillment or store pickup fulfillment workflows.
Store Pickup	Give your Fulfillment Manager the configuration tools to allow Store Pickup
Shipping Label Integration	Integrate your UPS or FedEx account with NetSuite, allowing you to receive tracking numbers and print bar code shipping labels.
Advanced Receiving	Receive orders separately from bills.
	<div>  Note: Enabling this feature creates the system-generated Accrued Purchases account. </div>
Multiple Shipping Routes	Enables shipment to several different addresses and use of different shipping methods on the same transaction.
Inbound Shipment Management	Provides tracking and management of incoming shipments.
Billing	








Feature	Description
Bill Costs to Customers	Purchase goods and services and sell them directly to your customers.
Advanced Billing	<p>Create billing schedules to invoice sales over a range of time or a contract term, such as a one-year membership billed monthly. Billing schedules manage the billing process to track when to invoice customers and how much to bill.</p> <p>The Advanced Billing feature requires that you also enable the Sales Orders feature.</p>
Charged-based Billing	Enable Charge-Based Billing, so that you can create billable charges for projects. Charges are calculated according to charge rules. These charge rules can be based on fixed dates, project progress, milestones, or on time entries. Enabling this feature adds the Charge-Based billing type for projects and a Create Charges page to your account.
Billing Operations	Create and manage bill runs, bill run schedules, and billing groups. After clicking Save, new menu options are available from the Transactions > Billing menu.
Invoice Groups	Group invoices for your customers, so that you have greater flexibility in meeting your customer's expectations for how and when they receive invoices by combining multiple invoices into one invoice group.
Payment Processing	
Credit Card Payments	<p>Accept credit card payments.</p> <div>  Note: Enabling both this feature and Customer Access creates the system-generated Unapproved Customer Payments account. </div>
Credit Card Soft Descriptors	<p>If you sell products under varying brand or company names, check this box to create a list of the names used and associate those descriptors with the items you sell under each name.</p> <p>When customers receive credit card statements, the descriptor associated with the item purchased is shown.</p>
Send Purchase Card Data	<p>With the Purchase Card Data module, NetSuite identifies when payments are made with a purchase card so you can take advantage of potential lower card processing fees.</p> <p>Purchase cards, also called Level II and Level III cards, can bring cost savings to you, the merchant, and to your customers.</p> <p>When you enter a credit card payment for a customer, NetSuite determines, based on the card's bank identification number (BIN), whether or not it is a purchase card. It then passes the extended transaction data along with the payment authorization request for processing.</p>
PayPal Integration	Allow customers to pay with PayPal. This enables you to set up PayPal as a payment method. Customers are taken to the PayPal site for checkout, and payment is deposited into your PayPal account.
Electronic Funds Transfer	<p>Allow customers to pay electronically.</p> <p>You must set up this service before you can use it. To do this, go to Setup > Set Up ACH Processing.</p> <div>  Note: Enabling this feature creates the system-generated Failed ACH Transactions account. </div>
Online Bill Pay	Allow customers to automatically pay bills online as they are entered.
ACH Vendor Payments	Pay vendors and pay employee expense report using ACH transactions.


Feature	Description
Payment Instruments	Improve handling of various payment instruments, including payment cards and tokens
Payment Link	Create invoices with a link for a straightforward payment from an online checkout. After enabling, configure this feature at Commerce > Payment Link.

Items and Inventory Features

Users with the Administrator role can enable the following features on the **Items & Inventory** subtab of the Enable Features page.

Feature	Description
Items	
Drop Shipments & Special Orders	Ship items from your vendor directly to your customer.
Matrix Items	Track inventory and pricing of items separately based on item options, such as tracking shirts by color and size.
Multiple Vendors	Manage procurement of items you buy from more than one vendor. Identify and track each vendor's name, item code, and purchase price.
Gift Certificates	<p>Sell gift certificate items of set or variable amounts to customers. When customers purchase gift certificates, they enter recipient information, and the gift certificate message, amount, and code is emailed to the recipient.</p> <p>Gift certificates are applied toward the total order amount and can be reused if there is a remaining amount after a sale.</p>
Sell Downloadable Files	<p>Enable download item records and online forms with downloads included. You can attach files to download item records that customers can purchase and download in the Web store. The online forms with downloads allow you to offer leads free downloads when they provide their contact information.</p> <p>You can also use this feature to share files with customers free of charge. For example, you can attach the customer's terms of service to the customer record, and the customer can access the file through the Customer Center.</p>
Bar Coding and Item Labels	Generate bar codes to identify transactions and items. Then, you can print labels with the item's bar code.
Merchandise Hierarchy	Create merchandise hierarchies that provide a customized organization of your company's merchandise to help you analyze sales, purchase, and inventory data.
Advanced Item Location Configuration	Check this box to enable advanced management of the item attribute information that is associated with each location. Use this feature to filter and access only the data that you need for specific locations.
Personalized Catalog Views	Divide your web store customers into groups and provide each group with access to a tailored selection of catalog items.
Inventory	
Inventory	Track quantities and profit from buying and selling inventory.

Feature	Description
	 Note: Enabling this feature creates the system-generated Inventory Asset and Cost Of Goods Sold accounts.
Multi-Location Inventory	<p>Track inventory for multiple locations.</p> <p>You must also enable Locations, Inventory, Advanced Shipping and Advanced Receiving.</p> <div>  Note: After you have enabled the Multi-Location Inventory feature and distributed items, you cannot turn the feature off without contacting Customer Support. </div> <div>  Note: Enabling this feature creates the system-generated Transfer Orders and Inventory In Transit accounts. </div>
Assembly Items	Use raw materials (inventory items) to build assembly items in NetSuite.
Advanced Bill of Materials	<p>Check this box to enable the Advanced Bill of Materials feature.</p> <div>  Note: If you enable this feature, it can introduce changes to assembly, item revision, manufacturing routing, work order, assembly build, and assembly unbuild records. These changes can affect customization and integrations related to these records. For more information, see the help topic Advanced Bill of Materials. </div>
Work Orders	<p>Use assembly work orders to track the production of assembly items needed for stock or to fill orders. Work orders track the quantities of assemblies that need to be built and the quantities of components, or member items, needed to do so.</p> <div>  Note: Enabling this feature creates the system-generated Work Orders account. </div>
Serialized Inventory	<p>Track the purchase and sale of physical inventory items by assigning a serial number to each item.</p> <div>  Note: After you have enabled the Serialized Inventory feature and serialized items have been created, the Serialized Inventory feature may not be turned off. </div>
Lot Tracking	<p>Assign lot numbers to groups of inventory items for tracking purposes.</p> <div>  Note: After you have enabled the Lot Tracking feature and the lot tracking items have been created, the Lot Tracking feature may not be turned off. </div>
Bin Management	<p>Create bin records that identify the places you store inventory items within your warehouse and track on-hand quantities.</p> <p>Tracking bins helps warehouse employees know exactly where to go to find items they need when picking and fulfilling orders. Bins also specify exactly where items need to be put away in stock when you receive them.</p>
Advanced Bin/Numbered Inventory Management	Manage bins and use them with serial and lot numbered inventory.

Feature	Description
Inventory Status	Check this box to assign statuses to inventory and drive internal processes. You can also choose to make items unavailable for allocation to orders based on the associated inventory status. For more information, see the help topic Inventory Status .
Warehouse Management	<p>Extend the inbound, inventory, and outbound features by enabling processing of specific tasks on a mobile device, from receiving to shipping orders. Use wave transactions to release orders to the warehouse and generate item fulfillments. Waves also enable you to track picking and staging as pickers process released orders through their mobile device.</p> <div>  Note: Use of the Warehouse Management feature requires the following SuiteApps: SCM Mobile and Oracle NetSuite WMS. See the help topic Installing the NetSuite WMS SuiteApps. </div> <p>For more information, see the help topic NetSuite WMS Overview.</p>
Advanced Inventory Management	Enable NetSuite to anticipate demand for items and adjust suggested item ordering. Purchases of new stock are based on previous purchases and sales of items.
Landed Cost	Track the costs associated with purchasing items apart from the material cost. For example, landed cost can include duty fees, insurance, and shipping cost.
Supply Allocation	Enable the Supply Allocation feature to expand inventory commitment calculations to consider future inventory on supply orders in addition to current, on-hand inventory.
Sales Channel Allocation	Enable Sales Channel Allocation to track order-to-cash processes by sales channels.
Demand Planning	<p>Calculate future demand for items and use demand plans and supply plans to regulate inventory replenishment. You must enable the Advanced Inventory Management feature to use this feature.</p> <p>For more details, read the help topic Demand Planning.</p>
Distribution Resource Planning	Use the Distribution Resource Planning feature to plan and optimize inventory across locations and, for OneWorld accounts, subsidiaries. Items can be transferred between locations to meet supply needs within a preset distribution network.
Material Requirements Planning	Check the box to activate the Supply Planning feature.
Available to Promise	Check item availability based on outstanding transfer orders, purchase orders, work orders, and sales orders. Read the help topic Available to Promise .
Standard Costing	Identify costing opportunities by maintaining standard costs across cost categories and perform variance analysis. Read the help topic Standard Costing .
Group Average Costing	<p>Group average costing enables you to track one average cost for an item across multiple locations within a defined group.</p> <p>Group average costing is available only when you have enabled the Multi-Location Inventory feature. Group average costing is available for inventory items and assembly items.</p>
Intercompany Cross-Subsidiary Fulfillment	In NetSuite OneWorld, check this box to use the Intercompany Cross-Subsidiary Fulfillment feature to fulfil orders and receive returns across multiple subsidiaries. For more information, see the help topic Intercompany Cross-Subsidiary Fulfillment .
Manufacturing Work In Process	Allows WIP tracking with work order issue and completion against a work order. Read the help topic Manufacturing Work In Process (WIP) .

Feature	Description
Outsourced Manufacturing	Allow tracking of Outsourced Manufacturing process (you own some of the components inventory). Automation between Work Orders, Purchase Orders, Item Receipts and Assembly builds.)
Centralized Purchasing and Billing	Enable the Centralized Purchasing and Billing feature in your OneWorld account to receive orders and fulfill vendor returns across multiple subsidiaries.
Inventory Count	Support improved tracking of inventory and tighter control over assets. When this feature is enabled, you can enter regular periodic counts of on-hand item quantities to maintain inventory accuracy. Keeping an accurate item count can help reduce required safety stock, which lowers your overhead costs.
Manufacturing Routing and Work Center	Record quantity completions, resource costs, and overheads against a list of work order operations.
Supply Chain Control Tower	Check this box to simulate inventory supply and demand across your supply chain. For more information, see the help topic Supply Chain Control Tower .
Related SuiteApps	For more information, see the following.
<ul style="list-style-type: none"> Supply Chain Management Grid Order Management 	<ul style="list-style-type: none"> Supply Chain Management Reports Grid Order Management


Employee and Payroll Features





Users with the Administrator role can enable the following features on the **Employees** subtab of the Enable Features page.




Important: To use some of the listed features, you will need SuitePeople HR or SuitePeople U.S. Payroll provisioned on your account. For more information, see the help topic [SuitePeople Overview](#).

Feature	Description
HR Information System (SuitePeople HR)	
Compensation Tracking	Track basic wage and salary information for employees directly from the employee record.
Job Management	Create jobs with job descriptions and assign them to employees.
Job Requisitions	Create job requisitions for recruiting, associate requisitions with jobs, and track status through the hiring process.
Time-Off Management	Define and manage time-off plans according to company policies and assign them to employees based on location, department, class, or subsidiary.
Effective Dating	<p>Make changes to the employee record that are back-dated or future-dated to a specific date.</p> <p>View an employee's timeline to see key employee milestones and career changes in chronological order. For details, see the help topic Viewing an Employee's Timeline.</p>
Employee Change Requests	<p>Manage change approvals for the employee record.</p> <p>Managers can create employee change requests for their direct reports and have it go through an approval process in the Employee Center.</p>


Feature	Description
Termination Reason Tracking	Specify various termination details on the employee record. If the Workforce Analytics feature is also enabled, you can see a high level snapshot and synopsis of the employees who are leaving your company and the reasons why they are leaving on the Turnover Analysis page (Reports > Employees/HR).
Basic Government-Issued ID Tracking	Track a variety of government-issued identification information about your employees. You can enable either Basic or Advanced Government-Issued ID Tracking features, but not both.
Advanced Government-Issued ID Tracking	Create, edit, and delete your own custom types of government-issued identification to match your company's employee identification policies. You can enable either Basic or Advanced Government-Issued ID Tracking features, but not both.
Workforce Analytics	Measure and analyze company headcount, hiring, and turnover trends. To access the Turnover Analysis page, from Reports > Employees/HR the Termination Reason Tracking box must also be checked.
Employee Center Dashboard Publishing	Set up default dashboard portlets and layout for the Employee Center, including the addition of a manager dashboard, and publish defaults out to Employee Center users. Create news items that appear in Employee Center dashboards, and limit the audience of news items by location or by managers.
Performance Management (SuitePeople HR)	
Performance Management	Manage employee performance through goals and performance reviews. Use NetSuite data to track the progress of goals. Create performance reviews and assign them to individual employees or to groups of employees.
Kudos	Enable your employees to give social-based recognition to each other for accomplishments, achievements, and milestones.
Payroll (SuitePeople U.S. Payroll)	
Payroll	Pay your employees through SuitePeople U.S. Payroll. Calculate wages, deductions, and liabilities, and always have the latest tax data. This feature supports U.S. payroll only. <div> Note: Enabling this feature creates the system-generated Payroll Adjustments account.</div>
Service Printed Check and Stubs	Use your payroll service provider to print check stubs.
Paycheck Journal	Allow SOAP web services integrations with external payroll systems and building of custom payroll solutions with SuiteScript. This feature supports payroll solutions in any country, and for non-U.S. subsidiaries in OneWorld accounts.
Time & Expenses	
Expense Reports	Track employee expenses and turn them into bills.

Feature	Description
	 Note: Enabling this feature creates the system-generated Unapproved Expense Reports, Advances Paid, and Accounts Payable accounts.
Approval Routing	<p>Set up an approval hierarchy required to process expense reports and purchase requests.</p> <p>If this feature is not enabled, each expense report or purchase request is automatically routed to the employee's immediate supervisor and then to accounting.</p> <p>When this feature is enabled, after an employee enters an expense report or purchase request, additional processing of the transaction depends on the employee's expense limit or purchase limit, the employee's designated supervisor or approver, and the approval limit of the supervisor or approver.</p>
Per-Employee Billing Rates	<p>Check this box to create billing classes that set billable time rates when different employees charge different rates for the same service.</p> <p>If you associate a billing class with an employee and set rates for the billing class on a service item, the proper rate defaults to bill the customer on time tracking transactions.</p>
Billing Rate Cards	Define different rates for groups of billing classes.
Purchase Requests	Allow employees to enter purchase requests online.
Time Tracking	<p>Let employees record the hours they work.</p> <div>  Warning: The following capabilities are not available to NetSuite CRM+ users. Other users may be able to: <ul style="list-style-type: none"> Record billable hours and invoice customers for them. Record time for payroll items. </div>
Weekly Timesheets	<p>Track employee time with a customizable weekly timesheet.</p> <div>  Important: Time Tracking is required to use Weekly Timesheets. </div>
New Weekly Timesheets Interface	<p>Enable an updated user interface for your company's weekly timesheet. The updated interface includes column headings, fixed time entry columns, and a memo popup window for each entry.</p> <div>  Important: Time Tracking and Weekly Timesheets are required to use the New Weekly Timesheets Interface. </div>
Time Tracking for CRM	<p>Track time associated with cases, tasks, and events.</p> <p>When this option is enabled, a Time subtab is available on case, task, and event records.</p>
Commissions	
Employee Commissions	Create schedules that calculate commissions for sales representatives and their managers and pay commissions when they are earned.


Feature	Description
	 Note: Enabling this feature creates the system-generated Commissions Payable account.
Commission on Custom Fields	Create custom transaction column fields for use as the commission basis on commission schedules. Custom transaction column fields must be of currency type and can be based on any standard or custom currency amount field.
Permissions	
Global Permissions	Enable the assigning of permissions directly to employees as well as to roles. When this feature is enabled, a Global Permissions subtab is available on the Access tab of each employee record.
Advanced Employee Permissions	Check this box to use the additional employee permissions that come with this feature. These permissions give administrators more flexibility and control over which fields and sublists on the employee record are available to the role, based on the assigned employee permissions. These changes extend to most parts of NetSuite. Before enabling this feature, review Before Enabling the Advanced Employee Permissions Feature .

CRM and SFA Features

Users with the Administrator role can enable the following features on the **CRM** subtab of the Enable Features page.

Feature	Description
Basic Features	
Customer Relationship Management	Manage all your business relationships with lists of contacts, companies, events, and tasks.
Sales Force Automation	Use SFA to manage your sales process.
Customer Support and Service	Track, route, and manage customer support request.
Marketing Automation	<p>Create targeted marketing campaigns and customize your email communications.</p> <p>You must agree to the NetSuite Marketing Application Terms of Service before you can enable this feature. To agree to the terms, click Terms of Service. Read the terms, check the box at the bottom of the page and click Close Window.</p>
Sales	
Opportunities	<p>Create opportunity records you can use to track sales opportunities.</p> <div>  Note: Enabling this feature creates the system-generated Opportunities account. </div>
Lead Conversion	<p>Convert leads to prospects, contacts, opportunities, and tasks.</p> <p>Before you begin using the Lead Conversion feature, you should do the following:</p> <ul style="list-style-type: none"> Set the Default Lead Type preference to Individual at Setup > Company > General Preferences. Set the Preferred Lead Form preference to Standard Lead Form at Setup > Sales > Sales Preferences.

Feature	Description
Advanced Forecasting	Manage your sales forecast as three different amounts—worst case, most likely, and upside.
Team Selling	Assign sales teams to transactions and customers. Team Selling lets you calculate split commission for multiple sales representatives on a transaction.
Historical Metrics	Track historical pipeline and forecast KPIs for the company and for each representative. Historical forecast and pipeline amounts can be used for comparison KPIs.
Support	
Email Case Capture	Forward your support email to NetSuite. Then, when a message is received by NetSuite, a case is automatically created using information from the email message.
Automated Case Escalation	Set up rules and assignments that determine when a case is escalated
Issue Management	Use issue records to track problems with products that need resolution outside of the support team.
Knowledge Base	Create a searchable database for FAQs, support cases and more.
Help Desk	Track internal support cases submitted by employees separately from support cases submitted by customers.
Marketing	
Online Forms	Add forms to your existing Web store or site to provide new leads and customer service.
Mail Merge	Create and manage fax, email, letter, and PDF documents you create for those you do business with. You must agree to the NetSuite Marketing Application Terms of Service before you can enable this feature. To agree to the terms, click Terms of Service. Read the terms, check the box at the bottom of the page and click Close Window.
CRM Template Categories	Categorize your email and campaign templates. You can create new categories at Documents > Templates > Template Categories > New.
Capture Email Replies	Track all replies to email that was originally sent from NetSuite. For example, if a support representative responds to a case record by email and the customer replies to the email, the response is automatically saved on the case record as well.
Subscription Categories	Categorize campaigns into different subscriptions. This allows message recipients to subscribe to some kinds of campaigns and unsubscribe from others.
Upsell Manager	Use the search capabilities to match customers with items they are likely to buy.
Sales Campaigns	Sales campaigns allow sales representatives to send email campaigns to their customers and track their responses.
Intelligent Recommendations	This feature uses artificial intelligence algorithms to calculate and display items a shopper may be interested in buying.
Partners	

Feature	Description
Partner Relationship Management	<p>Use records to manage your partners. Track the sales your partners bring in by associating partners with promotion codes or including partner codes in links to online forms.</p> <p>You must enable this feature to enable the Partner Access and Advanced Partner Access features.</p>
Partner Commissions/Royalties	<p>Create schedules that calculate commission for partners and pay commission when it is earned.</p> <div>  Note: Enabling this feature creates the system-generated Commissions Payable account. </div>
Multi-Partner Management	Associate more than one partner with each sales transaction.


Analytics Features

Users with the Administrator role can enable the following features on the **Analytics** subtab of the Enable Features page.

Feature	Description
Dashboards	
KPI Scorecards	Add the ability to display a portlet on your dashboard that shows the results of multiple KPIs for multiple date or period ranges. For more information, see the help topic KPI Scorecards
Connectivity	
SuiteAnalytics Connect	Enable the SuiteAnalytics Connect feature to access and query your NetSuite data using SQL through database standards such as ODBC, JDBC, and ADO.NET. For more information, see the help topic SuiteAnalytics Connect .
NetSuite Analytics Warehouse	Configure and transfer data to the NetSuite Analytics Warehouse. You can use any data transferred with Oracle Analytics for applications.
Third-party Analytics Integration	
Export to Tableau® Workbook	Enable users to export saved search and report results as Tableau® workbooks. For more information, see the help topic Exporting Reports, Searches, and Lists .
SuiteAnalytics Workbook	
SuiteAnalytics Workbook	Enable SuiteAnalytics Workbook in your account. After it is enabled, click the Analytics tab in the NetSuite navigation menu to begin using the tool. For more information, see the help topic SuiteAnalytics Workbook Overview .
Cached Data in Datasets	Select this option to enable using cached data to load your datasets.
Intelligent Suite	
Supply Chain Predicted Risks	Receive warnings about potential purchase order risks using the predicted risks portlet with the supply chain control tower.

Commerce Features

Users with the Administrator role can enable the following features on the **Web Presence** subtab of the Enable Features page.

Feature	Description
Web Site	
Web Site	Enable initial website functionality, for example, creation of domains. Also enable activation of other Commerce features, such as SuiteCommerce and SuiteCommerce Advanced.
Site Builder (Website)	Create a Site Builder website to give customers information about your company and enable them to browse your product catalog. For more information, see the help topic Site Builder Overview .
Site Builder (Web Store)	Add web store capabilities, such as shopping cart and checkout, to Site Builder websites. For more information, see the help topic Site Builder Overview .
Advanced Site Customization	Use HTML templates to customize the appearance of your website.
Advanced Web Reports	Gain access to detailed page hits and hosted page reports, customer page reports, keyword, referrer, and new visitor reports.
Advanced Web Search	Use an advanced search form in your website.
Descriptive URLs	<p>Allow tab, category and item pages of your website to use descriptive URL components of your choosing for search engine optimization.</p> <div>  Note: You can only enable the Descriptive URLs feature if you have set up a domain. Go to Commerce > Websites > Website List, click Edit next to a website, then click Domains. </div>
URL Component Aliases	Manage URL components used for facets in your SuiteCommerce or SuiteCommerce Advanced website. Also, track multiple URL component aliases on item and category records. For more information, read the help topic Enable URL Components Alias .
Customizable Checkout Subdomains	Create a customizable checkout subdomain for your site.
SuiteCommerce	Create shopping sites that include the full shopping, checkout, and My Account experiences for B2C and B2B businesses. Use themes and extensions to create a unique stylistic look or provide additional functionality for any domains associated with your site. For more information, see the help topic Store Front .
SuiteCommerce Advanced	Create shopping sites that have all of the functionality of a SuiteCommerce implementation but also have complete control for advanced customization using configurable templates (HTML/CSS/JS), product search API (REST/JSON), and cart and checkout services. For more information, see the help topic Store Front .
SuiteCommerce In-Store	Operate a web-based point-of-sale application that has an intuitive user interface designed for touch tablet screens. For more information, see the help topic SuiteCommerce InStore .
Site Management Tools	When this feature is enabled, the Site Management Tools administrator interface is enabled on your SuiteCommerce or SuiteCommerce Advanced site. This feature lets you manage content, add landing pages, and enhance existing pages on your SCA site.

Feature	Description
	To enable this feature, either the SuiteCommerce or SuiteCommerce Advanced feature must also be enabled. For more information on Site Management Tools, see the help topic Site Management Tools Overview .
Asynchronous afterSubmit Sales Order Processing	<p>When this feature is enabled, afterSubmit user events are triggered asynchronously when a sales order is created during web store checkout.</p> <p>When an afterSubmit user event runs in asynchronous mode, the next page is loaded during the period of time the afterSubmit user event is still processing. Web store Sales Orders process afterSubmit scripts in the background.</p> <p>This is a global setting. This setting causes all afterSubmit user events and workflows triggered by web store checkout to run asynchronously.</p>
Asynchronous afterSubmit Customer Processing	Check this box if you want afterSubmit user events to be triggered asynchronously when a sales order is created during web store checkout.
Web Site Duplicate Email Management	Check this box if you want to prevent shoppers from creating new customer accounts when they have already signed up for an account on your website.
Commerce Categories	Enable commerce categories. Commerce categories let you create a hierarchical structure of categories and subcategories for organizing your items. For more information on commerce categories, see the help topic Commerce Categories .
Commerce Search Analytics	When this feature is enabled, Commerce Search Analytics generates two standard workbooks to show the top searches in your website and top searches that returned zero items in the search results. For more information, see the help topic Search Analytics .
Publishing	
Host HTML Files	<p>Upload your HTML website to your NetSuite File Cabinet. You can then publish your website as a tab as your Home page or in conjunction with the NetSuite Shopping cart and Checkout tabs.</p> <p>Use NetSuite smart tags in the HTML of your website to pull information directly from your account to display in your website.</p>
External Catalog Site (WSDK)	Use the shopping cart and checkout pages with your Web catalog or Web store. If you check this, you must also check Allow Online Ordering, Use Sales Orders, Operate a Web Site and Operate a Web Store.
Document Publishing	<p>Publish links to your Microsoft® Word, PowerPoint, and other document files in your File Cabinet to your intranet or website. When you click this link from your site, the document opens in a separate window for viewing.</p> <p>Enabling Document Publishing adds a Publishing subtab to the records of all files in your File Cabinet.</p> <p>If you do not check this box, you can only publish images from your File Cabinet to your intranet or website.</p>
Intranet	Create an internal website to publish information for your company.
Access	
Customer Access	Give customers online access to their invoice and payment information.
Online Ordering	Give customers limited access to your account so they can place orders online. If you check this, you must also check Allow Customer Access.
Vendor Access	Give vendors online access to their transaction history and purchase orders.


Feature	Description
Partner Access	Give partners online access to view reports, promotions codes and their partner records.
Advanced Partner Access	Assign an Advanced Partner Center role to partners that gives access to more records and transactions than the Standard Partner Center.
SuiteCommerce Real User Monitoring	
SuiteCommerce Real User Monitoring	Enable real user monitoring data collection.

SuiteCloud Features

Users with the Administrator role can enable the following features on the **SuiteCloud** subtab of the Enable Features page.

Feature	Description
SuiteBuilder	
Record Customization (Beta)	Use Record Customization (Beta) to view and maintain all business record types in NetSuite. Create new fields and sublists, maintain mandatory settings, view and maintain roles and user access, and so on.
Item Options	Create and use item-specific options on purchase and sales transactions.
Custom Records	Use custom records to create a database of information specific to your business. This feature is also required for center and tab customization.
Advanced PDF/HTML Templates	<p>Enable powerful, template-based rendering of selected transactions.</p> <p>The Advanced PDF/HTML Templates feature provides a template-based model for print customization of transaction and entry forms.</p> <p>These HTML-based templates provide greatly expanded customization capabilities over the previously supported transaction form layouts, now known as basic layouts.</p>
Remove Personal Information	Remove personal information from NetSuite fields, records, and audit logs to comply with General Data Protection Regulations (GDPR) and keep personal information private.
SuiteScript	
Client SuiteScript	Add advanced functionality to your account with industry-standard JavaScript.
Server SuiteScript	Use server-side scripting to customize your business workflows and processes.
Workbook API	Create and manage datasets and workbooks programmatically as part of SuiteAnalytics Workbook.
SuiteScript Server Pages	Support the creation of SSP applications to use website and other customizations. You can utilize both SuiteScript 1.0 and SuiteScript 2.0 in web applications.
SuiteFlow	
SuiteFlow	Enable automation of business processes without custom code.
SuiteGL	
Custom GL Lines	Support plug-ins that allow for GL impact customization.

Feature	Description
Custom Transactions	Allow creation of custom transaction types for your business.
Custom Segments	Allow creation of custom segments for your business.
SuiteBundler	
Create Bundles with SuiteBundler	Check this box to enable the packaging together of groups of customization objects so they can be shared between NetSuite accounts
SuiteCloud Development Framework	
Create SuiteApps with SDF	Enable the packaging together of groups of customization objects so they can be shared between NetSuite accounts.
SuiteTalk (Web Services)	
SOAP Web Services	Enable the NetSuite SOAP web services API. This feature lets you integrate external systems and to migrate data using a standards-based interface.
REST Web Services	Enable the NetSuite REST web services API. This feature lets you integrate external systems and to migrate data using a standards-based interface.
REST Record Service (Beta)	Enable the feature to use a standard REST-based programming interface to work with the REST record service beta functionality. Using the REST record service, you can perform CRUD operations on beta records, filter record collections, interact with record metadata, and perform record actions and transformations.
Manage Authentication	
SuiteSignOn	Enable single sign-on integration in your account. This feature permits you to bypass the authentication step when accessing an integrated third-party application from the NetSuite user interface. For more information, see the help topic Outbound Single Sign-on (SuiteSignOn) .
OpenID Connect (OIDC) Single Sign-on	Enable single sign-on access from external applications to NetSuite. User credentials and policies are managed by an OIDC provider (OP). This feature allows users to access NetSuite from their OP, without logging in to NetSuite separately. For more information, see the help topic OpenID Connect (OIDC) Single Sign-on
SAML Single Sign-on	Enable single sign-on access from external applications to NetSuite, using authentication from a third-party identity provider compliant with SAML v2.0. For more information, see the help topic SAML Single Sign-on .
Token-based Authentication	Enable NetSuite's token-based authentication feature. For more information, see the help topic Token-based Authentication (TBA) . Note: The features Client SuiteScript and Server SuiteScript must also be enabled to use token-based authentication with RESTlets.
OAuth 2.0	Enable OAuth 2.0 authentication feature. For more information, see the help topic OAuth 2.0 . Note: The features Client SuiteScript and Server SuiteScript must also be enabled to use token-based authentication with RESTlets.
NetSuite as OIDC Provider	Enable the NetSuite as OIDC Provider feature. For more information, see the help topic NetSuite as OIDC Provider .

Feature	Description
Disable HMAC-SHA1 for Token-based Authentication	Disable the HMAC-SHA1 signature method for TBA in your account. You can revert it any time. For more information, see the help topic Create Your Own Test Window for HMAC-SHA1 in TBA Integrations .
Integration Add-ons	
Telephony Integration	Dial using any TAPI-enabled telephone hardware from any phone number field in the application.
Related SuiteApps	For more information, see the help topic NetSuite for Outlook .
<ul style="list-style-type: none"> Outlook Integration 	
SuiteCloud Development Framework	
SuiteCloud Development Framework	<p>Enable SuiteCloud Development Framework (SDF).</p> <p>For more information, see the help topic SuiteCloud Development Framework.</p>
Copy to Account	<p>Copy customizations from other accounts into your account.</p> <p>For more information, see the help topic Copy to Account.</p>
<div>  Note: The features SuiteCloud Framework(SDF) and SuiteTalk (Web Services) must also be enabled to use Copy to Account. </div>	
SuiteApp Control Center	<p>Enable distribution of SDF SuiteApps to customers.</p> <p>For more information, see the help topic SuiteApp Control Center.</p>

NetSuite Company Settings

For information about the various company settings you need to define to set up your NetSuite account, see the following:

- [Configuring Company Information](#)
- [Set Company Preferences](#)
- [Configuring Multiple Languages](#)
- [Enabling and Creating IP Address Rules](#)
- [Renaming Records and Transactions](#)
- [Set Auto-Generated Numbers](#)
- [Setting Up States, Provinces, and Counties](#)
- [Supported Countries](#)
- [Setting Printing and Fax Preferences](#)
- [Setting Email Preferences](#)
- [Setting Up Duplicate Detection](#)
- [Using System Alerts](#)
- [Searching Bulk Processing Jobs](#)
- [Configuring Administrative Notifications](#)
- [Managing Plug-ins](#)
- [NetSuite Service Tiers](#)
- [SuiteCloud Plus Settings](#)

If you are using NetSuite CRM+, see the following:

- [Setting Up Transactions for NetSuite CRM+](#)
- [The Setup Page for NetSuite CRM+ Users](#)
- [Using Telephony Integration](#)

Configuring Company Information

The Company Information page is where users with the Administrator role, or with the Set Up Company permission, can enter basic identifying information for an account. See the following topics for more information:

- [Enter Basic Company Information](#)
- [Enter Company Address Information](#)
- [View Company URLs for Services in This NetSuite Account](#)

Setting up company information requires View permission, and changes made to company information are captured in system notes. For more information, see the help topic [Searching System Notes](#).



Important: If you plan to set up a OneWorld account with multiple subsidiaries, the data that you enter on the Company Information page provide the values that NetSuite uses to create your root (top-level) subsidiary. After defining your root subsidiary, you can create additional child subsidiaries at lower levels in an organizational hierarchy. For more information, see the help topic [Set up NetSuite OneWorld](#).




Note: You can add custom fields and user event scripts to the Company record in both single instance and OneWorld accounts. Customizing the company record enables you to add fields and business logic that are specific to the country or region in which your business operates. Go to Customization > Lists, Records, & Fields > Other Custom Fields. In single instance accounts, select Company as the Record Type. In OneWorld accounts, select Subsidiary as the Record Type. Complete the fields as required and then save the custom field. For more information, see the help topic [Creating a Custom Field](#).

Enter Basic Company Information

Enter the information about your company to be used for this NetSuite account.

To enter basic company information:


1. Go to Setup > Company > Company Information.
2. On the Set Up Company page, enter your company information:
 - **Company Name** – Enter your company's name in the format that you want it to appear in on all forms except checks.
 - **Legal Name** – Enter the legal name of your company.
 - **Taxonomy Reference** – Select the taxonomy reference used by your company. Taxonomy reference is specifically used for Portugal Standard Audit File for Tax (SAF-T) which refers to the new classification for the natural accounts of the SNC. This identifies the use of the relative tax reporting type on the legal entity tax registration.
 - **E-Document Country for Free Use** – Select the country where you want to send e-documents to. If the Electronic Invoicing SuiteApp is installed on your account, you can use this SuiteApp to send e-documents to one country for free. To send e-documents to multiple countries, you must purchase a license for Electronic Invoicing. After you send an e-document, you cannot edit this field.
 - **E-Document Sender** – Select the employee whose name and email address you want to appear as the sender of e-documents sent by your company. If you do not select an employee, the name and email address of the user who sent the e-document will be shown as the sender.
 - **E-Document Email Customization Template** – Select an E-Document Email Customization Template to use. This template will add the predefined text to the email subject and body when the Default option is selected in the E-DOCUMENT SENDING METHOD PLUGIN IMPLEMENTATION field. For more information, see the help topic [E-Document Email Custom Templates](#).
 - **Recipient of E-Document Notifications** – Enter the email address of the recipient of email notifications when bulk processes have finished or encountered errors. If you do not enter an email address, the notifications will be sent to account administrators.
 - **Ship to Attention** – Enter the name of the designated contact person for your company as recorded on your UPS account.

 **Note:** This field is required for UPS Integration.

- **Company Logo (Forms)** – Select your company logo to show on printed and emailed transaction forms.

To upload a logo, go to Documents > Files > Images > New. Be sure to check the **Available Without Login** box. Logo files must be in GIF or JPG format, and the file size should be less than 10 KB.

If you have uploaded a logo, but do not see it in the list, make sure that the correct folder is selected in the Company Logo Folder list on the Setup > Company > General Preferences page.

 **Note:** To print your logo on standard forms, the logo must be no more than 200 pixels wide and 60 pixels high. Image resolution may change how your logo appears on a standard form. If your logo doesn't display correctly, change the image resolution.

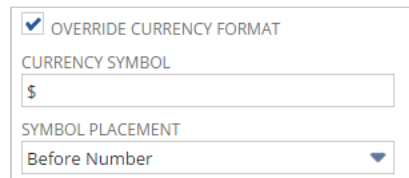
If your image resolution is too high, the page load time may increase.

- **Company Logo (Pages)** – Select a company logo to show on the pages of your Customer, Partner, and Vendor Centers.
- **Display Logo Internally** – Check this box to show the logo selected in the Company Logo (Pages) field on all pages of your NetSuite account next to the Oracle NetSuite logo.
- **Web Site** – Enter the URL of your website.
- **County/State/Province** – Set up counties, states, and provinces. For information, see [Setting Up States, Provinces, and Counties](#).
- **Country** – This field shows the country set for the company. For information, see [Supported Countries](#).
- **Return Email Address** – Enter the return email address used to send email forms and reports from NetSuite.
- **Fax** – Enter an optional fax number for your company.
- **Currency** – (Available when the Multiple Currencies feature **is** enabled.) Choose a base currency for the company. Choose carefully because after transactions have been entered with the selected base currency, you can no longer edit this field.

To add a currency, go to Lists > Accounting > Currencies > New. For information about working with multiple currencies, see the help topic [Currency Management](#). You can format the currency on the currency record.
- **Currency fields** – (Available when the Multiple Currencies feature **is not** enabled.) Use these fields to select a currency and format how currency amounts appear on reports and printed transactions.
 - **Currency Locale** – Select a country to determine the currency for your account. The currency locale specifies the symbol, symbol placement, and thousands separator for currency values.
 - **Name** – Enter a unique name for the currency.
 - **ISO Code** – Enter the three-letter International Standards Organization (ISO) code for the currency.
 - **Default Exchange Rate** – Enter an exchange rate for this currency against the base currency of the company, or if you use OneWorld, for this currency against the base currency of the root parent subsidiary.
 - **Automatic Update** – Check the box to update currency exchange rates daily.

- **Currency Precision** – Displays the precision of the currency, which designates the number of digits to the right of the decimal point used in currency transaction. Precision can be zero or two.
- **Inactive** – Check the box to make the currency record inactive, or clear it to make the record active.
- **Format Sample** – This field displays the default currency format for the currency. The currency format is the combination of the symbol, thousands separator, and level of decimal precision to display amounts on transactions.
- **Override Currency Format** – Check this box to override the default currency format for this currency. If you check the Override Currency Format box, the Currency Local field disappears, and the Currency Symbol and Symbol Placement (Before Number or After Number) fields appear.

Customized currency formats apply to currency fields displayed on the screen including viewing forms, editing and creating new forms, list pages, search results, and printed documents. Customized currency formats are **not** reflected in reports or CSV import and export results.



- **Symbol** – Enter the currency symbol and text that you want to use for this currency. Include spaces if you want to separate the symbol from the currency value. For example, \$ USD or \$USD.
- **Symbol Placement** – Select to place the currency symbol before or after the number.
The Format Sample field shows how currency amounts will display using the customized currency format.
See the help topic [Customizing Currency Formats](#) for more information about currency formats.
- **National business identification number** – (This number varies from country to country. It is usually assigned by a national tax agency.)
 - **Australia - ABN**: Enter your ABN (Australian Business Number), which is required if your company is required to be registered for the goods and services tax (GST). If you do not have an ABN, and you need one, please visit the Australian Taxation Office website at <http://www.ato.gov.au>.
 - **Canada - Business Number**: Enter the 15-digit registration number that identifies your company to the Canada Revenue Agency (CRA). If you do not have a Business Number, visit the CRA website at <http://www.cra-arc.gc.ca/menu-eng.html>.
 - **UK - VAT Registration No.:** Enter your company's VAT registration number. If you do not have a VAT registration number, please visit the HMRC website at <http://www.hmrc.gov.uk>.

- **US - Employer Identification Number:** Enter your company's U.S. federal employer identification number (EIN). If you do not have an EIN, visit the IRS website at <http://www.irs.treas.gov>.
- **ACN (Australia only):** Enter your ACN (Australian Company Number). For information about the ACN, see <http://www.asic.gov.au>.
- **SSN or TIN (Social Security Number, Tax ID Number):** If your business is a proprietorship or you do not have an EIN, enter your SSN or TIN.
- If your account has the EU One Stop Shop feature enabled:
 - **OSS Applies:** Check this box if the One Stop Shop (OSS) VAT scheme applies to this company.
 - **OSS Nexus:** Select the EU member state (tax nexus) where you are registered for OSS VAT returns.
- **UPS 3rd Party Billing Account Number:** Available when Third Party Billing is enabled on the Preferences subtab at Setup > Accounting > Shipping. Enter the UPS account number that should be used by default when Third Party Billing is selected on a UPS-integrated item

fulfillment. This can be your company's primary account number that should be used regardless of location.


You can override this account number on item fulfillments to enter another 3rd party account.

To set a default for customers when billing recipients, enter the customer's UPS or FedEx account number on the customer record.

- **FedEx 3rd Party Billing Account Number:** Available when Third Party Billing is enabled on the Preferences subtab at Setup > Accounting > Shipping. Enter the FedEx account number that should be used by default when Bill Third Party is selected on FedEx-integrated item fulfillments.
- **3rd Party Billing Zip:** Available when Third Party Billing is enabled on the Preferences subtab at Setup > Accounting > Shipping. Enter the zip code or postal code associated with the 3rd party accounts.
- **3rd Party Billing Country:** Available when Third Party Billing is enabled on the Preferences subtab at Setup > Accounting > Shipping. Select the country associated with the 3rd party account numbers.
- **First Fiscal Month:** Select the first month of your fiscal year.
- **Time Zone:** Select the time zone where your company is located. Individuals can set their personal time zones at Home > Set Preferences.
- **Allowed IP Addresses:** Available when the IP Address Rules feature is enabled. Enter the IP addresses from which you want to allow access to your NetSuite account. For more information, see the help topic [Enabling and Creating IP Address Rules](#).
- **Account ID:** This field shows the NetSuite account ID for your company, which is required when you submit a support case.
- **Data Center:** This field shows the data center where your account resides.
- Check the **GL Impact Locking** box to permit NetSuite to automatically generate journal entries (copy and adjustment) when changes are made to a transaction that posted to the general ledger.

When this box is checked, transactions that post to the general ledger display the GL Impact subtab. This subtab records the general ledger impact of this transaction and any modifications.


You can check or clear this box as needed.

 **Note:** This option is visible in implementations that are not OneWorld and only when the GL Audit Numbering feature is enabled. For more information, see the help topics [GL Audit Numbering](#) and [GL Impact Locking](#).

3. Set up address information.

Enter Company Address Information

You can define separate shipping and return addresses, in addition to the main address defined for your company. If you do not define a separate shipping or return address, it defaults to be the same as the main address. You do not need to define a billing address at the company level. Billing addresses can be defined on transactions as needed.

 **Note:** The following steps list the address fields included in the default address form. The address form shown may vary according to the country where the company is located, and depends on the custom address forms defined in your account. For more information, see the help topic [Customizing Address Forms](#).

To set up address information:

1. Click the **Addresses** subtab.
2. You can enter address information for your main business, shipping (used for receiving shipments), or receiving returns (used on return forms). To enter address information, click **Edit** next to the **Address** field and complete the following:
 - **Country:** Select your company's country.
 - **Attention:** Enter the person at this address who should be notified of receipt of documents or goods.
 - **Addressee:** Enter the company name that will appear on the shipping label.
 - **Phone:** Enter your company's phone number.
 - **Address 1:** Enter your company's address in the format that you want it to appear in on all forms except checks.
 - **Address 2:** Enter an optional second address line in the format that you want it to appear on all forms except checks.
 - **City** – Enter your company's city in the format that you want it to appear in on all forms except checks.
 - **State:** Enter your company's state in the format that you want it to appear in on all forms except checks.
 - **Zip:** Enter your company's postal code in the format that you want it to appear in on all forms except checks.
 - **Address:** The address information that you enter in the above fields will automatically appear in this field. Here, you can see how your address will appear on all forms except checks. You can check the **Override** box to edit this formatting.
 - **Override:** Check the box to disable the free-form address text field. When this field is disabled, text entered in the other address fields does not display in the Address text field.
3. To view the address location in Google Maps, click **Map** next to the **Address** field.
4. Click **Save**.

To update this information at any time, return to Setup > Company > Company Information, make changes, and save your changes.

View Company URLs for Services in This NetSuite Account

You can view the URLs for all NetSuite services for this account on the Company URLs subtab. The information shown on this subtab is not editable, it is provided for your convenience. Developers and other users in your account may need to know the account-specific URLs for a particular service. The URLs are unique to each account, so the URLs for your sandbox accounts and your Release Preview account are different from the URLs for your production account. Log in to a specific account to view the unique URLs for that account.

For more information about the **Company URLs** subtab, see the help topic [URLs for Account-Specific Domains](#).

To view the URLs for services in this account:

1. Click the **Company URLs** subtab to view the URLs following services:
 - **Customer Center Login**
 - **NetSuite UI**
 - **SuiteTalk (SOAP and REST) web services**
 - **RESTlets**

- **External Forms**
 - **External Catalog Site (WSDK)**
 - **SuiteAnalytics Connect**
2. Provide these URLs as necessary to users who do not have access to view the Company Information page.

Set Company Preferences

The General Preferences page is where users with the Administrator role, or with the Set Up Company permission, can set company preferences for how information is input and processed in NetSuite.

This page is available at Setup > Company > General Preferences. These preferences apply to all users in the account.

Some of the preferences available here also can be set at the subsidiary (OneWorld only), role, or individual user level. See [NetSuite Preference Levels Overview](#). You can prohibit these types of overrides on the Overriding Preferences subtab of this page. See [Overriding Company Preferences](#).

For information about the General Preferences page, see:

- [Setting General Account Preferences](#)
- [Overriding Company Preferences](#)
- [NetSuite Password Requirements](#)
- [Configuring Multiple Languages](#)
- [Center Logout Pages](#)
- [Custom Preferences](#)
- [Accounting Contexts](#)
- [Date Formats](#)
- [Number Formats](#)



Important: You can click **Audit Trail** in this page header to review a list of changes to general company preferences, including the users who made the changes, dates of the changes, and preference values before and after changes. This list includes preferences that have been reset through scripting. See the help topic [Auditing Account Preferences](#).

Other company preferences pages are available from the Setup > Accounting, Setup > Sales, and Setup > Marketing menus.

NetSuite Preference Levels Overview

NetSuite offers a variety of preferences that you can set to tailor NetSuite accounts to your individual needs. These preferences are available at the levels shown in the following table:

Preference Type	Applies To	Set By	Set On	For details, see
User	Current user only	User	Home > Set Preferences page	Setting Personal Preferences
Role	Users logging in with the role	Account Administrator	Role record, Preferences subtab	Setting Role-Based Preferences
Subsidiary (OneWorld only)	Users assigned to the subsidiary	Account Administrator	Subsidiary record, Preferences subtab	Editing Subsidiary Records

Preference Type	Applies To	Set By	Set On	For details, see
Company	All users in the account	Account Administrator	Setup > Company > Preferences > General Preferences (Administrator) page	Set Company Preferences


- The preferences that you can set at each level vary according to the edition of NetSuite you are using and the features enabled in your account.
- The same preferences are available at the user and role levels. Some of these preferences are also available at the company and subsidiary levels.
- If a company-level preference is set not to allow overrides, you cannot set this preference at the subsidiary, role, or user levels. See [Overriding Company Preferences](#).
- If the same preference is set at multiple levels, these conflicting preferences are processed in the following order:
 - An individual user preference takes precedence over role, subsidiary, and company preferences.
 - A role-based preference takes precedence over subsidiary and company preferences.
 - A subsidiary-based preference takes precedence over a company preference.
 - A company preference takes precedence over the system default.

Setting General Account Preferences

To set up general preferences:



1. Go to Setup > Company > General Preferences.
2. Enter values and select text in preferences fields.
3. Click **Save** when done.




To update or make changes to these preferences at any time, return to Setup > Company > General Preferences, make changes, and click **Save**.




 **Note:** Changes made to general preferences are captured in system notes. For more information, see the help topic [Searching System Notes](#).

General Preferences



Preference	Setting
Date Format	<p>Select the format for abbreviated dates.</p> <p>By default, users can override this preference at Home > Set Preferences. To prevent this, clear the Allow Overrides box for this preference on the Overriding Preferences subtab.</p> <p>For more information, see Date Formats.</p>
Long Date Format	<p>Select the format for formal dates.</p> <p>By default, users can override this preference at Home > Set Preferences. To prevent this, clear the Allow Overrides box for this preference on the Overriding Preferences subtab.</p> <p>For more information, see Date Formats.</p>
Time Format	Select the format for time entries to display online and in printed forms.


Preference	Setting
	By default, users can override this preference at Home > Set Preferences. To prevent this, clear the Allow Overrides box for this preference on the Overriding Preferences subtab.
Number Format	Select the format to display numbers entered on transaction forms and entity forms online. Users can override this preference at Home > Set Preferences. For more information, see Number Formats .
Negative Number Format	Select the format to display negative numbers entered on transaction forms and entity forms online. User can override this preference at Home > Set Preferences. For more information, see Number Formats .
Phone Number Format	<p>Select a default phone number format. When users enter phone numbers, they automatically change to this format. The format that you specify here is used on all online forms.</p> <p>By default, users can override this preference at Home > Set Preferences. To prevent this, clear the Allow Overrides box for this preference on the Overriding Preferences subtab.</p>
Use Phone Numbers Without the +1 International Country Calling Code	Check this box to display phone numbers without the +1 area code. This option can be selected for the purposes of improved backward compatibility.
First Day of Week	<p>Select the day to begin each calendar week.</p> <div>  Note: If you use Weekly Timesheets, updating the selected first day of the week will apply to any new timesheets. Existing timesheets will not be changed. This may result in shorter timesheets to accommodate the change. </div>
Search Sorting	<p>Select the alphabetical order to use when displaying search results. Select Language Specific to use the alphabetical order specific to your NetSuite language settings. Select English (U.S.) to use the U.S. English alphabetical order.</p> <p>By default, users can override this preference at Home > Set Preferences. To prevent overrides, clear the Allow Override box for this preference on the Overriding Preferences subtab.</p>
Add Primary Contact to Bill To Address	Check this box to add the primary contact for each entity to its Bill To address.
Use Last Name First for Employees	Check this box to list employees by last name first for tax and payroll purposes.
Use Last Name First for Entities	<p>Check this box to list all entities (including contacts, customers, partners, and vendors) by last name first for tax and payroll purposes.</p> <div>  Note: This preference applies to entity records defined as Individual (not Company) entered after the preference is set. You will need to do a mass update to set this preference for preexisting entity records. </div>
Pre-Populate Contact Address	Check this box to automatically fill address fields with customer addresses for contacts created from customer record.
Show Employees as Contacts	Check this box to create a contact record for each employee record.



Preference	Setting
	 Warning: Be aware that enabling this preference can make changes to employee records visible in the audit trail to users with access to contact records. Do not enable this preference if you do not want users with access to contact records to be able to view employee record changes.
Show Display Name with Item Codes	Check this box to display both item name and display code when an item is selected on transactions and records.
Password Policy	<p>Built-in password policies support three levels of password validation for NetSuite users. These policies enforce the following requirements for password length and content:</p> <ul style="list-style-type: none"> Strong: minimum length of 10 characters, at least 3 of these four character types — uppercase letters, lowercase letters, numbers, non-alphanumeric ASCII characters Medium: minimum length of 8 characters, at least 2 of these four character types — uppercase letters, lowercase letters, numbers, non-alphanumeric ASCII characters Weak (You should not choose a weak policy.): minimum length of 6 characters <div>  Note: The selected password policy determines the minimum acceptable value for the Minimum Password Length field. The policy does not affect the Password Expiration in Days field value. </div> <p>All NetSuite accounts are set to a Strong policy by default. For more information, see the help topic NetSuite Password Requirements.</p>
Minimum Password Length	<p>The Minimum Password Length is the minimum number of characters required for user passwords. The default value for this field is determined by the selected password policy. Because the default password policy is Strong, the default Minimum Password Length is 10 characters.</p> <p>You can, if wanted, make the minimum password length value longer than the minimum required by the policy. You cannot make this value shorter.</p> <p>If any users in your account have the View Unencrypted Credit Cards permission, a Strong policy is required. In these cases, you cannot change the default Password Policy value.</p> <p>Passwords for new users logging in with the Customer Center role, and for website shoppers, require a minimum of 6 characters. Passwords for Customer Center users and website shoppers who existed before that release were not affected by this change.</p> <p>For more information, see the help topic NetSuite Password Requirements.</p>
Password Expiration in Days	<p>Enter the number of days that users can continue to log in to your NetSuite account before they are prompted to change their password.</p> <div>  Note: As of December 10, 2015, valid values are 1-365. Values entered before that date are not affected by this limit. However, if any data on the General Preferences page is changed, only valid values within this range will be accepted for the Password Expiration in Days field. For accounts provisioned after this date, the value for Password Expiration in Days is set to 180 days by default. </div> <p>Days are calculated from the date that each user last changed their password, not from the date that the company preference is changed. Dates of the previous password change and current password expiration are displayed in the user's My login audit portal.</p>



Preference	Setting
	<div>  Important: You should set a value for Password Expiration in Days to ensure that the Password Policy is applied to existing users. </div> <ul style="list-style-type: none"> Employees using a role with the View Unencrypted Credit Card permission are prompted to update passwords at least every 90 days, unless the value set here is less than 90 days. You can enable the Require Password Change on Next Login option on employee records; or you can use CSV import to update this option on many employee records at one time. <div>  Note: The value set in the Password Expiration in Days field is not applied to Customer Center users' passwords. </div> <p>For more information, see the help topic NetSuite Password Requirements.</p>
User Registration Link Expiration In Hours	<p>The number of hours before the URL for new user access provisioning will expire. The default value is 24 hours. Valid values range from one (1) hour to 72 hours.</p> <p>The default value, 24 hours, is hard-coded in the in the following standard user access email templates:</p> <ul style="list-style-type: none"> Customer Center Access Email Partner Center Access Email User Access Email <p>If you change the default value in General Preferences, you must also update the value in the user access email templates.</p>
Idle Session Timeout In Minutes	<p>The number of minutes that a user's NetSuite user interface session can be idle before locking the user's session. The default value is 180 minutes (3 hours).</p> <p>Valid values range from 15 minutes to 720 minutes (12 hours).</p>
Internal Web Site	<p>Select the site from which tabs can be published to the internal centers.</p>
Allow Free-Form States in Addresses	<p>Check this box to allow the entry of free-form text in State/Province fields.</p> <ul style="list-style-type: none"> When this preference is enabled, the State/Province field is a free-form text field. You can type any text into the field, and it is not converted to standard state or province identifiers. The text you enter is stored on the record or transaction. When this preference is disabled, the State/Province field is a list where you can choose from standard U.S. States and Canadian Provinces. Any text you enter is converted to standard state or province identifiers. <div>  Note: If you enable this preference, you must enter the two-letter abbreviation for the state or province for the system to properly determine the transaction nexus. If you use the full name of the state or province, the system will not be able to determine the correct transaction nexus. </div> <p>This preference affects the State/Province field on entity records, location records and transactions. It also affects the search fields on entity, location, and transaction searches.</p> <p>This preference does not affect Web store address entries or UPS and FedEx shipping. UPS and FedEx look exclusively at the Zip Code and Country fields to determine shipping rates.</p>
Use State Abbreviations in Addresses	<p>Check this box to use the standard abbreviations for states in address fields and labels.</p> <p>If you clear this box, the full name of the state is used.</p>


Preference	Setting
Company Logo Folder	<p>Select the File Cabinet folder where your company (and for OneWorld accounts, subsidiary) logo is or will be stored.</p> <p>This selection determines the files that are listed in the Company Logo (Forms) and Company Logo (Pages) on the Setup > Company > General Preferences page.</p> <p>In OneWorld accounts, these files are also listed in the Subsidiary Logo (Forms) on the Setup > Company > Subsidiaries > Subsidiary page. The logo selected on the Setup Company Information page is used for the main subsidiary. Logos for other subsidiaries can be set on their Subsidiary pages.</p>
Customer Center Login Page	<p>If you have a custom login page for users with Customer Center roles, select the HTML file for that login page here.</p> <p>For more information, see the help topic Creating Custom Pages for Login to Your NetSuite Account.</p>
Default Role for New Customers	<p>Select the role assigned by default to customers granted NetSuite access.</p> <p>This role displays on the Access tab when Customer records are edited.</p>
Customer Center Welcome Message	<p>Enter the message to display to users of the Customer Center.</p> <p>When a customer is logged in, this message is followed by the customer's name. When no customer is logged in, it is followed by "Guest".</p>
Show Help Link in Customer Center	<p>Clear this box to remove the online help link so it is not visible to Customer Center users.</p> <p>By default, this box is checked and the help link is available.</p> <p>This preference does not affect any other centers.</p>
Horizontal Labels	<p>Check this box to display labels to the left of fields on record pages. By default labels appear above fields.</p>
Delay Loading of Sublists	<p>Check this box to delay loading of information shown on subtabs until they are clicked. Enabling this preference decreases page-load times.</p> <p>By default, users can override this preference at Home > Set Preferences. To prevent this, clear the Allow Override box for this preference on the Overriding Preferences subtab.</p>
Screen Font	<p>By default, the font is Open Sans. Select the default font for text displayed in online pages.</p> <p>By default, users can override this preference on the Appearance subtab at Home > Set Preferences. To prevent this, clear the Allow Overrides box for this preference on the Overriding Preferences subtab.</p>
Landing Page	<p>Select a tab created by a custom Suitelet deployment to be the first page displayed when users log into this NetSuite account. This preference overrides any user-defined landing page preferences for a standard or custom center tab set at Home > Set Preferences. If both this preference and the user landing page preference are unset, the user's Home page is the initial landing page.</p> <p>The list of available landing pages includes all deployed Suitelets, by their deployment IDs. This list does not include Suitelets that do not have at least one deployment.</p> <p>This preference is intended for use in cases where an initial account setup assistant is displayed for account setup and configuration.</p>
Number of Rows in List Segments	<p>When users look at a long list in NetSuite, the list is divided into segments. Enter the maximum number of records for each segment.</p> <p>For example, if you have 200 customers and you would like them to be displayed in groups of 25 per page, then set the segment size to 25. To see the next set of 25, users can click the Next icon. Click the Previous icon to return to previous segments of the list.</p>

Preference	Setting
Maximum Entries in Dropdowns	<p>By default, users can override this preference at Home > Set Preferences. To prevent this, clear the Allow Override box for this preference on the Overriding Preferences subtab.</p> <p>Enter the maximum number of records to display in lists. After a list has reached the limit you set here, the list will pop up in a window of its own. The highest number you can enter is 500.</p> <p>If you always want lists to pop up, set the maximum to zero. If you always want lists to be lists, set the maximum to 500.</p> <p>By default, users can override this preference at Home > Set Preferences. To prevent this, clear the Allow Override box for this preference on the Overriding Preferences subtab.</p> <div>  Note: The Case/Task/Event field for time transactions is displayed as a list only if the sum of all company-wide case, task, and event records is less than 5000 and less than the number entered here. Roles that can enter time transactions on behalf of other employees will always have a pop-up field displayed. </div>
Log System Notes on Update Only	<p>This preference prevents NetSuite from logging system notes when records are created. When this preference is set, system notes are generated only when records are updated. Record creation system notes are not needed because data is available in the newly created record itself.</p> <p>This preference was added in 2012.2. By default, it is enabled in all accounts as of that release or later, and disabled in all accounts that existed before that release.</p> <p>You should enable this option in all accounts, to provide storage savings and performance improvements.</p> <p>Before you enable this option, you should first review any saved searches containing system notes fields, as these searches may use data from record creation system notes. If your account includes searches that rely on record creation system notes, you can either revise the searches before enabling the Log System Notes on Update Only option, or you can leave this option disabled.</p> <p>For custom transaction body fields, if the Log System Notes on Update Only preference is not set, and you have the View access level to a field, the default value of your custom transaction body field is displayed in system notes fields when you create a transaction search. For more information, see the help topic Searching System Notes.</p>
Show Quick Add Row on Lists	<p>Check this box to allow quick add on direct editable lists. Quick add allows users to create new records from lists and only add basic information. Users can turn this preference off on individual lists.</p> <p>By default, users can override this preference at Home > Set Preferences. To prevent this, clear the Allow Override box for this preference on the Overriding Preferences subtab.</p>
Show List When Only One Result	<p>Check this box to return search results as a list when there is only one record in results. By default, NetSuite opens the individual record when there is only one record in search results.</p> <div>  Note: When this preference is enabled, NetSuite no longer automatically selects a single result from the suggestion list. </div> <p>By default, users can override this preference at Home > Set Preferences. To prevent this, clear the Allow Override box for this preference on the Overriding Preferences subtab.</p>
Default Customer Type	<p>Choose whether new customers are classified as individuals or companies by default.</p> <p>For companies, company names are used. For individuals, first and last names are used.</p>
Default Lead Type	<p>Choose whether new Leads are classified as individuals or companies by default.</p>

Preference	Setting
	For companies, company names are used. For individuals, first and last names are used.
Default Vendor Type	Choose whether new vendors are classified as individuals or companies by default. For companies, company names are used. For individuals, first and last names are used.
Default Partner Type	Choose whether new partners are classified as individuals or companies by default. For companies, company names are used. For individuals, first and last names are used.
Auto Name Customers	Check this box to cause the Auto box on customer records to be checked by default, so that the customer ID is copied from the customer name. When the Auto box is not checked, users can enter the ID rather than have it copied from the name.
Auto Inactivate Contacts with Customers	When a customer is made inactive, automatically inactive the customer's contacts.
Show Individuals as Contacts	Check this box to create a contact record for every individual-type customer record.
Hide Attachment Folders	Check this box if you want the default attachment folders to only show in the File Cabinet for administrators. All roles will still have access to files that are attached to customers and other records. The following folders are affected: <ul style="list-style-type: none"> ■ Attachments Received ■ Attachments Sent ■ Mail Merge For more information, read the help topic Hiding Attachment Folders .
Hide File Cabinet Hierarchical Info	Check this box to disable the calculation and display of folder sizes in the File Cabinet. Checking this box results in better performance.
Assign Tasks to Partners	Check this box to make it possible for tasks to be assigned to partners.
	 Note: Before a task can be assigned to a partner, the Assign Tasks box on the Info subtab of the partner's record must be checked.
Email Employee on Approvals	Check this box to automatically send email messages to employees when their supervisors approve their purchase requests, expense reports, and time transactions.
Maintenance Complete Email Notification	Check this box to cause email messages to be sent automatically to all active account administrators when scheduled account maintenance is complete.
Show Reports in Grid	Check this box to display reports in a grid format by default. By default, users can override this preference at Home > Set Preferences. To prevent this, clear the Allow Overrides box for this preference on the Overriding Preferences subtab.
Disable HTML in Search Formula (Text)	Check this box to prevent all HTML content from being displayed in saved search results. For more information about formulas in saved searches, see the help topic Formulas in Search .
Collapse VSOE Column by Default on Sales Transactions	Check this box to collapse the VSOE column for sales transactions such as sales orders, invoices, and cash sales.

Preference	Setting
Time Selectors Use Fiscal Calendars Based on First Month	<p>When this box is checked, date range selectors for fiscal elements (for example, this fiscal year) account for the First Fiscal Month setting in Setup > Company > Company Information.</p> <p>When this box is not checked, time selectors strictly reflect definitions for accounting years, quarters, and periods, as defined in the custom Fiscal Calendar.</p> <p>For example, a company has a custom Fiscal Calendar for 2014 aligned with business weeks. The calendar starts on the first Monday of March, which falls on March 3, 2014 and ends on March 1, 2015. The First Fiscal Month is set to March. If the Time Selectors Use Calendars Based on First Month box is checked, the this fiscal year selector returns a date range from March 1, 2014 to February 28, 2015. If the box is not checked, this selector returns a date range of March 3, 2014 to March 1, 2015.</p>
Web Site Hosting Files Always Available	<p>This box is checked by default. It affects how files in the Web Site Hosting Files Folder are made available online. This is a global setting that can override the Available Without Login setting on individual file records.</p> <ul style="list-style-type: none"> When the box is checked, your settings for the Available Without Login boxes on individual files are ignored. Files stored in the Web Site Hosting Files Folder are accessible on any URL listed on the file. When the box is cleared, your settings for the Available Without Login boxes on individual files are recognized. You can clear the Available Without Login box on individual files stored in the Web Site Hosting Files folder to make them unavailable on a shopping domain. <p>For more information, see the help topic Making Web Site Hosting Files Always Available.</p>
Show Transaction Numbering Setup	<p>Check this box to display the Transaction Numbers subtab at Setup > Company > Auto-Generated Numbers.</p> <p>Auto-generated numbers for transaction records are internal numbers that cannot be overwritten. These are unique, gapless numbers that are generated when transaction records are created.</p> <p>This box also affects Global search results. When checked, searching for a number will return results for both that document number and transaction number. When cleared, Global searches only search by Document numbers.</p> <p>Setup of internal transaction numbers requires that this box be checked. By default, this box is not checked.</p> <p>For more information about transaction numbers, see Auto-Generated Transaction Numbers. For details about auto-generated numbering, see Set Auto-Generated Numbers.</p>
Create Automatic Memorized Transactions as -System-	<p>Check this box to list the user who created a memorized transaction as -System- when NetSuite creates a memorized transaction.</p> <p>Clear this box to list the last user who edited the memorized transaction definition when NetSuite creates a memorized transaction.</p> <div>  Note: The last user to update the memorized transaction definition is visible in the memorized transaction definition. </div> <p>This box is not checked by default on new accounts.</p> <div>  Note: When set, this preference does not support server-side scripting. If you want to use server-side scripting and SuiteFlow on transactions, clear this box. </div> <p>Changes to this preference take effect when you create a new memorized transaction definition or you edit and save an existing one.</p>

Preference	Setting
	For more information about memorized transactions and definitions, see the help topic Memorized Transactions .
Website Duplicate Email Management	<p>Select whether website duplicate email detection feature is enabled.</p> <p>Website Duplicate Email Detection feature prevents web store shoppers from creating duplicate customer accounts on your website. For details, see the help topic Detect Duplicate Customer Email.</p>
Asynchronous Project Plan Recalculation	<p>Check this box to enable your project plans to recalculate in the background when time is tracked against that project.</p> <p>When project plans recalculate asynchronously, you maintain access to NetSuite and your project plans during recalculation.</p> <div>  Note: Because recalculations are asynchronous, project plan data may be out of date when accessed before the recalculations are complete. </div> <p>When the recalculation is complete, the updated project plan is displayed the next time it is opened. If the recalculation fails for any reason, a warning appears at the top of the project the next time it is opened.</p>
Show Project in New UI	<p>Check this box if you want Project Management feature to show in new user interface, released in NetSuite 2021.1. The new UI includes following enhancements:</p> <ul style="list-style-type: none"> ■ Customized Tasks and Task Hierarchy ■ Streamlined Record Creation and Editing ■ Improved Record Viewing <p>Clear this box to return to the original UI.</p> <div>  Note: This preference may not be compatible with some customizations and scripts. Test the behavior of the new UI to ensure the enhancements do not impact your existing scripts and integrations. </div> <p>When this preference is enabled and you are editing a record in the new UI, you cannot use SuiteScript 1.0 code in the developer console of your browser to load records or access detailed record information. If you want to use this approach (for example, for debugging purposes), use SuiteScript 2.0 code instead.</p>
Execute SuiteScript 2.X Server Scripts As	<p>Select the version of SuiteScript to run SuiteScript 2.x scripts as.</p> <p>You can use this preference to change the version of SuiteScript that is used to run all SuiteScript 2.x scripts in your account. Using this preference, you can run all SuiteScript 2.x scripts as SuiteScript 2.1 scripts without changing the version specified in the script file. Use this preference to test your existing SuiteScript 2.x scripts and make sure they work as expected using SuiteScript 2.1.</p> <p>This preference applies to all scripts with an @NApiVersion value of 2.x.</p>
Allow Subsidiary Hierarchy To Be Modified [Max: 30 Days]	<p>Specify a period during which authorized users can modify the subsidiary hierarchy. The maximum number of days is 30.</p>
Run SuiteScript 2.x Server Scripts As	<p>Select the version of SuiteScript to run SuiteScript 2.x scripts as.</p> <p>You can use this preference to change the version of SuiteScript that is used to run all SuiteScript 2.x scripts in your account. Using this preference, you can run all SuiteScript 2.x</p>

Preference	Setting
	<p>scripts as SuiteScript 2.1 scripts without changing the version specified in the script file. Use this preference to test your existing SuiteScript 2.x scripts and make sure they work as expected using SuiteScript 2.1. This preference applies to all scripts with an @NApiVersion value of 2.x.</p> <p>For more information, see the help topic SuiteScript 2.1.</p>
Enable Legacy Subsidiary Restrictions (OneWorld Only)	<p>Check this box to revert the role behavior of active and inactive subsidiaries to the 2018.2 state.</p> <p>Only Administrators or users with the Set Up Company permission can check this box.</p> <div>  Note: The Enable Legacy Subsidiary Restrictions is a temporary preference that will be removed in a future release. As such, you should only use the preference as a temporary solution. </div> <p>For more information, see the help topic Customizing or Creating NetSuite Roles.</p>
Preferred Subcustomer Form	Select the form to use by default when subcustomers are created.

Overriding Company Preferences

Some company preferences can be overridden by subsidiary-level preferences (OneWorld only), role-level preferences, and user preferences set by individual employees. You can disallow individual overrides of company preferences on the Overriding Preferences subtab of Setup > Company > General Preferences.

To prohibit individual overrides of company preferences:

1. Go to Setup > Company > General Preferences.
2. On the **Overriding Preferences** subtab, clear the **Allow Override** box next to the preferences you do not want to be overridden by individual user preferences.
3. Click **Save**.

After you have prohibited an override, individuals cannot set their own preferences. Note that it is not possible to prohibit overrides of company preferences by subsidiary-level or role-level preferences.

A company preference may have been set on one of the preferences pages available from the Setup menu by an administrator or by other users with setup permissions, or may be system-generated.

Configuring Multiple Languages

If the Multi-Language feature has been enabled in your account:

System-Supported Languages

- Users can choose from the following system-supported languages to be used for their NetSuite user interface:

<input type="checkbox"/> Chinese (Simplified)	<input type="checkbox"/> Indonesian
<input type="checkbox"/> Chinese (Traditional)	<input type="checkbox"/> Italian

<input type="checkbox"/> Czech	<input type="checkbox"/> Japanese
<input type="checkbox"/> Danish	<input type="checkbox"/> Korean
<input type="checkbox"/> Dutch	<input type="checkbox"/> Norwegian
<input type="checkbox"/> English (AU)	<input type="checkbox"/> Portuguese (Brazilian)
<input type="checkbox"/> English (CA)	<input type="checkbox"/> Russian
<input type="checkbox"/> English (International)	<input type="checkbox"/> Spanish
<input type="checkbox"/> English (UK)	<input type="checkbox"/> Spanish (Latin America)
<input type="checkbox"/> English (U.S.)	<input type="checkbox"/> Swedish
<input type="checkbox"/> Finnish	<input type="checkbox"/> Thai
<input type="checkbox"/> French	<input type="checkbox"/> Turkish
<input type="checkbox"/> French (Canada)	<input type="checkbox"/> Vietnamese
<input type="checkbox"/> German	

These choices are available in user preferences as soon as the Multi-Language feature is enabled. See the help topic [Choosing a Language for Your NetSuite User Interface](#).

- Customers can be allowed to see item names, descriptions, and expense categories in the language selected on the customer's record on printed transaction forms.
 - ☐ Only these system-supported languages are supported on printed transaction forms, because NetSuite provides pre-translated strings for general terms.
 - ☐ To enable the entry of item translation strings in a specific language, you need to specify that language on the Languages subtab of the General Preferences page, as described in [Enabling the Entry of Translation Strings for a Specific Language](#).
- Website elements can be translated to display in each visitor's language. These elements include website items, saved searches, tabs, categories, email forms, text, and images, and formatted website text.
 - ☐ The system-supported languages are supported for website translations. The following languages also are supported for website translations:

<input type="checkbox"/> Afrikaans	<input type="checkbox"/> English (CA)	<input type="checkbox"/> Italian	<input type="checkbox"/> Romanian
<input type="checkbox"/> Albanian	<input type="checkbox"/> English (International)	<input type="checkbox"/> Japanese	<input type="checkbox"/> Russian
<input type="checkbox"/> Arabic	<input type="checkbox"/> English (UK)	<input type="checkbox"/> Kannada	<input type="checkbox"/> Serbian (Cyrillic)
<input type="checkbox"/> Armenian	<input type="checkbox"/> Estonian	<input type="checkbox"/> Korean	<input type="checkbox"/> Serbian (Latin)
<input type="checkbox"/> Bahasa Malay	<input type="checkbox"/> Filipino	<input type="checkbox"/> Latin American Spanish	<input type="checkbox"/> Slovak
<input type="checkbox"/> Bengali	<input type="checkbox"/> Finnish	<input type="checkbox"/> Latvian	<input type="checkbox"/> Slovenian
<input type="checkbox"/> Bosnian	<input type="checkbox"/> French (Canada)	<input type="checkbox"/> Lithuanian	<input type="checkbox"/> Spanish
<input type="checkbox"/> Bulgarian	<input type="checkbox"/> German	<input type="checkbox"/> Luxembourgish	<input type="checkbox"/> Swedish
<input type="checkbox"/> Chinese (Simplified)	<input type="checkbox"/> Greek	<input type="checkbox"/> Marathi	<input type="checkbox"/> Tamil
<input type="checkbox"/> Chinese (Traditional)	<input type="checkbox"/> Gujarati	<input type="checkbox"/> Norwegian	<input type="checkbox"/> Telugu
<input type="checkbox"/> Croatian	<input type="checkbox"/> Hebrew	<input type="checkbox"/> Persian (Iran)	<input type="checkbox"/> Thai
<input type="checkbox"/> Czech	<input type="checkbox"/> Hindi	<input type="checkbox"/> Polish	<input type="checkbox"/> Turkish
<input type="checkbox"/> Danish	<input type="checkbox"/> Hungarian	<input type="checkbox"/> Portuguese (Brazil)	<input type="checkbox"/> Ukrainian
<input type="checkbox"/> Dutch	<input type="checkbox"/> Icelandic	<input type="checkbox"/> Portuguese (Portugal)	<input type="checkbox"/> Vietnamese
<input type="checkbox"/> English (AU)	<input type="checkbox"/> Indonesian	<input type="checkbox"/> Punjabi	


- ☐ To enable the entry of website translation strings in a specific language, you need to specify that language on the Languages subtab of the General Preferences page, as described in [Enabling the Entry of Translation Strings for a Specific Language](#).

Enabling the Entry of Translation Strings for a Specific Language

See the following procedure to enable the entry of website translation strings in a specific language.

To enable the entry of translation strings for a specific language:

1. Go to Setup > Company > General Preferences.
2. Click the **Languages** subtab.
3. Select a language that you want to be able to use for translating.

 **Note:** Your “base language” does not appear in the list. That is, the language determined by your country when your account was established is not available as a language for translation. For example, if your language base language is Spanish, then you will not see it in the list, but you can see Spanish (Latin America).

4. Click **Add**.
5. Repeat steps 3 and 4 for each language you want available.
6. Click **Save**.

You can now go to Lists > Mass Update > Bulk Update Translation to enter items translations for each of these languages. For more information, see the help topics [Working With Multi-Language Names and Descriptions](#) and [Setting Up a Site for Multiple Languages](#).

Translation Management

If you have the Multi-Language feature enabled, you can edit translations using a translation collection. Manage your translation collections using the Manage Translation feature. For more information, see the help topic [Manage Translations](#).

A Translation Collection is a customization object that stores translation strings with their translations. A single Translation Collection can contain many translation strings.

If available, you can edit a translation on the Translation subtab. However, editing a translation in the UI has limitations. You can, for example, override a field label on the Translation subtab of a custom form definition page. When you translate a field label on the Translation subtab of a custom field, the translated label overrides the language set up in Home > Set Preferences. Language changes will only be visible to users with the same language preference. For example, if you change the language from English (US) to English (International), only users with the English (International) language preference will see the changes. For more information about translations, see [Configuring Multiple Languages](#).

If you use SDF, you should make translation changes in SDF XML using a translation collection. If you modify a form and enter translation strings directly in the form, the translations are not connected to terms or translations collections. The translations are visible only to users with the same language preference. If you change your language preference, then you must also define the translations for that language.

For more information, see the help topics [Translation Collections Overview](#) and [Translation Collections as XML Definitions](#).

Center Logout Pages

The Centers subtab on the General Preferences page, available at Setup > Company > General Preferences, lists all custom and standard centers available in your account. Each center can have a unique log out landing page instead of using the default.

Specify the URL of the **Log Out Landing Page** to use for each center, as required.

Custom Preferences

The Custom Preferences subtab on the General Preferences page, available at Setup > Company > Preferences > General Preferences, includes preferences that can be applied as parameters for SuiteScript. If you are not using these features, this subtab may not be available.

For information about how to set up these preferences and how they are used, see the help topic [Creating Script Parameters](#).


Accounting Contexts

The Accounting Contexts subtab on the General Preferences page at Setup > Company > General Preferences. **is visible by default in OneWorld accounts.** If you do not have a OneWorld account, this subtab is not visible.

An accounting context can be a one-to-one relationship between a country's local GAAP (Generally Accepted Accounting Principles) reporting requirements and a statutory chart of accounts (COA). It can also be a unique relationship that meets your company's specific needs. Accounting contexts are useful when users prefer to work in a local GAAP context, rather than in the consolidated context with one centralized COA. Accounting contexts are also useful if you have Multi-Book Accounting provisioned in your account. You can set an accounting context specific for your secondary book and use it for your secondary book reports.

When one accounting context exists in your system, users can select their preferred accounting context at Home > Set Preferences. When users select an accounting context, all transactions including system-generated transactions post to the defined COA account name and number. For information about user preferences, see the help topic [General Personal Preferences](#).

An administrator or a user with the Set Up Company permission can set up accounting contexts. To set up an accounting context, enter the name and then optionally, select the language in which the account name and number should be translated. Click Add after each defined accounting context. Click Save.

 **Note:** The available languages are based on the values defined on the Languages subtab. For information about the Languages subtab, see [Configuring Multiple Languages](#).

When an accounting context exists in your system, the Localization subtab on the account record enables you to enter different account names, languages, and numbers for a single account.

The account name that displays is based on the order of the following conditions:

1. If any line on the Localization subtab represents both the accounting context language **and** the user's preferred language, the account name displays in this language.
2. If there is a line only for the user's preferred language, the account name displays in this language.
3. If there is a line only for the accounting context language, the account name displays in this language.
4. If none of these conditions exist, the account name displays as defined on the account record.

The account number that displays is based on the order of the following conditions:

1. If any line on the Localization subtab represents both the accounting context language **and** the user's preferred language, the account number displays in this language.
2. If this condition does not exist, the account number displays as defined on the account record.

When viewing the detail report associated with a specific summary report, the accounting context defaults to the selection on the summary report and cannot be changed.

On transactions that display the account field, users see the name and number defined in their selected accounting context.

For information about creating an account, see the help topic [Creating Accounts](#). For information about entering account names, languages, and numbers for a single account, see the help topic [Editing an Account](#).

If accounting contexts are defined in your system, you can use account saved searches. For more information, see [Use Accounting Contexts in Account Saved Searches](#).

Use Accounting Contexts in Account Saved Searches

If accounting contexts are defined in your system, you can use the following five columns in the Account saved search, and any saved search where the Account field (Account Fields list) is joined to the saved search:

- Accounting Context
- Language
- Localized Name
- Localized Number
- Localized Legal Name

It is important to note that these five columns contain values for **all** combinations of accounting context and language including combinations where the localized name and localized number are the same for different combinations of accounting contexts and languages. Therefore, if the Multi-Language feature is enabled, best practice is to always specify the combination of both accounting context and language in the search criteria to avoid duplicated results.

Example

You have the following accounting contexts and languages defined in your system:

- Accounting Contexts: Czech Republic, Germany, and None (None represents the header account name and account number value.)
- Languages: Czech, German, and the system language (The system language is the same as None, which represents the header account name value.)

A user with permission to modify the 1110 Advances Paid account record defines the following rules on the Localization subtab:

- Header Account Name and Number: 1110 Advances Paid
- Legal Name: Legal Name for Advances Paid account
- Accounting Context: Czech Republic, Number: 314, Name: Zalohy
- Language: German, Name: German Name

The following table displays several applicable combinations of searchable data based on these rules for this account:

Accounting Context	Language	Localized Number	Localized Name	Localized Legal Name
null	null	1110	Advances Paid	Legal Name for Advances Paid account
null	Czech	1110	Advances Paid	Legal Name for Advances Paid account
null	German	1110	German Name	Legal Name for Advances Paid account
Czech Republic	null	314	Zalohy	Legal Name for Advances Paid account
Czech Republic	Czech	314	Zalohy	Legal Name for Advances Paid account
Czech Republic	German	314	German Name	Legal Name for Advances Paid account
Germany	null	1110	Advances Paid	Legal Name for Advances Paid account
Germany	Czech	1110	Advances Paid	Legal Name for Advances Paid account
Germany	German	1110	German Name	Legal Name for Advances Paid account

Search Criteria 1

Your search criteria is Number set to 1110. The results you want to retrieve are Localized Number and Localized Name. This saved search returns several lines and some of them are duplicated because the Accounting Context and Language were not specified.

Search Criteria 2

Your search criteria is Accounting Context set to Czech Republic, Language set to null, and Localized Number set to 314. The results you want to retrieve are Localized Name and Localized Number.

This saved search returns only one line with Localized Name and Localized Number because the Accounting Context and Language is clearly specified.



Note: Users can create saved searches that are not dependent on the values set in User Preferences. For example, if a user creates a saved search where the criterion Name is set to Advances Paid, the search results will return the Advances Paid account **if** the user's preferences are Language set to English and Accounting Context set to null. If the user's preferences are Language set to English and Accounting Context set to Czech Republic, this save search will not return anything because the account Name is Zalohy.

In contrast, if this user creates a saved search where the criteria Accounting Context is set to null, Language is set to null, Localized Name is set to Advances Paid, the search results will return the Advances Paid account even if the user's preference is Accounting Context set to Czech Republic. This criteria is useful when a controller wants to create a saved search that works for all accountants in local subsidiaries no matter if they have any localization in their NetSuite account.

Date Formats

You can change the company, subsidiary, and user settings to use a different date format than the default setting. You can select the formats to use when displaying abbreviated and full dates. The abbreviated date format appears on reports, forms, and data-entry pages. The long date format is used when forms or templates require a non-abbreviated date format. You can choose between U.S. or international formats for dates, but some date formats are only available in specific locales.

Regardless of which date formats you choose, when you click the Pick icon or link next to a date field, a calendar opens that you can use to select a date.

To change the date format, do one of the following:

- To change the company date settings, go to Setup > Company > General Preferences. To change the abbreviated date format, in the **Date Format** dropdown list, select a date format. To change the long date format, in the **Long Date Format** dropdown list, select a date format. Click **Save**.
- To change the user date settings, go to Home > Set Preferences. Under **Formatting**, in the **Date Format** dropdown list and **Long Date Format** dropdown list, select date formats. Click **Save**. For more information about user preferences, see the help topic [General Personal Preferences](#).
- To change the date settings for subsidiaries, go to Setup > Company > Classifications > Subsidiaries. Next to the subsidiary that you want to change the date format for, click **Edit**. Click the Preferences subtab. On the General subtab, in the Date Format dropdown list and Long Date Format dropdown list, select date formats. Click **Save**. For more information about subsidiary settings, see the help topic [Editing Subsidiary Records](#).

If you enter a date in the DD/MM/YYYY format or the MM/DD/YYYY format, but the month or day only consists of a single numeral, a zero will be added in front of the single numeral automatically.

For example, 1/1/2000 will be changed to 01/01/2000.

Note: By default, users can override the date formats you select. To prevent this, go to Setup > Company > General Preferences. On the **Overriding Preferences** subtab, next to **Date Format** or **Long Date Format**, clear the **Allow Override** box.

Setting date formats

By default, the format M/D/YYYY is used to display dates.

The following table shows the available date formats and examples of how March 5, 2018 would appear when the different formats are applied.

Date Format	Example
M/D/YYYY	3/5/2018
D/M/YYYY	5/3/2018
D-Mon-YYYY	5-Mar-2018
D.M.YYYY	5.3.2018
D-MONTH-YYYY	5-March-2018
D MONTH, YYYY	5 March, 2018
YYYY/M/D	2018/3/5
YYYY-M-D	2018-3-5
DD/MM/YYYY	05/03/2018
DD-Mon-YYYY	05-Mar-2018
DD.MM.YYYY	05.03.2018
DD-MONTH-YYYY	05-March-2018

Date Format	Example
DD MONTH, YYYY	05 March, 2018
MM/DD/YYYY	03/05/2018
YYYY/MM/DD	2018/03/05
YYYY-MM-DD	2018-03-05



Note: Not all date formats are available in all locations. Depending on your location, some of the format options may not be available.



Important: If you omit the punctuation (slash marks, hyphens, and periods) when you enter dates into fields, you must enter all of the digits, including leading zeroes. For example, if you want to enter the date March 5, 2018 into a field but you do not want to include any of the punctuation included in the date format, you need to enter the date as 03052018.

Setting long date formats

On the General Preferences page, you can select the date format that you want to use when forms or templates use a non-abbreviated date format.

The following table shows the available date formats and examples of how March 5, 2018 would appear when the different formats are applied.

Long Date Format	Example
Month D, YYYY	March 5, 2018
D Month YYYY	5 March 2018
YYYY Month D	2018 March 5
Month DD, YYYY	March 05, 2018
DD Month YYYY	05 March 2018
YYYY Month DD	2018 March 05



Note: Not all date formats are available in all locations. Depending on your location, some of the format options may not be available.

Number Formats

Set the Number Format and Negative Number Format preferences to determine how numbers display on the screen for transaction forms, entity forms, and search results. These formats also apply to the list pages associated with these forms and fields that can be edited inline.

You can set the number format preferences at the company, subsidiary, and user levels. This enables users to work in NetSuite with familiar number formats customary for their region and prevents errors that result from incorrectly interpreting numbers on the screen.

The Number Format preference provides the following format options for thousands separators and decimal places:

- thousands separator: comma, period, space, reverse comma
- decimal places: comma, period

The screenshot shows the 'General Preferences' dialog box with three buttons at the top: 'Save' (blue), 'Cancel', and 'Reset'. Below the buttons are four dropdown menus: 'Date Format' (set to MM/DD/YYYY), 'Long Date Format' (set to Month DD, YYYY), 'Time Format' (set to hh:mm AM/PM), and 'Number Format'. The 'Number Format' dropdown is open, showing a list of options: '1,000,000.00' (highlighted), '1,000,000.00', '1.000.000,00', '1 000 000.00', '1 000 000,00', '1-000-000.00', and '1-000-000,00'. The 'Sunday' option is partially visible at the bottom of the list.

Users do not have to key in numbers with separators. Numbers are formatted according to the selected preferences upon tabbing out of a field.

The Negative Number Format preference provides two options to display negative numbers:

- minus sign: -100
- parentheses: (100)

You can set the Number Format and Negative Number Format preferences at the following levels. The default formats are 1,000,000.00 and -100.

- Company: Go to Setup > Company > Preferences > General Preferences (Administrator). For instructions, see [Setting General Account Preferences](#).
- Subsidiary: Go to Setup > Company > Classifications > Subsidiaries > New (Administrator) For instructions, see the help topic [Editing Subsidiary Records](#).
- User: Go to Home > Set Preferences. Setting the preferences at the user level affects all roles associated with that user. For instructions, see the help topic [General Personal Preferences](#).

Key Points for Number Format Preferences

- Number format preferences do not apply to exports, SOAP web services, SuiteScript, and CSV imports.
- Currency format settings apply to amounts on reports and printed transactions.
- Values with a currency symbol, such as €123,45 or \$123.45, render according to the currency format, not the number format preference.

- On the screen, foreign currency amounts render in the format for the currency. Base currency amounts displayed in columns on transactions forms and subtabs follow the number format preferences.
- The user preference setting for number format overrides the subsidiary and company format settings.
- Number format preferences do not apply to custom fields created before 2012.1, unless you explicitly enable the Apply Formatting preference. This preference also enables you to prevent custom fields created after 2012.1 from using number formatting. For details, see the help topic [Setting Display Options for Custom Fields](#).

Renaming Records and Transactions

Users with the Administrator role can change the names of their records and transactions from the NetSuite default names to names that fit the terminology of their company on the Rename Records/Transactions page. On this page, you can also change the names of account types used in NetSuite. For screenshots of the different areas of this page, see [Sections of the Rename Records/Transactions Page](#).

By changing the names of your records and transactions, your employees do not have to change their terms to fit NetSuite terms. Instead, NetSuite changes to fit the terms your employees are accustomed to using.

When you change the names of records or transactions, those names change in most places they appear in NetSuite to your preferred term. You can always return to the Rename Records/Transactions page to change them to the default name or to another term.

Note: You may see internal tags in translated record and transaction names in the user interface. For example, instead of Record you may see {#Record#}. If you find such tags displayed in the user interface, please contact NetSuite Customer Support so that we can make a correction in a future release.

Tip: In the Help Center, if you search for the name of a record or transaction that you renamed, the search results include an option to use the default transaction or record name as a search term. For example, you rename "estimate" to "quote" and search the Help Center for "quote." If there are fewer than 10 search results, you are asked if you meant to search for "estimate." You can then click the link in the search results and search for "estimate" instead.

Tip: Do not rename records to standard NetSuite record types or reuse the same name for multiple record types. For example, renaming Customer to Partner or renaming two different record types as Client.

Notes on the Rename Records/Transaction Page

Keep the following important details in mind when renaming records or transactions on this page.

- Name changes made in the Rename Records/Transactions page apply to the Language preference you currently have set at Home > Set Preferences only, not to every language. You need to reset your Language preference to each language that your account uses and repeat the renaming process. If you do not rename records and transactions with a language set as the preference, users in your account will continue to see the original Record/Transaction names when they set that language as their preference.

- Field labels for records and transactions on previously created custom forms do not change when you make changes on the Rename Records/Transactions page. You will need to manually edit field labels on custom forms.
- Name changes are applied to standard NetSuite element names (standard records, transactions, and page names), but not to elements you have customized. In the example in step 3 of the following procedure, the standard entity record named “Customer” is renamed “Client”. In this account, you could also have a custom center tab named “Customer”. The name change will not be applied to this custom element.

To change the names of records or transactions:

1. Go to Setup > Company > Rename Records/Transactions.
2. On the **Rename Records/Transactions** page, the default names for records are autofilled in the fields.
3. In the fields on the top section the page, edit the names of relationship records to better suit your company.
For example, in the **Name for Customer** field, you can change **Customer** to **Client**.
4. Click the **Transaction Names** subtab.
 - In the **Name** column, you can rename your transactions. For example, in the **Name** column of the **Cash Sale** row, you can change **Cash Sale** to **Sales Receipt**.
 - In the **Abbreviation** column, change the abbreviation of these transactions to match the new name. For example, in the **Cash Sale** row, change **RCPT** to **SALERCPT**.

Transaction abbreviations often show in lists of transactions, such as the **Transactions** subtab on relationship records, in the audit trail and on registers.
5. Click the **Account Type Names** subtab.
In the **Name** column, you can change the names of your accounts in NetSuite.
6. When you have finished renaming records, transactions, and accounts, click **Save**.
7. If different languages are used in your account, go to Home > Set Preferences, change your **Language** preference to another language used in your account, and repeat steps 1-6.
8. Continue this process for each language used in your account, until you have completed renaming in each language.

Your record, transaction, and account names are now renamed everywhere in NetSuite to your new name. Return to Setup > Company > Rename Records/Transactions to edit these names.

Sections of the Rename Records/Transactions Page

The Setup > Company > Rename Records/Transactions page includes the following sections:

- [Body \(Record Names\)](#)
- [Transaction Names Subtab](#)
- [Account Type Names](#)

Body (Record Names)

In the body of the Rename Records/Transactions page, you can change the names of standard NetSuite non-transactional record types.

Rename Records/Transactions

Save Cancel Reset

NAME FOR CUSTOMER *	NAME FOR PROSPECT *	NAME FOR PHONE CALL *
Customer	Prospect	Phone Call
NAME FOR VENDOR *	NAME FOR PARTNER *	NAME FOR PROJECT *
Vendor	Partner	Project
NAME FOR LOCATION *	NAME FOR CASE *	NAME FOR PROJECT TEMPLATE *
Location	Case	Project Template
NAME FOR CLASS *	NAME FOR ISSUE *	NAME FOR PROJECT TASK *
Class	Issue	Project Task
NAME FOR OTHER NAME *	NAME FOR EVENT *	NAME FOR RESOURCE ALLOCATION *
Other Name	Event	Resource Allocation
NAME FOR COMPANY *	NAME FOR TASK *	NAME FOR GENERIC RESOURCE *
Company	Task	Generic Resource
NAME FOR LEAD *		
Lead		

Transaction Names Subtab

On the Transaction Names subtab of the Rename Records/Transactions page, you can change the names and abbreviations of standard NetSuite transaction types.

Transaction Names • Account Type Names •		
TYPE	NAME	ABBREVIATION
Assembly Build	Assembly Build	BUILD
Assembly Unbuild	Assembly Unbuild	UNBUILD
Bill	Bill	BILL
Bill Credit	Bill Credit	BILLCRED
Bill Payment	Bill Payment	BILLPMT
Bin Putaway Worksheet	Bin Putaway Worksheet	BINWKSHT
Bin Transfer	Bin Transfer	BINTRNFR
Blanket Purchase Order	Blanket Purchase Order	BLANKORD
CCard Refund	CCard Refund	CC CRED
Cash Refund	Cash Refund	RETURN
Cash Sale	Cash Sale	RCPT
Check	Check	CHK

Account Type Names

On the Account Type Names subtab of the Rename Records/Transactions page, you can change the names of standard NetSuite account types.

Transaction Names • Account Type Names •	
Move To Top	Move To Bottom
TYPE	NAME
:: Bank	MyBank
:: Other Current Asset	Other Current Asset
:: Fixed Asset	Fixed Asset
:: Other Asset	Other Asset
:: Accounts Payable	Accounts Payable
:: Credit Card	Credit Card
:: Other Current Liability	Other Current Liability
:: Long Term Liability	Long Term Liability
:: Equity	Equity
:: Income	Income

To manage the list, you can change the order of the account type names by selecting a line and clicking Move To Top or Move To Bottom. However, the order of the list on this subtab has no effect on account type lists seen by users.

Explore the following topics to learn more about renaming in NetSuite:

- [Record Type Overview](#)
- [Record Customization Overview Page](#)
- [Configuration Bundles](#)
- [Global Search Prefixes](#)
- [Customizing Tax Fields on Transaction Forms](#)
- [Renaming SuiteBilling Records](#)
- [Order Management Accounting Preferences](#)
- [Forecasting Preferences](#)
- [Quotes for Commerce Websites](#)
- [Generating China Voucher Printing Report](#)

To find out more about other term customizations, see the following topics:

- [Renaming Custom Fields](#)
- [Renaming a Custom Financial Statement Layout](#)
- [Limitations for Custom Transaction Forms](#)
- [Resolving Conflicting Objects](#)

Set Auto-Generated Numbers

The Set Up Auto-Generated Numbers page enables users with the Administrator role to choose the record types that should be automatically numbered in the order in which they are created. On this page you can also add prefixes and suffixes to auto-generated numbers. Prefixes and suffixes are useful in determining a record, transaction, or document's type and estimated age at a glance.

For example, you may choose to enable auto-generated numbering for the customer record type in your account and prefix the number with CUST. Each time you add a new customer record, the record number increases sequentially by one. When you view your customer list, you can quickly see that CUST0025 is a newer customer than CUST0004.

When you set a record type to have auto-generated numbers, the number replaces the name that was stored in the Company Name field. Record numbers cannot be reverted back to names after auto-generated numbering has been enabled and the records have been updated.



Note: Auto-generated numbers are always enabled for transaction record types and document types.




Important: Internal IDs are assigned to records to assist with parallel processing. This means that an internal ID assigned to a new record can be significantly higher in value than the second highest number.

Internal IDs do not indicate when a record was created even though assignment of internal IDs to new records is sequential.

- [Overwrite Entity and CRM Record Type Numbers](#)
- [Auto-Generated Document Numbers](#)

- [Auto-Generated Transaction Numbers](#)
- [Reset Initial Transaction and Document Numbering Sequences](#)
- [Reporting](#)
- [Setting Up Auto-Generated Numbering](#)

 **Note:** To work with auto-generated numbers, you need a View level of the Auto-Generated Numbers permission.

Overwrite Entity and CRM Record Type Numbers

For some entity and CRM record types, you can enable the Allow Override option to permit users to manually enter numbers other than the auto-generated numbers. Be aware that overwriting these record type numbers permits users to create duplicate numbers or numbering gaps. Use this feature with caution.

After a manual override in a number sequence, the next auto-generated number follows the higher number in the series.

- For example, the most recently created record has an auto-generated number of 53. Someone creates a record and manually assigns it number 05. The next record created is automatically assigned number 54.
- For example, if customer record number 101 is overwritten and set to 1001, auto-generated numbers begins at 1002.

Additionally, when a record number is manually overwritten with a higher value, auto-generated numbers begins at the next sequential number. Use this feature with caution.

Auto-Generated Document Numbers

Auto-generated numbers for document types are external numbers such as the number for a vendor bill, or account based numbers such as a check number. Document numbers can also be type based, which store a document number for type based transactions. Type based numbers are available as custom columns in searches and lists.

When a document type has the Allow Override option enabled, users can unintentionally introduce duplicated document numbers and numbering gaps into your account. To prevent duplicated document type numbers and numbering gaps, you can customize transaction type records to display the Generate Document Number on Save box. When this box is checked, NetSuite records the document number when the user saves the transaction record, rather than when the user opens the transaction record. This ensures that the document number is unique for the document type, as if the Allow Override option was not enabled. To display the Generate Document Number on Save box on transaction type records and on standard reports, go to Customization > Forms > Transaction Forms. Locate the transaction type to be customized and then click **Customize** next to the transaction name. Click the Screen Fields subtab. In the Label column, locate Generate Document Number on Save, check the Show box and then save the record.

If the Allow Override option is enabled for a specific document type and the Generate Document Number on Save box is not visible in the user interface, NetSuite records the document number when the user opens the transaction record. This permits multiple instances of the same transaction record being assigned the same TranID value. For example, User One opens a transaction record assigned TranID 100. Before User One saves the transaction record, User Two opens a second instance of the same transaction record, which is assigned the same TranID 100.

Note: If you attempt to save a record that has a duplicate TranID, NetSuite presents an error message. You can cancel the message and save the duplicated number.

Important: For external numbering sequences such as vendor bill, the document number is unique for each vendor, which permits the same document number being assigned to more than one vendor. NetSuite prevents a vendor from having a duplicated document number on the same transaction type. This applies to all four external transaction types whether recorded through the user interface or through a CSV import: Bill (Vendor Bill), Bill Credit (Vendor Credit), Credit Card Charge (Customer Credit Card), and Credit Card Refund (CCard Refund).

Warning: Updating document numbers irreversibly modifies all of the document numbers on historical transactions.

Auto-Generated Transaction Numbers

Auto-generated numbers for transaction records are internal, gapless numbers that cannot be overwritten and are generated when the record is saved. These internal numbers are generated for each standard and custom transaction type.

The Transaction Numbers subtab, formerly named Transactions subtab, at Setup > Company > Auto-Generated Numbers is not visible by default. If you must configure transaction type options, you can display the Transaction Numbers subtab. Go to Setup > Company > General Preferences and check the Show Transaction Numbering Setup box.

Important: If your account is new to NetSuite as of 2016.1, default prefixes are automatically assigned to each transaction type. The default prefix is the internal system name for the transaction type. For example, the default prefix for the Bill transaction type is VENDBILL. You can modify the default prefix to suit your unique requirements. You can also delete the default prefix.

Some of the configuration options specified on the former Transactions subtab now appear on the new Transaction Numbers subtab. This occurs for account-based and externally generated numbered transactions because these configuration options modified both document number and transaction number sequences. Account-based and externally generated transactions include the following:

- Bill (Vendor Bill), Externally generated
- Bill Credit (Vendor Credit), Externally generated
- Bill Payment (Vendor Payment), Account-based
- Check, Account-based
- Credit Card Charge (Customer Credit Card), Externally generated
- Credit Card Refund (CCard Refund), Externally generated
- Customer Refund, Account-based
- Paycheck, Account-based
- Paycheck Journal, Regular
- Payroll Liability Check, Account-based
- Sales Tax Payment (Tax Payment), Account-based
- Tax Liability Cheque (Tax Liability), Account-based

Configuration options specified for transaction types other than account-based or externally generated numbers were copied to the Document Numbers subtab. You can reconfigure options on the Document Numbers subtab, as required.

If you do not have auto-generated numbering set up in your account, document type numbers are configured for the beginning number, which is set to 1.

By default, internal transaction numbers do not display on transaction type records or standard reports, but you can customize any transaction type record to display this number. To display internal transaction numbers on transaction records, go to Customization > Forms > Transaction Forms. Locate the transaction type to be customized and then click **Customize** next to the transaction name. Click the Screen Fields subtab. In the Label column, locate Transaction Number, check the Show box and then save the record. For information about customizing transaction forms, see the help topic [Custom Forms](#).

Internal transaction numbers are searchable when the number is hidden or visible on the user interface.

Successful CSV transaction imports are numbered according to the internal transaction numbering sequence at the time of the import.

Copied transactions are numbered according to the internal transaction numbering sequence at the time of the import.



Important: In the former Transactions subtab, NetSuite permitted overwriting the internal number of transaction records where the Allow Override option was enabled for the transaction type. In these historical transactions, there may be duplicate internal numbering. In the new Transaction Numbers subtab, NetSuite prohibits overwriting transaction type numbering sequences, instead permitting the overwriting of document numbers. NetSuite does not renumber historical internal transaction numbers.

Reset Initial Transaction and Document Numbering Sequences

In some countries, resetting an initial transaction number each fiscal year is a legal requirement. Users with the Administrator role can reset the initial record number for both transaction type numbers and document type numbers.

Be aware that resetting the initial number permits duplicate numbering in your account. In addition, if you reset the initial document number during the update of an existing transaction type record, the document number on that transaction record is not updated. Use this feature with caution. Ensure that you understand the risks associated with resetting transaction type and document type numbering sequences.

For instructions on resetting auto-generated transaction numbers, see [Setting Up Auto-Generated Numbering](#).

Reporting

Auto-generated numbering is tracked by the Transaction Numbering Audit Log. For more information, see [Transaction Numbering Audit Log](#).

By default, transaction lists display only the **Document Number** field in searches and reporting. If you plan to include the **Transaction Number** field, be aware that this value is different from the value in the **Document Number** field for the following transaction types.


- * Bill (Vendor Bill), Externally generated
- * Bill Credit (Vendor Credit), Externally generated
- * Bill Payment (Vendor Payment), Account-based

- * Check, Account-based
- * Credit Card Charge (Customer Credit Card), Externally generated
- * Credit Card Refund (CCard Refund), Externally generated
- * Customer Refund, Account-based
- * Paycheck, Account-based
- * Paycheck Journal, Regular
- * Payroll Liability Check, Account-based
- * Sales Tax Payment (Tax Payment), Account-based
- * Tax Liability Cheque (Tax Liability), Account-based

For all other transaction types these two values are the same.

Setting Up Auto-Generated Numbering


Use the steps below to set up auto-generated numbering for Entities, CRM records, and Schedules. These steps also help you configure transaction type numbers and document type numbers.

 **Note:** Multi-Book Accounting has no impact on transaction numbering.

To set up auto-generated numbering:

1. Go to Setup > Company > Auto-Generated Numbers.
2. On the **Entities**, **CRM**, and **Schedules** subtabs, check the **Enable** box for each record type you want automatically numbered from least recent to most recent.
3. For subrecords, check the **Within Parent Group** box to attach the subrecord number to the parent record number.
4. In the **Prefix** column, enter any letters or numbers that you want to appear in front of every record number of this type.

For example, you may want to have every customer record begin with **CUST** for quick identifying in a list.

 **Note:** You should not use prefixes or suffixes which contain only numbers. In addition, you should use a separator, such as a dash (-) or underscore (_), at the end of prefixes or beginning of suffixes.

Entities • Document Numbers • Transaction Numbers • CRM • Schedules •										
ENABLE	WITHIN PARENT GROUP	TYPE	PREFIX	SUFFIX	MINIMUM DIGITS	INITIAL NUMBER	CURRENT NUMBER	ALLOW OVERRIDE	UPDATE	
<input checked="" type="checkbox"/>		Customer	CUST		4	1		<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Subcustomer	U.S.					<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>		Job						<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>		Employee						<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>		Partner						<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	Subpartner						<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>		Vendor						<input type="checkbox"/>	<input type="checkbox"/>	

5. In the **Suffix** column, enter any letters or numbers you want to appear after every record number of that type.
6. In the **Minimum Digits** column, enter the lowest number of digits you want in your auto-generated numbering code. Valid values for this field range from 0–20.

For example, if you enter **4**, your first record is 0001.

7. In the **Initial Number** column, enter the number you want your first numbered record to be.

Note: Changing the initial number for an entity record type, CRM record type, or schedule record type sets the next number in the series of auto-generated numbered records. It does not change the numbering scheme.

On document type numbers and transaction type numbers, users with the Administrator role can reset the initial number. Check the **Update Initial Number** box to enable the **Initial Number** field for editing, then enter the new initial number.

Warning: Resetting the initial number permits duplicate numbering in your account. In addition, if you reset the initial document number during the update of an existing transaction type record, the document number on that transaction record is not updated.

8. For document type numbers, check the **Use Subsidiary** box to use the document prefix for numbering that is specified on the subsidiary record.

For transaction type numbers, check the **Use Subsidiary** box to use the transaction prefix for numbering that is specified on the subsidiary record.

Edit or create prefixes for each subsidiary at Setup > Company > Subsidiaries > New > List or Setup > Company > Subsidiaries > New.

Note: NetSuite uses the document or transaction prefix for numbering **only** if it is specified on the subsidiary record.

TYPE #	PREFIX	SUFFIX	MINIMUM DIGITS	UPDATE INITIAL NUMBER	INITIAL NUMBER	USE SUBSIDIARY	USE LOCATION	CURRENT NUMBER	ALLOW OVERRIDE	UPDATE
BASIC CUSTOM				<input type="checkbox"/>	1000	<input type="checkbox"/>	<input type="checkbox"/>	1000	<input type="checkbox"/>	<input type="checkbox"/>
Cash Refund				<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Cash Sale	CASH		6	<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	<input type="checkbox"/>	<input type="checkbox"/>
Commission				<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

Note: The **Use Subsidiary** column appears only in NetSuite OneWorld accounts.

9. For document type numbers, check the **Use Location** box to use the document prefix for numbering that is specified on the location record.

For transaction type numbers, check the **Use Location** box to use the transaction prefix for numbering that is specified on the location record.

Edit or create prefixes for each location at Setup > Company > Locations > New > List or Setup > Company > Locations > New.

Note: NetSuite uses the document or transaction prefix for numbering **ONLY** if it is specified on the location record.

10. On the **Entities**, **Document Numbers**, and **CRM** subtabs, check the **Allow Override** box to be able to enter your own name or number on records.

Checking this box clears the **Auto** box on records.

If you do not check this box, you cannot edit the numbers on records that serve as the record name.

The following document number types cannot be overwritten:

- Bill (Vendor Bill), Externally referenced
- Bill Credit (Vendor Credit), Externally referenced
- Bill Payment (Vendor Payment), Account-based

- Check, Account-based
 - Credit Card Charge (Customer Credit Card), Externally referenced
 - Credit Card Refund (CCard Refund), Externally referenced
 - Customer Refund, Account-based
 - Paycheck, Account-based
 - Payroll Liability Check, Account-based
 - Sales Tax Payment (Tax Payment), Account-based
 - Tax Liability Cheque (Tax Liability), Account-based
11. Check the **Update** box to assign a number to all existing records of that type, starting with the next available number or the number you enter in the **Initial Number** column, whichever is higher.

When your existing records are numbered, the former name moves to the **Company Name** field on that record. If the **Company Name** field is already filled, the former name displays next to the new number.



Warning: Updating document numbers irreversibly modifies all of the document numbers on historical transactions.



Important: The **Update** column is used to auto-generate numbers for records that have not been previously numbered. If you change the initial number for a record type and then check the **Update** box, auto-generated numbering assigns the new number to the next record created but does not renumber existing records.



Note: On existing employee records that are numbered, the former name moves to the **First Name**, **Middle Initial**, and **Last Name** fields.



Note: On document type numbers and transaction type numbers, the **Update** box is disabled if you have checked the **Use Location** box or the **Use Subsidiary** box.

12. Click **Save**.

To reset auto-generated transaction numbers:

1. Go to Setup > Company > Setup Tasks > Auto-Generated Numbers.
2. Click **Reset**.

Note: By default, the Set Up Auto-Generated Numbers page is not visible. To see this page, go to Setup > Company > Preferences > General Preferences, and check the **Show Transaction Numbering Setup** box. Click **Save**.

Records and Transactions Available for Auto-Numbering

All record, document type, and transaction type numbers are tracked in the Transaction Numbering Audit Log.



Note: Multi-Book Accounting has no impact on transaction numbering.

See the following sections for more information:

- [Entities](#)
- [Document Numbers](#)
- [Transaction Numbers](#)
- [CRM](#)
- [Schedules](#)

Entities

On the Entities subtab, you can replace the names of the following record types with numbers:

Customer	Subcustomer
Project	Employee
Partner	Subpartner
Vendor	—

Document Numbers



Important: For existing customers, configuration options specified on the Transactions subtab prior to 2015.2 were copied to the new Document Numbers subtab. You can reconfigure options on the Document Numbers subtab, as required. If the Transaction Numbers subtab is visible, you can configure options there, as required. To make the Transaction Numbers subtab visible, go to Setup > Company > General Preferences. Check the Show Transaction Numbering Setup box and then save your change.

For new customers, document type numbers are not configured, except for the beginning number, which is set to 1.

Some document types listed on the Document Numbers subtab may not be available if the related features are not enabled in your account.

Auto-generated numbers for document types are external numbers such as the number for a vendor bill, or account based numbers such as a check number. Document numbers can also be type based, which store a document number for type based transactions. Type based numbers are available as custom columns in searches and lists.

When a document type has the Allow Override option enabled, users can unintentionally introduce duplicated document numbers and numbering gaps into your account. To prevent duplicated document type numbers and numbering gaps, you can customize transaction type records to display the **Generate TranID on Save** box. When this box is checked, NetSuite records the document number when the user saves the transaction record, rather than when the user opens the transaction record. This ensures that the document number is unique for the document type, as if the Allow Override option was not enabled. To display the Generate TranID on Save box on transaction type records and on standard reports, go to Customization > Forms > Transaction Forms. Locate the transaction type to be customized and then click **Customize** next to the transaction name. Click the Screen Fields subtab. In the Label column, locate Generate TranID on Save, check the Show box and then save the record.

If the Allow Override option is enabled for a specific document type and the Generate TranID on Save box is not visible in the user interface, NetSuite records the document number when the user opens the

transaction record. This permits multiple instances of the same transaction record being assigned the same TranID value. For example, User One opens a transaction record assigned TranID 100. Before User One saves the transaction record, User Two opens a second instance of the same transaction record, which is assigned the same TranID 100.



Important: For external numbering sequences such as vendor bill, the document number is unique for each vendor, which permits the same document number being assigned to more than one vendor. NetSuite prevents a vendor from having a duplicated document number on the same transaction type. This applies to all four external transaction types whether recorded through the user interface or through a CSV import: Bill (Vendor Bill), Bill Credit (Vendor Credit), Credit Card Charge (Customer Credit Card), and Credit Card Refund (CCard Refund).



Warning: Updating document numbers irreversibly modifies all of the document numbers on historical transactions.

You can place letters in front of or after the numbers of the following document types:

Assembly Build	Assembly Unbuild
Bin Putaway Worksheet	Bin Transfer
Blanket Purchase Order	Cash Refund
Cash Sale	Commission
Credit Memo	Currency Revaluation
Custom	Customer Deposit
Deposit	Deposit Application
Estimate	Expense Report
Finance Charge	Inventory Adjustment
<div> Note: This numbering sequence is shared with Invoice. </div>	
Inventory Cost Revaluation	Inventory Count
Inventory Distribution	Inventory Transfer
Inventory Worksheet	Invoice
<div> Note: This numbering sequence is shared with Finance Charge. </div>	
Item Fulfillment	Item Receipt
Journal	Opportunity
Paycheck Journal	Payment (Customer)
Payroll Adjustment (Year-to-Date)	Purchase Contract
Purchase Order	Request For Quote

Requisition	Return Authorization
Revenue Commitment	Revenue Commitment Reversal
Revenue Contract	Sales Order
Statement Charge	Store Pickup Fulfillment
Tegata Payable	Tegata Receivable
Transfer	Transfer Order
Vendor Request For Quote	Vendor Return Authorization
Work Order	Work Order Close
Work Order Completion	Work Order Issue

Transaction Numbers

Some transaction types listed on the Transaction Numbers subtab may not be available if the related features are not enabled in your account.

Auto-generated numbers for transaction records are internal, gapless numbers that cannot be overwritten and are generated when the record is saved. These internal numbers are generated for each standard and custom transaction type.

The Transaction Numbers subtab, formerly named Transactions subtab, at Setup > Company > Auto-Generated Numbers is invisible by default. If you must configure transaction type options, you can display the Transaction Numbers subtab. Go to Setup > Company > General Preferences and check the Show Transaction Numbering Setup box.

Some of the configuration options specified on the former Transactions subtab now appear on the new Transaction Numbers subtab. This occurs for account-based and externally generated numbered transactions because these configuration options modified both document number and transaction number sequences. Account-based and externally generated transactions include the following:

- Bill (Vendor Bill), Externally generated
- Bill Credit (Vendor Credit), Externally generated
- Bill Payment (Vendor Payment), Account-based
- Check, Account-based
- Credit Card Charge (Customer Credit Card), Externally generated
- Credit Card Refund (CCard Refund), Externally generated
- Customer Refund, Account-based
- Paycheck, Account-based
- Paycheck Journal, Regular
- Payroll Liability Check, Account-based
- Sales Tax Payment (Tax Payment), Account-based
- Tax Liability Cheque (Tax Liability), Account-based

Configuration options specified for transaction types other than account-based or externally generated numbers were copied to the Document Numbers subtab. You can reconfigure options on the Document Numbers subtab, as required.

If you do not have auto-generated numbering set up in your account, document type numbers are configured for the beginning number, which is set to 1.

By default, internal transaction numbers do not display on transaction type records or standard reports, but you can customize any transaction type record to display this number. To display internal transaction numbers on transaction records, go to Customization > Forms > Transaction Forms. Locate the transaction type to be customized and then click **Customize** next to the transaction name. Click the Screen Fields subtab. In the Label column, locate Transaction Number, check the Show box and then save the record. For information about customizing transaction forms, see the help topic [Custom Forms](#).

Internal transaction numbers are searchable when the number is hidden or visible on the user interface.

Successful CSV transaction imports are numbered according to the internal transaction numbering sequence at the time the import.


Copied transactions are numbered according to the internal transaction numbering sequence at the time of the import.



Important: In the former Transactions subtab, NetSuite permitted overwriting the internal number of transaction records where the Allow Override option was enabled for the transaction type. In these historical transactions, there may be duplicate internal numbering. In the new Transaction Numbers subtab, NetSuite prohibits overwriting transaction type numbering sequences, instead permitting the overwriting of document numbers. NetSuite does not renumber historical internal transaction numbers.

If the Use Deletion Reason feature is enabled in your account, users must provide a reason for deleting transaction type records. For more information about the feature, see the help topic [Recording a Reason for Deleting a Transaction](#).

You can place letters in front of or after the numbers of the following transaction types:

Assembly Build	Assembly Unbuild
Bill (Vendor Bill)	Bill Credit (Vendor Credit)
Bill Payment (Vendor Payment)	Bin Putaway Worksheet
Bin Transfer	Blanket Purchase Order
CCard Refund (Credit Card Refund)	Cash Refund
Cash Sale	Check
Commission	Credit Card (Customer Credit Card Charge)
Credit Memo	Currency Revaluation
Custom	Customer Deposit
Customer Refund	Deposit
Deposit Application	Estimate
Expense Report	Finance Charge
<div>  Note: This numbering sequence is shared with Invoice. </div>	
Fixed Asset Accrual	Inventory Adjustment
Inventory Cost Revaluation	Inventory Count

Inventory Distribution	Inventory Transfer
Inventory Worksheet	Invoice
 Note: This numbering sequence is shared with Finance Charge.	
Item Fulfillment	Item Receipt
Journal	Opportunity
Paycheck	Paycheck Journal
Payment (Customer)	Payroll Adjustment (Year-to-Date)
Payroll Liability Check	Purchase Contract
Purchase Order	Request For Quote
Requisition	Return Authorization
Revenue Commitment	Revenue Commitment Reversal
Revenue Contract	Sales Order
Sales Tax Payment (Tax Payment)	Statement Charge
Store Pickup Fulfillment	Tax Liability Cheque (Tax Liability)
Tegata Payable	Tegata Receivable
Transfer	Transfer Order
Vendor Request For Quote	Vendor Return Authorization
Work Order	Work Order Close
Work Order Completion	Work Order Issue

Account-based transaction types such as Check, where the numbering sequence is dependent upon a particular account, and transaction types where the numbers are used for external reference such as Vendor Bill, display an additional read-only, auto-generated number in the Transaction Number field.

The following list provides the transaction types where the numbering sequences are either account-based or externally referenced:

- Bill (Vendor Bill), Externally referenced
- Bill Credit (Vendor Credit), Externally referenced
- Bill Payment (Vendor Payment), Account-based
- Check, Account-based
- Credit Card Charge (Customer Credit Card), Externally referenced
- Credit Card Refund (CCard Refund), Externally referenced
- Customer Refund, Account-based
- Paycheck, Account-based
- Payroll Liability Check, Account-based
- Sales Tax Payment (Tax Payment), Account-based

- Tax Liability Cheque (Tax Liability), Account-based

Note: The **Transaction Number** field is visible by default on standard NetSuite forms and not visible by default on customized forms. You can, however, customize a form to display this field.

By default, transaction lists display only the **Number** field in searches and reporting. If you plan to include the new **Transaction Number** field, be aware that this value is different from the value in the **Number** field for the account-based and externally referenced transaction types listed above. For all other transaction types, these two values will be the same.

Important: If you copy an externally referenced transaction such as Vendor Bill, the reference number is not copied. This is to avoid duplicate numbers in the system.

Warning: You cannot auto-generate numbers for journals if you enable the Always Allow Per-line Classifications on Journals preference.

CRM

On the CRM subtab, you can replace the names of the following records with numbers:

Campaign	Issue
Solution	Support Case

Schedules

On the Schedules subtab, you can replace the names of the following records with numbers:

Amortization Schedule	Revenue Recognition Schedule
-----------------------	------------------------------

Transaction Numbering Audit Log

The Transaction Numbering Audit Log provides a complete list of every internal transaction number including the numbers that were assigned to standard and custom transactions that have been deleted or failed to be created. Transactions such as these include cash sales that fail due to problems with credit card processing. For more information about internal transaction numbers, see [Auto-Generated Transaction Numbers](#).

Administrators and other users with the Lists type permission **Access to transaction numbering audit log** can view this audit log at Transactions > Management > Transaction Numbering Audit Log.

This audit log includes the transaction type, number, date and time the transaction number was assigned, and the creator of the transaction. The subsidiary and location for the transactions display if you base your auto-generated numbering on those criteria.

If a transaction is deleted, the date and time it was deleted and the person who deleted it are listed. If a transaction failed to be created, the reason displays in the Message column.

If the Use Deletion Reason feature is enabled in your account, the log also provides the reason a user deleted a transaction record, and any related memo. For more information about the feature, see the help topic [Recording a Reason for Deleting a Transaction](#).

Advanced Numbering

The Advanced Numbering feature enables you to set up flexible document and transaction numbering that reflect the requirements of the countries you do business in. With this feature, you can create multiple complex numbering sequences per transaction type, fiscal year, and other selected criteria. Advanced Numbering automatically updates your document or transaction number sequence, for example, when a new fiscal year begins, or you create different types of transactions.

The generated numbers use prefixes and suffixes that you set in each rule. You can also prioritize advanced numbering rules to run under different circumstances. NetSuite generates the number when you save the transaction.

Advanced Numbering supports the following transaction types:

Document Number Only	Transaction Number Only
<ul style="list-style-type: none"> ■ Cash refund ■ Cash sale ■ Credit memo ■ Currency revaluation ■ Custom transactions ■ Customer deposit ■ Deposit ■ Deposit application ■ Estimate ■ Expense report ■ Invoice ■ Item fulfillment ■ Item receipt ■ Journal ■ Opportunity ■ Payment ■ Purchase order ■ Return authorization ■ Sales order ■ System journal 	<ul style="list-style-type: none"> ■ Bill ■ Bill credit ■ Credit card ■ Credit card refund ■ Custom transactions

Definitions

Advanced Numbering uses two components to generate numbers: a rule set and rules.

- **Advanced numbering rule set** - A collection of advanced numbering rules for one transaction type. All rule sets have at least one rule. Rules within a rule set can be prioritized to run in an order that you set. Each advanced numbering rule set consists of Default rule that assigns the number in case no other rule applies. You cannot edit or delete this rule.

- **Advanced numbering rule** - The definition of a numbering scheme. You can use fiscal year expressions that reflect your company's fiscal year setup at Setup > Accounting > Manage G/L > Manage Accounting Periods and other expressions that only use the transaction date.

Each rule has the following attributes:

- Numbering format (including prefixes, suffixes, and minimum digits)
- Automated sequences by segment - A rule can use any combination of fiscal year, location, or subsidiary and a unique number sequence will be generated for all possible combinations you select. For example:
 - If you select fiscal year, NetSuite will generate a unique numbering sequence for every fiscal year (1 sequence for each fiscal year).
 - If you select fiscal year and subsidiary, NetSuite will generate a unique sequence for each subsidiary every fiscal year.
- Application criteria, including date range, country, and other criteria. For example, a numbering rule can be applied to transactions within a date range, whether the transaction is posting or not, or if the transaction is within a certain posting period.

Enabling the Advanced Numbering Feature

To enable the Advanced Numbering feature:

1. Go to Setup > Company > Enable Features (Administrator). In the Company subtab, scroll to the ERP General subsection and check the **Advanced Numbering** box.
2. Click **Save**.

Next, enable Advanced Numbering for document numbers or transaction numbers by supported transaction type:

- To enable Advanced Numbering for document numbers, see [Enabling Advanced Numbering for Document Numbers](#).
- To enable Advanced Numbering for transaction numbers, see [Enabling Advanced Numbering for Transaction Numbers](#).

Managing Access to Advanced Numbering

Use the Auto-Generated Numbers permission to control who has access to the feature. This permission controls who can access the Set Up Auto-Generated Numbers form and other Advanced Numbering forms. This permission has three levels:

- **View** - Users can view all pages where advanced numbering is defined. Examples include the Auto-Generated Numbers form, the Advanced Numbering Rule Set form, and the Advanced Numbering Rule form.
- **Edit** - Users can add and edit advanced numbering rules.
- **Full** - Users can add and edit advanced numbering rules and enable or disable the Advanced Numbering feature.

When you use Advanced Numbering, every transaction includes an Applied Rules subtab tab that displays the following information:

- The date NetSuite applied the rule
- A Rule Type field which names the feature which applied the rule

- An action log link to additional feature-specific information

Enabling Advanced Numbering for Document Numbers

See the following procedure to enable Advanced Numbering for document numbers.

To enable Advanced Numbering for document numbers:

1. Go to Setup > Company > Auto-Generated Numbers (Administrator).
2. Click the **Document Numbers** subtab.
3. Check the **Advanced Numbering** box next to each transaction type for which you want advanced numbering sequences.
4. Click **Save**.

NetSuite now displays a **Setup** link next to each transaction type you selected and creates a rule set for these transaction types. It also migrates your existing numbering settings for each transaction type you selected to the standard rule in the rule set. For more information, see [Migrating Existing Numbering Rules to Advanced Numbering Rules](#).

Enabling Advanced Numbering for Transaction Numbers

See the following procedure to enable Advanced Numbering for transaction numbers.

To enable Advanced Numbering for transaction numbers:

1. Go to Setup > Company > Preferences > General Preferences (Administrator).
2. Check the **Show Transaction Numbering Setup** box.
3. Click **Save**.
4. Go to Setup > Company > Auto-Generated Numbers (Administrator).
5. Click the **Transaction Numbers** subtab.
6. Check the **Advanced Numbering** box next to each transaction type for which you want advanced numbering sequences.
7. Click **Save**.

NetSuite now displays a **Setup** link next to each transaction type you selected and creates a rule set for these transaction types. It migrates your existing numbering settings for each transaction type you selected to the standard rule in the rule set. For more information, see [Migrating Existing Numbering Rules to Advanced Numbering Rules](#).

Migrating Existing Numbering Rules to Advanced Numbering Rules

When you enable Advanced Numbering for a transaction type, NetSuite migrates your existing numbering settings for that transaction type into an advanced numbering standard rule for the transaction type. When NetSuite migrates your numbering settings:

- The prefix, suffix, minimum digits, and initial number in the existing settings are moved to the same fields of the standard rule.
- The subsidiary or location are added to the prefix field of the standard rule.

- The advanced numbering rule will use the existing document or transaction number prefixes for your subsidiaries or locations. For more information, see the help topics [Creating Subsidiary Records](#) and [Creating Locations](#).

Creating Advanced Numbering Rules by Transaction Type

Advanced numbering sequences are a combination of an advanced numbering rule set and its associated rules. You can add as many rules for a selected standard and custom transaction type as you need. You create an advanced numbering rule using a three-step workflow:

1. Enter the number format, including the prefix and suffix, to use in your numbering sequence. For more information, see [Entering the Number Format](#).
2. Use the **Sequences by Segment** subtab to select a segment (fiscal year, subsidiary, or location) on which to apply the sequence. Advanced Numbering creates a unique sequence for each combination of segments you select. For more information, see [Selecting the Sequences by Segment](#).
3. Use the **Criteria** subtab to set when to apply the sequence. You must have at least one criterion. You should use Date as a criterion to limit Advanced Numbering to the following:
 - Transactions which occur after the feature was enabled
 - Transactions which occur after the date you want to start numbering transactions with Advanced Numbering.

For more information, see [Selecting the Criteria](#).

For detailed instructions to create an advanced numbering rule, see [Creating an Advanced Numbering Rule](#).

Entering the Number Format

Advanced Numbering enables you to use expressions in your numbering rules to add fiscal year, subsidiary, location, and transaction date information to your transaction and document numbers. Some of these expressions are tied to the segment you select in the Sequences by Segment tab, and must be used in a prefix or suffix if you want new sequences for each of these segments. For more information, see [Selecting the Sequences by Segment](#).

If you use Fiscal Year as a segment in your numbering and want to create a new sequence for each fiscal year, you must add one of the following fiscal year expressions in the prefix or suffix. Advanced numbering checks transaction dates against these expressions to determine which fiscal year to assign.

- **\${YYYY_START}** or **\${YY_START}**: When your fiscal year is spread across two years, uses the four or two digit year from the first portion of the calendar year as the fiscal year. For example, if your fiscal year runs from July 2020 to June 2021, a transaction with a transaction date of September 16, 2020 would be numbered as occurring in FY 2020.
- **\${YYYY_END}** or **\${YY_END}**: When your fiscal year is spread across two years, uses the four or two digit year from the second portion of the calendar year as the fiscal year. For example, if your fiscal year runs from July 2020 to June 2021, a transaction with a transaction date of September 16, 2020 would be numbered as occurring in FY 2021.

For more information, see [Using Fiscal Year Expressions with Advanced Numbering Rules](#).

If you want to generate numbers based only on the transaction date with no relation to a fiscal or calendar year, use the following expressions:

- **\${YYYY}** or **\${YY}**: Inserts the four digit or two digit year from the transaction date

- **\${MM}**: Inserts the numerical month from the transaction date
- **\${DD}**: Inserts the numerical day from the transaction date

If you use location or subsidiary to sequence by segment, you must include an expression for location or subsidiary in the numbering rule prefix or suffix:

- **\${location}**: Inserts a location prefix from a Location record
- **\${subsidiary}**: Inserts a subsidiary prefix from a Subsidiary record

For the next Advanced Numbering workflow step, see [Selecting the Sequences by Segment](#).

Selecting the Sequences by Segment

In the Sequences by Segment subtab, select any combination of the following segments to use in advanced numbering rules:

- Fiscal Year
- Subsidiary
- Location

Advanced Numbering creates a unique sequence for each combination of segments you select. For example:

- If you select fiscal year, NetSuite will generate a unique numbering sequence for every fiscal year (1 sequence for each fiscal year).
- If you select fiscal year and subsidiary, NetSuite will automatically generate a unique sequence for each subsidiary every fiscal year.

The following expressions in the number format generate additional numbering sequences by segment value:

- **\${YYYY_START}** or **\${YY_START}**
- **\${YYYY_END}** or **\${YY_END}**
- **\${location}**
- **\${subsidiary}**

Expressions tied to calendar year, including **\${YYYY}** or **\${MM}**, are not connected to the fiscal year segment.

For more information about using expressions with Sequences by Segment, see [Entering the Number Format](#) and [Using Fiscal Year Expressions with Advanced Numbering Rules](#).

For the next Advanced Numbering workflow step, see [Selecting the Criteria](#).

Using Fiscal Year Expressions with Advanced Numbering Rules

You can define your company's fiscal year at Setup > Accounting > Manage G/L > Manage Accounting Periods. Fiscal years do not have to align with calendar years. For more information, see the help topic [Fiscal Calendars](#).

You can use the following fiscal year expressions to correctly display the fiscal year in your advanced numbering rules. You can use any of these options when your fiscal year matches a calendar year.

- **\${YYYY_START}**: When your fiscal year is spread across two years, uses the four digit year from the first portion as the fiscal year.

- **\${YY_START}**: When your fiscal year is spread across two years, uses the two digit year from the first portion as the fiscal year.
- **\${YYYY_END}**: When your fiscal year is spread across two years, uses the four digit year from the second portion as the fiscal year.
- **\${YY_END}**: When your fiscal year is spread across two years, uses the two digit year from the second portion as the fiscal year.

Examples

Your Company's Fiscal Year	Transaction Date	Expression in Advanced Numbering Rule	Year Used in Document or Transaction Number
From July 2020 to June 2021	September 16, 2020	\${YYYY_START}	2020
From July 2020 to June 2021	September 16, 2020	\${YYYY_END}	2021
From July 2020 to June 2021	September 16, 2020	\${YYYY}	2020
From July 2020 to June 2021	September 16, 2020	\${MM}	09
From July 2020 to June 2021	September 16, 2020	\${DD}	16
From July 2020 to June 2021	January 5, 2021	\${YYYY_START}	2020
From July 2020 to June 2021	January 5, 2021	\${YYYY_END}	2021
From January 2020 to December 2020	September 16, 2020	\${YYYY_START}	2020
From January 2020 to December 2020	September 16, 2020	\${YYYY_END}	2020
From January 2021 to December 2021	January 5, 2021	\${YYYY_START}	2021
From January 2021 to December 2021	January 5, 2021	\${YYYY_END}	2021
Any defined fiscal year	January 5, 2021	\${YYYY}	2021
Any defined fiscal year	January 5, 2021	\${MM}	01
Any defined fiscal year	January 5, 2021	\${DD}	05

Selecting the Criteria

You can select any combination of the following fields to use as criteria to apply the advanced numbering rule:

- Subsidiary
- Posting Period
- Posting (Y/N)

- Memo
- Location
- Date
- Currency
- (Subsidiary) Country
- The following types of custom fields:
 - Checkbox
 - Currency
 - Date
 - Decimal Number
 - Email Address
 - Free-Form Text
 - Integer
 - List/Record
 - Rich Text
 - Text Area

Creating an Advanced Numbering Rule

See the following detailed instructions to create an advanced numbering rule.

To create an advanced numbering rule:

1. Go to Setup > Company > Auto-Generated Numbers (Administrator) and click the Document Numbers or Transaction Numbers subtab.
2. Click the **Setup** link next to the transaction type to create the rule for.
3. In the Advanced Numbering Rule Set, click **New Rule**.
4. Type a name for the rule. Names can include up to 32 characters.
5. (Optional) Check the **Inactive** box if you want to create the rule in an inactive state.
6. Enter the following in the Numbering section:
 - Prefix
 - Suffix
 - Minimum Digits
 - Initial Number

The **Number Preview** field displays what the next number will look like whenever you finish editing a Numbering Format field.

For more information, see [Entering the Number Format](#).

7. In the **Sequences by Segment** subtab, select the segment to create unique sequences for. You can create unique sequences for each fiscal year, location, subsidiary, or any combination of the three. NetSuite will create a unique numbering sequence for each combination.

For more information, see [Selecting the Sequences by Segment](#).

8. In the **Criteria** subtab, select the fields NetSuite will use to determine when to number transactions. For example, a numbering rule can be applied to transactions within a date range,

whether the transaction is posting or not, or if the transaction is within a specified posting period. For more information, see [Selecting the Criteria](#).

9. Click **Save**.
10. The Advanced Numbering Rules form appears, with a list of all rules within the rule set. Click **Edit**.
11. Prioritize your rules within the rule set. Rules are processed in ascending numerical order. To change the order, click a rule and click Move Up, Move Down, Move To Top, or Move to Bottom. For each transaction, NetSuite applies the first rule in the rule set which meets all criteria.
12. Click **Save**.

Copying Advanced Numbering Rules

See the following instructions to copy an advanced numbering rule.

To copy an advanced numbering rule:

1. Go to Setup > Company > Auto-Generated Numbers (Administrator) and click the Document Numbers or Transaction Numbers subtab.
2. Click the **Setup** link next to the transaction type with the rule set containing the rule you want to copy.
3. In the **Rules** subtab, click the name of the rule you want to copy.
4. Select **Make Copy** in the Actions menu.
5. Enter a new name for the advanced numbering rule.
6. Make changes to the prefix, suffix, minimum digits, initial number, Sequences by Segment, and Criteria subtabs.
7. Click **Save**.
8. The Advanced Numbering Rules form appears, with a list of all rules within the rule set. Click **Edit**.
9. Prioritize your rules within the rule set. Click a rule and click Move Up, Move Down, Move To Top, or Move to Bottom.
10. Click **Save**.

Deleting Advanced Numbering Rules

See the following instructions to delete an advanced numbering rule.

To delete an advanced numbering rule:

1. Go to Setup > Company > Auto-Generated Numbers (Administrator) and click the Document Numbers or Transaction Numbers subtab.
2. Click the **Setup** link next to the transaction type with the rule set containing the rule you want to delete.
3. In the **Rules** subtab, click the name of the rule you want to delete.
4. Click **Edit**.
5. In the Actions menu, select **Delete**.
6. Click **OK**.

NetSuite deletes the advanced numbering rule and returns you to the Advanced Numbering Rules form.

Disabling Advanced Numbering

See the following instructions to disable Advanced Numbering for a transaction type.

To disable Advanced Numbering for a transaction type:

1. Go to Setup > Company > Auto-Generated Numbers (Administrator) and click the Document Numbers or Transaction Numbers subtab.
2. Delete or inactivate all custom advanced numbering rules for the transaction type. You do not need to delete the standard rule for the transaction type. For more information, see [Deleting Advanced Numbering Rules](#).



Note: If you inactivate the custom rules, NetSuite will store them even if you disable Advanced Numbering. If you enable Advanced Numbering again in the future, NetSuite will create a new custom rule for that transaction type and display the inactive rules.

3. Go to Setup > Company > Auto-Generated Numbers (Administrator)
4. Click the Document Numbers or Transaction Numbers subtab.
5. Clear the Advanced Numbering box next to the transaction type with which you do not want to use Advanced Numbering.

Disabling the Advanced Numbering Feature

See the following instructions to fully disable the Advanced Numbering feature.

To fully disable the Advanced Numbering feature:

1. Disable the Advanced Numbering feature for all transaction types.
2. Go to Setup > Company > Enable Features (Administrator). In the Company subtab, scroll to the ERP General subsection and clear the **Advanced Numbering** box.
3. Click **Save**.

Importing Transactions When Using Advanced Numbering

When you import transactions from another application, Advanced Numbering determines the numbers to apply with the following rules:

- If external document numbers are present, Advanced Numbering uses those document numbers.
- If external document numbers are missing, Advanced Numbering generates document numbers with your Advanced Numbering rules.
- Advanced Numbering always generates new transaction numbers. You cannot import transaction numbers from external applications or overwrite the NetSuite generated transaction numbers with external numbers.

These rules apply to transactions you import with the following methods:

- SuiteScript

- CSV import
- REST
- JSON

Advanced Numbering Examples

See the following use cases for Advanced Numbering:

- [Use Case One](#)
- [Use Case Two](#)

Use Case One

You want to create two invoice advanced numbering rules. For the first, Rule A, you want to generate a sequence for each customer invoice as INV-year-number, applicable from January 1, 2021, and only for a Canadian subsidiary. Numbers should start with 1 and have a minimum of 5 digits. A new sequence should start with each fiscal year. The number for the first invoice should be INV-2021-00001.

To create invoice advanced numbering rule A:

1. In the Prefix field, type INV-`{YYYY_START}`-.
2. In the Sequences by Segment subtab, select Fiscal Year.
3. In the Criteria subtab:
 1. Add the Date field and set its value to is on or after 1/1/2021.
 2. Add the Subsidiary field and set its value to is CAN subsid.

For the second rule, Rule B, you want to generate a sequence for each customer invoice as INV-year-number-subsidiary, applicable from January 1, 2021, for all non-Canadian subsidiaries. Numbers should start with 1 and have a minimum of 5 digits. For example, the number for the first invoices of Singapore and Philippines subsidiaries should be INV-2021-00001-SING and INV-2021-00001-PHIL.

To create a invoice advanced numbering rule B:

1. In the Prefix field, type INV-`{YYYY_START}`-.
2. In the Suffix field, type -`{subsidiary}`.
3. In the Sequences by Segment subtab, add Fiscal Year and Subsidiary.
4. In the Criteria subtab:
 1. Add the Date field and set its value to is on or after 1/1/2021.
 2. Add the Subsidiary field and set its value to is not CAN subsid.

You now have three invoice numbering rules, including the Invoice Standard Rule.

When you prioritize the rules, you move Rule B to the highest priority, Rule A to second priority, and the Invoice Standard rule to the lowest priority. When NetSuite applies numbers to an invoice, it determines if the transaction date is on or after 1/1/2021 and the subsidiary is not Canadian, and if this criteria is met, it numbers the transaction using Rule B. If the transaction does not meet this criteria, NetSuite determines if the transaction date is on or after 1/1/2021 and the subsidiary is Canadian, and if this criteria is met, it numbers the transaction using Rule A. If neither of the first two rules' criteria is met, NetSuite numbers the transaction using the Invoice Standard Rule.

Use Case Two

You want to create two vendor bill advanced numbering rules. For the first, Rule A, you want to generate a sequence for each vendor bill as FYyear-BILL-number-location, applicable from January 1, 2021, only for an Australian subsidiary. Numbers should start with 1 and have a minimum of 5 digits. A new sequence should start with each fiscal year and each location. The number for the first vendor bill should be FY21-BILL-00001-AULOC1.

To create a vendor bill advanced numbering rule A:

1. In the Prefix field, type FY\$(YY_START)-BILL-.
2. In the Suffix field, type -(location).
3. In the Sequences by Segment subtab, add Fiscal Year and Location.
4. In the Criteria subtab:
 1. Add the Date field and set its value to is on or after 1/1/2021.
 2. Add the Subsidiary field and set its value to is Australia subsidiary.

For the second rule, Rule B, you want to generate a sequence for each vendor bill as year-AP-domestic-number, applicable from January 1, 2021, only for a Japanese subsidiary. Numbers should start with 1 and have a minimum of 5 digits. The number for the first vendor bill should be 21-AP-domestic-00001.

To create a vendor bill advanced numbering rule B:

1. In the Prefix field, type \$(YY_START)-AP-domestic-.
2. In the Sequences by Segment subtab, add Fiscal Year.
3. In the Criteria subtab:
 1. Add the Subsidiary field and set its value to is Japan subsidiary.
 2. Add the Date field and set its value to is on or after 1/1/2021.

You now have three vendor bill numbering rules, including the Vendor Bill Standard Rule.

When you prioritize the rules, you move Rule B to the highest priority, Rule A to second priority, and the Vendor Bill Standard rule to the lowest priority. When NetSuite applies numbers to a vendor bill, it determines if the transaction date is on or after 1/1/2021 and the subsidiary is Japanese, and if this criteria is met, it numbers the transaction using Rule B. If the vendor bill does not meet this criteria, NetSuite determines if the transaction date is on or after 1/1/2021 and the subsidiary is Australian, and if this criteria is met, it numbers the transaction using Rule A. If neither of the first two rules' criteria is met, NetSuite numbers the vendor bill using the Vendor Bill Standard Rule.

Setting Up States, Provinces, and Counties

At Setup > Company > States/Provinces/Counties, you can:

- View lists of system-provided states and provinces for supported countries
- Add and edit custom states, provinces, and counties
- Set up lists of custom states, provinces, and counties for supported countries
- Print lists of states, provinces, and counties available for use in NetSuite records

To view a list of available states, provinces, and counties, expand the Filters and select a country from the Country list. Only countries with lists of system-provided or custom (or both) states, provinces, or counties are available for selection.

STATE	SHORT NAME
Alabama	AL
Alaska	AK
Arizona	AZ
Arkansas	AR
Armed Forces Americas	AA
Armed Forces Europe	AE
Armed Forces Pacific	AP

System names do not have **Edit**, because system states and provinces are not editable. Custom states, provinces, and counties that you have added do have an Edit link. You can click **Edit** to make changes.

To add a state, province, or county to be used on NetSuite records, click the New button. On the New State/Province/County page, select a country from the list, enter a full name and a short name (abbreviation) for the state, province, or county you want to add, and click Save.

To print a list of states, provinces, and counties for a country, select the country from the list and click the Print button.

You can set up lists for supported countries that do not have system-provided states, provinces, and counties.

Note: For information about working with state values in SOAP web services, see the help topic [Setting State Values in SOAP web services](#).

To set up a list of states, provinces, and counties for a supported country:

1. Go to Setup > Company > States/Provinces/Counties > New.
2. On the New State/Province/County page, select the country, and enter a full name and a short name (abbreviation) for the state, province, or county you want to add.
3. Click **Save**. The States/Provinces/Counties refreshes with the new list you created.
You can now select the country and view its list. Click **Edit** next to the state, province, or county to make changes.
4. Repeat Steps 2–3 to add more custom states, provinces, and counties.

Supported Countries

At Setup > Company > Countries, you can:

- View a list of countries available for use in NetSuite records
- Click the Print button to print the list of supported countries
- Click **country name** to review its address template and the script used to start mapping programs when users click Map links next to addresses on NetSuite pages.
- Click **Edit** for a country to modify its address template or mapping program script. (if you have associated permissions)

If you are referencing countries in your customizations and integrations built on the SuiteCloud Platform, be aware of the following:

- SOAP web services integrations reference countries using country enumerations that are specific to SOAP web services. For a list of these enumerations, see the help topic [Country Enumerations](#).
- CSV imports reference countries using country names, or labels, as listed in [Country Names for CSV Import](#).
- SuiteScripts generally reference countries using ISO country codes, which are not maintained by NetSuite. Some SuiteScript APIs may also reference country names.
- SuiteAnalytics Connect integrations reference countries using ISO country codes.

Setting Printing and Fax Preferences

The Printing & Fax Preferences page is where users with the Administrator role can set up preferences for printing forms, and set up the fax service. Preferences set on these pages affect all users in your NetSuite account.

Note: Use the Web Site Setup page to set preferences for sending email from your website. For more information, see the help topic [Set Website Email Preferences](#).

Printing and Fax Preferences

You must register with eFax® or Faxaway® to use NetSuite for faxing. Visit www.efax.com or www.faxaway.com to register before setting your fax preferences.

Note: If you choose to register with eFax, be aware of the following:

- When sending faxes from NetSuite, eFax validates your Sender Policy Framework (SPF) records in DNS. For more information, see the [Sender Policy Framework \(SPF\)](#) section in [Email Best Practices](#).
- Free eFax accounts do not function with NetSuite. To use eFax with NetSuite, you must set up a pay account with eFax.

To set your printing and faxing preferences:


1. Go to Setup > Company > Printing & Fax Preferences.
2. Click the name of each subtab to view instructions for setting printing and fax preferences.
 - [Printing](#)
 - [Fax](#)


Printing

General

Field	Description
Save Toner When Printing	Check the Save Toner When Printing box to choose a form style that saves ink or toner.

Transactions

Field	Description
Customers Default to Print Transactions	<p>Check the Customers Default to Transactions box as appropriate on the Print subtab.</p> <p>Default to deliver customer transactions by printing, by email, by fax, or by a combination of the three. The delivery preferences you define will default on all new customer records you create. Later, you can change the settings on individual customer records as needed by checking or clearing the appropriate boxes.</p>
Vendors Default to Print Transactions	<p>Check the Vendors Default to Transactions box as appropriate on the Print subtab.</p> <p>Default to deliver vendor transactions by printing, by email, by fax, or by a combination of the three. The delivery preferences you define will default on all new vendor records you create. Later, you can change the settings on individual vendor records as needed by checking or clearing the appropriate boxes.</p>
Print Return Form with Packing Slip	Check the Print Return Form with Packing Slip box to print a return form every time you print a packing slip.
Print Remittance Form With Invoices & Statements	<p>Check the Print Remittance Form With Invoices & Statements box to include a remittance form on invoices and statements.</p> <p>The remittance form details payment information the customer needs to make a payment, including the invoice number and statement amount due, the name to make checks payable to and the address to mail the payment to.</p>
Print Transaction Forms Landscape	<p>Check the Print Transaction Forms Landscape box to print transaction forms in landscape format.</p> <div data-bbox="498 1335 1369 1451"> <p> Note: To use this preference, you must use a standard transaction PDF layout. Use either a standard transaction form with a standard transaction PDF layout or use a custom transaction form associated with a standard PDF layout.</p> </div>
Print Separate Voucher for Bill Payments	<p>Remittance information for payments against many bills may not fit on a single check voucher. In such a case, you can print a separate voucher page that includes all of the remittance advice. Then, you can send this expanded voucher page to the vendor along with the check.</p> <p>When you print a separate voucher, no bills are listed on the voucher part of the check. The check voucher indicates that the remittance advice is on a separate page.</p>
Print Accounts on Vouchers	Check the Print Accounts on Vouchers box to print the name of the account used on checks.
Print Discount and Shipping Lines in Columns	<p>Check the Print Discount and Shipping Lines in Columns box to show discount and shipping items with descriptions as line-items in transaction columns.</p> <p>If you clear this box, the footer of the transaction shows only a shipping-item name and the total shipping and handling cost.</p>


Field	Description
Print Business Number on Forms	Check the Print Business Number on Forms box if you want your Federal ID or EIN printed in the header of your transaction forms.
Use Location Address on Forms	Check the Use Location Address on Forms box if you want to print the address and logo of the location identified in the body of a transaction.
	<div>  Note: This does not apply to locations identified by line-items on transactions. </div> <p>The address and logo for each location is identified on the location record.</p> <p>This preference does not apply to printing statements.</p>

Advanced PDF/HTML Printing

By default the preferred transaction PDF basic layout or transaction HTML basic layout is used to format printed item detail statements, item labels, and mailing labels. If the Advanced PDF/HTML Templates feature is enabled in your account, you can use an advanced template instead. For information about advanced printing, see the help topic [Advanced PDF/HTML Templates](#). For information about transaction layouts, see the help topic [Customizing Transaction Form PDF Layouts](#).

Field	Description
Use for Item Detail Statements	Check to use the preferred advanced template to format printed item detail statements.
Use for Item Labels	Check to use the preferred advanced template to format printed item labels.
Use for Mailing Labels	Check to use the preferred advanced template to format printed mailing labels.

Check Printing

 **Note:** These preferences do not affect the position of layout elements on the check form.

Field	Description
Default Check Type	<p>In the Default Check Type field, select the type of checks you use:</p> <ul style="list-style-type: none"> ■ Select Standard for checks printed without a voucher, three to an 8.5 by 11-inch sheet. ■ Select Voucher for checks printed at the top of an 8.5 by 11-inch sheet, with voucher information printed on a bottom stub. <p>One check prints per sheet.</p>
Font	<p>In the Font field, select the type font to use when printing checks.</p> <p>Print checks at Transactions > Management > Print Checks and Forms.</p>
Font Size	In the Font Size field, enter the font size to use when printing checks.

PDFs

Field	Description
Letter	In the Letter field, select the File Cabinet folder you want to store your letter templates in by default.

Field	Description
	This field appears only if you have enabled the Mail Merge feature.
PDF	In the PDF field, select the File Cabinet folder you want to store your PDF templates in by default.
	This field appears only if you have enabled the Mail Merge feature.

Messages

Field	Description
Sales Form Disclaimer	Enter a disclaimer to appear at the bottom of your sales forms. Some examples of sales forms include invoices, sales orders and credit memos.
Purchase Form Disclaimer	Enter a disclaimer to appear at the bottom of your purchase orders.
Statement Disclaimer	Enter a disclaimer to appear at the bottom of your customer statements.
Payment Receipt Disclaimer	Enter a disclaimer to appear at the bottom of payment receipts.
Packing Slip Message	Enter a message to appear at the bottom of your packing slips.
Return Policy	Enter your return policy to appear on return forms.
Remittance Slip Message	Enter a message to appear at the bottom of your remittance slips.

Fax

You must register with eFax® or Faxaway® to use NetSuite for faxing. Visit www.efax.com or www.faxaway.com to register before setting your fax preferences.

Note: If you choose to register with eFax, be aware of the following:

- When sending faxes from NetSuite, eFax validates your Sender Policy Framework (SPF) records in DNS. For more information, see the [Sender Policy Framework \(SPF\)](#) section in [Email Best Practices](#).
- Free eFax accounts do not function with NetSuite. To use eFax with NetSuite, you must set up a pay account with eFax.


Field	Description
Customers Default to Fax Transactions	Check the Customers Default to Transactions box as appropriate on the Fax subtab. Default to deliver customer transactions by printing, by email, by fax, or by a combination of the three. The delivery preferences you define will default on all new customer records you create. Later, you can change the settings on individual customer records as needed by checking or clearing the appropriate boxes.
Vendors Default to Fax Transactions	Check the Vendors Default to Transactions box as appropriate on the Fax subtab. Default to deliver vendor transactions by printing, by email, by fax, or by a combination of the three. The delivery preferences you define will default on all new vendor records you create. Later, you can change the settings on individual vendor records as needed by checking or clearing the appropriate boxes.

Field	Description
Send Faxes Using	After you have registered for a fax service, select the fax service you have registered with.
Registered Email Address	Enter the email address you used to set up your fax service.
Mode	Select standard or fine as the quality of your fax. This only applies if you registered with eFax.
Send Cover Page	Check this box to send a cover page with your fax. This only applies if you registered with eFax.
Send Confirmation Email	Check this box to receive an e-mail message containing a copy of the fax you sent.
Fax Template Folder	Select the File Cabinet folder you want to store your fax templates in by default.
Prepend a '1' to Number When Sending a Fax	To add a 1 to the beginning of a fax number when dialing, check this box.

Setting Email Preferences

The Email Preferences page is where users with the Administrator role can set up global email preferences for their company. Preferences set on these pages affect all users in your NetSuite account. See the following sections for more information:

- [General](#)
- [Transactions](#)
- [Templates](#)
- [Domain Keys](#)
- [Sandbox and Release Preview Email Preferences](#)


 **Note:** Use the Set Up Web Site page to set preferences for sending email from your website. For more information, see the help topic [Set Website Email Preferences](#).

To set your email preferences:

1. Go to Setup > Company > Email > Email Preferences.
2. Complete the required fields as detailed in the following sections.
3. Click **Save**.

General

Field	Description
Global BCC List (Separate Addresses with Commas)	In this field, list email addresses to which you want to send blind copies of outbound email messages, including emailed transaction forms, individually sent email, email merges, campaign email, and system response email. Separate multiple addresses with commas. To enter BCC email addresses intended for outbound messages from the Web store, see the help topic Set Website Email Preferences .

Field	Description
Global Footer	<p>In this field, enter text to be included at the bottom of each outbound email message, including emailed transaction forms, individually sent email, email merges, campaign email, and system response email.</p> <p>This text can meet legal requirements and serve as a disclaimer.</p> <div>  Note: This email uses HTML based on your setting in the Email Using HTML field at Home > Set Preferences on the Transactions subtab under Printing. </div> <p>To enter content intended for outbound messages from the Web store, see the help topic Set Website Email Preferences.</p>
Default Mail Merge Domain	<p>Select the campaign email domain you want selected by default on your email and templates.</p> <p>A campaign domain is required if you send more than 10,000 bulk email per month.</p> <p>To create new campaign email domains, go to Commerce > Websites > Website List, click Edit next to your website, and then click the Domains subtab.</p>
Enable Email Alerts for WS and CSV Imports	To improve performance and avoid unnecessary email, by default, saved search email alerts are not sent for updates made by CSV imports or SOAP web services integrations. Check this box to cause email alerts to be sent for CSV imports and SOAP web services integrations.
Remove Email Addresses From Bounced Email Address list After	Select the number of days delay before email addresses that returned a bounce message are removed from the Bounced Email Address list. Email addresses on this list are not sent email from NetSuite during this period. This includes all types of email, including individual and bulk email messages through mail merge or marketing campaigns.

Transactions

Click the **Transactions** subtab to set email preferences for your transactions.

Field	Description
Customers Default to Email Transactions	Check this box to deliver customer transactions by printing, by email, by fax, or by a combination of the three. The delivery preferences you define default on all new customer records you create. Later, you can change the settings on individual customer records as needed by checking or clearing the appropriate boxes.
Vendors Default to Email Transactions	Check this box to deliver vendor transactions by printing, by email, by fax, or by a combination of the three. The delivery preferences you define default on all new vendor records you create. Later, you can change the settings on individual vendor records as needed by checking or clearing the appropriate boxes.
Send to all Administrators	<p>Check this box to send every employee with the Administrator role a copy of each transaction form emailed to customers or vendors.</p> <p>Security-sensitive email is always sent to the owner of the email address. For example, password reset email does not obey preferences that override routing rules (such as the Send to all Administrators preference).</p> <p>Examples of security-sensitive email include:</p> <ul style="list-style-type: none"> ■ Reset Password ■ Change Password ■ Change Email Address ■ Security Questions (Setup or Update) ■ Two-Factor Authentication Setup (one-time password)

Field	Description
CC (Separate Addresses with Commas)	<p>In this field, list email addresses to which you want to send copies of emailed transaction forms.</p> <p>Separate multiple addresses with commas or semicolons.</p> <p>You can email copies of forms to all Administrators, all Administrators and those you specify in the CC field, or only those you specify in the CC field.</p>
From Address for Emailed Forms	<p>In this field, select the email address to show in the From field of email you send with NetSuite:</p> <ul style="list-style-type: none"> ■ Company Return Email Address – Email is sent from the address you enter in the Return Email Address field at Setup > Company > Company Information ■ Subsidiary Return Email Address – Email forms generated in NetSuite are sent using the company email address: Setup > Company > Classifications > Subsidiaries > New. ■ User Email Address – Email is sent from the address you enter in the From Email Address field at Home > Set Preferences. If you do not enter an email address here, email is sent from your login email address.
Use Popup for Main Transaction Email Button	<p>Check this box if you want to view and modify the email you send when you click the Email button from a transaction.</p> <p>With this preference enabled, when you click the Email button on a transaction, an email form opens, allowing you to modify the recipients and email text.</p> <p>If this preference is disabled, when you click the Email button on a transaction, the transaction email is sent immediately.</p>
CC Customer on All Emails Related to Orders Placed by Contacts	<p>Check this box if you want to send all web store order email messages to:</p> <ul style="list-style-type: none"> ■ the contact who placed the order, AND ■ the email address defined for the customer <p>If this box is not checked, all web store order email is sent only to the contact who placed the order. No email is sent to the main customer email address.</p>
Default Email Template	Select an email template to use as the default template for standard transactions. The Standard Transaction Email Template provided with NetSuite is selected by default.

Templates

Click the **Templates** subtab to set preferences for your email templates.

Field	Description
Template Folder	In this field, select the File Cabinet folder you want to store your mail templates in by default.
User Access Email Template	<p>In this field, select the template to use when notifying an employee that they have been given access to your account.</p> <p>To create additional templates to go in this dropdown list, go to Setup > Company > Email > Email System Templates, then click New Template.</p>
Customer Center Email Template	<p>In this field, select the template to use when notifying customers that they have been given access to the Customer Center.</p> <p>To create additional templates to go in this dropdown list, go to Setup > Company > Email > System Email Templates and click New Template.</p>

Field	Description
Partner Center Email Template	In this field, select the template to use when notifying partners that they have been given access to the Partner Center or Advanced Partner Center. To create additional templates to go in this dropdown list, go to Setup > Company > Email > System Email Templates, then click New Template .
Webstore Template Folder	Select which File Cabinet folder to store templates used by the Web store for outbound email messages.

Domain Keys

By setting up your domain keys, DKIM headers are applied to outgoing email messages sent from your NetSuite account. This code header contains domain key information to authenticate the email with the receiving server but does not add any text to your messages.

For information about Domain Keys, see the help topic [DomainKeys Identified Mail \(DKIM\)](#).

Field	Description
Email Address to Receive Test Response	In this field, enter the email address where you want the results of the Send Test Email to DKIM Reflector to be sent. By default, the field contains the return email address found on the Company Information page.
Domain Selector	In this field, enter where the public key is located in the DNS entry of the domain. Do not include the <code>._domainkey</code> suffix that you include when setting up your domain with your domain provider. This is the same domain selector you enter when setting up the domain with your domain provider. For example, if you are using GoDaddy.com for your domain hosting, enter the TXT name you entered as the Host in the TXT (Text) section of the Total DNS Control Panel.
Domain Name	In this field, enter the domain name where the public key is stored.
Active	Check this box if the selected domain key is active. Inactive keys are ignored by NetSuite when sending email.
Private Key	In this field, enter the private domain keys used for signing in one of the following ways: <ul style="list-style-type: none"> Enter them manually. Click the Generate Key Pair button to have NetSuite generate it for you.
Public Key	In this field, enter the public domain keys used for signing in one of the following ways: <ul style="list-style-type: none"> Enter them manually. Click the Generate Key Pair button to have NetSuite generate it for you.
Generate Key Pair	Click this button to generate your domain keys. After you click this button, the Private Key and Public Key fields display your generated keys.
Generated DNS Entry	After generating or entering your domain keys, click this button to display the complete DNS entry for your domain. You can paste this DNS entry into the domain settings with your domain provider.
Verify DNS Entry	Click this button to verify the presence of your public key in DNS. The results are shown in a popup window. For information, see the help topic Verify Your DKIM Setup .
Send Test Email to DKIM Reflector	Click this button for a more extensive test of your DKIM setup. NetSuite generates and email using your domain, and sends it to the DKIM reflector. A report is sent to the address shown in the Email Address to Receive Test Response field.

Field	Description
	For information, see the help topic Verify Your DKIM Setup .

Sandbox and Release Preview Email Preferences

Click the **Sandbox and Release Preview Email Preferences** tab to set preferences for the routing of email messages from your sandbox and release preview accounts.

Important: You should choose the **Send Email To** option for both the Sandbox and Release Preview accounts.

There are exceptions to the email routing rules you specify. Security-sensitive email will be always sent to the owner of the email address. For example, password reset email does not obey preferences that override routing rules.

Examples of security-sensitive email include:

- Reset Password
- Change Password
- Change Email Address
- Security Questions (Setup or Update)
- Two-Factor Authentication Setup (one-time password)

Option	Description
Send Email To (You should choose this option.)	<p>Choose this option to ensure email messages are delivered to specific addresses.</p> <ul style="list-style-type: none"> ■ Enter the email address or email addresses to which to deliver email messages. Separate each email address entered with a comma. ■ Choose this option when testing your web store in your Sandbox or in your Release Preview accounts. This option ensures web store generated email messages are routed to the required recipient.
Send Email to Logged In User	<p>Choose this option to route email messages to the user logged in to the NetSuite UI.</p> <p>If you select this option, be aware of the following behaviors:</p> <ul style="list-style-type: none"> ■ Email messages initiated by an error in a scheduled script follow the notification settings in the script record.

Option	Description
	<ul style="list-style-type: none"> Email messages generated from web stores will not be sent to the user logged in to the NetSuite UI. For example, an order notification email message would be sent to the shopper's email address, not the logged in user's email address. To prevent this, choose the Send Email To option instead.
Do Not Send Emails	Choose this option if you do not want any email messages sent.

Email Spam Guidelines

Email campaigns can only be successful if the intended recipients receive the email. There are several best practices that can help you ensure that email is not marked as spam. For more information, see the following:

- [Email Best Practices](#)
- [Optimizing Email Campaigns](#)
- [DomainKeys Identified Mail \(DKIM\)](#)

You can also improve your domain's reputation as a non-spammer by preventing spam on both incoming and outgoing mail. Some sources of spam messages going out are a result of spam messages coming in. Therefore, preventing bad email from coming in will also prevent you from sending out spam.

Consider the case capture address that you have set up. If you have a dedicated custom case capture address, you can perform some spam filtering using an external spam filter service. Bots can get case capture email addresses and send spam messages to those email addresses.

These spam messages can result in your domain being added to a blocklist by major mail providers because of the volume of email being sent out. For more information about case capture email addresses, see the help topic [Using Email Case Capture](#).

For example, set up a branded case capture address such as support@cases.example.com. Modify your MX DNS record for cases.example.com to redirect all email traffic for this domain to your spam filter service provider. Filtered, clean traffic is sent to your SMTP server as configured on the spam filter side. Your server then redirects the branded capture case email address to the NetSuite case capture address.

Another best practice that can help prevent receiving spam is to keep your group email addresses private as much as possible (for example, the email addresses you use for email case capture and case profiles). Minimize the number of attached users, and include only the users that should be involved in the communication. Leakage of group email addresses to a spammer can result in opening a spam distribution channel.

Note: For a spam distribution channel attack, NetSuite has protection for the reply-to-case scenario only. For more information, see the help topic [Customer Responses to Cases](#). Other communications (transactions and messages) cannot be protected the same way, so circulating email addresses privately is essential.

Email Sent from NetSuite

Email sent from NetSuite are different, depending on where they are sent from, due to the templates and mechanism of sending. For example, standard email footers and the sending domain are specified in a

different way on a campaign email vs. a saved search email alert. Consequently, email sent from different sources might behave differently against a specified spam filter.

To optimize email delivery, ensure DMARC compliance by using DKIM keys for every email domain that your organization uses.

Setting Up Duplicate Detection

After you enable the Duplicate Detection feature at Setup > Company > Enable Features, you need to set criteria to use when searching for duplicates before records can be flagged. By default, NetSuite searches for duplicates by email address. See the following topics for more information:

- [Duplicate Detection Preferences](#)
- [Duplicate Record Notification](#)

Note: Merging records also merges the records' transaction histories. The original data, such as entity name, is retained to preserve a transaction's history. You should restrict the ability to perform merges to specific roles or to the NetSuite administrator. This is particularly important where audit requirements discourage merging transaction records.

Duplicate Detection Preferences

You can change how NetSuite searches for duplicates on the Duplicate Detection page. You can have NetSuite search for duplicates among customer, contact, partner, or vendor records and search for matching information in certain fields.

To prevent you from merging records that are not duplicates, you can only merge records if they have the same tax registration number or if both records do not have tax registration numbers entered. If you use NetSuite OneWorld, records with different subsidiaries cannot be merged.

To set up Duplicate Detection:

1. Go to Setup > Company > Company Management > Duplicate Detection.

Note: You may have to scroll the Company menu to see the Company Management section.


2. Check the **Detect Duplicates Across Subsidiaries (Customers and Vendors Only)** box to search for duplicate customers and vendors, even if they are within different subsidiaries.
3. Check the box next to each type of record you would like use duplicate detection with.


For example, check the **Detect Customer Duplicates** box to be alerted of possible duplicate customer records.

There are four types of records you can detect duplicates for:

- Customer
- Vendor
- Partner
- Contact

4. For each type of record, in the **Fields to Match On** box, select the fields from respective record type you want to use when searching for similar information.

Depending on your settings in Home > Set Preferences, you may see all fields listed in the form or you may have to click the Select Multiple icon , and select your fields from there.

 **Note:** Duplicate detection does not support the following entity custom field types: Time Of Day, Rich Text, Password, and Date/Time. These types of custom fields will not appear in the Fields to Match On box.

For a record of type Customer, selecting the field **Company Name**, makes the system search for duplicate matches in the **Company Name** field in the Customer Form.

Records must have matching information in **all** of the fields you select to be returned as possible duplicates.

For example, if you check the **Detect Customer Duplicated** box and then select phone and email in the **Fields to Match On** field, customers must have a matching phone number **and** a matching email address to be considered duplicates.

Detection Excluded Domains Other Preferences

To set the criteria for marking records as duplicates, select which record types to search within, and select the fields to check for duplicates. Records with matches in all selected fields will be marked as duplicates.

☒ DETECT DUPLICATES ACROSS SUBSIDIARIES (CUSTOMERS AND VENDORS ONLY)

☒ DETECT CUSTOMER DUPLICATES

CUSTOMER FIELDS TO MATCH ON

Email (domain only)
Primary Contact Phone

Choose Customer Fields To Match On

Search

Click Selection to Add

- Address 1
- Address 2
- Address 3
- Alt. email (domain only)
- Alt. email (full)
- Alt. phone
- Email (domain only)
- Email (full)

Current Selections

- ✗ Email (domain only)
- ✗ Primary Contact Phone

Done Cancel

You can base duplicate detection criteria on custom fields. On the Set Up Duplicate Detection page, the list of fields for each entity type includes [To create or modify custom entity fields](#); you have created for those record types. Check the **Store Value** box when creating a custom entity field to make it available as criteria in duplicate detection.

5. If you want to exclude specific email domains from Email (domain only) duplicate detection, click the **Excluded Domains** subtab, and enter the domains you want to exclude. Press **Enter** after each domain. Enter these excluded domains without the top-level domain (.com, .net, etc.). For example, to exclude Gmail email addresses, you would enter **gmail**.

Set Up Duplicate Detection

Save Cancel Reset

Detection **Excluded Domains** Other Preferences

Excluded Domains

- adelphia
- altavista
- ameritech
- aol
- att
- attbi
- bellsouth
- bigfoot
- comcast
- cox
- earthlink
- excite

Click anywhere on the list, press **Enter** and type the domain to be included without the dot com or dot net ending.

6. On the **Other Preferences** tab, check the **Show Duplicate Warning Popup on Records** if you want to present a popup warning when a user clicks **Save** when the cursor is in a duplicate criteria field.

Normally, users are warned of possible duplicates when they click from a duplicate criteria field on a record to another field. Sometimes the cursor is still in a duplicate criteria field when the user clicks **Save**, and this standard warning is not presented. Enabling this preference allows users to still be notified.

The screenshot shows a dialog box titled "Set Up Duplicate Detection". At the top are three buttons: "Save", "Cancel", and "Reset". Below these are three tabs: "Detection", "Excluded Domains", and "Other Preferences". The "Other Preferences" tab is selected. Under this tab, there is a checkbox labeled "Show Duplicate Warning Popup on Records" which is checked. Below that is a dropdown menu labeled "Resolve Duplicates with Conflicting Login Access" with "Manually" selected.

7. Choose how you would like to resolve duplicate records that have conflicting login access.

If two duplicate records each have login access, but the records have different email addresses, they are considered to have conflicting login access. The following options are available:

- **Manually:** Duplicate records with conflicting login access are not merged. You must manually remove the login access of one of the records before they can be merged.
- **By deleting the duplicates' access:** When merging records, the login access of duplicate records is deleted when it is merged into the primary record.

8. Click **Save**.

When you click **Save**, NetSuite begins searching for duplicate records based on your criteria.

Note: The initial search can take a significant amount of time based on the number of customer and contact records you have in your account. You will not see duplicate alerts or be able to merge records until this initial search is complete.

After the search is complete, possible duplicate records are flagged with a notice and a link to a page where you can decide how to manage the duplicates. For more information, see the help topic [Merging or Deleting Duplicate Records](#).

You can also go to Lists > Mass Update > Mass Duplicate Record Merge to search for all possible duplicate contact and customer records based on the criteria you have set.

Duplicate Entity Management Permission

Access to the Manage Duplicates page is controlled by the Duplicate Entity Management permission.

To limit a role's ability to perform merges:

1. Go to Setup > Users/Roles > Manage Roles.
2. Click **Customize** or **Edit** for a role.
3. On the **Permissions** tab, click Lists.
4. Add the **Duplicate Entity Management** permission to the role.
5. Select **View** to hide the **Merge** button from users with this role.

Duplicate Record Notification

Users are notified of potential duplicates in three ways:

- When you open a record that has potential duplicates, a notice is shown at the top of the page with a link to potential duplicates.
- When you are creating a new record and enter matching data in fields that are set up as duplicate criteria, a warning is shown at the top of the page with a link to the potential duplicates. If you have permission to view those records, you can click a link to open those matching records.
- When you add a record from a list by using Quick Add or you use the Inline Editing feature to make changes to a record that would make it a duplicate, you also receive a popup warning.

These notifications can help reduce the number of duplicate records created in your NetSuite account.



Note: For OneWorld accounts, cross subsidiary records are not treated as duplicates. For example, two entities belonging to different subsidiaries will not be listed as duplicates on the Manage Duplicates Page.

Certain words or phrases are skipped over when NetSuite searches for duplicates. For a list of these words, see the help topic [Words Excluded from Duplicate Detection Matching](#).

NetSuite Account Information

The Setup > Company > NetSuite Account Information menu can assist you with maintaining your account.

Billing Questions – Opens the Contact Support Online page. You are encouraged to search the help center and review the FAQs before filling in the fields required to contact support. For more information, see the help topic [NetSuite Support](#).

View Billing Terms: Opens the Billing Terms page, which describes the billing process and procedures for your NetSuite account.

View Billing Information: Opens a Billing Information page, which shows installed components, add-on modules, provisioning history, and component usage.

NetSuite Support Login: Opens the Allow NetSuite Support Login. Select the duration to allow NetSuite to access your data for investigating your cases.

Close Account: Opens the Contact Support Online page.

Outlook Sync Configurations: Change the Outlook sync configuration, if required. For more information, see the help topic [NetSuite for Outlook](#).

Antivirus Scanning on File Cabinet Files



Important: This is a required feature. Administrators cannot request the service is switched off. No setup is required.

All files stored in the File Cabinet are screened for malicious content. This is done automatically when attempting to upload a file either through the user interface, SuiteScript or Web Services. Files that are determined to be malicious are rejected. In such cases you will receive the following error message

either in the UI or through the console: **"The file '{1:filename}' was not saved to the File Cabinet. An Unexpected error has occurred."**

If you believe a rejected file is safe, please contact Customer Support for help resolving the issue.

Files received in NetSuite from email attachments are also scanned for viruses. These may include attachments in support cases, or through the use of the email capture plug-in feature. If a file attachment is determined to be malicious, it is automatically blocked without sending an error message.

Using System Alerts

A System Alert notifies administrators of problems NetSuite encounters when processing a transaction and advises how to correct the problem. Only users with the Administrator role have access to system alerts.

System alerts appear in the Reminders portlet on the Home tab after you have activated the reminder.

To activate the System Alerts reminder:

1. Click **Personalize Dashboard** in the Settings portlet or **Personalize** in the top right corner of the Home page.
2. In the **Add Content** panel, click or move the **Reminders** item.
3. In the **Reminders** portlet, click **Set Up**.
4. Check the **NetSuite System Alerts to Acknowledge** box.
5. Click **Save**.

To view a system alert, click the reminder in the Reminders portlet on the Home page. System alerts also can be accessed at Setup > Company > System Alerts.

The AMT system alert notifies you that an automatic memorized transaction has failed to post because it does not have a location reference. AMT alerts appear as a system alert in the Reminders portlet of the Home page.

Viewing a system alert

See the following instructions to view a system alert and its details.

To view a system alert:

1. Go to Setup > Company > Company Management > System Alerts.
The System Alerts page opens. The type, date, and name of each alert is shown.
To also show system alerts that have been acknowledged, click the **Show acknowledged alerts** box.
2. On the System Alerts page, click the name of the system alert in the **Name** column. The system alert record opens and shows these fields:
 - **Type:** the type of alert
 - **Date/Time:** the date and time of the alert
 - **Name:** the name of the alert
 - **Acknowledged:** if the alert has been acknowledged

- **Description:** a description of the alert
 - **User email:** the user email address
 - **Document:** the document type and number
 - **Resolution:** the suggestion resolution for the error
3. Read the resolution to determine what steps to take to correct the transaction error.
 4. Check the **Acknowledged** box to mark the alert acknowledged.
After an alert is marked acknowledged, the related reminder no longer appears in the **Reminders** portlet.
 5. Click **Save**.

A list of system alert records can be accessed at Setup > Company > System Alerts.

Searching Bulk Processing Jobs

If you have the Administrator role, you can view the status and history of all the bulk processing jobs in your account.

Go to Setup > Company > Company Management > Bulk Processing Status List to view a list of bulk processing jobs. The columns that appear on this list include submission ID, submission status, percent complete, result, message, date created, and created by. Many of these columns are also filters so that you can narrow the list display to those processing jobs you want to view.

Available filters include the bulk processing type, submission status, result, and who created the bulk processing job. You can choose from a list of selectors to narrow the date the bulk processing job was created. You can also choose the style in which to display the list.


Configuring Administrative Notifications

NetSuite uses administrative notifications, displayed when you log in, to provide you with important information about changes to your account such as infrastructure maintenance, service upgrades, or any potentially high impacting change that may affect your business.

It is important to configure the appropriate recipients to receive these notifications so that you can plan appropriately for these maintenance events. Some examples include:

- NetSuite Administrators and IT personnel who should be aware of changes to the service.
- Accounting or Billing department heads who need to see billing or renewal notices.
- Legal department heads may need to see legal notifications.
- Operations decision makers may need to see scheduled maintenance notifications that may affect access to your account.

You can configure administrative notification recipients by going to Setup > Company > Company Management > Administrative Notifications to add the users you want to receive the notifications, and to view information about when and by whom notifications have been confirmed.

 **Note:** This page is only available to users with the Setup Company permission.

By default, all administrative notifications are presented to all account administrators, and each administrator must acknowledge the notification to access the NetSuite account.

You can define configuration settings separately for each of the notification types listed below to make sure all notifications are going to the most appropriate recipients:


- **Administrative Notifications:** Announce upcoming changes to feature availability in your account.
- **Billing and Renewal Notices:** Alert you to payment requirements when you purchase new features and notify you when it is time to renew your contract with NetSuite.
- **Legal Notifications:** Notify you of changes that require administrator acceptance, such as a modification to the Terms of Service (TOS).
- **Scheduled Maintenance:** Provide the date and time when scheduled maintenance tasks may affect access to your account.
- **Service Release Notifications:** Occur prior to the release of a new version of NetSuite. These notifications provide information about access to the Release Preview account, and the time-frame when your account will be upgraded.

Setting Administrative Notification Options

The Administrative Notifications page is available to account administrators, and to other users with the Setup Company permission.

NOTIFICATION TYPE	INCLUDE ADMINS	RECIPIENTS	SEND EMAIL	REQUIRE EACH RECIPIENT TO ACCEPT
Administrative Notifications	Yes - Mandatory	Amit Patel	Yes	Yes
Billing and Renewal Notices	Yes - Mandatory			Yes
Legal Notifications	Yes - Mandatory			Yes
Scheduled Maintenance	Yes - Mandatory			Yes
Service Release Notifications	Yes - Mandatory			Yes

- On the Options subtab, you can:
 - Designate multiple users, in addition to administrators, as notification recipients.

 **Important:** You may be able to set users that do not have login access to NetSuite as notification recipients, but users without login access will not receive notification email.

- Elect to send notifications by email, in addition to displaying them in the user interface.
- On the Confirmed subtab, you can:
 - View the date and time when a recipient has confirmed that they read a notification.
 - View the name of the recipient who confirmed they read the notification.

For more information, see [Review Notification Confirmations](#).
- On the Pending Confirmation subtab, you can:
 - View the notifications that have yet to be confirmed.
 - View the name of the recipient who has not yet confirmed that they read the notification.

For more information, see [Review Pending Confirmations](#).

To set options for administrative notifications:

1. Go to Setup > Company > Company Management > Administrative Notifications.

2. Click the **Edit** button, then review the following columns on the **Options** subtab and make changes as needed:

- **Include Admins**

- Indicates that all account administrators are added to the list of recipients for the selected type of notifications.
- This required setting is set to **Yes — Mandatory**.

- **Recipients**

- Lists the specific set of users to receive in-account notifications of the selected type.
- Default is empty.
- You can define multiple recipients for each notification type, by using the Shift or Ctrl keys and selecting from the **Recipients** list.
- Individual users and groups are available in the list.



Note: Only employee users, and groups made up exclusively of employee users are available, because you cannot select Customer Center, Partner Center, or Vendor Center users as recipients.

- **Send Email**

- Indicates whether email messages containing notifications should be sent to recipients, in addition to in-account messages.
- Default setting is disabled.
- Check the box to enable this option.
- If this option is enabled, email messages are sent to the complete list of recipients.



Note: In-account notification email are different from email campaigns. It is possible that you might be signed up for one type, but not the other type. To find out if you are signed up for email campaigns, see the help topic [Subscription Management](#).

- **Require Each Recipient to Accept**

- Indicates whether all recipients should be required to confirm in-account notifications of this type.
- Default setting is disabled. Each administrator is required to confirm the notification, but other recipients are not.
- To ensure that all selected recipients see all in-account notifications of the selected type, check the box.

3. When you are satisfied with settings, click **Save**.

Review Notification Confirmations

You can review the **Confirmed** subtab of the notifications page for details about notifications that have been confirmed by all required recipients.

- **Notification Type:** Shows the type of notification.
- **Confirmed By:** Shows the names of users who have confirmed that they read the notification.
- **Date Confirmed:** Shows the date and time the user confirmed they read the notification.
- **Message Text:** Shows the text of the notification message.
- **Date emailed:** Shows the date when the notification was sent by email.

Review Pending Confirmations

You can review the **Pending Confirmation** subtab for details about the notifications that have not yet been confirmed by all required recipients.

- **Notification Type:** Shows the type of notification.
- **Require Each Recipient to Accept:** Shows whether you indicated on the Options subtab, that each notification recipient was required to confirm that they read the notification.
- **Confirmed By:** Shows the names of recipients who have confirmed they read the notification.
- **Not Confirmed By:** Shows the names of those who have not yet confirmed they read the notification.
- **Message Text:** Shows the text of the notification message from NetSuite.
- **Start Date:** Shows the date when the notification message was originally posted.
- **Expiration Date:** Shows the last date the notification message will be posted.

Managing Plug-ins

A plug-in is functionality, defined by an interface, that can be customized. After a plug-in is implemented, users with the Administrator role can override the plug-in's default logic with logic that suits their organization's needs.

Core plug-ins are provided by NetSuite, and are typically part of a major release. A core plug-in's interface defines functions that are executed within the core NetSuite code. For more information about core plug-ins, see the help topic [Core Plug-in Overview](#).

Custom plug-ins are alternate implementations of an interface that are developed by third-party solution providers who bundle them as part of a SuiteApp. For more information about custom plug-ins, see the help topic [Custom Plug-in Overview](#).

When a plug-in's implementations are ready to be utilized, the organization's NetSuite administrator activates the implementations available to each account.

To view the plug-in implementations available in an account, go to Customization > Plug-ins > Manage Plug-ins.

The Manage Plug-in Implementations page lists the core and custom plug-in implementations that are available in the current account. To inactivate an implementation, clear the box. To activate an implementation, check the box.

Make changes as required. Then, click **Save**.

Viewing Plug-in Implementation System Notes

To view the activity of your plug-in implementation, use the System Notes subtab.

To view plug-in implementation system notes:

1. Go to Customization > Plug-ins > Plug-in Implementations. Click **Edit** beside the implementation that you want to view.
2. Click the **System Notes** subtab.

Note: Previously, plug-in implementation information was listed on the History subtab, but that subtab is no longer updated. New plug-in implementation activity is captured on the System Notes subtab.

Plug-In Implementation ← → List

[Edit](#) [Back](#) [Configure](#) [Actions ▾](#)

TYPE
Custom GL Lines Plug-in

NAME
Custom GL Lines Update

ID
customscript_custom_gl_lines

API VERSION
1.0

STATUS
Testing

LOG LEVEL
Debug

EXECUTE AS ROLE
Current Role

OWNER
Wolfe, M S

☐ INACTIVE

[Scripts](#) [Unhandled Errors](#) [Execution Log](#) [System Notes](#)

FIELD [VIEW](#)
- All - Default

[Customize View](#)

DATE ▾	SET BY	CONTEXT	TYPE	FIELD	OLD VALUE	NEW VALUE
7/7/2017 3:01 am	Wolfe, M S	UI	Set	Owner		Wolfe, M S
7/7/2017 3:01 am	Wolfe, M S	UI	Set	Name		CC Custom GL Lines
7/7/2017 3:01 am	Wolfe, M S	UI	Set	ID		CUSTOMSCRIPT_CC_CUST_GL_LINES
7/7/2017 3:01 am	Wolfe, M S	UI	Set	Inactive		F
7/7/2017 3:01 am	Wolfe, M S	UI	Set	Log Level		Debug
7/7/2017 3:01 am	Wolfe, M S	UI	Set	Notify All Admins		F
7/7/2017 3:01 am	Wolfe, M S	UI	Set	Script File		Custom-GL-Line-Script.js
7/7/2017 3:01 am	Wolfe, M S	UI	Set	Notify User		F
7/7/2017 3:01 am	Wolfe, M S	UI	Set	Status		Testing
7/7/2017 3:01 am	Wolfe, M S	UI	Set	Notify Owner		T

The system note for a change on a plug-in implementation record captures the following information:

- Date when the change was made
- Who made the change
- Context for the change (for example, UI)
- Type of change, for example, Edit
- Field changed
- Old value
- New value
- Role of the user who made the change (included as of 2017.2 — you have to customize the view to see the Role column)

For more information about system notes, see the help topic [System Notes Overview](#)

Important: The current version of the Custom GL Lines Plug-in is always used. An older version of the plug-in might have been used to create a transaction, and might have generated a different result than the current version. If you attempt to update a transaction in a closed period, and the current version of the plug-in generates a different result, you cannot save the updates.

You can either open the period, or branch your plug-in implementation by the date of the plug-in version.

NetSuite Service Tiers

NetSuite grows to meet your business needs using service tiers. Your account's service tier indicates service characteristics such as the maximum number of users, limits on file storage and monthly

transactions, the number of parallel operations, like importing and exporting data, and maximum number of SuiteCloud Plus licenses.

The NetSuite Service Tiers provide you with visibility into your account's usage, empowering you to make decisions about the resources your business needs. More processing power is provided in each of the service tiers to help reduce operational risk.

See the following topics for more information:

- [NetSuite Service Tier Structure](#)
- [How to Find Information About Your NetSuite Service Tier](#)
- [Service Tier Upgrades](#)
- [NetSuite Service Tiers Frequently Asked Questions](#)

NetSuite Service Tier Structure

NetSuite Service Tiers are designed to align with your needs and provide an optimal experience at different levels of scale. Each service tier includes support up to maximum limits for users, file storage, and monthly transaction lines processed. All tiers except Standard include a sandbox instance. The table below summarizes the service characteristics of the NetSuite Service Tiers.

Service Tier	Users	File Storage (GB)	Monthly Transaction Lines ¹
Standard	100	100	200,000
Premium	1,000	1,000	2,000,000
Enterprise	2,000	2,000	10,000,000
Ultimate	4,000	4,000	50,000,000

(1) Total transaction lines per month across all transaction types, averaged over the most recent six months.

NetSuite Service Tiers also govern the base and maximum concurrency for platform web services transactions, and the number of processors available for scheduled scripts, through SuiteCloud Plus (SC+) licenses. The base level of web services concurrency for each service tier can be increased in increments of ten by purchasing SC+ licenses up to the maximum concurrency in any tier. The default number of SuiteCloud Processors available is 2 if you have not purchased any SuiteCloud Plus licenses. The number of SuiteCloud processors available increases with the number of SuiteCloud Plus licenses purchased. For details, see [SuiteCloud Plus Settings](#). The following table describes different concurrency attributes for each NetSuite Service Tier.

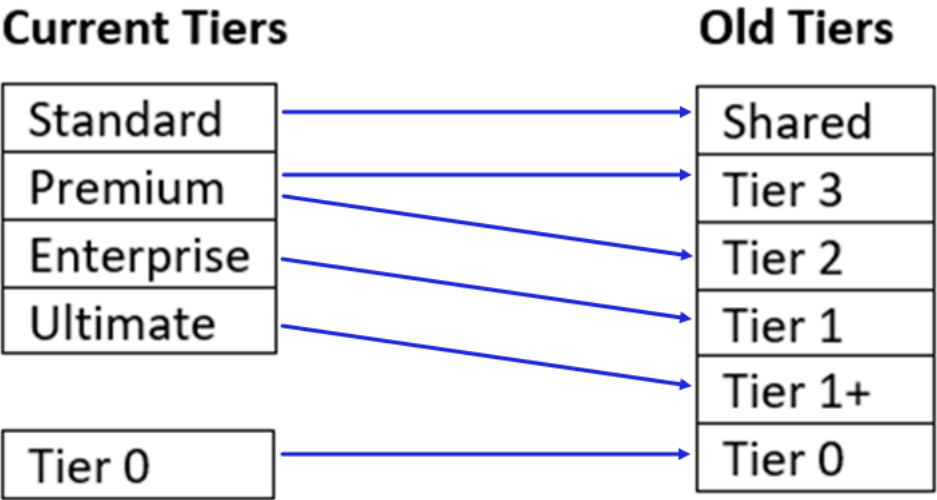
Service Tier	Maximum SuiteCloud+ Licenses	Concurrency (Base/Max)	Maximum SuiteCloud Processors	Maximum CSV Import Queues/ Threads per Queue	Maximum REST Async Processors
Standard	1	5 / 15	5	5 / 2	5
Premium	3	15 / 45	15	5 / 10	15
Enterprise	6	20 / 80	30	5 / 10	30
Ultimate	12	20 / 140	60	5 / 10	60

*The default number of SuiteCloud Processors available is 2 if you have not purchased any SuiteCloud Plus licenses.

*The default number of CSV Import Queues/Threads per Queue is 1/1 if you have not purchased any SuiteCloud Plus licenses.

*The default number of REST Async Processors is 2 if you have not purchased any SuiteCloud Plus licenses.

The graphic below shows the mapping between the current service tiers and the old service tiers. If your NetSuite account needs to be renewed for the first time since the tier structure changed, you might find this information helpful.



Note: Tier 0 will be available on a case-by-case basis for customers who need highly customized tier solutions.

How to Find Information About Your NetSuite Service Tier

If you have the Administrator role, you can view your current service tier in the NetSuite application, at Setup > Company > View Billing Information.

Additionally, you can view your concurrency usage and other limits at Setup > Integration > Integration Governance.

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NetSuite

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SERVICE TIER

Premium [View all tiers](#)

Billable Components	Add-On Modules	Add On Bundles	Provisioning History	Component Usage
COMPONENT ▲			CURRENT PROVISIONED QTY	CURRENT USED QTY
Adv Order Mgmt Automated Orders				0
Advanced Partner Center			0	0
Bill Payment			50	0
Bulk Merge Email Volume			360,000	0
Campaign Email Volume			120,000	0
Direct Deposit			15	0
EFT			20	0
Employee Center			5	0
File Cabinet Size (GB)			1,410	0

Service Tier Upgrades

There are three primary factors to consider if you think you require additional scale in your usage of NetSuite:

- Transaction volume
- Number of users
- Concurrency

If your account is approaching your current tier's maximum capacity for any of these attributes, you should consider a tier upgrade to ensure NetSuite can optimally support your business needs.

Service Tier Upgrade Process Overview

The Service Tier upgrade begins immediately after the sales order has been billed.

Note: Within three days after your Service Tier license is activated, all components will be provisioned and you can immediately begin to use your new service tier.

In most cases, the tier upgrade is complete after your new license has been activated. After your new license has been activated, you may begin using the increased capacity of your new tier. In some cases, additional maintenance may be required, which will limit your ability to reschedule your NetSuite version upgrades until the scheduled maintenance is complete. You will be alerted through an IAN message at least 48 hours before the scheduled maintenance date.

NetSuite Service Tiers Frequently Asked Questions

For more information, see the following frequently asked questions about NetSuite Service Tiers.

Does my service tier affect performance and scalability of my NetSuite account?

Oracle NetSuite has tools and teams, such as ACS Optimize and Support, to help solve performance-related problems and optimize your service tier and number of SuiteCloud Plus licenses.

When you think about performance, your most common question is likely how long will it take? Performance issues including page load times, integration request process times, and single transaction load/save/edit times can be resolved by using the Application Performance Management tools, doing root cause analysis with Support, and involving ACS for more technical health-check reports. Regardless of your service tier, you should use these tools and teams to help you optimize the performance of your NetSuite account.

For more information, see the help topic [Application Performance Management \(APM\)](#).

When you think about scalability, your most common question is likely how many do we need? Scalability issues include user counts, map-reduce, and integration concurrency, which can be monitored using APM Concurrency. One main option to resolve these issues is to purchase additional SuiteCloud Plus licenses. The service tier you choose, affects the maximum number of SuiteCloud Plus licenses you can add to your NetSuite account.

For more information, see [SuiteCloud Plus Settings](#).

Will a tier upgrade fix my performance issues?

No, your service tier does not impact performance. Service tier upgrades provide an additional number of users, file cabinet storage, transaction volume and concurrency to support your business growth.

How long does it take to receive the new service tier after I place my order?

The service tier upgrade begins immediately after the sales order is billed. After the sales order is billed, an invoice is generated, and a new license is created for the service tier. You will receive your new service tier within 3 days of license creation.

After the new license creation, the system updates the base concurrency threads automatically.

Your new service tier components, such as file cabinet storage size, full licensed users purchased, and monthly transaction line limits are provisioned as of the contract start date.

Can I pick the date and time of my upgrade?

No. We strive to upgrade your service tier as soon as your new service tier's first invoice is fulfilled.

How am I notified when my new service tier begins?

You can find your new service tier listed on the Billing Information page within 72 hours after the new license becomes active. If additional maintenance with downtime is required, your administrators are notified at least 48 hours before the maintenance regarding the downtime through an In Account Notification (IAN). This does not impact your ability to begin using the increased capacity of the new tier.

Where in NetSuite can I check the status of my service tier?

You can confirm your new service tier by checking your Billing Information page when your new service tier begins. The Service Tier field on the Billing Information page is updated after 72 hours of the new license start date. To access your Billing Information page, go to Setup > Company > View Billing Information.

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Activities Transactions Lists Reports Analytics Documents **Setup** Customization SuiteApps Support

Billing Information

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SERVICE TIER
Premium - [View all tiers](#)

Billable Components	Add-On Modules	Add On
** This component is a key attribute of your Service Tier.		
COMPONENT ▲		
Adv Order Mgmt Automated Orders		
Advanced Partner Center		
Bill Payment		
Bulk Merge Email Volume		
Campaign Email Volume		
Direct Deposit		
EFT		
Employee Center		
File Cabinet Size (GB) **		

Setup Manager

- Company > COMPANY MANAGEMENT
- Accounting > System Alerts
- Sales > Bulk Processing Status List
- Marketing > Administrative Notifications
- Issues > Sandbox Accounts
- Site Builder > Release Preview
- Import/Export > Customer-Scheduled Maintenance
- Users/Roles > Traffic Health
- Integration > NETSUITE ACCOUNT INFORMATION
- Records Catalog

- Billing Questions
- View Billing Terms
- View Billing Information**

What actions are required of me in preparation of my Service Tier upgrade?

There is no preparation required before the tier upgrade because there are no changes to your data. After the upgrade is complete, you may need to modify integrations and customizations to use the additional available base tier concurrency and any additional SuiteCloud Plus licenses purchased.

Will I be notified when the tier upgrade is complete?

Yes. You will receive a notification when your tier upgrade is complete.

If additional maintenance is required, account administrators will be alerted through an IAN at least 48 hours ahead of the maintenance. This does not impact your ability to begin using the increased capacity of the new tier. After the additional maintenance has been completed, you will be notified if you have opted-in through the notification settings at Setup > Company > General Preferences > Maintenance Complete.

The screenshot shows the Oracle NetSuite Setup interface. The 'Setup' menu is open, and 'Company' is selected under 'Setup Tasks'. The 'Company Information' settings are visible on the right. The 'MAINTENANCE COMPLETE EMAIL NOTIFICATION' checkbox is highlighted with a red box.

If additional maintenance is required, do I need to do anything to prepare for the scheduled maintenance related to the service tier upgrade?

If additional maintenance with downtime is required, consider pausing integrations that are running 24/7 before the scheduled date and schedule those processes to run ahead of the scheduled maintenance window (best practices). Those processes can resume after the maintenance is complete.

What transaction types contribute to the Monthly Transaction Lines metric?

NetSuite account usage is measured using transaction lines. Monthly Transaction Lines will be reported each month and a 6-month rolling average will be used to determine the appropriate service tier. For a list of the transaction types used to determine the Monthly Transaction Line metric, see [Transaction Types Included in Monthly Transaction Lines Metric](#).

What is a Full Licensed User?

A user is an individual who has access to a NetSuite account. Full Licensed Users are individuals who are assigned any role (Standard or Custom) that requires the user login to perform activity within NetSuite. To check the number of Full Licensed Users currently provisioned or currently used in your account, go to **Setup > Company > View Billing Information** and look under Billable Components.

It is important to note that it is the email address associated with the user that is counted as one user license. That email address can be associated with multiple roles within NetSuite, but still only counts as one Full Licensed User.

For example:

- If the user only has an Administrator role assigned, this is counted as one user against the Full Licensed Users.
- If the user has both an Administrator role and a Custom role assigned, this only counts as one user against the Full Licensed Users, if the user is using the same email address for both roles.

- If the user has both an Administrator role and an Employee Center role assigned, this is only counted as one user against the Full Licensed Users.
- If the user only has an Employee Center role assigned, this is not counted against the Full Licensed Users count.

The following roles do not count against the Full Licensed Users count, because they do not grant the user with full NetSuite account access:

- Customer Center role
- Employee Center role
- Advanced Partner Center role

For more information about the above mentioned roles, see:

- [Customizing the Customer Center Role](#)
- [About the Employee Center Role](#)
- [Assigning the Advanced Partner Center Role](#)
- [Customer Center, Vendor Center, and Partner Center Roles](#)

Can I purchase an upgrade for a short-term period and later downgrade to a lower tier?

Service tiers align with long-term growth and are not appropriate for accommodating short-term spikes. With the new tier structuring, customers have a wider threshold in tracked attributes and are much less likely to require a tier downgrade.

How is my sandbox account upgraded?

NetSuite provides one sandbox offering, so no upgrades are possible or required. Note that we no longer offer premium sandboxes as all customer sandbox accounts will have their own database instance.

Who can I speak with about tier upgrades?

Contact your Account Manager to discuss your questions or concerns about the tier upgrade process. Contact NetSuite Customer Support for technical questions.

Transaction Types Included in Monthly Transaction Lines Metric

Each service tier includes support up to maximum limits for users, file storage, and monthly transaction lines processed. The number of transaction lines is determined by the Monthly Transaction Lines metric. This metric is calculated as the number of processed transaction lines per month across transaction types listed below, averaged over the most recent six months.

The following table lists all transaction types that contribute to the Monthly Transaction Lines metric.


Transaction Types
Assembly Build
Assembly Unbuild
Balancing Journal
Bill
Bill Credit
Bill Payment

Bin Putaway Worksheet
Bin Transfer
Blanket Purchase Order
Card Refund
Cash Refund
Cash Sale
Check
Commission
Credit Card
Credit Memo
Cross Charge Journal
Currency Revaluation
Custom
Customer Deposit
Customer Payment Authorization
Customer Refund
Deposit
Deposit Application
Deprecated Custom Transaction
Estimate
Expense Report
Finance Charge
Fulfillment Request
GL Impact Adjustment
Inbound Shipment
Inventory Adjustment
Inventory Cost Revaluation
Inventory Count
Inventory Distribution
Inventory Status Change
Inventory Transfer
Inventory Worksheet
Invoice

Invoice Group
Item Fulfillment
Item Receipt
Journal
Liability Adjustment
Netting Settlement
Opportunity
Ownership Transfer
Paycheck
Paycheck Journal
Payment
Payroll Adjustment
Payroll Liability Check
Period End Journal
Purchase Contract
Purchase Order
Purchase-Type Custom Transaction
Request For Quote
Requisition
Return Authorization
Revenue Arrangement
Revenue Commitment
Revenue Commitment Reversal
Revenue Contract
Sales Order
Sales Tax Payment
Sales-Type Custom Transaction
Statement Charge
Store Pickup Fulfillment
System Journal
Tax Liability Cheque
Tegata Payable
Tegata Receivable

Transfer
Transfer Order
Vendor Prepayment
Vendor Prepayment Application
Vendor Request For Quote
Vendor Return Authorization
Wave
Work Order
Work Order Close
Work Order Completion
Work Order Issue

The Transaction Line Workbook Solution is available on the SuiteApp marketplace to help you determine your company's monthly transaction line usage in NetSuite. If you install the SuiteApp, you can then use the pre-populated workbook and dataset that appear under Analytics to see how many transaction lines you generate each month and then analyze transaction lines by transaction type. For details on installing SuiteApps, see the help topic [SuiteApp Installation](#).

The  [Using SuiteAnalytics Workbook to Determine Your Monthly Transaction Line Usage](#) video explains why transaction lines are important and includes instructions on how to setup the SuiteAnalytics Workbook if you are not using the Transaction Line Workbook Solution.

Note: The number of transaction lines you see in the SuiteAnalytics Workbook are accurate, however, you might notice a minimal difference between the total value in the workbook and the usage numbers found on the Billing Information page. This is because a small number of transaction types, such as memorized transaction templates and statistical journals, do not appear in the Transaction Dataset in SuiteAnalytics. The discrepancy is less than 1%.

Transaction Types Not Included in Monthly Transaction Lines Metric

Apart from transaction types that contribute to the Monthly Transaction Lines metric, NetSuite provides other transaction-related records. You can see an example of such transaction types in under **Transactions**.

Note: For information about specific transaction types and transaction-related records, go to **Transactions > Transactions Overview** and click on a transaction type in the Transactions Links portlet. After the transaction opens, click the **Help** button in the header of the page. An appropriate Help topic will open.

SuiteCloud Plus Settings

If you are using SuiteCloud features, the purchase of a SuiteCloud Plus license can enhance NetSuite performance. A SuiteCloud Plus license increases an account's throughput by permitting more

concurrency for web services, scheduled processes and file imports. By adding SuiteCloud Plus licenses, customers can operate, in parallel, more web services integrations, batch processes and file imports. The number of SuiteCloud Plus licenses made available has a direct impact on attainable throughput and peak scalability.

The SuiteCloud Plus license can enhance scalability by:

- Increasing the governance limit for concurrent SOAP, REST and RESTlet web service requests.
- Increasing the number of queues available for scheduled scripts, or the number of processors available for scheduled scripts and map/reduce scripts.
- Increasing the number of queues and threads available for CSV import jobs.
- Increasing the number of REST Async Processors available for asynchronous request execution of REST web services.



Important: SuiteCloud Plus licenses are not included with any of the service tiers. To take advantage of the benefits SuiteCloud Plus licenses offer, you must purchase licenses for your account. Based on your service tier, you can purchase up to the maximum SuiteCloud Plus licenses indicated in the following table.

The following table summarizes the parameters of the SuiteCloud Plus license, assuming the purchasing of the maximum SuiteCloud Plus licenses for each corresponding service tier.

Service Tier	Maximum SuiteCloud Plus Licenses	Integration Concurrency (Base/Max)	Maximum SuiteCloud Processors	Maximum CSV Import Queues/ Thread per Queue	Maximum REST Async Processors
Standard	1	5/15	5	5 /2	5
Premium	3	15/45	15	5 /10	15
Enterprise	6	20/80	30	5 /10	30
Ultimate	12	20/140	60	5 /10	60

*The default number of SuiteCloud Processors available is 2 if you have not purchased any SuiteCloud Plus licenses.

*The default number of CSV Import Queues/Threads per Queue is 1/1 if you have not purchased any SuiteCloud Plus licenses.

*The default number of REST Async Processors is 2 if you have not purchased any SuiteCloud Plus licenses.

SuiteCloud Plus Licenses Needed

The number of SuiteCloud plus licenses required for an account will depend on integration concurrency and peaks, batch processing, and file import needs. You need to consider integration concurrency needs during peak transaction periods, the number of applications to integrate with, and the overall design of the integration to handle governance limits. When leveraging scheduled processors or map/reduce jobs, the number of transactions and time taken to process them will help determine the optimal number of queues/processors required. When leveraging the CSV import utility, the number of files that need to be imported in parallel, and time it takes to process them will help determine optimal number of queues/ threads.

Increasing the integration concurrency limit permits an increase in parallel integration operations at any given time. This increases integration transaction throughput.

Map/reduce and scheduled script processors help with batch processing of large volumes of transactions or executing scheduled business processes. Increased processor count increases parallel processing which increases transactional throughput and reduces processing times.

CSV import queues are available to load large volumes of transactions into NetSuite using the Import Assistant. These imports can be multi-threaded to reduce the import time. Increasing the CSV queues and threads per queue helps to import more files in a shorter period of time.

Note: Only Premium, Enterprise, and Ultimate tier accounts are eligible to purchase more than one SuiteCloud Plus license. Contact your sales representative or account manager to discuss SuiteCloud Plus licenses.

The following table summarizes the impact on integration concurrency, SuiteCloud Processors and CSV import queues/threads due to the number of SuiteCloud Plus licenses purchased.

SuiteCloud Plus Licenses	Integration Concurrency	SuiteCloud Processors	CSV Import Queues/Threads Per Queue	REST Async Processors
0	Account base limit	2	1 / 1	2
1	Account base limit + 10	5	5 / 2	5
2	Account base limit + 20	10	5 / 5	10
3	Account base limit + 30	15	5 / 10	15
6	Account base limit + 60	30	5 / 10	30
10	Account base limit + 100	50	5 / 10	50
12	Account base limit + 120	60	5 / 10	60

The account base limit refers to the integration concurrency limit for a particular service tier without any SuiteCloud Plus license. With the addition of a SuiteCloud Plus license, the integration concurrency increases by 10 and the number of available SuiteCloud Processors increases by 5, and the number of available Async REST Processors increases by 5. The CSV import Queue/Threads Per Queue increases up to 5 queues and 10 threads per queue with the addition of 3 SuiteCloud Plus licenses.

Please note the following:

- SuiteCloud Plus licensing may be offered in conjunction with service tiers. For further information about service tier offerings, see [NetSuite Service Tiers](#).
- The account governance limit for concurrent requests is based on the service tier as well as the number of SuiteCloud Plus licenses purchased. Different service tiers have different base limits.
- The SuiteCloud Processors feature is used to process map/reduce scripts and scheduled scripts. A scheduler automatically determines the order in which jobs process. The scheduler uses algorithms that are based on user-defined priority levels, submission times, and user-defined preferences. The result is increased throughput, reduced wait times, and the elimination of most bottlenecks. For more information about this feature, see the help topic [SuiteCloud Processors](#).
- The REST Async Processors feature is used to process asynchronous requests in REST web services. For more information, see the help topic [REST Web Services Request Processing](#).

Setting Up Transactions for NetSuite CRM+



Important: The information in this section pertains only to users of the NetSuite CRM+ product. Users of other NetSuite products can refer to [Accounting Preferences](#).

In NetSuite CRM+, users with the Administrator role can use the Set Up Transactions page to set preferences for processing their transactions.

To set up transactions:

1. Go to Setup > Company > Set Up Transactions.
2. On the Set Up Transactions page, select the preferences you want to set up.
See the sections below for descriptions of these preferences.
(Preferences that appear vary depending on the features you have enabled.)
3. Click **Save**.

Descriptions of each subtab on the Set Up Transactions page follow:

- [General Subtab](#)
- [Reporting Subtab](#)
- [Ordering/Shipping Subtab](#)
- [Time & Expenses Subtab](#)
- [Tax Subtab](#)

General Subtab

- **Consolidate Projects on Sales Transactions** – Check this box to consolidate projects on customer invoices. You can create invoices for one customer including multiple projects.
You are no longer able to issue invoices to a specific project, instead you issue the invoices to the customer.
- **Maximum # of Quantity-based Price Levels** – Enter a number to set a limit for the most price levels allowed to be assigned to an item when using Quantity Pricing.
- **Allow Discounts per Price Level on Quantity Pricing Schedules** – Check this box if you want to enter different quantity discounts for each price level on quantity pricing schedules.
- **Default Estimate Expiration (in days)** – Enter the default number of days before you want quotes to expire.
- **Duplicate Number Warnings** – Choose to have everyone with access to your account receive duplicate number warnings when transactions are submitted with the same numbers. This preference overrides the individual preference set at Home > Set Preferences.
If you clear this box, individuals can decide to have duplicate number warnings by setting the preference at Home > Set Preferences.
- **Make Departments Mandatory** – Check this box to make the Department field required on records and transactions. If you check this box, records and transactions cannot be saved without completing this field.
- **Make Classes Mandatory** – Check this box to make the Class field required on records and transactions. If you check this box, records and transactions cannot be saved without completing this field.

- **Make Locations Mandatory** – Check this box to make the Location field required on records and transactions. If you check this box, records and transactions cannot be saved without completing this field.
- **Allow Per-Line Departments** – Check this box to associate a department with individual line items on a transaction. When this preference is on, you can choose a different department for each line item on transactions.
Clear this box to select a department in the header of a transaction. When this preference is off, the department chosen in the header applies to all line items on the transaction.
- **Allow Per-Line Classes** – Check this box to associate a class with individual line items on a transaction. When this preference is on, you can choose a different class for each line item on transactions.
Clear this box to select a class in the header of a transaction. When this preference is off, the class chosen in the header applies to all line items on the transaction.
- **Allow Per-Line Locations** – Check this box to associate a location with individual line items on a transaction. When this preference is on, you can choose a different location for each line item on transactions.
Clear this box to select a location in the header of a transaction. When this preference is off, the location chosen in the header applies to all line items on the transaction.

Reporting Subtab

Check the Include Shipping Costs in Sales and Forecast Reports to have shipping and handling costs includes in order totals for sales and forecasting reports.


Ordering/Shipping Subtab

- **Default Shipping Method:** Select the shipping method you want to appear automatically on bills and invoices.
You can choose other shipping methods when you enter transactions.
To add choices to this list, go to Lists > New Shipping Items.
- **Default Sales Order Status:** Choose your default status for sales orders:
 - Choose **Pending Approval** if your company uses the approval process for sales orders.
 - Choose **Pending Fulfillment** if your company does not use the approval process for sales orders.
 You can still choose your sales order status at the time you enter a transaction.
- **Require Re-approval on Edit of Sales Order:** Choose to require re-approval when someone edits a sales order that was previously approved.
Partially fulfilled sales orders are not affected by this preference. After a sales order is partially fulfilled, the status cannot be changed back to pending approval.
- **Send E-mail Confirmation when Sales Order Cancelled:** Check this box if you want an e-mail sent to the customer when a sales order is canceled.
- **Default Return Auth. Status:** Select **Pending Approval** if your company uses the approval process for return authorizations.
Select **Pending Fulfillment** if your company does not use the approval process for return authorizations.
You can still choose any return authorization status when you enter a transaction.
- **Charge for Shipping:** Check this box to charge shipping by weight, by percent of total order or by a flat rate.

After you check this box, go to Lists > Shipping Items > New to create shipping items.

After you create shipping items, you can select them on product invoices. Your customers can also select shipping items when making a purchase from your Web store.

- **Charge Handling Separate from Shipping:** Check this box to charge a separate handling charge in addition to shipping charges.
- **Default Item Weight in Lbs.:** Enter a default shipping weight for items without a weight set on their item records.

 **Note:** If you do not enter a weight here, NetSuite uses 1 pound as the default weight. Item weight is used to determine shipping costs if you charge shipping per item or use UPS real-time rates.

Time & Expenses Subtab

- **Override Rates on Time Records:** Check this box if you want the option to lock the billable rate you enter on time records so the billable rate is not affected by any rate changes that may happen before this customer is invoiced.

If you check this, you can use different price levels by going to Setup > Enable Features > Customers/Sales, and checking the Use Multiple Prices box.

Clear this box if you have the rate field in time tracking and you do not want employees to see the service item rates. Then, the rate is kept in the system, but will no longer show in time tracking.

- **Combine Detail Items on Expense Report Transactions:** This preference affects detail items on expense reports.

Check this box if you want to combine line items from the same category on a single expense report submitted by an employee.

For example, if an employee enters a single expense report that contains two entries for entertainment costs, the total shows as one line item for entertainment costs on the invoice.

Clear this box to detail each expense report line item individually.

This preference does not combine expense categories from multiple expense reports submitted by the same employee.

- **Require Approvals on Time Records:** Check this box to require supervisors to approve their employees' time transactions.

If you don't check this, time transactions can be billed to customers or included in the payroll run without the approval of a supervisor.

- **Automatically Notify Supervisor:** Check this box to send supervisors e-mail messages when they need to approve expense reports and purchase requests.

If you check this, you must also check either Use Expense Reports, Enable Purchase Requests or both at Setup > Enable Features.

Tax Subtab

- **Tax Code Lists Include:** Choose what you want to appear in the Tax field on sales transactions:

- ☐ **Tax Groups Only**
- ☐ **Tax Groups and Tax Items**
- ☐ **Tax Items Only**

You can create Tax Groups at Lists > Accounting > Tax Groups > New. You can create tax items at Lists > Accounting > Tax Items > New.

The Tax Code Lists Include preference does not apply to journals.

The Setup Page for NetSuite CRM+ Users



Important: The information in this section pertains only to users of the NetSuite CRM+ product. Users of other NetSuite products can refer to [The Setup Page](#).

The Setup page is where users with the Administrator role manage the administrative details of their NetSuite CRM+ accounts. Set up your NetSuite CRM+ account by entering company information, enabling features and setting your preferences for processing, storing, and accessing information.

It is best to enter this information as soon as possible after your NetSuite CRM+ account is activated so that information and data you enter is processed correctly.

The links that show depend on the features you have enabled and the role you are using. Features can be enabled by users with the Administrator role at Setup > Company > Enable Features.

The Setup page includes the following categories:

- **Company:** This category contains links to records for establishing a company address and contacts, enabling features and setting preferences, and viewing your account billing terms and information.
- **Accounting:** This category contains links to set up expense categories, tax information, other accounting lists, and employee-related lists.
- **Sales Force Automation:** This category contains links to set up your sales force automation, including customer statuses, sales rules, territories, and commissions.
- **Marketing:** Set up marketing campaigns and online customer forms.
- **Support:** This category contains links to set up customer support management, including support case email, case types, case origins, case territories, online case forms, escalation rules and assignment.
- **Web Site:** This category contains links to customize item and category layouts for your website, or customize the colors in your site.
- **Import/Export:** This category contains links to transfer your data in and out of NetSuite CRM+ or set up an XML import for information exchange between applications.
- **Users/Roles:** This category contains links to edit user accounts and roles or view the audit trail.
- **Integration:** Set Up XML Import and SOAP web services.

You can also click **New** next to a setup link to create a new record of that type.

Using Telephony Integration

NetSuite provides two options for integrating NetSuite with a telephone system. Each requires different technology for implementation:

- **Telephony Application Programming Interface (TAPI):** for **placing outbound calls** with NetSuite. With TAPI you can click on the phone icon next to a phone number and your phone system will automatically dial the number. TAPI only works on Windows operating systems (not Mac or Linux). For more information, see [Setting Up TAPI Telephony Integration](#).

- Use **Computer Telephony Integration (CTI)**: for receiving and routing inbound calls. As calls are received, the CTI application queries customer information in NetSuite and presents it to the sales or support representative in a browser window using Screen Population technology. The representative has the required information shown on the screen when speaking with the customer. For more information, see [Setting Up CTI Telephony Integration](#).

To integrate your NetSuite account with either TAPI or CTI technology, users with the Administrator role must first enable the Telephony Integration feature at Setup > Company > Enable Features, on the SuiteCloud subtab. Then, each user who plans to use Telephony Integration must go to Home > Set Preferences and follow the directions provided on the Telephony subtab.

For instructions on making calls automatically from NetSuite records, see the help topic [Making Calls From NetSuite](#).

Setting Up TAPI Telephony Integration

Telephony Application Programming Interface (TAPI) must be set up individually on each user's PC. You must have a TAPI compliant phone and software such as Artisoft's® TeleVantage. TAPI integration requires the ActiveX component which is only available in the Internet Explorer browser.

To set up TAPI integration, the account administrator must first enable the Telephony Integration feature at Home > Set Preferences on the Telephony subtab. After downloading the driver, enter the name of the TAPI enabled phone.

Note: Two versions of TAPI are available, TAPI 2.x and TAPI 3.x. NetSuite supports both TAPI versions.

To set up telephony integration with a TAPI device:

1. Go to Home > Set Preferences.
2. On the **Telephony** subtab, in the **Telephony Option** field, select **TAPI Device**.
3. Follow the on-screen instructions to download the ExceleTelForNetSuiteApplications.zip file, which contains the executable file needed to install the required drivers for Telephony Integration.

Set Preferences More

Save **Cancel** **Reset**

General Appearance Transactions Analytics Activities Alerts **Telephony** Restrict View Custom Preferences

TELEPHONY OPTION
TAPI Device

TAPI DEVICE

CTI URL

PREFIX TO DIAL OUT

FOR TAPI ONLY:
MAKE SURE YOU HAVE A TAPI-ENABLED PHONE OR HAVE TAPI-ENABLED YOUR TELEPHONY CLIENT.
FOR EXAMPLE, IF YOU USE TELEVANTAGE BY ARTISOFT®, FOLLOW THE PRODUCT'S DIRECTIONS TO SET IT UP FOR TAPI USE WITH YOUR COMPUTER AND PHONE.
CLICK [HERE](#) TO DOWNLOAD AND INSTALL THE REQUIRED DRIVERS. THESE DRIVERS ARE NEEDED TO COMPLETE SETUP OF OUTBOUND DIALING FROM NETSUITE.
CONFIGURE YOUR TAPI DEVICE NAME IN THE FIELD ABOVE, AND SET ANY DIALING RULES.

4. In the **TAPI Device** field, enter the device that controls communication with your phone. If you do not know the name of your TAPI device, you can use a sample program at www.exceleтел.com to find this information.
5. In the **Prefix to Dial Out** field, enter any numbers that must be dialed before dialing a phone number in your phone system. For example, you may need to dial 9 or 1 before a number.

6. Click **Save**.

If you have trouble locating the name of your TAPI device or receive an error message that it could not be found, try the following troubleshooting tips:

- If the name of your TAPI device ends with extension.tsp, try leaving out this extension when entering the name in NetSuite.
- The TAPI Device field is case-sensitive and must match your device name exactly.
- Download a sample program [here](#) to test dialing from your phone. From the exceleTel Web page, click **EXE** to download the etQuickDial program.

When the program has downloaded, open the program and view all TAPI-enabled devices on your computer in the Active field. Select the device you are using, and check the Active box. Then enter a phone number to dial and click Dial to make sure the call is initiated from your device correctly.

To learn how to initiate and end calls, see the help topic [Making Calls From NetSuite](#).

Setting Up CTI Telephony Integration

To use Computer Telephony Integration (CTI), you must set up an account with one of our partners:

- [Contivio](#)
- [Five9](#)

Software provided by these partners uses VoIP to work with your NetSuite account to provide click-to-call for out bound calls and Screen Population (Screen Pop) technology for incoming calls.

To set up your account for CTI, an account administrator must go to Setup > Company > Enable Features. On the SuiteCloud subtab, check the boxes next to Telephony Integration and SuiteTalk (Web Services).

To set up telephony integration with CTI:

1. Go to Home > Set Preferences, and click the Telephony subtab.
2. In the **Telephony Option** field, select **CTI**.
3. In the **CTI URL** field, enter the URL corresponding to the partner you have chosen.
4. Click **Save**.



Note: See your chosen partner's website for more information about setting up their software to work with NetSuite.

To learn how to initiate and end calls, see the help topic [Making Calls From NetSuite](#).

Classifications in NetSuite

- [Classifications Overview](#)
- [Departments and Classes Overview](#)
- [Locations Overview](#)
- [Using Per-Line Classifications](#)

Classifications Overview

Departments, Classes, and Locations are classifications that users with the Administrator role can use to identify and categorize records in their NetSuite accounts. You can also define classifications for your organization's needs by creating custom segments. Classifications enable you to better organize data and preserve accuracy.

To use each classification, you must enable the feature and then set up records. After you have set up classification records, you can use them to identify other records in your NetSuite account. For example, you can enable the Departments feature and then set up a record for each department. You can select a department on each employee record or select a location on each sales order. You can identify employees by department and then run financial reports by location.

To create additional custom classification fields similar to class, department, and location, you use the Custom Segments feature. You can create an unlimited number of custom segments and add them to specific record types. For more information, see the help topic [Custom Segments](#).

See the topics below to get started using classifications:

- [Departments and Classes Overview](#)
- [Custom Segments Overview](#)
- [Locations Overview](#)

If you use NetSuite OneWorld, subsidiaries are the primary classification used to organize your NetSuite records. Departments, classes, locations, and custom segments can be used in addition to subsidiaries. If you use these classifications, you must associate them with a subsidiary. This association enables you to select the department, class, location, or custom segment on the record or transaction related to that subsidiary. For more information about using subsidiaries, see the help topics [Subsidiaries in OneWorld](#) and [Subsidiary Setup](#).

In addition, if you plan to enable the Intercompany Time and Expense feature for NetSuite OneWorld, you must determine a strategy for handling classifications on intercompany time and expenses. You can either make classifications non-mandatory for journal entries, or set up global classifications that are available to all subsidiaries. Without a defined strategy, errors may occur for automated intercompany adjustments. For information about using this feature, see the help topic [Enabling Intercompany Time and Expenses](#).

Departments and Classes Overview

Departments and classes are categories that users with the Administrator role can create to identify, categorize and track records such as financials, transactions, and employees. There is no limit to the number of departments or classes you can create.


Departments are listed first on transactions, and are useful when designating transactions and employees as part of an internal team. For example, you can create a department for each team of employees dedicated to a certain area of business (Sales, Marketing, Accounting and others). Then you can track income and expenses by each department over any time period in the reports. Also you can use the classification to departments in Sales Forecasting with the [Forecast vs. Quota by Department Report](#) or the [Alt. Sales Forecast vs. Quota by Department Report](#).

Classes are useful for wider segments within your business. For example, if you have created a department for your sales team, you can create classes to track information on sales transactions such as new customers and repeat customers. Sales orders would then indicate whether the transaction was created for a new or repeat customer. This is useful in tracking where income and expenses are generated.

To set up departments, go to Setup > Company > Classifications > Departments > New.

To set up classes, go to Setup > Company > Classifications > Classes > New.

After you have set up departments and classes, you can select them on forms and records.

 **Note:** Custom Segments are custom classification fields similar to class and department. You can use the Custom Segment feature to create an unlimited number of custom segments and add them to specific record types. For more information, see the help topic [Custom Segments](#).

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 > 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 the help topic [Applying Role-Based Restrictions to Custom Records](#).

Modifying and Deleting Classes

At any time you can edit an existing class. Any change you make overwrites historical transactions. For example, if you change the name of the class NorthEast to North East, all historical transactions for that class appear as North East.

You can delete a class only **if** there are no dependent transactions. If there are any historical transactions, you cannot delete the class.

To modify a class record:

1. Go to Setup > Company > Classifications > Classes.
2. Click **Edit** to the left of the class you want to modify.
3. On the Class page, modify the class as needed.
4. Click **Save**.

To delete a class record:

1. Go to Setup > Company > Classifications > Classes.
2. Click **Edit** to the left of the class you want to delete.
3. On the Class page, in the **Actions** menu, click **Delete**.
4. Click **OK** to confirm the deletion.

Restricting Access to Records by Class

If your account has the Classes feature enabled, 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.



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

The following settings for the Class Restrictions field on the Role page define class-related restrictions for transaction and customer 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.

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

Check the **Apply to Items** box to apply the class restrictions defined here to item records, in addition to transaction and customer records.

To set up a role to include these restrictions, go to Setup > Users/Roles > Manage Roles. Click **Customize** or **Edit**, or click the New button.



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



Important: If you are using the Advanced Employee Permissions feature, restrictions set on the Role page are only applicable to the Employees and Employee Administration permissions. The Employee Public and Employee Confidential permissions ignore the restrictions set on this page. For more information, see the help topic [Setting Employee Access for Advanced Employee Permissions](#).

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](#).

Creating Departments

Departments are categories that you can create to separate and track records such as financials, transactions, and employees. For example, you can create a department for each team of employees dedicated to a certain area of business, and then track income and expenses by each department over any time period.

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

To create a department record:

1. Go to Setup > Company > Classifications > Departments > New.
2. Enter up to 60 alphanumeric characters for the name of the department.
3. If this department is a subdepartment of another, in the **Subdepartment of** field, select the parent department.
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 department for the department 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 department with all the child subsidiaries of each subsidiary selected in the **Subsidiary** field.
6. Check the **Department is Inactive** box to inactivate this department record.

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



Note: To inactivate departments from the Departments list at Setup > Company > Classifications > Departments, 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 department values. You can also limit the departments that users can assign to these records. Department 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 Department](#).

You also can apply department restrictions to custom records, if the custom record type includes a Department field. You can add this field directly from the Department record by clicking the New Field button. For more information, see the help topic [Applying Role-Based Restrictions to Custom Records](#).

Modifying and Deleting Departments

At any time you can edit an existing department. Any change you make overwrites historical transactions. For example, if you change the name of the department NorthEast to North East, all historical transactions for that department appear as North East.

You can delete a department only **if** there are no dependent transactions. If there are any historical transactions, you cannot delete the department.

To modify a department record:

1. Go to Setup > Company > Classifications > Departments.
2. Click **Edit** to the left of the department you want to modify.
3. On the Department page, modify the department as needed.
4. Click **Save**.

To delete a department record:

1. Go to Setup > Company > Classifications > Departments.
2. Click **Edit** to the left of the department you want to delete.
3. On the Department page, in the **Actions** menu, click **Delete**.
4. Click **OK** to confirm the deletion.

Restricting Access to Records by Department

If your account has the Departments feature enabled, you can restrict access to transaction, employee, partner, and optionally item records based on their assigned department values. You can also limit the

departments that users can assign to these records. Department restrictions can be defined per user role and then applied to all users logged in with that role.



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.

The following settings for the Department Restrictions field on the Role page define department-related restrictions for transaction and customer 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.

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

Check the **Apply to Items** box to apply the department restrictions defined here to item records, in addition to transaction and customer records.

To set up a role to include these restrictions, go to Setup > Users/Roles > Manage Roles. Click **Customize** or **Edit**, or click the New button.



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.




Important: If you are using the Advanced Employee Permissions feature, restrictions set on the Role page are only applicable to the Employees and Employee Administration permissions. The Employee Public and Employee Confidential permissions ignore the restrictions set on this page. For more information, see the help topic [Setting Employee Access for Advanced Employee Permissions](#).

You can also apply role-based, department restrictions to custom records. For more information, see the help topic [Applying Role-Based Restrictions to Custom Records](#).

Converting Classes to Departments

Classes and departments are categories you create to track and classify your transactions. When you generate a transaction, departments are always listed first. If you are using classes to represent departments, you can convert them to departments and then create new classes to further detail and categorize your business.

For example, you currently have a class for your sales department, but you want to create classes for inside sales and outside sales. If you convert your sales department class to a department, you can create new classes that categorize the different areas of the sales department.

 **Warning:** The conversion process overrides existing departments, deletes all class information, and is **irreversible**.

To convert classes to departments:


1. Go to Setup > Company > Convert Classes to Departments.
2. To convert your classes to departments, click **Save**.
3. To view your new departments, go to Setup > Company > Classifications > Departments.

Converting Classes to Locations

You can use the Locations feature to track inventory, employees, and transactions for multiple company locations. If you were previously using classes for this purpose, you can convert all your class information to location information.

When you use this feature, all class are converted to locations, including historical transactions. On financial reports that show classes or locations, values that previously appeared on class are now displayed on location.

You cannot convert classes to locations if you already have locations in the system. These existing locations must first be removed before you can convert classes to locations. In addition, each class can only have one subsidiary before being converted to locations.

 **Warning:** The conversion process overrides existing locations, deletes all class information, and is **irreversible**.

To convert classes to locations:

1. Go to Setup > Company > Classifications > Convert Classes.
2. To convert your classes to locations, click **Save**.
3. To view your new locations, go to Setup > Company > Classifications > Locations.

Custom Segments Overview

The Custom Segments feature lets you create custom classification fields similar to class and department. You can create an unlimited number of custom segments, define possible values for each segment, and add the segments to specific record types. People working in NetSuite can then use the segments to classify records appropriately.

You can configure segments to display on the GL Impact page. Also, standard NetSuite reports can be customized to use custom segments as filters and columns. In financial reports, custom segments can be added as a horizontal dimension. The functionality of custom segments enhances your ability to categorize data and meet your organization's unique reporting and analysis needs.

To enable custom segments, go to Setup > Company > Enable Features. On the SuiteCloud subtab, check the Custom Segments box, and then click Save.

To create a custom segment record, see the help topic [Creating a Custom Segment](#).

Locations Overview

The Locations feature enables users with the Administrator role to track information about employees and transactions for multiple offices or warehouses. For example, you can create locations for the corporate office and all of the sales offices, or for warehouses in several states. You can associate transactions and employees with each location, and then filter report data by location.

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

To track data by location, you must enter a record for each location you want to track. Then, you can associate employees and transactions with a location record. For more information, see [Creating Locations](#).

You can use the Locations feature to do the following:

- **Associate transactions with a location.**

Sales and purchases can be grouped by location, as well as bank transactions like checks, deposits, and credit card purchases.

You can search transactions associated with a location and filter reports to show data specific to each location. For more information, see [Associating a Transaction with a Location](#) and [Searching for a Transaction by Location](#).

- **Associate employees with a location.**

Choose a location on the employee's record to associate them with a location. By customizing employee roles at Setup > Users/Roles > Manage Roles, you can restrict employee access to data for only their location. For example, you can restrict access for warehouse personnel who handle item receipts or fulfillments at a single location. For more information, see the help topic [Employee Locations](#).

- **Assign fulfillment locations to sales order lines automatically.**

If the Automatic Location Assignment feature is enabled, you can use location records to represent your fulfillment locations and assign those locations to sales order lines automatically. NetSuite assigns locations to sales orders based on the customer shipping address, the fulfillment locations in your organization, and one or more rules that define the assignment criteria (such as the location type or the distance to the shipping address). For more information, see the help topic [Automatic Location Assignment](#).

The Automatic Location Assignment feature is part of the Advanced Order Management module – contact your account representative for more information.



Important: To associate items with a location, you must enable the Multi-Location Inventory feature. Before you enable this feature, it is recommended that you read the help topic [Multi-Location Inventory](#) to determine if this feature is appropriate for your company. After you have enabled the Multi-Location Inventory feature and distributed items, you cannot disable the feature without first contacting Customer Support. Note that the Multi-Location Inventory feature is required for NetSuite OneWorld using the Inventory feature.

Creating Locations

You can create a location record for each of your company's locations. Then you can track employees and transactions by location.

Note: To create more than 100 locations, using the Advanced Item Location Configuration feature is recommended. The Advanced Item Location Configuration feature provides more flexibility and better system performance. To create more than 1000 locations, you are required to use the Advanced Item Location Configuration feature and can create an unlimited number of location records.

Read more about the [Advanced Item Location Configuration](#) feature.

Warning: We do not recommend using locations to identify areas within your warehouse such as a bin, shelf, or dock. Using locations for this purpose creates difficulties with fulfillments, LIFO and FIFO costing, and NetSuite reporting.

To create a location record:

1. Go to Setup > Company > Classifications > Locations > New.
2. Enter up to 60 alphanumeric characters for the name of the location.
This name appears on forms and reports that require you to choose a location. For example, you might name one location Georgia Warehouse and another California Warehouse.
3. If this location is a sublocation of another, in the **Sublocation of** field, select the parent location.
4. If you use NetSuite OneWorld, in the **Subsidiary** field, select the respective subsidiary.
A subsidiary must be associated with a location for the location to be selected on a transaction or record related to that subsidiary.
NetSuite OneWorld using the Inventory feature must associate each location with a single subsidiary. NetSuite OneWorld not using this feature can associate each location with no subsidiary, or one subsidiary. For information about working with subsidiaries, see the help topics [Subsidiaries in OneWorld](#) and [Subsidiary Setup](#).
5. If you use NetSuite OneWorld, check the **Include Children** box to associate the location with all the child subsidiaries of the subsidiary selected in the **Subsidiary** field.

Important: The **Include Children** box is not available in NetSuite OneWorld with the Inventory feature enabled.

6. Check the **Location is Inactive** box to inactivate this location record.
Inactive locations do not appear in lists of locations on records and transactions.

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

7. Select the kind of location: Store, Warehouse, or Undefined.
The location type is one of the criteria that the Automatic Location Assignment feature uses when determining the ideal fulfillment location. You can set the location to Undefined to represent locations that are neither a store nor a warehouse.
8. Select the time zone for the location.
9. If you want to use location-specific document and transaction numbering, in the **Document Number Prefix**, **Transaction Number Prefix**, or both fields, enter up to eight alphanumeric characters to be a prefix for autogenerated numbers.
This prefix indicates that document numbers and transaction numbers are associated with this location.

Note: You must set up location-specific transaction numbering on the Set Up Auto-Generated Numbers page at Setup > Company > Auto-Generated Numbers. On the Document Numbers subtab of this page, check the **Use Location** box next to each type of transaction that you want use location-specific numbering.

10. Select a location-specific logo to display on printed and emailed transaction forms.

To upload a logo, go to Documents > Files > Images > New. Check the **Available Without Login** box.

Note: Logos must be in JPG or GIF format. For your logo to be printed on standard forms, the logo must be no more than 200 pixels wide and 60 pixels high.

11. Check the **Make Inventory Available** box if inventory at this location can be stocked and can be allocated and committed for sales or fulfillments.

Clear this box if inventory at this location can be stocked, but cannot be committed on sales or fulfillments.

Note: To track inventory items by location, you must enable the **Multi-Location Inventory** feature. For more information, see the help topic [Multi-Location Inventory](#). The Multi-Location Inventory feature is required for NetSuite OneWorld using the Inventory feature.

12. Check the **Make Inventory Available in Web Store** box if you want on-hand inventory stored at the location to be included in the total quantity available that is displayed in your Web store.

Note: On existing location records, when you check this box or clear it and then click Save, the Locations in Queue page displays the locations that are currently processing.

13. If you use the Multi-Location Inventory and Advanced Bin Management features, and want to use bins to track inventory at this location, check the **Use Bins** box.

For more information, see the help topic [Bin Management by Location](#).

14. Check the **Include in Supply Planning** box to include this location in supply planning calculations. When the Plan Through Distribution Network preference is enabled, NetSuite completes supply planning calculations including only locations that have this setting enabled.

Note: This option is available only when the **Demand Planning** feature is enabled.

15. Check the **Include in Control Tower** box to include this location when generating snapshots. For more information, read the help topic [Supply Chain Control Tower](#).

Note: This option is available only when the **Supply Chain Control Tower** feature is enabled.

16. Enter address information for the location.

Note: In NetSuite OneWorld, the Country, Addressee, and State fields are filled in automatically with information from the subsidiary. Change the address information as required.

17. Click **Save**.

You can restrict access to transaction, employee, partner, and optionally item records based on their assigned location values. You can also limit the locations that users can assign to these records. Location

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 Location](#).

You also can apply location restrictions to custom records, if the custom record type includes a Location field. You can add this field directly from the Location record by clicking the New Field button. For more information, see the help topic [Applying Role-Based Restrictions to Custom Records](#).

Modifying and Deleting Locations

At any time you can edit an existing location. Any change you make overwrites historical transactions. For example, if you change the name of the location NorthEast to North East, all historical transactions for that location appear as North East.

You can delete a location only **if** there are no dependent transactions. If there are any historical transactions, you cannot delete the location.

To modify a location record:

1. Go to Setup > Company > Classifications > Locations.
2. Click **Edit** to the left of the location you want to modify.
3. On the Location page, modify the location as needed.
4. Click **Save**.

To delete a location record:

1. Go to Setup > Company > Classifications > Locations.
2. Click **Edit** to the left of the location you want to delete.
3. On the Location page, in the **Actions** menu, click **Delete**.
4. Click **OK** to confirm the deletion.

Making a Location Inactive

If you no longer track information for a location, you can make the location inactive to prevent it from displaying in lists of locations on records and transactions.

To inactivate a location:

1. Go to Setup > Company > Classifications > Locations.
2. Click **Edit** next to the name of the location record you want to inactivate.
3. Check the **Location is Inactive** box.



Note: If you inactivate a main location record, its child location records are automatically inactivated.

4. Click **Save**.

To inactivate locations from the Locations list at Setup > Company > Classifications > Locations, check the **Show Inactives** box, check one or more boxes in the **Inactive** column and then click **Submit**.

Associating a Transaction with a Location

When you associate transactions with a location, you can create and fulfill sales orders by location, create and receive purchase orders by locations, and search transactions by locations. You can also filter reports to obtain an accurate representation of sales, purchases, and employee data for each company location. To filter reports by location, choose a location in the footer of the report.

The Location field is mandatory for inventory transactions when Locations is enabled. To enable the Locations feature, go to Setup > Company > Setup Tasks > Enable Features (Administrator). On the Company subtab, check the Locations box and then click Save.

To associate a transaction with a location:

1. Click the **Transaction** menu.
2. Click the name of the transaction you want to create.
3. In the Classifications section, in the **Locations** field, select the appropriate location. For more information on how to create a location, read the help topic [Creating Locations](#).
4. Complete the transaction as required.
5. Click **Save**.

For example, you can select a location in the header of a sales order to record where the sale is made. Or, you could select a location in the header of a purchase order to identify where you expect to receive those items.

The screenshot shows the 'Classification' section of a NetSuite transaction form. A red box highlights the 'LOCATION' dropdown menu, which is open and shows a list of locations including 'East Coast', 'East Coast : Georgia', 'East Coast : Georgia : Atlanta Sales', 'East Coast : Georgia : Atlanta Warehouse', 'East Coast : New York', 'West Coast', and 'West Coast : California'. Other fields in the form include 'DEPARTMENT', 'CLASS', 'DEFERRED REVENUE RECLASSIFICATION ACCOUNT', 'READY FOR SHIPMENT', 'FOREIGN CURRENCY ADJUSTMENT REVENUE ACCOUNT', 'SALES REP PHONE', 'CUSTOMER CATEGORY', 'POINTS', 'ENABLE ITEM LINE SHIPPING', 'COUPON CODE', 'PROMOTION', 'DISCOUNT ITEM', and 'RATE'. A 'Calculate' button is also visible.

After transactions have been associated with a location, you can then search transactions by location. For more information, read [Searching for a Transaction by Location](#).

Searching for a Transaction by Location

The Locations feature enables you to track information about employees and transactions for multiple offices or warehouses. For example, you can create locations for the corporate office and all of the sales offices, or for warehouses in several states. You can limit employee access to company information, and monitor sales or purchasing volumes per location. You can filter reports to display data for one or all locations.

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

You can associate an employee with a location by choosing a location on the employee's record. Employee roles can be customized to access only data that is relevant to their location. For example, you can restrict access for warehouse personnel who handle item receipts or fulfillments at a single location. To customize roles, go to Setup > Users/Roles > Manage Roles.

You can classify transactions by location to precisely track data. For example, you can choose which location processes each sales and purchase transaction.

After transactions have been associated with a location, you can then search transactions by location.

To search for a transaction by location:

1. Go to Transactions > Management > Search Transactions.
2. On the Search Transactions page, in the **Locations** field, choose:
 - **any of** – finds transactions associated with chosen locations
 - **none of** – finds transactions not associated with chosen locations
3. In the text box beneath the **Locations** field, choose the locations to include (**any of**) or exclude (**none of**) in your search.
To select multiple locations, press and hold Ctrl and then click each location.
4. Select or enter additional criteria in other fields to further narrow your search.
5. Click **Submit**.

When you have finished, the Search Results page appears listing the transactions that meet the criteria of your search. To view a transaction on the list, click the date next to the transaction. When the transaction opens, you can edit it or create a new transaction.

Restricting Access to Records by Location

If your account has the Locations feature enabled, you can restrict access to transaction, employee, partner, and optionally item records based on their assigned location values. You can also limit the locations that users can assign to these records. Location restrictions can be defined per user role and then applied to all users logged in with that role.



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

The following settings for the Location Restrictions field on the Role page define location-related restrictions for transaction and customer 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.

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

Check the **Apply to Items** box to apply the location restrictions defined here to item records, in addition to transaction and customer records.

To set up a role to include these restrictions, go to Setup > Users/Roles > Manage Roles. Click **Customize** or **Edit**, or click the New button.



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



Important: If you are using the Advanced Employee Permissions feature, restrictions set on the Role page are only applicable to the Employees and Employee Administration permissions. The Employee Public and Employee Confidential permissions ignore the restrictions set on this page. For more information, see the help topic [Setting Employee Access for Advanced Employee Permissions](#).

You can also apply role-based, location restrictions to custom records. For more information, see the help topic [Applying Role-Based Restrictions to Custom Records](#).

Using Per-Line Classifications

If you enable classifications such as departments, classes, locations, and custom segments, a field for the classification shows in the header of transaction forms. When a classification is selected in a transaction header, all lines on that transaction are associated with the selected classification. For example, if you choose the location East Coast in the Location field on a sales order, all lines on that sales order are associated with the East Coast.

You can also choose to use per-line classifications that enable you to select a classification on each transaction line. Per-line classifications can be used either instead of header classifications or in addition to them.

Per-Line Classifications Only

If you use per-line classifications instead of header classifications, a classification field shows for each transaction line but does not show in the header. For example, if you have the Locations feature enabled, a Location field shows on each transaction line. You can choose the location East Coast on one line and choose West Coast on another line.

The items on each line are associated with individual locations, but the entire transaction is not associated with a location. For example, on an invoice, line one is associated with East Coast and line two is associated with West Coast, but the Accounts Receivable line is associated with no location.

Per-Line Classifications with Header Classifications

If you use per-line classes, departments, locations, or custom segments, you can customize transaction forms to identify the classification at both the header and line level at the same time.

For example, if you have enabled both the Locations feature and the Allow Per-Line Locations preference, then a Location field displays on each transaction line **and** in the form header. You can choose the location East Coast on one line and choose West Coast on another line. Then, you can choose the location United States in the transaction header and the Accounts Receivable line is associated with the United States.


These classifications can be useful if you identify legal entities or geographical segments by location and wish to report separate balance sheets and income statements by those segments. From the previous example, a sales order can post line items to the correct locations (East and West Coast), whereas the header location provides a correct income statement to be run for United States transaction totals. For example:

Location: United States

Sublocation: East Coast

Sublocation: West Coast

When you use a form customized to show a class, department, location, or custom segment at both the header and line level, both fields are required. If either the line or header field is not filled, both fields are cleared unless they are mandatory. If you have also enabled a preference to make classes, departments, locations, or custom segments mandatory, the selection is mandatory at both the header and line level.

 **Note:** Transaction lines for tax and shipping use the class selected in the transaction header, if any.

The following preferences can be set at Setup > Accounting > Accounting Preferences:

- **Make Departments Mandatory**
- **Make Classes Mandatory**
- **Make Locations Mandatory**
- **Allow Per-Line Departments**
- **Allow Per-Line Classes**
- **Always Allow Per-Line Classifications on Journals**

For only journal entries, this preference overrides any other **Allow Per-Line** preferences you have set.

- **Allow Non-Balancing Classifications on Journals**
- **Allow Empty Classifications on Journals**

For more information on these preferences, see the help topic [Accounting Preferences](#).

To specify that a custom segment is mandatory, check the Mandatory box on the Validation & Defaulting subtab on the Custom Segment configuration page.

For more information on how to customize a form to identify a classification at both the header and line level, see [Customizing Forms for Per-Line and Header Classifications](#).

Customizing Forms for Per-Line and Header Classifications

If you have enabled preferences to use per-line classes, departments, locations, or custom segments, you can customize transaction forms to identify the classification at both the header and line level at the same time.

To customize a form to identify a classification at both the header and line level, open a new transaction and click Customize. Then follow the steps below to choose which fields appear on the form and whether they are mandatory.

1. Enter a name for the custom form.
2. On the subtab **Screen Fields > Main**:
 - **Show** column – Check the box next to **Class**, **Department**, or **Location** to use the fields in the transaction header.
 - **Mandatory** column – Check the box next to **Class**, **Department**, or **Location** to require the header field to be completed on this form.
3. On the subtab **Sublist Fields**, check the box in the **Show** column next to **Class**, **Department**, or **Location** to use the fields on individual transaction lines.
4. Complete other fields as necessary.
5. Click **Save**.

The classification fields you have indicated are available for use when you use the customized form.

Approval Routing

NetSuite Approval Routing helps your organization define who can approve employee purchase transactions and limit approval amounts by authorizer level and department. This feature helps you to control spending by allowing managers to better understand your organization's approval process. Increased cost awareness helps management and staff work together to reduce unnecessary spending.

- The **Approval Routing Feature** is the most basic NetSuite approval routing option.
To learn more, see [Using the Approval Routing Feature](#).
- **Standard Suiteflow Workflows** offer a simple and flexible approvals process that is easy to install.
To learn more, see [Using Standard SuiteFlow Workflows \(SuiteApps\) for Approval Routing](#).
- **Customized SuiteFlow Workflows** offer the maximum flexibility for processing approvals.
To learn more, see [Using Custom SuiteFlow Workflows for Approval Routing](#).



Important: Whether you use the Approval Routing feature or use SuiteFlow, the setting you choose for approvals applies to all users in your company.

Posting Period for Transactions Subject to Approval

When posting transactions are subject to approval, the posting period is set upon approval of the transaction. (Non-posting transactions do not have a posting period.) The Posting Period value shown for transactions that are pending approval is subject to change when the transaction is approved.

The Posting Period value you see for transactions that are **pending approval** depends on your role, accounting preferences, and the status of the period as follows:

- If the period that maps to the transaction date is open and not locked, you see that period in the Posting Period field.
- If the period that maps to the transaction date is open but locked and your role includes the **Override Period Restrictions** permission, that period is displayed as the Posting Period.
- If the matching period is open but locked and your role **does not** include the override permission, the system behaves as if the period is closed.
- If the matching period is closed, the value you see for Posting Period is either the first open period or the current period. The accounting preference **Default Posting Period When Transaction Date in Closed Periods** determines which period is displayed.

When you approve a posting transaction, you can select a different Posting Period than the one initially displayed. You cannot select a closed period. You may be able to select an open and locked period if your role includes the Override Period Restrictions permission.

When you save the approved transactions, you may see warnings or errors, depending on the transaction and the settings of other accounting preferences. The following accounting preferences also affect the posting period. For details, see the help topic [General Accounting Preferences](#).

- Allow Transaction Date Outside of Posting Period
- Create and Edit Inventory Transactions Dated in Closed Period
- Allow Inventory Transactions Dated Outside the Posting Period

Using the Approval Routing Feature

Approval Routing enables users with the Administrator role, or the Employee Center role, to designate that specific purchase and expense transactions be approved before they are processed. Create an approval hierarchy to designate approvers for employees and set approval limits for expense reports, purchase requests, and purchase orders.

Note: If you enable Approval Routing for specific purchase and expense transactions, you can only approve 25 of those transactions at a time.

To use this method, enable [Setting up Approval Routing](#). You do not use SuiteFlow workflows with this feature.

You can incorporate the Approval Routing feature into your workflow to process the following transaction types:

- [Blanket Purchase Order Approval Workflow](#)
- [Approving an Expense Report](#)
- [Invoice Approval Workflow](#)
- [Journal Entries](#)
- [Purchase Contract Approval Workflow](#)
- [Purchase Order Approval Workflow SuiteApp](#)
- [Requisition Approval Workflow](#)
- [Revenue Arrangement Approval Routing](#)
- [Vendor Bill Approval Workflow](#)

After an employee enters an expense report, purchase request, or time transaction, the approval routing workflow may require additional processing depending on the following:

- the employee's expense limit or purchase limit
- the employee's designated supervisor or approver
- the approval limit of the supervisor or approver

For example, an employee enters a purchase request for a new computer that costs \$5000.00. According to our approval routing rules, the employee's supervisor must approve all purchase orders costing more than \$500.00. After approval the request is forwarded to purchasing for processing.

Note: A supervisor must have access to the Employee Center to give approval. An administrator can add the Employee Center role to an employee record.


Setting up Approval Routing

To use the Approval Routing feature, a user with the Administrator role must enable Approval Routing, assign roles, to employees, designate an approver, and set approval limits.

To use approval routing:

1. Enable the Approval Routing feature.
 1. Go to Setup > Company > Setup Tasks > Enable Features.
 2. In the **Employees** subtab, check the **Approval Routing** checkbox.

3. Click **Save**.
2. Assign [Assigning Roles to an Employee](#).
3. Designate [Supervisors, Approvers, and Approval Limits](#) on employee records.
4. Set [Supervisors, Approvers, and Approval Limits](#).

 **Note:** To maintain the hierarchy of an approval routing, enter all expense reports and purchase requests through the Employee Center. This includes employees with other roles.

For example, your A/P clerk has the ability to enter purchase requests in the A/P Clerk role. However, to maintain proper approval routing, your A/P clerk must change from the A/P Clerk role to the Employee Center to enter a purchase request. The A/P clerk's supervisor can then approve the purchase request by logging in to the Employee Center.

Using Standard SuiteFlow Workflows (SuiteApps) for Approval Routing

NetSuite offers standard SuiteFlow workflows, available in SuiteApps, that you can use for approval routing. These workflows are ready to be installed and do not require you to create a custom SuiteFlow workflow. However, you can customize standard SuiteFlow workflows to better meet your requirements.

You do not need to enable Approval Routing to use this workflow. To learn more, see the help topic [Enabling SuiteFlow](#).

The following transactions are available for Standard SuiteFlow Workflows:

- [Setting up the Blanket Purchase Order Approval Workflow](#)
- [Using SuiteFlow for Journal Entry Approvals](#)
- [Setting up the Purchase Contract Approval Workflow](#)
- [Purchase Order Approval Workflow Setup](#)
- [Requisition Approval Workflow Setup](#)
- [Revenue Recognition Approval Workflow](#)
- [Installing the Vendor Bill Approval Workflow](#)

Using Custom SuiteFlow Workflows for Approval Routing

Use NetSuite SuiteFlow to create custom workflows for processing approvals. You can create more flexible transaction approval processes, such as a non-sequential approval process or conditionalized routing. For example, set up a workflow that requires action from specific employees, shows buttons on forms at certain stages, or automatically send email based on specified actions.

To use a custom SuiteFlow workflow, enable a preference on the Approval Routing subtab of Accounting Preferences and then set up an approval workflow to process transactions.

You do not need to enable Approval Routing to use this workflow. To learn more, see the help topic [Enabling SuiteFlow](#).

The following transactions are available for Approval Routing:

- [Using Custom Workflow-Based Approvals for Expense Reports](#)
- [Custom Workflow Based Invoice Approval](#)

- [Customizing the Purchase Contract Approval Workflow](#)
- [Custom Workflow-based Approvals for Purchases](#)
- [Setting up Suiteflow Workflow-Based Approvals for Requisitions](#)
- [Resource Allocations Custom Approval Workflow](#)
- [Time Tracking](#)
- [Customizing for the Vendor Bill Approval Workflow](#)
- [Custom Workflow-Based Approvals for Vendor Payments](#)

Supervisors, Approvers, and Approval Limits

Use the Approval Routing feature to set up a hierarchy of supervisors and approvers who will approve purchase and expense transactions before they are processed.

Purchase approvals processes require that the Purchase Order preference for Approval Routing be disabled. To learn more, see [Using Custom SuiteFlow Workflows for Approval Routing](#). Processes for expense approvals are the same regardless of the preference setting.


After a transaction is entered by or routed to an employee for approval, the employee's record settings define which transactions require additional approval. These settings include the following:

- **Supervisor** – The employee's direct supervisor
- **Expense Limit** – The amount the employee can expense without supervisor or approver approval
- **Expense Approver** – The person who approves the employee's expense reports. If no approver is selected, the supervisor approves expense reports. If an expense approver is selected, the supervisor is no longer part of the approval hierarchy
- **Expense Approval Limit** – The maximum amount an employee can approve on an expense report when specified as an approver for another employee
- **Purchase Limit** – The amount an employee can purchase without supervisor or approver approval
- **Purchase Approver** – The person who approves the employee's purchase requests. If no approver is selected, the supervisor approves purchase requests. If a purchase approver is selected, the supervisor is no longer part of the approval hierarchy
- **Purchase Approval Limit** – The maximum amount an employee can approve on a purchase request when specified as an approver for an employee

To learn how to enter employee records settings, see the help topic [Entering Human Resources Information for an Employee](#).

For each employee, set an expense limit or purchase limit to determine the highest transaction amount the employee is allowed enter without requiring additional approval. Then, when the employee enters an expense report or purchase request with an amount below their limit, the transaction is automatically approved.

If the employee enters a transaction with a total amount that is higher than their limit, the transaction follows approval routing processes. The transaction is sent for approval by a supervisor or approver that has an approval limit greater than or equal to the amount of the transaction.

 **Note:** Employee limits and approval limits are enforced using the currency set on the employee record. If an employee enters a transaction in a foreign currency, the transaction total is first converted to the employee's currency and then compared to the defined limits.

Approval is sought based on the supervisor or approver identified on the employee's record until sufficient approval authority is found.

If sufficient authority is not found, an alert is displayed on the transaction.