Account Administration Overview Guide

2022.2

March 22, 2023

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NetSuite Account Administration

Review the following subject areas in the NetSuite administrator documentation for guidance in administering your NetSuite account:

> **Note:** The following areas and features depend on your assigned role and permissions. For more information, see the help topic NetSuite Permissions Overview.

- Account Setup
  - Centers Overview
  - Enabling Features
  - NetSuite Company Settings
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Account Administration Overview Summaries

The following summaries describe what you can find in each Account Administration guides:

- Account Administration Overview Guide
- Account Setup Guide
- Managing Users and Roles Guide
- NetSuite OneWorld Guide
- Email for Administrators Guide
- Authentication Guide
- CSV Imports Guide
- Auditing and Data Management Guide
- System Notes Guide
- Cloud Infrastructure Guide
- NetSuite Account Types Guide
- Application Performance Management Guide
- Optimizing System Performance Guide

Account Administration Overview Guide

In the Account Administration Overview Guide, you can find basic information and guidelines for administrators.

Account Administration Overview	See available documentation for administrators and its summaries. For more information, see NetSuite Account Administration.
Guidelines for Administrators	Learn how to setup up and maintain NetSuite, about customer-scheduled maintenance and upgrading NetSuite. For more information, see Guidelines for NetSuite Administrators.

Account Setup Guide

In the Account Setup Guide, you can find information about enabling features, setting company preferences, defining classifications for NetSuite records, managing NetSuite roles and permissions, and incorporating approval routing.

Centers Overview	For each user, NetSuite displays a variable set of tabbed pages, called a center, based on the user's assigned role. Find out more about each center NetSuite provides. For more information, see the help topic Centers Overview.
Enabling Features	The Enable Features page is where you turn on or off features in NetSuite. For more information, see the help topic Enabling Features.

NetSuite Company Settings	You can set up company information, general preferences, language, location, renaming records and transactions, communication preferences, duplicate detection, administrative notifications, plug-ins, service tiers, and other preferences. For more information, see the help topic NetSuite Company Settings.
Classifications in NetSuite	Classifications enable you to better organize data and preserve accuracy. Find out more about Departments, Classes, and Locations classifications that you can use to identify and categorize records in your NetSuite account. For more information, see the help topic Classifications in NetSuite.
Approval Routing	NetSuite Approval Routing helps your organization define who can approve employee purchase transactions and limit approval amounts by authorizer level and department. For more information, see the help topic Approval Routing.

Managing Users and Roles Guide

In the Managing Users and Roles Guide, you can find information about how to manage NetSuite roles and permissions to provide your users accounts with the access they need.

NetSuite Roles Overview	Details about standard roles provided by NetSuite, how to create customized roles, and tools for managing roles. For more information, see the help topic NetSuite Roles Overview.
NetSuite Users Overview	Learn how to work with the different kinds of users that can access NetSuite, such as employee, vendor, partner, and customer. For more information, see the help topic NetSuite Users Overview.
NetSuite Permissions Overview	NetSuite provides a large number of permissions that govern the data and interface that users can access. For more information about tips for working with permissions, see the help topic NetSuite Permissions Overview.

NetSuite OneWorld Guide

In the NetSuite OneWorld Guide, you can find information about how to manage multiple areas of your multinational, multicompany business including financials, customers, e-commerce, Services Resource Planning (SRP), business intelligence, and tax and compliance management.

Subsidiaries in OneWorld	NetSuite OneWorld enables you to manage data for a hierarchical structure of separate legal entities, or subsidiaries. Learn about the hierarchy, subsidiary setup, settings manager, how to associate subsidiaries with entities and items, and the subsidiary navigator. For more information, see the help topic Subsidiaries in OneWorld
Set up NetSuite OneWorld	Follow the six steps to set up NetSuite OneWorld. Learn more about account setup, inventory setup, multiple vendors setup, and logos in OneWorld. For more information, see the help topic Set up NetSuite OneWorld.
Intercompany features	You can manage your intercompany workflows with the Intercompany Framework feature which includes a variety of components. For more information, see the help topic Intercompany Framework. Manage intercompany transactions and automatically generate elimination journal entries with the Automated Intercompany Management feature. For more information, see the help topic Automated Intercompany Management.

	When an administrator enables the Intercompany Framework feature or the Automated Intercompany Management feature, NetSuite provides access to the Intercompany Preferences page, where you can define intercompany preferences. For more information, see the help topic Intercompany Preferences. You can compare the open accounts payable balance in one subsidiary to the open accounts receivable balance in the paired subsidiary at the Intercompany Balance Overview page. For more information, see the help topic Viewing Open Intercompany Balances.
Consolidated Reporting in OneWorld	View data consolidated from multiple subsidiaries on many reports. For more information, see the help topic Consolidated Reporting in OneWorld.
OneWorld ERP Accounting	See specific help topics for details about how NetSuite OneWorld affects accounting, ERP functions. For more information, see the help topic OneWorld ERP Accounting.
OneWorld CRM	Learn about consolidated quotas and forecasts, employee and partner commission, and how to set subsidiaries on online forms in OneWorld. For more information, see the help topic OneWorld CRM.
OneWorld and SuiteCommerce	When you use SuiteCommerce in a NetSuite OneWorld account, you can associate multiple subsidiaries to a Site Builder or to a SuiteCommerce Advanced website. For more information, see the help topic OneWorld and SuiteCommerce.

Email for Administrators Guide

In the Email Guide for Administrators Guide, you can find information about DomainKeys Identified Mail (DKIM), email blocklists and spamlists, scriptable templates, and DMARC-Compliant messaging in NetSuite. For more information, see the help topic Email Best Practices.

DomainKeys Identified Mail (DKIM)	DKIM is a method of digitally signing your email to allow its authentication to protect customers from unsolicited email. For more information, see the help topic DomainKeys Identified Mail (DKIM).
Email Blocklists and Spamlists	Find out about how NetSuite monitors outbound mail servers to ensure they are not listed by major, credible lists that have good reputations. For more information, see the help topic Email Blocklists and Spamlists.
Scriptable Templates	Produce personalized output and give you control over the presentation of your email communication. For more information, see the help topic Scriptable Templates.
DMARC-Compliant Messaging in NetSuite	Learn more about DMARC, or Domain-based Authentication, Reporting, and Conformance. A DMARC policy specifies how the domain owner wants the receiving mail server to handle messages claiming to be sent from their domain, but that cannot be authenticated as having originated from your domain. For more information, see the help topics DMARC-Compliant Messaging in NetSuite and Email Best Practices.

Authentication Guide

In the Authentication Guide, you can find information about password requirements and policies in NetSuite. NetSuite supports a variety of authentication methods, including two-factor authentication, token-based authentication, OAuth 2.0, Device ID authentication, Single Sign-on, Digital Signing, SSH Keys, and RESTlet authentication.

Overview	Learn general information about password requirements and policies, session management, login pages, and IP address rules setting for your account. For more information, see the help topic Authentication Overview.
Two-Factor Authentication (2FA)	Allows enforcement of a second level of security for logging in to the NetSuite user interface. Using 2FA can protect your company from unauthorized access to data. For more information, see the help topic Two-Factor Authentication (2FA).
Token-based Authentication (TBA)	Increases overall system security and enables client applications to use a token to access NetSuite through APIs, eliminating the need for RESTlets or web services integrations to store user credentials. For more information, see the help topic Token-based Authentication (TBA).
OAuth 2.0	Enables client applications to use a token to access NetSuite through REST web services and RESTlets. For more information, see the help topic OAuth 2.0.
Device ID Authentication	Allows account administrators to restrict login to only approved devices registered in NetSuite using a unique identifier. For more information, see the help topic Device ID Authentication.
Single Sign-On	Allows you to log in with a single ID and password. NetSuite supports Outbound Single Sign-on (SuiteSignOn), SAML Single Sign-on, and OpenID Connect (OIDC) Single Sign-on.
Digital Signing	Provides authentication of documents or messages so that the identity of the sender and the validity of the document's contents can be trusted. For more information, see the help topic Digital Signing.
SSH Keys for SFTP	Use SSH keys to establish an SFTP connection. By using the keys, you can manage files and directories by using the SSH file transfer (SFTP) protocol. For more information, see the help topic SSH Keys for SFTP.
RESTlet authentication	RESTlets require authentication and calls are processed synchronously. Learn more about authentication for RESTlets. Setting up Token-based authentication and OAuth 2.0 for a RESTlet integration, and using user credentials for RESTlet authentication. For more information, see the help topic RESTlet Authentication.

CSV Imports Guide

In the CSV Imports Guide, you can find information about the CSV import, the most commonly used method for transferring small to medium-sized data sets from other applications into NetSuite. Learn details about importing CSV files with the Import Assistant, guidelines for CSV import files, CSV import error messages, and additional import and export options.

Importing CSV Files with the Import Assistant	Import CSV data to NetSuite in only five steps with the Import Assistant. For more information, see the help topic Importing CSV Files with the Import Assistant.
Guidelines for CSV Import Files	Set up CSV files and review their formatting carefully to avoid errors that prevent the import and to ensure that data are imported with correct values. For more information, see the help topic Guidelines for CSV Import Files.
CSV Import Error Messages	Lists some of the common errors found during a CSV import, such as general import errors, employee import errors, transactions import errors, and others, and what you can do to correct the error. For more information, see the help topic CSV Import Error Messages.
Additional Import and Export Options	Describes options for data import and export that do not use the CSV Import Assistant, such as importing a CSV file from a third-party accounting software vendor, export of selected lists and reports as CSV files, extraction of data from NetSuite, and others. For more information, see the help topic Additional Import and Export Options.

Auditing and Data Management Guide

In the Auditing and Data Management Guide, you can find information about tracking changes in NetSuite, internal controls, managing transactions, personal information removal, auditing data changes using searches, and avoiding duplicates.

Tracking Changes in NetSuite	Information about auditing primary data and configuration changes in NetSuite, auditing account preferences, documenting changes, and audit enablement. For more information, see the help topic Tracking Changes in NetSuite.
Internal Controls in NetSuite	Lists internal controls that are readily available in NetSuite. This listing is provided as a reference to assist you in building strong internal controls in your NetSuite implementation. Find out more about standard internal controls and internal controls that require basic configuration, see the help topic Internal Controls in NetSuite.
Managing Transactions	NetSuite provides several features that enable you to record reasons for deleting transactions and view transaction history. For more information, see the help topic Managing Transactions
Personal Information (PI) Removal	Enables NetSuite users with the appropriate permissions to remove personal information from NetSuite fields, records, and audit logs. Find out more about how to address privacy regulations related to data subject requests, see the help topic Personal Information (PI) Removal.
Auditing Data Changes using Searches	To monitor changes made to NetSuite data, you can search system notes records. Learn more about searching system notes, viewing an audit trail for a record type, searching for deleted records, and understanding the context for changes. See the help topic Auditing Data Changes using Searches.
Avoiding Duplicates	Avoid unintended duplicate entries in NetSuite. Specifically, you can avoid duplicate transaction numbers, address duplicate transaction number warnings, and use auto-generated numbering for transactions. You can also avoid duplicate processing of memorized transactions in a bulk update. For more information, see the help topic Avoiding Duplicates.

System Notes Guide

In the System Notes Guide, you can find information about the NetSuite System Notes which will help you track changes made to a record. Find out more about System Notes, System Notes v2, System Notes v2 workbook, terminology, and documentation, and comparison of System Notes and System Notes v2.

System Notes	The original NetSuite system notes used to track changes made to a record. These system notes are available for records or groups of configuration settings where a System Notes subtab is available on the NetSuite page. For more information, see the help topic System Notes Overview.
System Notes v2	Captures detailed changes for records supported in System Notes v2, and groups the changes under high-level actions. These actions include create, change, deleted, set, update, and unset. For more information, see the help topic System Notes v2 Overview.
System Notes v2 Workbook	Use the System Notes v2 workbook to analyze system notes v2 data for your records. Create a custom workbook to add charts, pivots, and tables to view configuration details in your account. For more information, see the help topic System Notes v2 Workbook.
System Notes Terminology and Documentation	See terms that are used to refer to system notes in NetSuite and documentation that contains information about auditing,system notes, and transaction history.

	For more information, see the help topics System Notes Terminology and System Notes Documentation.
Comparison of System Notes and System Notes v2	See the differences between System Notes and System Notes v2 which are separate systems for tracking changes made to NetSuite records. For more information, see the help topic Comparison of System Notes and System Notes v2.

Cloud Infrastructure Guide

In the Cloud Infrastructure Guide, you can find best practices for various methods of access to NetSuite, supported cipher protocols, and more.

NetSuite IP Addresses	Provides more secure alternatives for accessing NetSuite than using IP address rules. For more information, see the help topic NetSuite IP Addresses.
Supported TLS Protocol and Cipher Suites	Lists the supported versions of TLS and cipher suites for accessing various NetSuite services. For more information, see the help topic Supported TLS Protocol and Cipher Suites.
VPN Configuration for User Access to NetSuite	Describes VPN configuration for access to NetSuite. For more information, see the help topic VPN Configuration for User Access to NetSuite.
Traffic Health	Helps you locate instances of data center-specific URLs in your account. For more information, see the help topic Traffic Health.
NetSuite Accounts Are Hosted in the Cloud	NetSuite accounts are hosted in various data centers around the globe. You should be aware of the importance of using best practices for NetSuite account access. For more information, see the help topic NetSuite Accounts Are Hosted in the Cloud.
Best Practices for NetSuite Access by Feature	Provides information to help you ensure your account, integrations, and customizations are not bound to a specific data center or type of account. For more information, see the help topic Best Practices for NetSuite Access by Feature.
Understanding NetSuite URLs	Follow the best practice of ensuring that your NetSuite accounts and related integrations are not bound to a specific data center. For more information, see the help topic Understanding NetSuite URLs.
Best Practices for Accessing NetSuite in a Cloud Environment	See best practices for Dynamic Discovery of URLs for SOAP Web Services and RESTlet Clients and How to Transition from Data Center-Specific Domains.

NetSuite Account Types Guide

In the NetSuite Account Types Guide, you can find summary-level descriptions of the different types of NetSuite accounts, such as NetSuite sandbox and NetSuite development accounts.

NetSuite Sandbox	NetSuite sandbox accounts can be used to test and train your employees on existing integrations and processes without affecting your production data. The data in the sandbox is a copy of your production data and can be refreshed from production, bringing in new data and customizations. For more information, see the help topic NetSuite Sandbox.
NetSuite development Accounts	NetSuite development accounts provide an improved experience for developing NetSuite customizations. They never contain production data. This separation prevents in-

	progress customizations from being overwritten, and enables controlled access to sensitive, restricted, and financial data. For more information, see the help topic NetSuite Development Accounts.

Application Performance Management Guide

In the Application Performance Management Guide, you can find information about the Application Performance Management (APM) SuiteApp, which lets you monitor and manage NetSuite performance for business-critical operations.

Application Performance Management (APM)	Enables you to see and manage the performance of your NetSuite customizations and business-critical operations. Use the Performance Health Dashboard to monitor issues then investigate the performance of record pages, scripts, workflows, plug-ins, jobs handled by SuiteCloud Processors, SOAP and REST web services, saved searches, web services, and RESTlet integrations in dedicated tools and pages. For more information, see the help topic Application Performance Management (APM).

Optimizing System Performance Guide

In the Optimizing System Performance Guide, you can find information about optimizing performance for users, troubleshooting performance issues, and performance best practices.

Optimizing Performance for Users	Helps administrators to improve the performance of their NetSuite application and address performance issues that their NetSuite users may experience. For more information, see the help topic Optimizing NetSuite Performance.
Troubleshooting Performance Issues	See specific troubleshooting issues and how to solve them. For more information, see the help topic Troubleshooting Performance Issues.
Performance Best Practices	Find best practices for troubleshooting, the SuiteApp Architectural Fundamentals & Examples (SAFE) Guide, SuiteCloud Plus, SOAP Web Services, CSV Import, SuiteBundler, SuiteScript, SuiteFlow, SuiteBuilder, SuiteAnalytics Connect, and SuiteCommerce. For more information, see the help topic Performance Best Practices.

Guidelines for NetSuite Administrators

NetSuite account administrators are important contacts for NetSuite. For each account, users with the Administrator role:

- Oversee the initial implementation of the NetSuite application, including setup, security, user roles, and data migrations
- Configure and customize NetSuite, both for the initial NetSuite implementation and on an ongoing basis
- Manage the ongoing administration of the NetSuite application, including helping users and ensuring system health and performance
- Refresh sandbox accounts as required
- Manage NetSuite releases

Refer to the following sections for some of the key tasks performed by administrators:

- Set Up NetSuite
  - Account Setup
  - Security and Authentication Setup
  - Users, Roles, and Permissions Setup
  - System Integrations
  - Data Migrations
  - Customizations
  - Sandbox Management
- Maintain Your NetSuite Account
  - Help Users and Maintain User Access
  - Ensure System Health
- Customer-Scheduled Maintenance
  - Customer-Scheduled Maintenance FAQ
- Get Ready for Your NetSuite Upgrade
  - Release Delivery
  - Release Preparation

For links to other NetSuite help topics for account administrators, see NetSuite Account Administration.

Set Up NetSuite

Training	What's New?	New Release	Tools
2FA Delivered Your Way for Administrators	Traffic Health	Release Notes	CSV Imports Overview
NetSuite Training	Translation Collections Overview	Release Preview Availability	Showing Role Permission Differences
		Opt-In to Release Preview	

Initial Implementation of NetSuite

Users with the Administrator role oversee the initial implementation of the NetSuite application, working with the NetSuite team. Implementation tasks include:

- Account Setup
- Security and Authentication Setup
- Users, Roles, and Permissions Setup
- System Integrations
- Data Migrations
- Customizations
- Sandbox Management

Account Setup

Setup tasks for your NetSuite account are described in the following table.

Task	More Information
Create a login page to display your company's branding on the NetSuite account login page.	Displaying Login Fields on Your Web Page
Ensure that your NetSuite account and related integrations are data center agnostic.	NetSuite Accounts Are Hosted in the Cloud
Determine the customizations required by your organization based on business needs.	SuiteCloud Platform Customization
Ensure that your global subscription status adheres to the regulations in the recipient's jurisdiction. The email opt-in status in the **Global Subscription Status** field specifies whether customers can receive email messages sent through campaigns and email merge operations.	Subscription Management

Security and Authentication Setup

NetSuite administrators determine how users and client applications access NetSuite.

Task	More Information
Set a strong password policy for users who access your account.	Password Settings That Can Be Modified
Set the appropriate password requirements for your organization.	Password Requirements and Policies in NetSuite
Set up two-factor authentication for users that handle confidential data.	Two-Factor Authentication (2FA)
Set up token-based authentication to allow client applications access to NetSuite through APIs.	Token-based Authentication (TBA)
Determine and implement the appropriate single sign-on option for your organization.	Authentication Overview

Users, Roles, and Permissions Setup

Employees, vendors, partners, and customers are users who may require access to your NetSuite account. Create custom roles for your organization, and add any permissions and restrictions required to the appropriate roles.

Task	More Information
Give employees only the amount of access they need.	NetSuite Access Overview
Never assign standard roles to users. Customize standard roles and assign custom roles to users. Create roles for each job function. You can assign multiple roles to users with multiple job functions.	Showing Role Permission Differences Customizing or Creating NetSuite Roles
Carefully consider the permissions assigned to a role and use restrictions when necessary to further control access to a record.	Permissions and Restrictions
Do not use the Full Access role.	Full Access Role (Deprecated)
Assign Core Administration Permissions to roles as needed.	Core Administration Permissions
We highly recommend users not to use the Global Permissions Feature. Only use the Global Permissions Feature to assign permissions to employees if needed. Whenever possible, you should use permissions and restrictions instead of global permissions. **Note:** Global permissions apply to every role assigned to an employee.	Using the Global Permissions Feature
Set preferences that tailor the NetSuite account to the needs of a particular role, if needed.	Setting Role-Based Preferences
Assign the Financial History permission to any role that requires access to customer or vendor transaction information.	Granting User Access to Transaction History
Understand how the Advanced Employee Permissions feature changes access to the employee record.	Before Enabling the Advanced Employee Permissions Feature
Assign each role being used to yourself and test the role. Verify that the role has all permissions and access to necessary data from beginning to end of a required process.	Permissions Documentation
Assign custom roles to users before they start accessing the account.	Assigning Roles to an Employee
Create user records.	NetSuite Users Overview Working with Records
Give new users access.	Giving an Employee Access to NetSuite Giving Customers Access
Ensure that users know how to find help.	Tips for Help Center and SuiteAnswers Getting Help
Immediately remove employees’ access to NetSuite when they leave.	Employee Termination

System Integrations

To integrate NetSuite with information from other systems, you can use:

- CSV Import
- Web Services
- RESTlets

CSV Import

Use the Import Assistant in CSV import for small- to medium-sized data imports. If you save the import mapping, you can reuse it for later import jobs and to programmatically import CSV file data. For more information, see Data Migrations.

Web Services

Use web services for large or ongoing data migration, and for migrating data for record types not currently supported for CSV import.

Use SOAP web services to regularly bring large amounts of data into NetSuite or send large amounts of data out of NetSuite. With SuiteTalk SOAP Web Services, you can develop your integration using the language of your choice.

REST web services provide a REST-based interface for interacting with NetSuite without coding.

RESTlets

A RESTlet is a SuiteScript that executes when called by an external application or by another SuiteScript. RESTlets offer ease of adoption for developers familiar with SuiteScript.

NetSuite requires authentication for RESTlets, which can retrieve, add, or manipulate data within NetSuite from an external source. The RESTful integration supports stateless communication between client and server.

Refer to the following table for more information about the system integration tools.

Tool	More Information
CSV import for small to medium-sized data imports.	CSV Imports Overview
Web services for large or ongoing data migration projects.	SuiteTalk SOAP Web Services Platform Overview SuiteTalk REST Web Services Overview and Setup
RESTlets to create custom logic and make it available to external applications over HTTP.	SuiteScript 2.x Getting Started with RESTlets

Data Migrations

You will need to migrate some company information from your other system into NetSuite. In addition to being used for system integrations, comma-separated value (CSV) import is the most commonly-used method for transferring small to medium-sized data sets from other applications into NetSuite. The CSV import process saves time and prevents errors because the import can add or update many records at one time, avoiding the need for manual data entry.

Use web services for large or ongoing data migration projects and for migrating data for record types not currently supported for CSV import. For information, see System Integrations.

Review the following tasks and the detailed information available to prepare for migrating your company's data.

Task	More Information
Scrub your data before importing it, and adjust CSV file data to conform to NetSuite file conventions and record types.	Guidelines for CSV Import Files
Save related data in separate CSV files, for example, save employee data in one file. There is one exception to this guideline: import customers, prospects, and leads with contacts.	Importing Entities and Contacts Together
Follow these best practices when performing CSV imports: ■ Perform test imports with a sample set of data first, starting with two or three records. ■ Break large jobs into smaller pieces to improve performance. The record limit per imported file is 25,000. ■ Perform import tasks during off-peak hours.	—
When importing transactions: ■ Do not import large volumes of historical transactions – your storage space may be limited. For information about the space allowed for your account, contact your account manager. ■ Imported transactions behave as if they were created in the user interface. If you import an invoice or vendor bill with inventory items, that transaction affects the inventory. When you import open accounts payable and accounts receivable transactions, make sure the amounts are not duplicated in the account balances you import later.	Transactions Import Type

Customizations

To support your organization's business processes, you may need to create customizations to add functionality to NetSuite prior to implementation. After your initial implementation of NetSuite, administrators are required to provide ongoing technical and system administration support to users. Additional configuration and integration may be necessary as the needs of the organization change over time.

Before customizing, identify what is unique to your business and what is needed to support your business practices. Then, assess whether the required functionality exists in NetSuite.

Task	More Information
Plan, review, and design before you create customizations to meet user needs. The SuiteCloud platform supports several tools you can use to adapt NetSuite for your organization: ■ Customize the NetSuite UI and business logic through scripting or through point-and-click options in the UI. ■ Search and report on NetSuite data. ■ Create custom roles to ensure users access only the tasks and pages needed for their jobs. ■ Share your customizations with other accounts.	SuiteCloud Platform Customization

Task	More Information
■ Integrate information from other systems into your NetSuite accounts.	
Limit the number of users who can add customizations.	Permissions Documentation
Establish naming conventions for your customizations so that users can identify the correct object to use.	Conventions for Naming Custom Objects
Custom fields: ■ Suggested naming convention: _abbreviation_description. ■ Use the **Description** field to provide business reasons for the field, who asked for it, and any notes. ■ Enter field level help in the **Help** field on the Display subtab to instruct users about what information to enter in the field.	Custom Fields
Custom forms: ■ Use the standard forms provided with your NetSuite account as templates for custom forms that will better suit your business needs. For example, you may want to reorganize subtabs or change field names to match your organization's workflow and terminology. After you create the custom forms, set them as your preferred forms. ■ Specify on a particular custom form that the custom field is required for that form only if a custom field is not always required.	Custom Forms Setting Validation and Defaulting Properties
Custom records: ■ Create and save your custom record first, and then add fields. ■ Test incrementally as you work with custom records and objects. ■ Use permissions only when the record is ready to be used.	Custom Records
Develop functional tests to test your organization's business processes in NetSuite.	Recommended Test Plan

Sandbox Management

A NetSuite sandbox is a safe and isolated test account in which you can develop and test new applications and customizations without affecting your production account. Your organization's sandbox account has the same configuration, data, and customizations as your production account.

The administrator requests the refresh the sandbox as required to ensure that developers are working in an up-to-date account.

Task	More Information
Monitor sandbox and coordinate refreshes from production as required.	Refreshing Sandbox Accounts
Ensure that your company is fully notified and ready for the refresh from production, before requesting a sandbox refresh.	NetSuite Sandbox
Refresh your sandbox only when you are completely ready. A refresh completely replaces the content of the sandbox account with the content of the production account. After your sandbox is refreshed from production, it cannot be restored to its prior state.	Requesting a Refresh
Monitor sandbox expiry dates.	When a Sandbox Account Expires

Task	More Information
Set up the **Send Email To** option on the Email Preferences page for Sandbox and Release Preview. This option ensures the email messages from both Sandbox and Release Preview are delivered to the email addresses you specify.	Setting Preferences for Sandbox Email

Maintain Your NetSuite Account

Training	What's New?	Tools
2FA Delivered Your Way for Administrators NetSuite Training	Traffic Health Translation Collections Overview	Application Performance Management (APM) SuiteApp Login Audit Trail Overview

Help Users and Maintain User Access

Administrators are the point of contact for users, providing ongoing technical and system administration support to users. Administrators assist users with tasks described in the following table.

Task	More Information
Act as the point of contact for end users, and provide users with resources to consult when they have questions about NetSuite.	Getting Help
Ensure system adoption by users and increase user satisfaction through training and support.	SuiteAnswers Overview SuiteAnswers
Assist users with data extraction using searches and reports. Use NetSuite's business intelligence tools to help you and your users get the most out of your data.	Saved Searches Reporting Overview Dashboards Overview Key Performance Indicators SuiteAnalytics Workbook Overview
Regularly analyze logs for undelivered email messages.	Troubleshoot Undelivered Email
Reset user passwords when requested	User Access Reset Tool
Work with NetSuite Customer Support to resolve issues. When you contact support, ensure that you know your account ID.	NetSuite Support Finding Your NetSuite Account ID

Ensure System Health

Regularly monitor the NetSuite application to ensure the health of your system.

Task	More Information
Ensure the quality of account data and monitor changes made to NetSuite data by performing regular data audits.	Auditing Data Changes using Searches

Task	More Information
Resolve data integrity issues.	Avoiding Duplicates
Review the Login Audit Trail regularly, particularly the Security Challenge column, to determine if unauthorized people are trying to access the system.	Login Audit Trail Overview
Audit roles and permissions using saved searches.	Use Searches to Audit Roles and Permissions
Monitor SuiteScript usage with saved searches.	Defining a Saved Search
Monitor and optimize NetSuite performance.	Optimizing NetSuite Performance

Getting Help for Administrators

NetSuite provides a variety of resources for administrators. From NetSuite communities and international resources to NetSuite educational services.

The following resources are available:

Support Resources

- NetSuite Support - a summary of the customer support resources NetSuite provides.
- NetSuite Communities (User Groups) - details on the online communities where you can connect with other NetSuite users.
- Voting for Enhancements - a description of SuiteIdeas, the voting tool where you can let us know which enhancements you would like to see in future versions of NetSuite.
- Checking NetSuite System Status - steps for checking the status of the NetSuite service and more information about potential outages or disruptions to service.

International Resources

- Country-Specific Features - a list of the documentation resources provided for NetSuite features used in countries around the world.
- Release Notes - PDF files of the release notes are available in several languages. When the translated release notes for the newest version of NetSuite are available, you can access them from this page.

Additional Resources

- SuiteSuccess - learn how SuiteSuccess can make implementing NetSuite fast and effective.
- SuiteApp.com - browse and choose SuiteApps that you can install in your NetSuite account.
- NetSuite Education Services - a summary of the training and certification resources available.

Note: For information about resources for users, see the help topic Getting Help.

Customer-Scheduled Maintenance

NetSuite now gives you the opportunity to reschedule some types of planned maintenance for your account to a date and time that works best for your organization. Over the next several major releases, many maintenance types will be made available to reschedule.

> **Note:** The Customer-Scheduled Maintenance feature requires View permissions and only an administrator, or another user with Set Up Company permission can use it.

For more information, watch the video.

Benefits of Customer-Scheduled Maintenance

About the Customer-Scheduled Maintenance Page

When you receive a notification that a maintenance type that can be rescheduled has been scheduled for your account, you will have the opportunity to reschedule the date and time of the maintenance.

Reschedule a Maintenance

1. Go to Setup > Company > Customer-Scheduled Maintenance and select **Reschedule** beside the maintenance you want to reschedule.
2. In the popup window, select a new date, start time, and justification for changing for the selected maintenance, then click **Reschedule**.

    > **Note:** You will notice that some dates and times are greyed out, because there is a conflicting maintenance that cannot be rescheduled. You can choose from any date and time that you are able to select in the Reschedule popup calendar.

Customer-Scheduled Maintenance has a limited number of timeslot openings, which are available on a first come, first served basis. If the Oracle NetSuite scheduled date/time is not optimal for you, you may select an alternative date/time from the available timeslot openings.

If you elect to reschedule the maintenance, please select your alternative timeslot carefully as Oracle NetSuite does not validate the suitability of the new date/time and is not responsible for any impact to your business.

Once you have rescheduled your maintenance, the new date and time for that maintenance are reflected on the Customer-Scheduled Maintenance page. The update happens automatically, and no approvals are required.

You can reschedule a maintenance as many times as required up until 72 hours before the scheduled maintenance time. At this point, the maintenance schedule is locked and no further changes can be made to the planned maintenance. To see the rescheduling history for the planned maintenance, select Show rescheduling history under the new start date and time.

Maintenance Statuses Explained

Users with the Administrator role receive email reminders about maintenance. The table describes each status you might encounter.

Status	Description
Scheduled	Important maintenance must be performed on your account. The maintenance has been scheduled for a date and time that is least disruptive to your business operations, but you can reschedule if necessary.
Rescheduled	Maintenance has been rescheduled for one of the following reasons: ■ An administrator for your account has chosen a different date and time for the maintenance.

Status	Description
	■ Oracle NetSuite must move the date and time of the maintenance because it conflicts with other important maintenance that is scheduled to be performed on your account.
Cancelled	Maintenance has been canceled due to an internal issue. The maintenance will be rescheduled when the issue is resolved. OR Oracle NetSuite has approved an exception requested by an administrator for your account to cancel the maintenance. The maintenance will be rescheduled for a future date and time.
Rolled Back	Some tasks could not be completed during the maintenance. The maintenance changes have been reversed, and your account has been reset to its previous state before the maintenance began. No data was lost. You can continue to use your account, and the maintenance will be rescheduled for a future date and time.
Extended	The maintenance is taking longer than expected to complete. You will be notified when the maintenance is complete.
Completed	The maintenance has completed successfully.

Types of Customer-Scheduled Maintenance

The following table describes the maintenances that are currently available for rescheduling. Additional maintenances are targeted to be available for rescheduling in the future.

Maintenance	Description	Supported Account Type	More Information
Routine Maintenance	Bug fixes and minor enhancements to improve your NetSuite experience.	Production	Customer-Scheduled Maintenance FAQ
NetSuite Version Upgrade	Introduces new features and improvements to NetSuite. **Note:** This maintenance is currently only available to customers with accounts in data centers built on the Oracle Cloud Infrastructure.	Production Sandbox	NetSuite Version Upgrade FAQ For more information, read the Release Notes.
Account Move to OCI	Your NetSuite account is being moved to a new data center built on Oracle Cloud Infrastructure.	Production Development	Account Move to OCI FAQ
Oracle Database Update	An update to prepare the NetSuite Cloud for migration to the Oracle Cloud Infrastructure (OCI).	Production	Oracle Database Update FAQ

Customer-Scheduled Maintenance FAQ

How does the Customer-Scheduled Maintenance page work?

The Customer-Scheduled Maintenance page gives customers the ability to pick the date and time for applicable planned maintenance to minimize the impact on their business operations.

How will I know when my account has a maintenance that I can reschedule?

When a maintenance is planned, an email notification is sent to all account administrators who are signed up to receive administrative notifications at Setup > Company > Company Management > Administrative Notifications. If the maintenance can be rescheduled, the email will include a link to the Customer-Scheduled Maintenance page.

What time format and time zone are used for my Customer-Scheduled Maintenances?

The Customer-Scheduled Maintenance page displays all dates and times in a 12-hr HH:MM AM/PM format in the local time zone you have configured in User Preferences.

The maintenance notifications communicate all dates and times in the time format and time zone recipients have configured in their User Preferences.

When I reschedule a maintenance, are the date and time options based on the NetSuite maintenance window to which my account is assigned?

Maintenance rescheduling is not restricted based on the current NetSuite maintenance windows (APAC: 9:00 AM PST, EU: 2:00 PM PST, NA: 12:01 AM PST). Customers can reschedule their maintenance to any alternate date and time that are available for selection. Dates and times that are not available will be greyed out in the Reschedule Maintenance Date/Time selector.

What is the deadline for rescheduling a maintenance?

The option to reschedule a planned maintenance locks 72 hours before the start of the maintenance. The Customer-Scheduled Maintenance page clearly indicates when the period for rescheduling locks.

How long do I have to wait for the request to be approved?

Reschedule requests are automatically processed immediately. Approvals are not required.

Will I receive a notification if a planned maintenance is canceled?

An in-account notification is displayed to users who log in with the Administrator role if a planned maintenance is canceled.

How are planned maintenances initially scheduled?

Initial maintenance times are chosen by NetSuite based on your account activity.

The options posted on the Customer-Scheduled Maintenance page’s Rescheduling Date/Time selector are based on the dates and times that are available for the planned maintenance at the time of rescheduling.

Who can access the Customer-Scheduled Maintenance page?

Users with the Administrator role can access the Customer-Scheduled Maintenance page and can reschedule planned maintenances.

Who receives automated communications about planned maintenances?

All account administrators and any additional recipients who are signed up to receive administrative notifications at Setup > Company > Company Management > Administrative Notifications for particular communication types will receive communications.

What types of automated communications are included with customer-scheduled maintenances?

In-account notifications and email messages are used to inform you about customer-scheduled maintenances.

Does the Customer-Scheduled Maintenance feature support non-production accounts like sandbox, Release Preview, and development accounts?

The Customer-Scheduled Maintenance feature supports production, sandbox, and development accounts. For supported maintenance types, see Types of Customer-Scheduled Maintenance.

Currently, there is no support for Release Preview accounts. Support for these account types will be made available in future releases.

Will the Customer-Scheduled Maintenance page on the production account display maintenance for sandbox accounts?

No. The Customer-Scheduled Maintenance page on the production account will not display maintenance for sandbox accounts. To reschedule a sandbox maintenance, you will need to log in to the sandbox account and go to the Customer-Scheduled Maintenance page.

How is the Estimated End Time in the Reschedule Maintenance popup calculated?

Estimated End Time is calculated by adding the planned maintenance duration to the rescheduled start date and time of the maintenance.

Can a maintenance be canceled or rescheduled even if a customer does not request it?

Yes. The NetSuite Operations team can cancel a customer-scheduled maintenance if necessary. If this occurs, the account administrators will be notified and given an opportunity to select a new date and time for the maintenance.

What does it mean if my maintenance has been rolled back?

During the maintenance, not all required tasks could be completed. Because of this, the maintenance changes have been reversed and your account has been set to its latest state before the maintenance began. No data has been lost. You can continue to use your account and the maintenance will be rescheduled for another date in the future. All administrators will be notified of the roll back and again when the maintenance is rescheduled.

Does my service tier determine if I can reschedule a maintenance?

No. Customer-scheduled maintenances are rolled out to all NetSuite customers, regardless of service tier.

NetSuite Version Upgrade FAQ

As you prepare for your NetSuite version upgrade, the following questions and answers will help you to get ready.

What should I do to prepare for my NetSuite upgrade?

You should request a Release Preview account and test your critical business processes in the new NetSuite version. If you encounter any issues while conducting that process review, report them to NetSuite Customer Support.

For information about how to request a Release Preview account, see the help topic Requesting a Release Preview Account.

How does Customer-Scheduled Maintenance work?

If your account has already been moved to a NetSuite data center built on Oracle Cloud Infrastructure (OCI), then scheduling and rescheduling of your NetSuite upgrade will be done using Customer-Scheduled Maintenance.

For details about Customer-Scheduled Maintenance, see Customer-Scheduled Maintenance FAQ.

I received a notification that I have an upcoming NetSuite upgrade, but I don't see a maintenance on the Customer-Scheduled Maintenance page. What am I missing?

Only accounts in NetSuite data centers built on Oracle Cloud Infrastructure (OCI) can use Customer-Scheduled Maintenance for their NetSuite upgrade.

If you require an early move of your account to a NetSuite data center built on OCI, please file a support case with NetSuite Customer Support, and then you can reschedule **subsequent** NetSuite upgrades. For more information, see the Account Move to OCI FAQ.

When will my sandbox be upgraded?

Your sandbox account will be upgraded within 7 days after your production account is upgraded. You will receive a separate notification related to your sandbox upgrade schedule.

If your account is in a NetSuite data center built on Oracle Cloud Infrastructure (OCI), you will have the flexibility to change sandbox upgrade dates from the Customer-Scheduled Maintenance page in your sandbox account.

Can I use Customer-Scheduled Maintenance to reschedule my NetSuite upgrade?

If your account has already been moved to a NetSuite data center built on Oracle Cloud Infrastructure (OCI), then yes, regardless of your service tier, you can use Customer-Scheduled Maintenance to reschedule your upgrade. Your administrator will receive a notification after your rescheduled upgrade is confirmed.

If your account has not yet been moved to a data center built on OCI, and you are a Premium, Enterprise, or Ultimate tier customer, you can request a change of upgrade date by contacting your Account Manager at least 10 days prior to your assigned upgrade date. If you are a Standard tier customer, your upgrade date cannot be changed. For details about your NetSuite service tier, see the article **How to Find Information About Your NetSuite Service Tier**, SuiteAnswers ID 102417.

Whom should I contact if I want an upgrade date and time that is not available in Customer-Scheduled Maintenance?

If you are a Premium, Enterprise, or Ultimate tier customer, please contact NetSuite Customer Support at least 72 hours before the scheduled maintenance and provide a justification for your request. For details about your NetSuite service tier, see the article **How to Find Information About Your NetSuite Service Tier**, SuiteAnswers ID 102417.

Whom will be notified of the date and time for our NetSuite upgrade?

Automated email notifications and in-account notifications will be sent to administrators of the account that is targeted to be upgraded.

If I reschedule my upgrade, is the new date and time guaranteed?

If you were able to use the Customer-Scheduled Maintenance page to reschedule your upgrade, administrators will receive an acknowledgement email to confirm the change and NetSuite will perform your upgrade on the selected date and time. In rare situations, NetSuite may need to reschedule your upgrade, but account administrators will receive a notification if a rescheduling occurs. Administrators will then be able to reschedule the upgrade if the new date and time does not work for your business.

How long will the NetSuite upgrade take?

Four hours are reserved for the NetSuite upgrade maintenance; however, many customer upgrades are completed much faster (within 60 minutes).

How will I know when my NetSuite upgrade has completed?

After the upgrade of your account to the latest NetSuite version has completed, account administrators will receive an email notification.

What does it mean if my maintenance has been rolled back?

During the maintenance, not all required tasks could be completed. Because of this, the maintenance changes have been reversed and your account has been set to its latest state before the maintenance began. No data has been lost. You can continue to use your account and the maintenance will be rescheduled for another date in the future. All administrators will be notified of the roll back and again when the maintenance is rescheduled.

Account Move to OCI FAQ

As the move of your NetSuite account to a new data center built on Oracle Cloud Infrastructure (OCI) approaches, the following questions and answers will help you to prepare.

Who will be notified about the date and time for our account move?

Automated email notifications and in-account notifications will be sent to account administrators.

Can I change the date and time of our account move?

Yes. You will have the ability to reschedule your move. Details on how to reschedule your move will be in the notifications you receive.

How many times can I change our move date?

Administrators have the ability to change your move date as many times as necessary.

How long will the move take?

We anticipate the move taking less than 60 minutes to complete.

After our account has been moved to the new data center, can we move back to the classic NetSuite data center?

No, that is not possible.

How will we know when the move is complete?

If you have the Maintenance Complete Email Notification box checked under Setup > Company > General Preferences, you will receive an email notification when your move has completed successfully.

How will it be decided which data center our account will be moved to?

Oracle NetSuite will balance accounts among data centers within each geographic region.

Can we select the data center to which our account is moved?

No. Your account will be moved to a data center within the geographic region closest to you.

We have a compliance requirement for our data to be located in a certain geographical location. How can we confirm this requirement is met?

Oracle NetSuite will follow all compliance requirements. To discuss further requirements, please contact your Account Manager.

Has the process for moves to the new data center been tested?

Yes. Oracle NetSuite has thoroughly tested the move process to ensure a smooth transition for you and your business.

Does our new data center have a disaster recovery plan?

Yes. For more on disaster recovery capabilities, please see the Disaster Recovery Fact Sheet.

Will this move impact our sandbox account?

After your production account is moved to a data center built on OCI, you can refresh your sandbox and it will then be moved to OCI as well.

If you want your sandbox account moved to a data center built on OCI without refreshing it, please file a support case with NetSuite Customer Support.

Can I request an early move to OCI?

Yes. If your circumstances require an early move of your production or sandbox account to OCI, please file a support case with NetSuite Customer Support.

Do I need to do anything to prepare for my move to OCI?

Most customers won't need to take any action before their account is moved to OCI. Existing integrations, customizations, and SOAP web services are expected to continue functioning normally after the move to OCI. However, if your integrations, customizations, or SOAP web services contain hard-coded IP addresses or data center specific URLs, you will need to make changes. For more information about how to discover whether your account is ready for a move, see the help topic Traffic Health Reports. For alternatives to hard-coding IP addresses, see the help topic NetSuite IP Addresses.

If any action is required, you will be notified in advance with instructions about what needs to be done prior to the move.

What is the value of my NetSuite account being moved to a data center built on OCI?

We are moving NetSuite accounts to data centers built on OCI to utilize Oracle's ongoing investments in security, reliability, and availability.

The NetSuite service running in data centers built on OCI means that:

- We can deploy more data centers in more locations. We can also more easily accommodate regulatory compliance, like privacy laws.
- We can reduce the number of customers in each data center. The potential impacts of an unforeseen event are also diminished by using an optimally sized data center that is located in your geographic region.

- We can define the optimal data center and use that plan everywhere. This uniformity improves:
  - Consistency in performance between regions
  - Reliability within every region
  - The speed at which NetSuite can release new infrastructure improvements
- We use the latest technology, including:
  - Exadata, which is the fastest Oracle database platform in the world.
  - Autonomous Database, which uses the power of AI to make optimizations quicker.
  - The latest hardware upgrades Oracle offers.

After your NetSuite account is moved to a data center built on OCI, you will have more opportunities to use Customer-Scheduled Maintenance. You will have the flexibility to reschedule your NetSuite upgrade to a date and time that works best for your business.

Will the move to OCI improve performance in my NetSuite account?

Performance in your NetSuite account will be similar in your new data center to what you experienced in your old data center.

What do Connect users need to know about OCI?

Connect customers that use ODBC or JDBC drivers need to take some actions prior to the move to OCI. For more information, see the help topic Required Update of SuiteAnalytics Connect Drivers.

Why do some of my account's logs seem incomplete after the move?

The following logs and data collections are not moved with your NetSuite account to the new data center built on Oracle Cloud Infrastructure (OCI):

- Data about concurrency usage at **Setup > Integration > Integration Management > Integration Governance (Administrator)**.
- Data about scripting, at **Customization > Scripting > Script Execution Logs**.
- Data about the performance of NetSuite customizations and operations, at various pages under **Customization > Performance**.

For the first 29 days after the move, the displayed values will be calculated using data stored since the date of the move, rather than from the last 30 days.

Oracle Database Update FAQ

See the following for answers to common questions about the Oracle Database Update.

What is the Oracle Database Update?

We are updating NetSuite to Oracle's latest database multitenant architecture.

Why are we doing this update?

This update will place each customer's data in their own database. This change will increase performance consistency in the short term, improve overall performance in the long term, and allow customers the flexibility to schedule more future maintenance types at their discretion.

When will the update happen?

Updates will occur from July 2019 through May 2021 and will include both sandbox and production accounts.

Will this update require accounts be taken offline?

Accounts will be offline for 1 to 4 hours. Customers will receive a notification with details about the timing of their update closer to the day it is scheduled to occur.

Can I reschedule my Oracle Database Update maintenance?

Yes. If you need to reschedule the Oracle Database Update maintenance for your account, go to Setup > Company > Customer-Scheduled Maintenance to select a new date and time for your maintenance.

> **Important:** Not all database maintenances can be rescheduled at this time. For example, host level maintenances cannot be rescheduled.

For more information about Customer-Scheduled Maintenance and which maintenances can be rescheduled, see Customer-Scheduled Maintenance.

Will I see any differences after the update?

There will be no changes to account behavior after the account is updated.

Where do I go if I have questions?

If you have additional questions, please reach out to your Account Manager or contact NetSuite Customer Support.

Get Ready for Your NetSuite Upgrade

Training	What's New?	Resources
Opt-In to Release Preview	Customer-Scheduled Maintenance	Release Preview Guide
Use Your Release Preview	Sneak Peeks	Recommended Test Plan
SuiteAnswers		Release Notes

Release Delivery

NetSuite delivers changes to customers in one of three ways:

- **Major release** – NetSuite features two major releases each year. For all major releases of NetSuite, customers are upgraded in phases over a period of a few months.

  Before the upgrade, customers can request access to a Release Preview account to test the new features using their data and business processes. For more information, see the help topic The New Release Process.
- **E-fix** – An e-fix is a scheduled maintenance release used to resolve customer–reported issues that do not require immediate attention but should be fixed prior to a major release. Each e-fix is rolled out to all customers at the same time. For more information, see e-Fix Release Notification.

- **Hot push** – A hot push is an update that occurs outside of the release schedule to fix critical customer-reported issues that cannot wait for the next scheduled e-fix. A hot push is typically rolled out to a specific customer or set of customers.

Release Preparation

Prepare your organization for the two major NetSuite releases each year.

Task	More Information
Learn the New Release process, review the release notes, and monitor the New Release portlet on your dashboard.	The New Release Process Release Notes About New Release Resources
Find the latest release news and training in SuiteAnswers.	SuiteAnswers Overview SuiteAnswers
Develop tests, functional testing, and rollout of application releases.	Release Preview Guide
Log in to your Release Preview account several weeks before your upgrade date to prepare, preview, and manage your release upgrade. Access Release Preview to test the new features using your data and business processes. Use Release Preview to increase the chance of identifying any potential problems before you upgrade to the new release.	Release Preview Availability Release Preview Notifications
Report issues that you find during testing from your Release Preview account.	How to Report Release Preview Issues