Sales Orders and Cash Sales

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Sales Orders and Cash Sales Overview

Sales orders and cash sales let you record the sale of goods and services. When you create a sales order, you record the intent to sell one or more items to a particular customer. A sales order can include many types of information such as sales information, shipping information, payment details, and accounting information. To bill a sales order, you create a cash sale or an invoice, depending on the type of sales order created originally. A cash sale requires immediate payment by the customer whereas a sales order typically lets the customer pay for the items at a later date. In your sales order workflow, you can set sales orders to be approved automatically or require approval before the sales orders can be fulfilled.

Cash sales record the sale of goods or services when payment is received immediately. You enter a cash sale by specifying the items purchased by the customer, as well as other related information such as shipping or billing details. You can print receipts in PDF format and refund cash sales as necessary.

> **ⓘ Note:** In NetSuite, the role you use has a set of permissions that give you access to pages, transactions, and records. Your role also determines the tabs and navigation menu in the application.
>
> Most of the tasks in this guide use the standard Sales Manager role. If a task or procedure cannot be completed with the Sales Manager role, instructions are provided using the Administrator role.
>
> If you have questions about your role and access permissions, speak with your account administrator. For more information on roles and permissions, see the help topic NetSuite Access Overview.

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Sales Orders

A sales order is a transaction that records a commitment to sell items or services to a customer. Sales orders have no accounting impact until items are shipped or services are completed.

Recording sales orders helps you track the following:

- What your customer has ordered
- What must be pulled from inventory
- What you have already shipped
- What still remains to be shipped

After items on sales orders are shipped, the sales orders can be turned into invoices or cash sales to bill the customer. When sales orders are converted into bills, they automatically show the items, quantities, and prices from the order without having to re-enter the information.

⚠️ **Important:** The total number of lines per transaction cannot exceed 500. Sales orders created by SOAP web services can have up to 1000 lines. For more information about line limitations in NetSuite, see the help topic Line Limitations for Transactions.

Sales orders can be created in two ways:

- **Create a sales order from an existing estimate.**

  If you have entered an estimate that contains information about a potential customer order, you can convert the estimate into a sales order. Then, NetSuite uses the exact information from the estimate to create the sales order. You do not need to re-enter the information.

  For more information, read the help topic Converting an Estimate.

  To view existing estimates, go to Opportunities > Transactions > Estimates.

- **Create a new, individual sales order.**

  You can enter information onto a sales order form without an existing estimate.

  For more information, read Creating Sales Orders.

  To enter a sales order, go to Opportunities > Transactions > Sales Orders > New.

See Sales Order Entry Workflow Chart for more information about creating sales orders.

After you have created and approved sales orders for items and services, you can view or process the sales order at each stage to track the progress of the order:
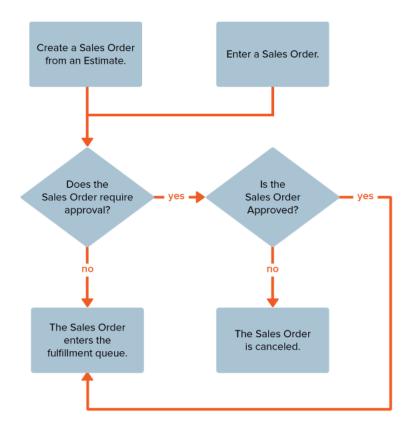
- Invoicing Sales Orders
- Viewing the Status of Sales Orders
- Creating Invoices or Cash Sales from Sales Orders

On the sales orders page, click **View** next to a sales order to view it. You can click **Edit** next to a sales order to make changes to the order.

Sales Order Entry Workflow Chart

In a typical sales order workflow, you create a sales order from an estimate or you create a new sales order. After the sales order is approved, it enters the fulfillment queue. The approval process of sales orders is determined by your company's accounting preferences.

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Creating Sales Orders

Enter sales orders to record items and services you promise to customers. Then, you can fulfill items on sales orders to track which items and services have already been delivered and which are yet to be delivered. Sales orders do not post to the general ledger.

In NetSuite, there are several types of predefined sales order forms. You or an administrator can also create customized sales order forms.

- **Standard Sales Order** – A standard sales order lets you create an invoice or a cash sale, based on whether you enter billing terms or a payment method. See The Standard Sales Order Form for more information.
- **Standard Sales Order - Cash Sale** – When you bill this type of sales order, NetSuite creates a cash sale transaction.
- **Standard Sales Order - Invoice** – When you bill this type of sales order, NetSuite creates an invoice.
- **Standard Sales Order - Progress Billing** – You can bill progress sales orders at intervals according to the fulfillment progress of the goods or services. See Creating Progress Sales Orders for more information.

If the **Automatic Location Assignment** feature is enabled and configured, NetSuite assigns locations automatically to lines in a sales order depending on the inventory available at each location and how the feature is configured. See the help topic Order Fulfillment Automation for more information. To enter a sales order with the feature enabled, see Assigning Locations Automatically in a Sales Order.

You can specify the fulfillment location for items on a sales order by selecting a location in the Location column on sales order lines. If you use the **Intercompany Cross-Subsidiary Fulfillment** feature, you

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can fulfill from locations in other subsidiaries in your company. In this case, use the Inventory Location column instead of the Location column on sales order lines to select a fulfillment location. The column shows locations in the customer subsidiary, as well as locations in all other subsidiaries that have a global inventory relationship with the transaction subsidiary. See the help topic Intercompany Cross-Subsidiary Fulfillment for more information.

Creating a Sales Order

Entering a sales order with the standard sales order form lets you create a basic sales order, which can then be billed as an invoice or a cash sale. The minimum information you must enter on a sales order is:

- **Customer** – The customer to whom you are selling the goods or services. If you use the Projects feature, you can select a project or job.
- **Date** – The date of the transaction. The current date is entered by default.
- **Status** – The sales order status indicates the stage in the fulfillment process. The sales order status can be either Pending Approval or Pending Fulfillment.
- **Items** – A sales order requires at least one item to be added in the Items tab.

For information about additional fields in the sales order header, see Sales Order Header Fields.

To create a standard sales order:

1. Go to Opportunities > Transactions > Sales Orders > New.
2. Select Standard Sales Order in the **Custom Form** field.

   The default form is the standard sales order form. For more information about how this form works, see The Standard Sales Order Form.
3. In the **Customer** field, select a customer.

   If you use the Projects feature, you can select a project or job.

   > ⓘ **Note:** If you add, edit, or delete a project after a sales order is billed, the sales order becomes a standalone sales order and is no longer associated with the invoice. Also, the invoice is removed from the Related Records subtab on the sales order.

4. Enter a date for the transaction. The current date is entered by default.
5. Select the status of the transaction. Your company's accounting preferences determine the default status.
6. In the **Items** subtab, add items to the sales order.

   To add an item, select it in the Item column, enter the quantity, and click **Add**. You can enter additional details for each line item such as an inventory commitment setting, order priority, or expected ship date. See Adding Items on a Sales Transaction for more information.
7. Enter additional information as necessary. You can enter general information in the sales order header. You can also enter information related to shipping, billing, payments, accounting, relationships, and communication:
   - Sales Order Header Fields
   - Entering Shipping Information on a Sales Transaction
   - Adding Billing Information to a Transaction
   - Entering Payment Information on a Transaction
   - Entering Accounting information about a Sales Transaction
   - Entering Relationships on a Transaction

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- Associating Sales Teams with Customers and Transactions
- Entering Communication Information on a Transaction

8. Click **Save**. You can also do one of the following:
   - Click **Save & Print** to save and print the form.
   - Click **Save & Email** to save the form and email it.
   - Click **Save and Fulfill** to save the information and immediately open a fulfillment form for this order.

> (i) **Note:** The Save and Fulfill button shows on new sales orders only. It does not show when you edit an existing order. To edit an existing sales order, go to Transactions > Sales > Enter Sales Orders > List (Administrator) and then click **Edit** next to the order.

Sales Order Header Fields

The sales order header fields let you specify additional information about a sales order transaction. You can enter general information, sales information, and information to classify the sales order for reporting purposes. The list of available fields might change depending on the features enabled in your company. The fields available for the standard sales order form are described in the following table.

Field	Description
Primary Information	
End Date	The date on which the sales order becomes invalid.
PO Number	A customer purchase order associated with the sales order.
Memo	A note used to describe the sales order. The memo appears on some sales order reports. When you use the Search Transactions feature, you can search for specific words and phrases in the **Memo** field.
Start Date	The date on which the first invoice will be created. The Advanced Billing feature must be enabled to create an invoice based on the start date.
Sales Information	
Exclude Commissions	Check this box to exclude the sales order amount, and all subordinate transactions, from commission calculations for all sales people.
Lead Source	The source of the lead associated with the sales order.
Opportunity	The opportunity related to the sales order. This field appears only when the Opportunities feature is enabled.
Partner	The partner associated with the sales order. If you use the Multi-Partner Management feature, you can associate partners with this transaction on the **Relationships** subtab.
Sales Effective Date	A date that determines which commission plan and historical sales team the transaction applies to.
Sales Rep.	The sales representative associated with the sales order. If you use the Team Selling feature, you can set this on the **Sales Team** subtab.
Classification	
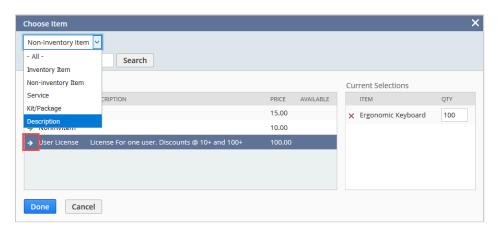
Field	Description
(OneWorld) Subsidiary	Defaults to the primary subsidiary of the customer if the customer record is not shared with multiple secondary subsidiaries.
	If the customer record is shared with multiple subsidiaries, choose the subsidiary by which to classify the sales order.
Class	The class by which to classify the sales order.
Department	The department by which to classify the sales order.
Location	The location by which to classify the sales order.

Adding Items on a Sales Transaction

A sales transaction must have at least one line item. You can enter additional details for each line item depending on the item added. Most line item columns in the Items subtab are optional. In the Items subtab, you can also apply a promotion to all items in the sales order – see Applying a Promotion on a Sales Order for more information.

To add items on a transaction:

1. Click the **Items** subtab in the form.
2. If you use the Multiple Shipping Routes feature, check the **Enable Item Line Shipping** box to enter multiple shipping addresses and shipping methods on a sales order. For more information, see the help topic Multiple Shipping Routes.
3. In the **Item** column, select the item you want to add. Note the following:
   - To add several items to a transaction at one time, click **Add Multiple**. This button above the item list opens a window with a list of the items you can add.

   You can filter the list by item type or search for an item by name or part of a name. To add an item, click its arrow in the left pane. The item moves to the Current Selections list, where you enter the quantity. To add the current selections to the item list, click **Done**.

   - To apply a discount to a single line item, add a discount item. For information, see the help topic Discount Items.
4. If you use locations in your NetSuite account, select a fulfillment location in the **Location** column. Take the following into account:
   - If you use the Intercompany Cross-Subsidiary Fulfillment feature, select a fulfillment location in the **Inventory Location** column instead.

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- If you use the Automatic Location Assignment feature, you do not need to set a location because NetSuite will assign a location automatically.

- If the Location column is not displayed and the location will not be assigned automatically, you will need to select the fulfillment location when fulfilling the sales order.

5. In the **Quantity** column, enter the quantity for this item.

   Do not enter a negative quantity in a transaction that has a net positive total value. Use a return authorization instead. For information, see the help topic Entering a Linked Return Authorization.

   > **(i) Note:** Decreasing the quantity on fulfilled sales order lines, including the inventory details, does not adjust the inventory levels of an item. It also does not change the fulfilled quantity on associated fulfillment records.

6. In the **Serial/Lot Numbers** field, enter the serial or lot number of the item.

   - Separate each serial number with a space, a comma, or by pressing Enter after each one.

     You must enter a serial number for each serialized item. For example, if you enter a quantity of 2, then you must enter two serial numbers.

   - Lot numbers must be entered in this format: **LOT#(Quantity)**

     For example, to enter a quantity of 100 items as Lot number ABC1234, enter **ABC1234(100)**.

   > **(i) Note:** By entering a specific serial or lot number, you are designating a specific item and NetSuite attempts to allocate the specific item for this order. If you do not enter a specific serial or lot number, NetSuite allocates only the specified quantity of this item to the order. Then, you can designate the specific serial or lot number for the item later.

7. If you use multiple prices, in the **Price Level** column, choose a price level for this item.

   If you choose **Custom**, you can enter a custom price for this item in the **Unit Price** column.

   This price applies to this transaction only.

   The tax code for this item is shown in the **Tax Code** column.

8. In the **Commit** column select one of the following:

   - **Available Qty** - Items for this line item are committed as available. Available items are shipped, and items that are not available are placed on backorder.

   - **Complete Qty** - This line item only ships when all items are committed.

   - **Do Not Commit** - Items are not committed to this line item until this setting is changed.

9. Set any options that apply to this item.

   If the item is a gift certificate and you do not see a Gift Certificate field, click this field to set the recipient's name and email address (required for gift certificate sales). To expand the options, click the **Set Options** icon next to the field.

10. In the **Expected Ship Date** field, enter the date you expect this item to be shipped from the vendor. This date is used for demand planning calculations.

    This defaults to show the transaction date.

11. If you use the Available to Promise feature, the **Check Item Availability** icon 🐷 shows next to the field.

    Click the **Check Item Availability** icon.

    - You can enter a new quantity in the popup. When you click OK, the new quantity populates the transaction.

    - You can select an alternative unit of measure in the popup. When you click OK, quantities are updated based on the alternative unit of measure.

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- The bottom portion of the popup displays the quantity available of the item based on future dates. The supply, demand, and balance quantities are shown for each date.

Close the popup by clicking one of the following:

- Click **Close** to close the popup without updating any data on the transaction.
- Click **OK** to close the popup and update the transaction with the new data you entered.

12. If you use the legacy revenue recognition features Revenue Commitment and VSOE, four additional columns are included: **Rev. Rec. Schedule**, **Rev. Rec. Start Date**, **Rev. Rec. End Date**, and **VSOE**. Information for these columns is provided by revenue accountants. These columns are not included when your company uses the Advanced Revenue Management feature. For more information about the legacy features, see the help topics Using Revenue Commitments and Using the VSOE Feature.

13. Check the **Exclude Item from Rate Request** box if you want to exclude the item when calculating shipping. The shipping rate total will not include this item. This box is available only for inventory and assembly items.

14. Click **Add** or press Enter to add the item to the order.

Required Deposit Workflow

The Required Deposit Workflow feature enables you to specify a required deposit amount on a sales order. You can specify the required deposit in the following ways:

- an amount on the Items subtab for each line item in the Required Deposit Amount column
- an amount for the whole sales order in the Required Deposit Amount field on the Items subtab
- a percentage for the whole sales order in the Required Deposit Percentage field on the Items subtab

You can enable the Required Deposit Workflow feature by going to Setup > Company > Enable Features. On the Transactions subtab, check the Required Deposit Workflow box. You must select the Standard Sales Order – Invoice in the Custom Form sales order field for the feature to work.

If you change any value, all remaining values related to the required deposit are automatically recalculated.

Imagine the following example scenario: you add two different items with the Unit Price of 20 USD, and set the value of the Required Deposit Amount column to 10. The sales order total amount is now 40 USD. The following field values automatically change on the Items subtab of the sales order:

- the Required Deposit Amount field value is now set to 20
- the Required Deposit Percentage field value is now set to 50

Then, if you decide to change the Required Deposit Percentage to 75, the following happens automatically:

- the Required Deposit Amount value changes to 30
- the item line values are recalculated accordingly and set to 15

Without the Required Deposit Workflow feature, the entire unpaid amount on the sales order is considered to be a deposit. With this feature, you can specify the required deposit in a way that suits your needs.

Applying a Promotion on a Sales Order

When creating a sales order, you can apply promotions to items in the order.

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To apply a promotion to items on a sales order:

1. Go to Transactions > Sales > Enter Sales Orders > List.
2. Next to the sales order containing the item that requires a discount, click **Edit**.
3. To apply a promotion, on the Items subtab, do one of the following:
   - If the promotion uses a single-use coupon code, in the **Coupon Code** field, enter the promotion's coupon code.

     The promotion name appears in the **Promotion** field.
   - For promotions with multiuse coupon codes, you can select the promotion in the **Promotion** field, and the system automatically enters the coupon code.

     > **Note:** You must manually enter single-use coupon codes in the **Coupon Code** field.
4. (Optional) If a transaction discount applies to this order, in the **Discount Item** field, select the discount.
5. In the **Rate** field, make sure the desired rate for your selected discount item appears. If not, edit the field to insert the correct percent or currency value.
6. Click **Save**.

Applying a Discount on a Sales Order

You can apply a discount to an entire sales order or to individual items on the sales order. You can apply discounts either when you create the order or later by editing the sales order.

To apply a discount to items on a sales order:

1. Go to Transactions > Sales > Enter Sales Orders > List.
2. Next to the sales order containing the item that requires a discount, click **Edit**.
3. To apply a line-level discount, insert a discount item directly below the item you want to discount.
   - To add a discount item, select it in the Item column, and then click **Add** or **OK**. For details on existing discount items, go to Lists > Accounting > Items, and in the **Type** field, select **Discount**.
   - To create new discount items, go to Lists > Accounting > Items > New, and click **Discount**.
4. To apply a discount to the entire order:

   > **Note:** If you apply a discount to the entire order, the system adds it to any defined line-level discounts. For example, if you apply a 10% line-level discount, and there is already a 10% order discount, that item now has a 20% discount.

   a. On the **Items** subtab, in the **Discount Item** field, select the discount.
   b. In the **Rate** field, make sure the desired rate for your selected discount item appears. If not, edit the field to insert the correct percent or currency value.
   c. Click **Save**.

Entering Accounting information about a Sales Transaction

The Accounting subtab tracks the financial impact of sales transactions.

On this subtab, you can determine which account is impacted by the transaction and set the customer currency and exchange rate to use. If you use the Revenue Commitments feature, you can have a

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commitment created in place of the invoice or commitment reversal. If you use the VSOE feature, you can choose to create a VSOE bundle upon saving the transaction.

Depending on the type of transaction you are entering and which form you are using, some of the fields below might not apply.

To enter accounting information about a sales transaction:

1. Click the **Accounting** subtab.
2. For cash sales:
   - If you receive payment by cash or check, select **Undep. Funds**.

     After the money is deposited, go to Transactions > Make Deposits to record your deposit.
   - If you receive payment by credit card, select **Account**, and choose which account will be credited.
3. For invoices, in the **Account** field, select the Accounts Receivable account impacted by this transaction.

   > (i) **Note:** The Account list includes all accounts receivable account types. The account used for your most recent invoice is the active account in the list. You can change the account by selecting it from the Account list.

4. If the customer uses multiple currencies, in the **Currency** field, you can select the currency you want to use for this transaction. The customer's primary currency is selected by default. For more information, see the help topic Customers and Multiple Currencies.

   If you change the currency, NetSuite updates prices and amounts to the currency you select.

   You can change the exchange rate for this transaction only, or you can update the currency record with the exchange rate you enter here.
5. If you use the Revenue Commitments feature, under **Revenue**, check the **Rev Rec on Rec Commit** box if you want to create a revenue commitment or revenue commitment reversal.

   On sales orders, the revenue commitment is created in place of an invoice. On a return authorization, the revenue commitment reversal is created in place of a credit memo or refund.

   NetSuite automatically creates all required revenue recognition schedules for the resulting commitment or commitment reversal.
6. If you use the VSOE feature:
   - Check the **Transaction is VSOE Bundle** box if you want a VSOE bundle created when you save this transaction that includes all the items on this transaction.
   - Check the **Auto Calculate VSOE Allocation** box if you want to calculate the VSOE allocation amount automatically when you save this transaction.

Assigning Locations Automatically in a Sales Order

When the Automatic Location Assignment feature is enabled and running in your account, NetSuite can automatically assign fulfillment locations to lines in a sales order. Locations are assigned according to assignment rules set up by an administrator or a fulfillment manager. See the help topic Order Fulfillment Automation for more information.

Typically, the automatic location assignment feature is configured to assign locations automatically when a sales order is approved. After you approve the sales order, NetSuite then assigns the locations asynchronously in the background. You can then check the locations assigned by waiting a few moments and returning to the sales order to view it or edit it.

If automatic location assignment is set up, but is not configured to run automatically in the background, you can still take advantage of the automatic location assignment process, provided that:

- An automatic location assignment configuration is active for your company or your subsidiary.
- The Location column is displayed in the Items subtab in a custom sales order form.

If you use the **Intercompany Cross-Subsidiary Fulfillment** feature, you can fulfill from locations in the transaction subsidiary as well as from locations in other subsidiaries in your company. With this feature enabled, NetSuite sets the fulfillment location in the Inventory Location column on sales order lines.

To use automatic location assignment when creating a sales order:

1. Go to Opportunities > Transactions > Sales Orders > New.
2. Select the relevant custom form.

   To be able to use automatic location assignment, you must select a custom sales order form in which the Location column is displayed in the Items subtab.
3. In the **Items** subtab, add the order items and their quantity.
4. If you don't want NetSuite to assign a location automatically for a particular line, do one of the following:

   - Check the **Do Not Auto Assign Location** box.
   - Manually select a location in the Location column. Doing this automatically checks the Do Not Auto Assign Location box.
5. If the Automatic Location Assignment Configuration field is displayed on the sales order form, verify that a configuration is selected.

   > **Note:** If the Automatic Location Assignment Configuration field is hidden on the sales order form, an administrator might have selected a default configuration for the form or might have created a workflow in SuiteFlow that selects a configuration. For more information about configurations, see the help topic Automatic Location Assignment Configurations.

6. Click the **Auto Assign Locations** button. If NetSuite is able to assign locations to the items, the locations appear in the Location column. Otherwise, the Location column remains blank.

   > **Note:** NetSuite assigns locations in the background. It might take a few moments for the locations to appear on each line in the column.

   > **Note:** If the automatic location assignment configuration for the sales order includes rules that have a line item saved search, NetSuite is unable to assign locations until after the sales order is saved.

7. Fill in any other details for the sales order and click **Save**.

If you edit a sales order by changing the quantity of a line, changing the item on a line, or adding a new line, you must click the **Auto Assign Locations** button again to rerun the automatic location assignment process.

Understanding the Automatic Location Assignment Configuration Field

When the Automatic Location Assignment Configuration field is displayed on the sales order form, you can choose the configuration you want NetSuite to use when assigning locations. For example, on a

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sales order for a business-to-business (B2B) customer, you might use a configuration designed for large volume sales orders. In such a configuration, rules might be set up so that larger warehouses with higher inventory quantities are assigned before smaller warehouses with less inventory.

The Automatic Location Assignment Configuration field might sometimes be hidden on the sales order form. In this case, the configuration can be set in one of the following ways:

- An administrator can set a default configuration for all sales order in a subsidiary.
- A script (SuiteScript) or workflow (SuiteFlow) can set the configuration.

> **Note:** Even if you select a configuration on the sales order form, a script or workflow can be created that overrides the selected configuration.

Creating Store Pickup Sales Orders

If you use the Store Pickup feature, you can enter a sales order for store pickup. The Store Pickup feature lets you create store pickup orders at store locations and fulfill the orders. By using the Store Pickup feature with the Fulfillment Request feature, you can also manage the workload at stores and enter fulfillment exceptions if there are problems fulfilling the order. You should use fulfillment requests with store pickup orders.

> **Note:** Using the Store Pickup feature requires several setup steps to be completed before you are able to create a store pickup order. See the help topic Setting Up Store Pickup for more information.

Entering a store pickup order is similar to entering a standard sales order, except you specify the fulfillment method for each line item as Store Pickup and choose the store at which the customer wants to pick up the order.

To enter a sales order for store pickup

1. Go to Transactions > Sales > Enter Sales Orders.
2. Select a custom sales order form for store pickup.
3. In the **Customer** field, select the customer. Enter other information such as the transaction date and the status. See Creating Sales Orders for more information.
4. On the **Items** subtab, add the items for the store pickup order:
   a. Select the item in the **Item** column.

      If an item does not appear in the list, it might not be available for store pickup. You can check this by viewing the item record.

   b. In the **Fulfillment Choice** column, select Store Pickup as the fulfillment method.

   c. In the **Location** column select the store at which the customer wants to pick up the order.

      If the Intercompany Cross-Subsidiary Fulfillment feature is enabled, select the store in the **Inventory Location** column instead of the Location column. Cross-subsidiary fulfillment lets you fulfill orders from locations in the transaction subsidiary as well as locations in other subsidiaries. The list of locations can include store locations from other subsidiaries. See the help topic Intercompany Cross-Subsidiary Fulfillment for more information.

      If a particular location does not appear in the list, store pickup might not be allowed at the location for the item. You can check this by viewing the item record.

5. Click **Save**.

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After a sales order is entered, you can edit it. However, in the case of a store pickup order, the Fulfillment Choice field becomes read only if another transaction has already been created from the sales order. For example, if a fulfillment request already exists for a line in the sales order, the Fulfillment Choice cannot be changed for that line in the sales order. Other transactions that prevent changing the Fulfillment Choice field include the Store Pickup Fulfillment transaction and the Item Fulfillment transaction.

Getting Credit Card Authorization Automatically on Sales Orders

You can customize sales orders to always get credit card authorization by default. This eliminates the need to manually check the Get Authorization box on each order.

To customize sales order forms, go to Setup > Customization > Transaction Forms (Administrator) and click **Customize** next to the standard sales order form. On the custom form, click the **Screen Fields** subtab and then click **Payment**. Check the boxes as follows:

- Check the **Get Authorization** box to use the Get Authorization box on the form.
- Check the **Show** box to display the field on the form. Clear the Show box to hide the field.
- Check the **Default Checked** box to set the default value for the Get Authorization box. The Get Authorization box is now automatically checked on this form unless you manually clear it.

If the Default Checked box is checked but the Show box is not checked, orders that use this form and have credit card information entered still attempt to authorize the charge when saved.

If the Display Type field is set to Inline Text, then the Get Authorization field shows Yes or No, depending on your setting for Default Checked.

When the customization is complete, and you save an order that uses the custom form set to Default Checked that includes the customer's credit card information, the merchant account gateway automatically authorizes the credit card. If the authorization fails, you are notified and must change the payment information before resubmitting the order.

Please note the following about using the Get Authorization box:

- When you customize a form, if you set both of the fields Get Authorization AND Credit Card Approved to **Default Checked**, the setting for Get Authorization does override the setting for Credit Card Approved. In such a case, the Get Authorization box is the only one of the two fields checked on the form.
- The Get Authorization box is not displayed when you view a transaction, only when you edit it.
- On a transaction, if both the Get Authorization AND Credit Card Approved boxes are checked AND a credit card number is not entered on the order before it is saved, when you edit the order later, the Get Authorization field is unchecked.
- For orders created through your Web Store, the preference to Require Authorization for Credit Card Transactions does override the setting for Default Checked.
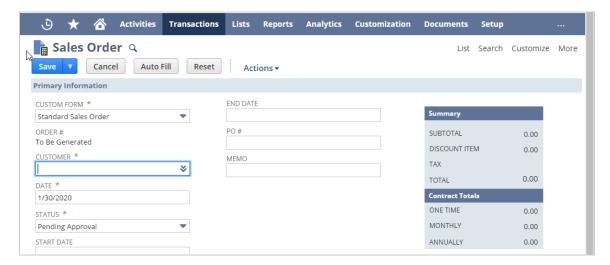
The Standard Sales Order Form

The Standard Sales Order form automatically creates the appropriate billing transaction based on whether you enter a payment method or select payment terms on the sales order.

- If you enter a payment method, NetSuite automatically generates a cash sale upon billing.
- If you select payment terms, NetSuite automatically generates an invoice upon billing.
- If you enter neither terms nor a payment method, NetSuite generates an invoice upon billing.

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When you select payment terms on a sales order, NetSuite does assess the credit limit if one is listed for the customer. When you select a payment method on a sales order, NetSuite does not assess the credit limit.

Approving Sales Orders

If a sales order has the status of Pending Approval, the order must be approved by someone with authorization before NetSuite can process it.

If you operate a Web store or use online ordering, you can quickly approve sale orders that are automatically generated when your customers order online.

To approve a sales order:

1. Go to Opportunities > Transactions > Approve Sales Orders.

   A list of orders shows at the bottom of the page.

2. In the **Supervisor** field, select a name to filter the sales order list by supervisor.

   Clear this field to show all sales orders pending approval.

3. Check the box in the **Approve** column for each sales order you want to approve.

4. In the **Date** field, select the date range for the transactions you want to show in the list. The date range you select is reflected in the From and To fields. If you enter a different range in the From and To fields, the Date field automatically shows Custom.

5. To approve a specific order, enter an order number in the **Select Order** number field, either manually or by scanning a bar code.

   The Security Match column verifies that the credit card was properly matched for the following:

   - Address Verification Service (AVS) street address match
   - Address Verification Service (AVS) postal zip code match
   - 3- or 4-digit Card Security Code match

   The **Amount** field shows the total amount of orders you have checked for approval.

6. Click **Submit**.

You can now process your sales orders and turn them into cash sales or invoices. To do this, go to Transactions > Sales > Fulfill Orders (Administrator).

Resetting Approval Status

The status of an order that is approved and pending fulfillment can be reset to Pending Approval. If you have permission to approve and edit sales orders, the Status field appears when you edit a sales order that has not been fulfilled. When a sales order is partially fulfilled, the status cannot be changed back to pending approval. For more information about setting permissions, see the help topic Approval Routing.

To reset the status, select Pending Approval in the Status field, then click **Save**. To edit an existing sales order, go to Opportunities > Transactions > Sales Orders and click **Edit** next to the order.

Requiring Re-approval

You can also require re-approval when someone edits a sales order that was previously approved. However, partially fulfilled sales orders are not affected by this preference. When a sales order is partially fulfilled, the status cannot be changed back to pending approval.

To enable this preference, go to Setup > Accounting > Preferences > Accounting Preferences (Administrator) and click the Order Management subtab. Check the Require Re-approval on Edit of Sales Order box and click **Save**.

Closing a Sales Order

You can close a sales order manually if, for example, you do not intend to fulfill part or all of the order.

For example, you sell five widgets, two contraptions, and nine bags of gizmos to a customer. After you fulfill and invoice the five widgets, the customer calls and cancels the remaining portion of the order for the contraptions and gizmos. To save time, you may choose to close the entire sales order instead of closing each line individually.

You have three options for closing a sales order. You can:

- Close one or more individual line items on a sales order.
- Close all unfulfilled line items on a sales order at one time.
- Close multiple sales orders at one time using SuiteScript.

For information about closing individual line items, see Closing Line Items on Sales Orders.

For information about how closing a sales order or closing individual line items affects revenue, see the help topic Setting Advanced Revenue Management (Essentials) Preferences.

For information about using SuiteScript to close multiple sales orders at one time, contact your NetSuite account manager or NetSuite Customer Support.

> ⓘ **Note:** If you are going to manually close a partially fulfilled line item on a sales order, you must bill the sales order **before** you close the line. When all line items on a sales order are fulfilled or closed manually, the sales order is removed from the billing queue and the receiving queue.

To close a sales order manually:

1. On the sales order, verify that the Close Order button is visible. If not, check to make sure the sales order meets each of the following conditions:
   - The sales order was created using a standard sales order form.
   - The sales order has an amount remaining to bill.
   - The sales order is in one of the following statuses:

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□ Pending fulfillment

□ Partially fulfilled

□ Pending billing

2. Click the **Close Order** button.

Reopening a Closed Sales Order

If you close a sales order in error, you can reopen it if it has not yet been fulfilled.

To reopen a closed sales order:

1. On the sales order record, click **Edit**.

2. In the **Closed** column of any line item, click to show the box, then clear the box.

3. Click **Save**.

   The status of the sales order changes to **Pending Fulfillment**.

Auto Close Back Orders

If a line item on a sales order is partially fulfilled, the remaining quantity is saved as back order. However, in many organizations, such back order quantities are not fulfilled, and the sales order is closed. The Auto Close Back Orders SuiteApp enables you to close such partially fulfilled back orders automatically, post billing. The SuiteApp also enables you to maintain a list of items to exclude or include in automatic closure of back orders.

Overview of Auto Close Back Orders

The Auto Close Back Orders SuiteApp works with the following item types:

- Assembly items
- Lot numbered assembly items
- Serialized assembly items
- Inventory items
- Lot numbered inventory items
- Serialized inventory items
- Item groups
- Kit/Package items

Auto Close Back Orders Preference

Select appropriate option in the **Items to Auto Close** preference in the **Custom Preferences** subtab of the General Preferences page (Setup > Company > General Preferences). The preference has the following options:

- **None (or Blank)** – The **Auto Close Back Orders** script does not run on any items.
- **Items in Auto Close Items List** – The Auto Close Back Orders script runs on items selected in the Auto Close Items page.

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- **Items not in Auto Close Items List** – The Auto Close Back Orders script runs on all items except the ones selected in the Auto Close Items page.

> ⓘ **Note:** In version 1.02.0 of the Auto Close Back Orders SuiteApp, the following options in the **Auto Close Back Orders** preference are renamed:
>
> - **Items in Fill Kill Items List** renamed to Items in **Items in Auto Close Items List**
> - **Items not in Fill Kill Items List** renamed to **Items not in Auto Close Items List**
>
> If you had previously installed a version older than 1.02.0 of the SuiteApp, you would see the old options even after upgrading to the latest version. Also, translation will not work on the old options.

Criteria for Automatic Closing of Back Orders

A line item on a sales order is automatically closed only when all of the following conditions are met:

- The item is included in the auto close items list.
- The status of the sales order is **Partially Fulfilled** or **Pending Billing/Partially Fulfilled**.
- The item is of one of the following types:
  - Inventory items (except drop ship and special order items)
  - Assembly items
  - Item groups
  - Kit/Package items
- The sales order line item is not in outbound processing, that is, the line item is not in picked or packed state.
- If either of the following conditions is true:
  - **Fulfilled Quantity** and **Invoiced Quantity** for the item is equal as well as greater than zero.
  - **Fulfilled Quantity** for the item is zero and at least one of the line items is closed.
- **Ordered Quantity** is greater than the **Fulfilled Quantity** for the item.

> ⓘ **Note:** Completely fulfilled sales order lines are not automatically closed.

Setting Up Auto Close Back Orders

Auto Close Back Orders is a managed SuiteApp that is automatically updated whenever enhancements or new features are added.

Installing Auto Close Back Orders

Only users with Administrator role or with SuiteBundler permission can install the SuiteApp. Following are the bundle details:

- Bundle Name: Auto Close Back Orders
- Bundle ID: 300047

For more information about installing a bundle, see the help topic Installing a Bundle.

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Prerequisites

The Auto Close Back Orders SuiteApp is developed and tested for use primarily with NetSuite OneWorld.

The following features are required to use this SuiteApp.

To enable the features:

1. Go to Setup > Company > Setup Tasks > Enable Features.
2. Check the boxes next to all the features listed in the following table:

Subtab	Feature Name
SuiteCloud	▪ Custom Records ▪ Client SuiteScript ▪ Server SuiteScript

3. Click **Save**.

Supported Browsers for Auto Close Back Orders

The Auto Close Back Orders SuiteApp supports the following browsers and operating systems:

Browser	Platform
Google Chrome 71 or newer	▪ Windows 10 ▪ Windows 8.x ▪ Windows 7
Microsoft Edge (Anniversary Update and later)	Windows 10 (Anniversary Update)
Mozilla Firefox 60 or newer	▪ Windows 10 ▪ Windows 8.x ▪ Windows 7 ▪ Windows Vista

Creating or Customizing Roles to Use Auto Close Back Orders

If you are an administrator, you can create new roles or customize roles to add permissions for using Auto Close Back Orders. For more information, see the help topics Assigning Roles to an Employee and Customizing or Creating NetSuite Roles.

Refer to the following table for minimum access levels for different record types required to use Auto Close Back Orders:

Record	Minimum Access Level
Transaction > Find Transaction	View
Lists > Custom Record Entries	View
Lists > Customers	View
Lists > Documents and Files	View

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Record	Minimum Access Level
Lists > Subsidiaries	View
Custom Record > Auto Close Items	View
Custom Record > Item Exceptions	View

Using Auto Close Back Orders

The Auto Close Back Orders script is used to automatically close back orders. The script triggers when you save an invoice. When a line item is identified for automatic closing, the script takes the following actions:

- The line item on the sales order is automatically closed.
- The **back order** quantity is set to zero.
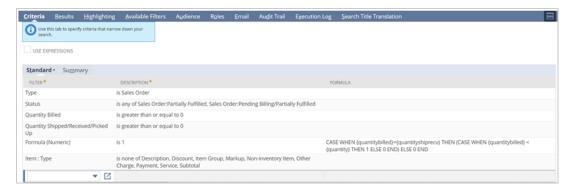
Creating Auto Close Items List

For each customer, create an auto close items list. The selection in the **Items to Auto Close** preference decides whether the Auto Close Back Orders script runs on the auto close items or excludes the auto close items.

To create an auto close items list:

1. Go to Lists > Accounting > Auto Close Items > New.

   For existing customers, you can also access the page by clicking the **Auto Close Items** button on the Customer record.

2. In the Auto Close Items page, add items to the list.

   a. Select the customer.

   b. Select the subsidiary.

   c. (Optional) To select all items, check the **Select All Items** box.

   d. In the sublist, select the item.

   e. Click **Add**.

   f. Repeat steps d and e above to include more items to the exceptions list.

3. Click **Save**.

The **AFK Fill Kill Transaction Search** saved search is editable. Use the saved search to define your own criteria to search for sales order line items that you want to auto close. Below is a screenshot of the default saved search criteria.

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Importing Auto Close Items

You can also import the auto close items using the CSV Imports feature. For importing auto close items, you must have **Edit** permission for the following records:

- Custom Record > Auto Close Items
- Custom Record > Item Exceptions

For more information, read the help topic Importing CSV Files with the Import Assistant.

Invoicing Sales Orders

Invoicing a sales order, also knows as billing a sales order, turns an approved sales order into an invoice or cash sale.

When you invoice or bill sales orders, NetSuite defaults to use standard invoice and cash sale forms.

> **Note:** If you use custom sales orders, you also need to create custom invoices and custom cash sales.

To invoice sales orders:

1. Go to Transactions > Sales > Invoice Sales Orders (Administrator).
2. To filter the list of billable sales orders displayed, do the following:
   - To view the list of sales orders for a particular customer, select a customer. Otherwise, select All to view sales orders of all customers.
   - In the **Next Bill On Or Before** field, enter a date to filter the list by the billing date on the orders.
3. Set basic billing information for the sales orders you want to invoice:
   a. In the **Posting Period** field, select the accounting period to which you want to post the transaction. If a period is closed, you cannot post to that period.
   b. In the **Date** field, enter the billing date for the transactions. The current date is entered by default.
   c. In the **To Be Printed** field:
      - Select **Yes** if you want to save this form in a queue to print.
      - Select **No** if you do not want to print this form.
      - Select **Respect Customer Preference** to print based on the default preference on the customer record. Set the preference on the Info subtab of a customer record in the Send Transactions By field.
   d. In the **To Be Emailed** field:
      - Select **Yes** if you want to email this form.
      - Select **No** if you do not want to email this form.
      - Select **Respect Customer Preference** to send email based on the default preference on the customer record. Set the preference on the Info subtab of a customer record in the Send Transactions By field.
   e. Check the **Credit Card Approved** box if the transactions you select have already had credit card charges performed outside NetSuite, such as by a card-swipe terminal.

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> **ⓘ Note:** If you check this box and submit this transaction, NetSuite automatically checks the Credit Card Approved box and sets the Account field on Cash Sales you process.

> **ⓘ Note:** You can also set the billing information for other fields in the transaction. See Bulk Update Fields
>
> for more information

4. Check the box under the Invoice column for the sales orders you want to bill.

   The Order Type column shows whether the sales order becomes an invoice or a cash sale. Whether you create an invoice or cash sale for the sales orders depends on the form you originally used to enter the orders. The cash sale form generates a cash sale and the invoice form generates an invoice.

5. > **⚠ Important:** In this step, the selected sales orders enter the processing queue and are billed with the data you selected or entered.

   Click **Submit** to create the invoice or cash sale.

   The Process Status page displays with the status of the sales orders submitted for billing. Click the Refresh button to view updates to the status.

If you converted the sales order into an invoice, go to Transactions > Customers > Accept Customer Payments (Administrator) to apply a payment to the open invoice.

If you turned the sales order into a cash sale, you can choose to place the payment into Undeposited Funds or directly into a bank account. If you select Undeposited Funds, after the payment is approved, click **Make Deposits** to deposit the money from Undeposited Funds into a bank account.

If you use advanced shipping, you can track sales orders separately from invoices. To use advanced shipping, go to Setup > Company > Enable Features (Administrator), click the Transactions subtab, check the Advanced Shipping box, and then click **Save**.

If you use advanced shipping and want to create invoices for a whole order even if the order has not been completely fulfilled, go to Setup > Accounting > Preferences > Accounting Preferences (Administrator), click the Order Management subtab, check the Invoice in Advance of Fulfillment box, and then click **Save**.

Bulk Update Fields

The bulk billing page includes a Set Fields subtab where you can enter updates to enter for orders being billed.

For example, if you bulk bill a group of sales orders, you may want to update the memo field on all of the orders to say "Q1 Rush processing." You are able to enter the memo text on the Set Fields subtab and all orders processed show the new text.

To update fields during a bulk process:

1. Go to Transactions > Sales > Invoice Sales Orders (Administrator).
2. Click the **Set Fields** subtab to choose the fields to update and select the data for entry.
3. In the **Field** column, choose a field to update.
4. Depending on the field you select, data is entered in one of the following fields:

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- In the **Selection** column, choose a setting for the field.

- In the **Checked** column, define whether a box is checked or cleared.

- In the **Text** column, enter text for the chosen field.

- In the **Date** column, choose a date for the chosen field.

5. Click **Add**.

6. Repeat these steps for each field you want to update during this bulk process.

7. Complete other fields on the billing form as necessary.

8. Click **Submit**.

When you submit the form, the invoices are generated and the fields are updated as you specified.

> **i** **Note:** Only fields in the header of the form are available for updating during bulk fulfillment or invoicing.

Closing Line Items on Sales Orders

On sales orders, you are able to close line items manually when you do not intend to fulfill open items on the order.

For example, you sell ten widgets to a customer and have already fulfilled five of them. Then, you discontinue the item and cannot fulfill the remaining five. If you close the line manually instead of changing the quantity, you retain a record of how many were ordered originally.

To close a line item on a sales order manually:

1. Go to Opportunities > Transactions > Sales Orders.

2. Click **Edit** next to the sales order with the line you want to close.

3. On the **Items** subtab of the sales order, click the line you want to close.

4. Check the box in the **Closed** column, and click **Done**.

5. Click **Save**.

> **i** **Note:** If you are going to manually close a partially fulfilled line item on sales order, you must bill the sales order **BEFORE** you close the line. When all line items on a sales order are fulfilled or closed manually, the sales order is removed from the billing queue and the receiving queue.

Viewing the Status of Sales Orders

With advanced shipping, your shipping and accounting departments use separate processes for fulfilling and billing sales orders. You can fulfill all or part of sales orders separately from invoices. Your sales orders have statuses that reflect where the orders are in the fulfilling and billing process.

To enable the Advanced Shipping feature, an administrator can go to Setup > Company > Enable Features (Administrator). On the Transactions subtab, check Advanced Shipping, and then click Save.

To view the status of a sales order:

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1. Go to Opportunities > Transactions > Sales Orders.
2. The status of each sales order shows in the **Status** column.

The status of a sales order could be as described below.

- With the Advanced Shipping Feature OFF:
  - **Closed** – The sales order is closed and will not be fulfilled or billed.
  - **Pending Approval** – The sales order has not been approved.
  - **Pending Fulfillment** – The order is pending creation of an invoice or cash sale, including partially billed shipping orders.
  - **Partially Fulfilled** – The order is partially shipped.
  - **Fulfilled** – The order is completely shipped and billed
  - **Canceled** – The sales order has been canceled. Canceled is a terminal status and cannot be undone. You must copy or recreate the sales order if it is needed again.
- With the Advanced Shipping Feature ON:
  - **Closed** – The sales order is closed and will not be fulfilled or billed.
  - **Pending Approval** – The sales order has not been approved.
  - **Pending Fulfillment** – The sales order is approved and pending shipment of items ordered.
  - **Partially Fulfilled** – The sales order is partially shipped, regardless of billing status.
  - **Pending Billing** – The sales order is pending the creation of an invoice or cash sale, including partially billed sales orders.
  - **Pending Billing/Partially Fulfilled** – The sales order is approved and partially fulfilled. Billing occurs when an invoice or sales order is created.
  - **Billed** – The sales order is completely shipped and billed.
  - **Canceled** – The sales order has been canceled by clicking Cancel Order. Canceled is a terminal status and cannot be undone. You must copy or recreate the sales order if it is needed again.

On the sales orders page, click **View** next to a sales order to view it. You can click **Edit** next to a sales order to make changes to the order.

To see what has already been fulfilled and invoiced for a sales order, go to a sales order and click the Items subtab. The Fulfilled and Invoiced columns show the quantity fulfilled and invoiced for each line item.
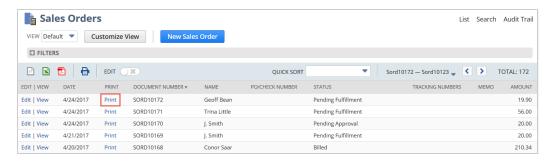
Printing a Sales Order

To print sales orders in PDF format, you need a PDF viewer such as Adobe® Acrobat® Reader. Visit the Adobe website to download the latest version at no charge.

To print a single sales order:

1. When creating a new sales order, enter all the sales order information and then click **Save & Print**. To enter a sales order, go to Transactions > Sales > Enter Sales Orders.
2. When viewing an existing sales order, hover over the Print icon 🖶 and then click **Print**.
3. If you are viewing the sales orders list, click **Print** next to the sales order you want to print. To view the sales orders list, go to Opportunities > Transactions > Sales Orders.

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When you enter a sales order, you can add it to a print queue, which you can then print at a later stage. On the Sales Order page, click the Communication subtab, select Messages, and then check the **To Be Printed** box. When you go to the Print Sales Order page, the sales orders you added to the print queue are displayed on the page.

To print multiple sales orders:

1. Go to Customers > Transactions > Print Checks and Forms.
2. On the Print Checks & Forms page, click **Sales Orders**.
3. In the **Form** field, choose the transaction form you want to use to print these orders.
4. To be able to reprint previously printed transactions, check the **Allow Reprinting** box.

    When you check this box, all documents appear at the bottom of the page in segments.
5. For each sales order you want to print, check the box in the **Print** column.
6. Click **Print**.

    If you have not enabled the Download PDF Files preference on the Set Preferences page, a preview of your sales orders pops up in the default Adobe application.

    If you have enabled the Download PDF Files preference, you must first save your sales orders and then open them with the Adobe application.
7. In the Adobe application frame, click the printer icon.
8. Select the desired print options and then click **Print** or **Save**.
9. If required, select a save location and enter a filename.
10. Click **OK** or **Save**.

Creating Invoices or Cash Sales from Sales Orders

A sales order expresses a commitment to ship goods, perform services, or both. A sales order has no accounting impact until items have been delivered and an invoice or cash sale created from the sales order to bill the customer.

A cash sale is a transaction that records the sale of goods or services for which you receive immediate payment. An invoice transaction records the sale of goods and services when payment is not received at the time of delivery.

> **Note:** Whether you create an invoice or cash sale for the sales order depends on the sales order form you originally used to enter the order. The cash sale form generates a cash sale and the invoice form generates an invoice.

The steps used to convert a sales order into an invoice or cash sale depend on whether you have enabled the Advanced Shipping feature.

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- **Without advanced shipping**, you use a single process to fulfill and bill sales orders. Fulfilling a sales order automatically creates an invoice or cash sale from the sales order.

- **Using advanced shipping**, there are separate processes for fulfilling sales orders and creating corresponding invoices or cash sales. For more information about advanced shipping, read the help topic Order Fulfillment.

If you use the Multiple Currencies feature, when you create a cash sale or invoice from a sales order, NetSuite applies the currency on the sales order to the new transaction. For more information, see the help topic Currency Management.

You can choose to fulfill a single sales order or multiple sales orders.

Error Messages

When you are creating an invoice or cash sale from a sales order, NetSuite displays an error message when the following occurs:

- If there are two browser windows open and two users bill a sales order at the same time.

- If one user tries to bill an individual sales order at the same time another user is bulk billing sales orders.

  (If the individual instance is processed before the bulk instance, the bulk processing status displays an error requesting an item to be selected for the transaction.)

- If a user accidentally double-clicks the Save button on an invoice and submits two requests to the server.

If these conditions occur, NetSuite displays the following error message: "[Transaction #001] has already been processed in another browser instance or by another user. Please re-open the transaction to view the current status."

> **ⓘ Note:** This error does not show in the following circumstances:

- If you are creating an invoice from an opportunity.
- If you are creating a new invoice or cash sale.
- If you are editing an existing invoice or cash sale.
- If you make a copy of an invoice and then save it again.

To create an invoice or cash sale from a single sales order:

1. Go to Transactions > Sales > Fulfill Orders (Administrator).

2. On the Fulfill Orders page, select the customer for whom you want to create an invoice or cash sale.

   A list of open sales orders for that customer shows.

3. From the **Bulk Fulfill From Location** list, select the location to be used to fulfill the order, or select **New** to enter a new location.

4. In the **Process** column, click **Fulfill** next to the sales order for which you want to create an invoice or cash sale.

5. Click **Save**.

   The sales order you have selected appears as an invoice or cash sale.

6. Make any changes you need to the invoice or cash sale.

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> **ⓘ Note:** To generate deferred revenue for billable time, you must manually select revenue recognition schedules on the **Billable Time** subtab located on the **Items** subtab.

7. Click **Save**.

   NetSuite creates an invoice or cash sale for the sales order.

To accept a customer payment for the invoice, go to Transactions > Customers > Accept Customer Payments (Administrator).

> **ⓘ Note:** You cannot include a partially processed sales order when fulfilling multiple orders. Partially processed sales orders must be fulfilled individually.

To create invoices or cash sales from multiple sales orders:

1. Go to Transactions > Sales > Fulfill Orders (Administrator).

2. On the Fulfill Orders page, select the customer for whom you want to create an invoice or cash sale, or select **All** to list all open sales orders.

3. From the **Bulk Fulfill From Location** list, select the location to be used to fulfill the order, or select **New** to enter a new location.

4. In the **Fulfill** column, check the boxes next to the sales orders you want to fulfill.

5. Click **Submit**.

   The Processed Orders list appears. It lists the transactions created when the sales orders are fulfilled.

To edit the transactions created from the Processed Orders list:

1. Click the number in the Processed Number column next to the transaction you want to edit.

2. When the transaction appears, click **Edit**.

3. Make any changes, and click **Save**.

Creating Progress Sales Orders

Many service businesses use progress billing to bill for portions of projects as they are completed.

When using progress billing, a progress sales order is created and approved. When a portion of the project has been completed, the progress sales order is fulfilled. Then, a progress invoice is created for a percentage of the total cost.

To create a progress sales order:

1. Go to Opportunities > Transactions > Sales Orders > New.

2. In the **Custom Form** field, choose Standard Sales Order - Progress Billing.

3. In the **Customer** field, select a customer.

4. Enter a date for the transaction. The current date is entered by default.

5. Select the status of the transaction: Pending Approval or Pending Fulfillment.

   The default status is determined in your company's accounting preferences.

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6. On the **Items** subtab, add items to the sales order.

   To add an item, select it in the Item column, enter the quantity, and click Add. You can enter additional details for each line item such as an inventory commitment setting, order priority, or expected ship date. See Adding Items on a Sales Transaction for more information.

7. On the **Billing** subtab, select billing terms for this order in the **Terms** field.

8. Enter additional information as necessary. You can enter general information in the sales order header. You can also enter information related to shipping, billing, payments, accounting, relationships, and communication:

   - Sales Order Header Fields
   - Entering Shipping Information on a Sales Transaction
   - Adding Billing Information to a Transaction
   - Entering Payment Information on a Transaction
   - Entering Accounting information about a Sales Transaction
   - Entering Relationships on a Transaction
   - Associating Sales Teams with Customers and Transactions
   - Entering Communication Information on a Transaction

9. Click **Save**. You can also do one of the following:

   - Click **Save and Accept Deposit** to save the sales order and open the customer deposit transaction.
   - Click **Save & Print** to save the sales order and print it.
   - Click **Save & Email** to save the sales order and email it.
   - Click **Save and Fulfill** to save the sales order and open a fulfillment transaction.

You can approve a pending sales order at Opportunities > Transactions > Approve Sales Orders. When a portion of the approved sales order has been completed, you can invoice for the percent completed by going to Transactions > Sales > Fulfill Orders (Administrator).

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Cash Sales

A cash sale is a transaction that records the sale of goods or services for which you receive immediate payment. Enter a cash sale when payment for goods or services has been received at the time of delivery.

Record cash sales by adding each item sold from your Items list. Then, cash sale line-items specify the goods and services sold and their sales amounts. The sum of all sales amounts plus any applicable tax equals the total amount paid for this sale.

Entering a Cash Sale

To enter a cash sale:

1. Go to Opportunities > Transactions > Cash Sales.
2. Under Primary Information:
   a. In the **Custom Form** field, select a sales receipt form.
   b. Accept or enter the sale number in the **Sale #** field
   c. In the **Customer** or **Project** field, select a customer or project.
   d. Accept or enter the date in the **Date** field.
   e. If you use the Advanced Billing feature, enter the date for the first bill to be created in the **Start Date** field.

      If a cash sale is created from a sales order that includes a Start Date and End Date, those dates autofill on the cash sale when the order is billed.
   f. Enter or pick the date for this cash sale.
   g. Select the period you want this cash sale to post to.
   h. If the customer is paying by check, enter the check number.
   i. In the **Memo** field, enter a memo to identify this cash sale.

      When you use the Search Transactions feature, you can search for specific words and phrases in the Memo field.
3. Under Sales Information:
   a. In the **Opportunity** field, select the opportunity for this cash sale.

      You can change the sales effective date for this transaction. The sales effective date determines which commission plan and historical sales team this transaction applies to.
   b. Check **Exclude Commissions** to exclude this transaction and its subordinate transactions from inclusion in all commission calculations. For example, selecting this box on a sales order excludes the sales order and the resulting invoice from all commission calculations for all sales people.
   c. The partner associated with this customer appears in the **Partner** field. You can choose a different partner for this opportunity.

      If you have enabled the Multi-Partner Management feature, you can associate partners with this transaction on the **Partners** subtab. For more information, see the help topic Associating Partners With Customers and Transactions.
   d. Associate sales reps with this transaction in one of the following ways:
      - If you do not use the Team Selling feature, select the sales rep or sales group in the **Sales Rep** field.

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The sales rep or sales group associated with the customer on this transaction is chosen by default.

- If you use the **Team Selling** feature, click the **Sales Team** subtab.

  Select the sales team for this transaction. For more information, see the help topic Associating Sales Teams with Customers and Transactions.

4. Under **Classification**, select a department, class, or location if you track them.

> (i) **Note:** If you use NetSuite OneWorld and the selected customer is shared with multiple subsidiaries, you can choose any subsidiary assigned to the selected customer. For information about sharing customer records with multiple subsidiaries, see the help topic Assigning Subsidiaries to a Customer.

5. Select an account for the sales amount to post to:

- Click **Undeposited Funds** if you receive payment by cash or check and your bank account will not be credited until you deposit the check.
- Click **Deposit To** and select a bank account if payment is by credit card and your bank account is automatically credited.

The page for entering a cash sale has several subtabs. The subtabs that display on the page are determined by the setting and options you have enabled. The following list includes possible subtabs.

- The Adding Items on a Sales Transaction subtab.
- The Entering Shipping Information on a Sales Transaction subtab.
- The Adding Billing Information to a Transaction subtab.

  Depending on you settings, billing information may display on the Payments subtab.

- The Entering Payment Information on a Transaction subtab.
- The Entering Accounting information about a Sales Transaction subtab.
- The Entering Relationships on a Transaction subtab.
- The Associating Sales Teams with Customers and Transactions subtab.
- The Entering Communication Information on a Transaction subtab.

Printing a Sales Receipt

To print receipts in PDF format, you need Adobe® Reader®. Visit the Adobe Web site to download the latest version at no charge.

To print a single sales receipt:

1. Go to Opportunities > Transactions > Cash Sales.
2. On the **Cash Sale** page, complete the information as appropriate.
3. Click **Save & Print**.

   NetSuite opens the printout for your receipt in an Adobe application document.
4. Click the printer button in the Adobe application frame.
5. Click **OK**.

You can also print sales receipts by going to the Opportunities > Transactions > Cash Sales. Then, on the Cash Sales page, click Print next to the receipt you want to print.

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If you enter multiple cash sales before printing, you can print all the receipts at the same time. Check the **To Be Printed** box on each transaction you enter.

To print sales receipts for multiple transactions:

1. Go to Customers > Transactions > Print Checks and Forms.
2. On the Print Checks and Forms page, click **Sales Receipts**.
3. On the Print Receipts page, if you use locations, choose the location you want to print receipts from.
4. Check the **Print** box by each receipt you want to print.
5. Click **Print**.

   If you have not enabled the Download PDF Files preference at Home > Set Preferences page, a preview of your receipts pops up in the Adobe application.

   If you have enabled the Download PDF Files preference, you must first save your receipts and then open them with the Adobe application.
6. Click the printer button in the Adobe application frame.
7. If you want to print multiple copies, specify the number on the print message that appears.
8. Click **OK**.

You can print a list of cash sale receipts by creating a search and printing the results page. This enables you to filter the list to a specific customer or date range.

Refunding a Cash Sale

A cash sale refund is a transaction that gives money back to a customer who immediately paid for goods or services using cash, a check or a credit card.

To refund a cash sale:

1. Go to Transactions > Customers > Refund Cash Sales.
2. Under Primary Information:
   a. In the **Custom Form** field, select a cash refund form.
   b. Accept the next consecutive refund number, or enter another.
   c. In the **Customer** or **Project** field, select the customer whose sale you are refunding.
   d. (Optional) If you want to refund the money using a check, check the **Create Check** box.

      To print it later from the checks queue, check the **Print Check** box.

      > ℹ **Note:** This is the only way to print this check. If you click Print after you fill in the appropriate information about this page, it prints the refund form rather than your check.

   e. (Optional) If you want to refund the money using a credit card, go to the **Billing** subtab. On the **Payment** subtab, fill out the credit card information.
   f. Select the bank account you are using for this refund.

      The currency associated with this bank account is shown here.
   g. If you use the Multiple Currencies feature, select the currency you want to use for this transaction. Only the currencies set on the customer's record are available in this field. The

       customer's primary currency is selected by default. For more information, see the help topic Customers and Multiple Currencies.

       If you change the currency on the record, prices and amounts are updated to the currency you select.
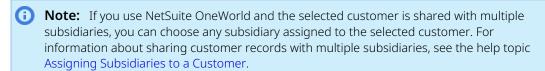
   h. You can change the exchange rate for this transaction only or update the rate on the currency record.

   i. Accept today's date, or enter another.

   j. Select the period you want to post this refund to.

   k. If your customer paid by check, enter the check number.

   l. Enter a memo with notes on the transaction.

       You can change the sales effective date for this transaction. The sales effective date determines which commission plan and historical sales team this transaction applies to.

3. Under Sales Information:

   a. Associate sales reps with this transaction by doing one of the following:

      ■ If you do not use the Team Selling feature, select the sales rep or sales group in the **Sales Rep** field.

         The sales rep or sales group associated with the customer on this transaction is chosen by default.

      ■ If you use the Team Selling feature, click the **Sales Team** subtab.

         Select the sales team for this transaction. For more information, see the help topic Associating Sales Teams with Customers and Transactions.

   b. Select a partner to associate with this order. If you use the Multi-Partner Management feature, you can associate partners with this transaction on the Entering Relationships on a Transaction subtab.

   c. Check **Exclude Commissions** to exclude this transaction and its subordinate transactions from inclusion in all commission calculations. For example, selecting this box on a sales order excludes the sales order and the resulting invoice from all commission calculations for all sales people.

   d. You can change the sales effective date for this transaction. The sales effective date determines which commission plan and historical sales team this transaction applies to.

4. Under Classification, select a subsidiary, department, class, and location you want this order associated with.

> ⓘ **Note:** If you use NetSuite OneWorld and the selected customer is shared with multiple subsidiaries, you can choose any subsidiary assigned to the selected customer. For information about sharing customer records with multiple subsidiaries, see the help topic Assigning Subsidiaries to a Customer.

The page for refunding a cash sale has several subtabs. The subtabs that display on the page are determined by the setting and options you have enabled. The following list includes possible subtabs.

■ The Adding Items on a Sales Transaction subtab.

■ The Entering Shipping Information on a Sales Transaction subtab.

■ The Adding Billing Information to a Transaction subtab.

   Depending on you settings, billing information may display on the Payments subtab.

■ The Payments subtab.

■ The Entering Accounting information about a Sales Transaction subtab.

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- The Entering Relationships on a Transaction subtab.
- The Associating Sales Teams with Customers and Transactions subtab.
- The Entering Communication Information on a Transaction subtab.

If you refunded your customer in the form of a check and click Print, it prints your refund form rather than your check. To print this check, go to Customers > Transactions > Print Checks and Forms.

Approving Cash Sales that Have a Payment Hold

Cash sales that have a payment hold are saved with the Unapproved Payment status and are non-posting until they are approved.

> ⚠️ **Important:** Cash sale transactions flagged with a payment hold are not saved if the Preserve Transactions when Payment is on Hold preference is disabled. You can find this preference on the Items/Transactions subtab at Setup > Accounting > Preferences > Accounting Preferences.

View payment event details of the unapproved cash sale and determine how to proceed. You can delete the cash sale or override the payment hold after reviewing the cash sale.

Cash sales that have a payment hold can be approved in one of the following ways:

- Manually

  To approve a cash sale, open the cash sale, and then click the Override Payment Hold button. The ledger account on the transaction is determined depending on the account selected on the payment method record.

  Only users with a role that includes the Override Payment Holds permission can access the Override Payment Hold button on a cash sale transaction. If you are unable to access the Override Payment Hold button, contact your NetSuite administrator.

  > ❌ **Warning:** When you approve a transaction with the Override Payment Hold button, NetSuite does not send another request to the gateway to validate the payment. Before you click this button, make sure you have validated the payment outside of NetSuite. For example, check your bank account or contact the gateway back office.

- Automatically

  In some cases, the gateway may later confirm the payment by sending a new request to NetSuite:

  - If the request contains the Accept status, the transaction status automatically changes to Deposited or Not Deposited. The ledger account on the transaction is determined depending on the account selected on the payment method record.
  - If the request contains the Reject status, the transaction remains non-posting and has the Unapproved Payment status.

Viewing Cash Sales that Have a Payment Hold

To view cash sale transactions that have a payment hold, create a saved transaction search as follows:

1. Go to Opportunities > Transactions > Manage Payment Holds.
2. Click **Transaction**.
3. In the **Filter** field on the Criteria subtab, do the following:
   - Set **Payment Event Result** to **Payment Hold**.

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- Set **Type** to **Cash Sale**.

For more information about saved searches, see the help topic Defining a Saved Search.

For information about voiding, deleting, or closing a cash sale, see the help topic Voiding, Deleting, or Closing Transactions.

Managing Undeposited Cash Sales

If you receive payment by cash or check, your bank account is not credited until you deposit the funds.

To enter a cash sale and place it in Undeposited Funds:

1. Go to Opportunities > Transactions > Cash Sales.
2. On the Cash Sale page, select a customer and enter the transaction information.
3. Select **Undep. Funds**.
4. Click **Save**.

Then, when you go to Transactions > Bank > Make Deposits (Administrator), this sale will appear on the Payments subtab as an item ready to be deposited to your bank account.

If payment is by credit card, and your bank account is automatically credited, then you will place the funds into a bank account.

To enter a cash sale and place it in a bank account:

1. Go to Opportunities > Transactions > Cash Sales.
2. On the Cash Sale page, select a customer and enter the transaction information.
3. In the **Account** field, select a bank account from the list.
4. Click **Save**.

When you view cash sales you have entered previously, they are marked **Deposited** or **Not Deposited** at the top of the page. To view a cash sale, go to Opportunities > Transactions > Cash Sales, and click **View** next to the sales order you want to see.

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Grid Order Management

To get you started in using Grid Order Management, read the following topics:

- Grid Order Management Overview
- Setting Up Grid Order Management
    - Installing the Grid Order Management SuiteApp
    - Roles and Permissions for Grid Order Management
    - Setting Grid Order Management Preferences
- Setting Up Grid Templates
    - Setting Up Grid Matrix Templates
    - Setting Up Grid Item Templates
- Managing Grid Orders
    - Entering Single Grid Orders
    - Entering Multi-Grid Orders
    - Editing Grid Orders
    - Importing Grid Orders
    - Viewing the Grid Matrix Information
- Grid Printing
    - Single Transaction Grid Printing
    - Bulk Grid Printing
    - Customizing the Grid Print Templates
    - Customizing the Printout using Advanced PDF/HTML Templates
    - Uploading Custom Grid Print Templates

Grid Order Management Overview

The Grid Order Management SuiteApp lets you enter and print orders in grid format for assembly and inventory items. This SuiteApp enables you to create custom grid print templates and assign them to selected transactions.

As you create the grid order, you can view relevant item information such as the item name, location, available quantity, and price. This comprehensive grid format can save order entry time, increase the accuracy of orders, and help you sell or fulfill orders faster.

This SuiteApp has the following features:

- **Grid Order Entry** – This feature lets you enter order transactions in grid format. Grid Order Entry is available for purchase orders, sales orders, transfer orders, and quotes. For more information, see Managing Grid Orders.
- **Standard Grid Order Printing** – This feature lets you print transaction records in grid format for items added through Grid Order Entry. Standard Grid Order Printing is available only for purchase orders and sales orders. For more information, see Standard Grid Order Printing.
- **Grid Print Templates** – This feature lets you print transaction records in grid format using customizable grid templates. Grid Print Templates are available for cash sales, invoices, packing slips, picking tickets, purchase orders, quotes, and sales orders. For more information, see Grid Print Templates.

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- **Bulk Grid Printing** – This feature lets you print multiple transaction records that use grid print templates. Bulk Grid Printing is available for cash sales, invoices, packing slips, picking tickets, quotes, and transfer orders. For more information, see Bulk Grid Printing.

The following table shows the available features for each transaction record.

Transactions	Available Features			
	Grid Order Entry	Standard Grid Order Printing	Printing Using Grid Print Templates	Bulk Grid Printing
Cash sale	N	N	Y	Y
Inventory adjustment	Y	N	N	N
Invoice	N	N	Y	Y
Packing slip	N	N	Y [2]	Y [2]
Picking ticket	N	N	Y	Y
Purchase order	Y	Y	Y	N
Quote	Y	N	Y	Y
Sales order	Y [1]	Y	Y	N
Transfer order	Y	N	N	Y

[1] Multi-grid order entry is available only for sales orders.

[2] Grid print templates can be used to print packing slips for item fulfillments that were created from sales orders or transfer orders only.

For better performance of Grid Order Management, use Mozilla Firefox or Google Chrome web browsers.

Grid Order Management SuiteApp Availability

Grid Order Management is a managed and shared SuiteApp. Contact your NetSuite account manager to purchase the SuiteApp and to have it shared with your account for installation.

The Grid Order Management SuiteApp supports English language only.

To install the SuiteApp, see Installing the Grid Order Management SuiteApp.

Limitations of Grid Order Management

Be aware of the following limitations of Grid Order Management:

- Grid Order Management supports the following item types only:
  - Inventory items (Lot Numbered and Serialized)
  - Assembly items (Lot Numbered and Serialized)
  - Matrix items (Assembly, Inventory)
- Matrix items for Non-Inventory, Other Charge, and Service items are unsupported item types.
- Customizations on order transaction forms are not reflected on the Grid Order Entry form.

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- If you use the Advanced Bin/Numbered Inventory Management feature, grid matrix templates for inventory adjustments cannot support serialized and lot numbered items.
- If you use multiple currencies, the selected currency is applied across all order related transactions and it cannot be changed. For more information, see the help topic Vendors and Multiple Currencies.
- After installing Grid Order Management, you can use grid print templates to print transactions and forms. Transaction records created prior to the release of Grid Order Management SuiteApp version 6.01.0 appear as a basic report in the printout. To display old transaction records in grid format, you must click **Edit** and then click **Save** on the transaction record. You do not need to perform this step for standard grid order printing. For more information, see Grid Printing.
- Grid order printing is not available for inventory adjustments.
- Multi-Grid Order Entry is available only for sales orders.
- The Grid Order Entry form does not show on mobile devices.
- You can use the **%** wildcard character to search for specific values. This search applies to locations on the **Grid Matrix Information** subtab of parent matrix item records and templates on the transaction's Grid Order Entry form. See the following examples to search for column values that begin, end, or contain the characters you specify:
    - **str%** – Retrieves values that begin with **str**
    - **%str** – Retrieves values that end with **str**
    - **%str%** – Retrieves values that contain **str**
- The Grid Order Management SuiteApp supports English language only. The SuiteApp cannot be translated in any other language.

Other limitations and considerations are included in the following topics:

- Setting Up Grid Templates
- Applying Grid Attributes to Items
- Managing Grid Orders
- Grid Printing
- Bulk Grid Printing
- Viewing the Grid Matrix Information

Setting Up Grid Order Management

Read the following topics for information on how to set up the Grid Order Management SuiteApp:

- Prerequisites for Grid Order Management
- Installing the Grid Order Management SuiteApp
- Roles and Permissions for Grid Order Management
- Setting Grid Order Management Preferences

Prerequisites for Grid Order Management

Before installing Grid Order Management, ensure that the required features are enabled in your account. Go to Setup > Company > Enable Features.

- General features
    - On the **Items & Inventory** subtab, check the box for the following options:
        - Inventory

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- Assembly items
- Matrix items
  - On the **SuiteCloud** subtab, check the box for the following options:
    - Custom Records
    - Client SuiteScript
    - Server SuiteScript

If you want to use standard grid order printing or grid print templates, you must enable the **Advanced PDF/HTML Templates** feature.

For the following prerequisites, enable the features for transactions where you want to enter grid orders and use grid print templates.

- Features for grid sales orders
  - On the **Transactions** subtab, check the **Sales Orders** box.
  - If the Demand Planning feature is enabled in your account, the ship date you enter on the Grid Order Entry form is assigned as ship date for all items in the grid. This condition only applies to items that are submitted for the first time. For more information, see Managing Grid Orders.
- Features for grid purchase orders
  - On the **Transactions** subtab, check the **Purchase Orders** box.
  - On the **Order Management** subtab, check the **Allow Purchase of Assembly Items** box.
- Features for grid transfer orders
  - On the **Transactions** subtab, check the **Transfer Orders** box.
  - For OneWorld accounts, on the **Items & Inventory** subtab, check the **Multi-Location Inventory** box.
- Features for grid inventory adjustments
  - On the **Transactions** subtab, check the **Inventory Adjustment** box.
  - For OneWorld accounts, on the **Items & Inventory** subtab, check the **Multi-Location Inventory** box.
- Features for estimates

  On the **Transactions** subtab, check the **Estimates** box.

For more information about enabling required features, see the help topic Enabling Features.

Installing the Grid Order Management SuiteApp

Only administrators can install the Grid Order Management SuiteApp. Before installing, you must set the required preferences and enable the required features on your account. For more information, see Prerequisites for Grid Order Management.

To install the Grid Order Management SuiteApp:

1. Go to Customization > SuiteBundler > Search & Install Bundles.
2. On the Search & Install Bundles page, use the following information to search for the SuiteApp:
   - Bundle Name: **Grid Order Management**
   - Bundle Id: 41296
   - Availability: Shared
3. (Optional) Click the **Grid Order Management** link to display its Bundle Details page.

- The **Admin Documentation** provides a link to the help topic.
- The **Overview** subtab displays the SuiteApp abstract and description.
- The **Components** subtab lists bundle objects, including their custom script IDs, referencing objects, and lock status.

  For more information, see the help topic Bundle Details.

4. Click **Install**.

   If asked, indicate your agreement to allow NetSuite to automatically upgrade the SuiteApp in your account when new updates become available.

   During the installation, you can click **Refresh** to get the latest status.

After installing the SuiteApp, you can set the roles and preferences according to your company's requirements. For instructions, read the following topics:

- Roles and Permissions for Grid Order Management
- Setting Grid Order Management Preferences

Roles and Permissions for Grid Order Management

Read the following topics for information on the roles and permissions for Grid Order Management:

- Grid Order Management Custom Roles
- Grid Order Management Permissions

Grid Order Management Custom Roles

After you install the Grid Order Management SuiteApp, the following custom roles become available:

- CEO - Grid Order Entry
- CFO - Grid Order Entry
- Sales Manager - Grid Order Entry
- Sales Vice President - Grid Order Entry
- Sales Administrator - Grid Order Entry
- Sales Person - Grid Order Entry

These roles are preconfigured with a default set of permissions required to use Grid Order Management. Administrators can assign the roles. The grid custom roles can also be used as templates for creating new roles or modifying existing ones. For more information, see the help topics Assigning Roles to an Employee and Customizing or Creating NetSuite Roles.

NetSuite center views can vary depending on your role. The following are role-specific views of the NetSuite center for Grid Order Management:

- **Administrator** – Lists > Grid Order Entry
- **Executive** – Sales/Marketing > Grid Order Entry
- **Sales or Accounting** – Customer > Grid Order Entry

The following list shows the different navigation paths to create a grid template, depending on the role:

Role	Navigation
Administrator	Lists > Grid Order Entry > Grid Templates

Role	Navigation
CEO - Grid Order Entry	Sales/Marketing > Grid Order Entry > Grid Templates
CFO - Grid Order Entry	Customers > Grid Order Entry > Grid Templates
Sales Manager - Grid Order Entry	Customers > Grid Order Entry > Grid Templates
Sales Vice President - Grid Order Entry	Customers > Grid Order Entry > Grid Templates
Sales Administrator - Grid Order Entry	Customers > Grid Order Entry > Grid Templates
Sales Person - Grid Order Entry	Customers > Grid Order Entry > Grid Templates

Grid Order Management Permissions

Instead of editing roles individually, you can use the Mass Update feature to add, remove, or change the level of permission for multiple roles. For more information, see the help topic Mass Updating a Permission on Custom Roles.

To view the default permissions assigned to these roles, go to Setup > Users/Roles > Manage Roles and click the link for the role.

The following table lists the record permissions required to use Grid Order Management:

Permission	Subtab	Minimum Permission Level
Apply Attribute	Custom Record	Full
GOE - Grid Item	Custom Record	Full
GOE - Grid Item Template	Custom Record	Full
GOE - Grid Matrix	Custom Record	Full
GOE - Grid Matrix Template	Custom Record	Full
GOE - Grid Order Item	Custom Record	Full
GOE - Grid Order Template	Custom Record	Full
GOE - Preferences	Custom Record	Full
Grid Attribute	Custom Record	Full
Grid Attribute - Value	Custom Record	Full
Grid Template	Custom Record	Full
Custom Record Types	Setup	Edit
Custom Item Fields	Setup	Edit
Custom Record Entries	Lists	Edit
Location	Lists	View
Subsidiaries[*]	Lists	View
Accounting Lists	Setup	View

[*] For OneWorld accounts only.

To use grid print templates, the role must have access to the NetSuite File Cabinet.

Permission	Subtab	Minimum Permission Level
Documents and Files	Lists	Full

On the role record of the **Forms** subtab, click the **Custom Record** subtab. In the **Enabled** column, verify that all Grid Order Entry forms are set to **Yes**. See the following table for the complete list of forms:

Type	Form Name	Notes
Apply Attribute	Standard Apply Attribute Form	-
Apply Attribute	GOE - Apply Attribute Form	Set as preferred
GOE - Grid Item	Standard GOE - Grid Item Form	-
GOE - Grid Item Template	Standard GOE – Grid Item Template Form	-
GOE - Grid Matrix	Standard GOE – Grid Matrix Form	-
GOE - Grid Matrix Template	Standard GOE – Grid Matrix Template Form	-
GOE - Grid Order Item	Standard GOE – Grid Order Item Form	-
GOE - Grid Order Template	Standard GOE – Grid Order Template Form	-
GOE - Grid Template	Standard GOE - Grid Template Form	-
GOE - Preferences	Standard GOE - Preferences Form	-
GOM Apply Attribute Log	Standard GOM Apply Attribute Log Form	-
GOM Background Process Request Log	Standard GOM Background Process Request Log Form	-
Grid Attribute	Standard Grid Attribute Form	-
Grid Attribute	GOE - Grid Attribute Form	Set as preferred
Grid Attribute - Value	Standard Grid Attribute - Value Form	-
Grid Attribute - Value	GOE - Grid Attribute - Value Form	Set as preferred

Setting Grid Order Management Preferences

You can set preferences for the Grid Order Entry form, grid printing, and preferred grid template.

> **Note:** The navigation paths used in these instructions are based on the Administrator role. If you are not an administrator, you may see a different view of the NetSuite center. For more information, see Roles and Permissions for Grid Order Management.

Setting Grid Order Preferences

Grid order preferences enable you to modify the settings of the Grid Order Entry form.

To set grid order preferences:

1. Go to Lists > Grid Order Entry > Set Grid Preferences.

2. In the **Grid Order** subtab, set the following preferences:

- **Default No. of Decimal Places** – Enter the number of decimal places for percentages in grid templates and Grid Order Entry form. The default is 2 and the maximum is 5.

- **Percentage Tolerance** – Enter the tolerance value in decimal form when the total percentage is not 100%. The value you enter is applied to the minimum and maximum tolerance.

  By default, the tolerance is set to 0.01 which limits the total percentages from exceeding by 1% above or below 100%. For example, the total is either 104.3% or 97.03%. When the tolerance is exceeded, you cannot submit the grid order.

  The Percentage Tolerance preference does not apply to inventory adjustments.

- **Enable Quantity Distribution** – Check this box to enable automatic distribution of the total quantity across the items on a Grid Order Entry form. The distribution is based on percentages defined on your grid template. This preference is enabled by default.

- **Show Percentage Column** - Check this box to show the percent columns on the Grid Order Entry form. This preference is enabled by default.

- **Enable Multi-Grid Order Entry** – Check this box to enter grid orders using multiple templates in one Grid Order Entry form. The Order Summary table on the Grid Order Entry form lists the orders you entered in the grid templates. For more information, see Entering Multi-Grid Orders.

3. Click **Save**.

Setting Grid Printing Preferences

Grid printing preferences enable you to modify the settings for printing grid orders or templates.

To set grid printing preferences:

1. Go to Lists > Grid Order Entry > Set Grid Preferences.

2. On the **Grid Printing** subtab, specify an email address for bulk grid printing notifications in the **Email Recipients for Errors** field. If you leave this field blank, the email notifications are sent to administrators.

   You can also send notifications to multiple recipients using a group email address

3. Select a grid print template for each transaction or form.

   You can select a standard print template or customized print template that you can use for grid printing. If you do not want to set up grid printing, select the **No Grid Template** option from the list.

   By default, the standard grid templates provided in the Grid Order Management SuiteApp are selected for the following transactions and forms:

- **Cash Sale** – wd_gom_template_csgridprintout.xml

- **Invoice** – wd_gom_template_ivgridprintout.xml

- **Packing Slip** – wd_gom_template_psgridprintout.xml

- **Picking Ticket** – wd_gom_template_ptgridprintout.xml

- **Purchase Order** – wd_gom_template_pogridprintout.xml

- **Quote** - wd_gom_template_qtgridprintout.xml

- **Sales Order** – wd_gom_template_sogridprintout.xml

4. Click **Save**.

You can use advanced print templates that are customized for grid printing. For more information, see Customizing the Printout using Advanced PDF/HTML Templates.

Setting Up Grid Order Management

Grid Order Management SuiteApp also enables you to create custom grid print templates for selected transaction records. When you delete a template used for grid printing, you must edit your grid printing preferences. For more information, see Customizing the Grid Print Templates.

Setting the Preferred Grid Template Preference

The preferred grid template preference lets you set the value of the **Set As Preferred Grid Template** box. This box appears when you create or edit a grid matrix template.

To set the preferred grid template preference:

1. Go to Lists > Grid Order Entry > Set Grid Preferences.

2. On the **Preferred Grid Template** subtab, leave the **Check By Default The Set As Preferred Grid Template Box On The Grid Matrix Template And Bulk Create Grid Matrix Template Pages** box checked.

   If you enable this preference, the **Set As Preferred Grid Template** boxes on both the Grid Matrix Template and Bulk Create Grid Matrix Templates pages are also checked. Then, you can leave the boxes checked so that the matrix template you create automatically becomes the preferred grid template. You can override this preference when creating or editing a matrix template. For more information, see Creating a Single Grid Matrix Template and Creating Grid Matrix Templates in Bulk.

3. Click **Save**.

Setting Up Grid Templates

You can set up a grid matrix or grid item template for assembly and inventory items. Use grid matrix templates for matrix items, or grid item templates for either matrix and nonmatrix items.

Read the following topics for more information about each of these templates:

- Setting Up Grid Matrix Templates
- Setting Up Grid Item Templates

Guidelines for Setting Up Grid Templates

Note the following guidelines when setting up grid templates:

- Grid Order Management can optimally handle up to 1000 matrix templates and 1000 item templates. In NetSuite OneWorld accounts where items can be shared by multiple subsidiaries, you can set up a maximum of 1000 grid templates for better performance of the grids.

- Grid templates can support a maximum of 200 values as grid attributes. To determine if a grid template exceeds the maximum number set for grid attributes, multiply all values specified for each grid attribute. You cannot create grid templates for parent items with more than 200 grid attributes.

  For example, a parent matrix item that has 195 subitems contains the following attributes:

  - 26 colors
  - 3 sizes
  - 3 fabrics

  In this example, a total of 234 attributes can be derived from multiplying all values specified for each grid attribute. The total exceeds the maximum number of grid attributes for a matrix template.

Therefore, you cannot create a grid matrix template for this parent matrix item. The system displays an error message when the matrix template you want to create exceeds the maximum number set for grid attributes.

■ Only matrix items with two or more attribute sets are supported. You can edit an item record to add more attributes to a parent matrix item. For more information, see the help topic Editing Matrix Items.

When you add or remove an attribute of a matrix item, you must also refresh the grid matrix template associated to the item record. To get the updated matrix items for the grid matrix template, go to Lists > Grid Order Entry > Grid Templates. Click **Edit** beside the template. Click **Get Item**, then click **Save**.

■ You can only create grid matrix templates for parent matrix items that contain child matrix items.

■ You cannot create new grid matrix and grid item templates using CSV Import and SOAP web services.

■ For consistency, avoid changing the names of used grid templates. Template names shown in associated transactions are not updated automatically when the template names are changed. However, if you change a template name, it is shown in new grid line items that you add to associated transactions. This behavior results in transactions where line items use the same template but display either the previous or updated name. Names that are shown in line items are also used for printouts generated through standard grid order printing only.

For limitations of Grid Order Management in general, see Limitations of Grid Order Management.

Setting Up Grid Matrix Templates

Grid matrix templates define how matrix items are organized on a transaction form. When you select a parent matrix item in the template, the row and column attributes are populated with properties that define the matrix item. When the matrix item is retrieved, the child matrix items are organized in the grid according to the row and column value combinations.

For more information on grid matrix templates, read the following topics:

■ Creating a Single Grid Matrix Template

■ Editing a Grid Matrix Template

■ Deleting a Grid Matrix Template

■ Creating Grid Matrix Templates in Bulk

■ Creating a Copy of the Grid Matrix Template

■ Assigning a Preferred Grid Template

Creating a Single Grid Matrix Template

Use the following procedure to create a single grid matrix template. To create grid matrix templates in bulk, see Creating Grid Matrix Templates in Bulk.

To create a single grid matrix template:

1. Go to the Grid Templates page.
   - ■ If you are using an Administrator role, go to Lists > Grid Order Entry > Grid Templates.
   - ■ If you are using other roles, read Roles and Permissions for Grid Order Management.
2. On the Grid Templates page, click **New Grid Matrix Template**.

   Before you can access the **New Grid Matrix Template** button, you must first enable the **Matrix Items** feature. For more information, see Prerequisites for Grid Order Management.
3. On the Grid Matrix Template page, do the following in the Matrix Item Definition section:

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a. In the **Name** field, enter a name for the grid matrix template.

b. In the **Matrix Item** field, select the matrix item you want to configure.

When you select a matrix item, the system populates the **Category** field with the item's properties. It also sets default values in the **Column Attribute** and **Row Attribute** fields. If the matrix item is defined by more than two properties or categories, one property is automatically assigned as the column attribute and the other properties as row attributes.

c. (Optional) In the **Description** field, enter a grid template description.

The limit is 300 characters.

d. To set this template as the preferred grid template, leave the **Set As Preferred Grid Template** box checked.

When a template is set as preferred, it automatically becomes the template for the selected assembly or inventory matrix item, including all its child items. If you do not want to set this template as the preferred grid template, clear the **Set As Preferred Grid Template** box.

By default, this box is checked and follows the setting on the preferred grid template preference. For more information, see Setting the Preferred Grid Template Preference.

4. In the Grid Template section, do the following:

a. In the **Column Attribute** field, select a property to designate as the column attribute.

When you change the column attribute, the value you replaced is automatically assigned in the **Row Attribute** field.

b. In the **Available In** field, select the transactions where you want the grid template to be available.

Doing so enables you to open the Grid Order Entry form on the selected transactions.

If you use the Advanced Bin/Numbered Inventory Management feature, you cannot select the Inventory Adjustments transaction for lot numbered and serialized items. For more information, see Limitations of Grid Order Management.

5. Click **Get Item**.

The items are placed in a grid, along with the matrix child items mapped to the row and column values.

6. In the grid, enter the percentage of the total order quantity you want for each column and row value.

For example, you can use the distribution of percentages to control the distribution of item quantities across customers.

ROW PERCENTAGE	COLUMN PERCENTAGE		
100.00	100.00		

COLOR - SIZE		SMALL 25.00	MEDIUM 50.00	LARGE 25.00
COLOR	PERCENT			
Ocean	20.00	Skinny Jeans -O-S	Skinny Jeans -O-M	Skinny Jeans -O-L
Midnight	50.00	Skinny Jeans -M-S	Skinny Jeans -M-M	Skinny Jeans -M-L
Honey	30.00	Skinny Jeans -H-S	Skinny Jeans -H-M	Skinny Jeans -H-L

The row and column percentages are automatically adjusted as you enter the percentage for each attribute value. The total percentage should be equal to 100.

The percentages defined on the matrix template are used when you enter the total quantity in your grid order. If you do not set the percentages, the total quantity is equally distributed across the items in your grid order.

7. To save the grid matrix template, click **Save**. If you want to start over with a blank template without saving the current one, click **New**.

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The grid matrix templates can be used for grid order entry. For more information about creating grid orders, read the following topics:

- Entering Single Grid Orders
- Entering Multi-Grid Orders

Editing a Grid Matrix Template

When you edit a grid matrix template, existing orders that use the template do not update automatically. For more information, see Editing Grid Orders. Additionally, you cannot inactivate a parent matrix item or delete a matrix item that is assigned to a grid matrix template.

Use the following procedure to edit a grid matrix template.

To edit a grid matrix template:

1. Go to the Grid Templates page.
   - If you are using an Administrator role, go to Lists > Grid Order Entry > Grid Templates.
   - If you are using other roles, read Roles and Permissions for Grid Order Management.
2. On the Grid Templates page, click **Edit** beside the grid matrix template you want to update.
3. Edit the grid matrix template as needed. You can update the **Name**, **Description**, **Available In**, and **Percent** fields.

   You can also check or clear the **Set As Preferred Grid Template** box. By default, this box is checked and follows the setting on the preferred grid template preference. For more information, see Setting the Preferred Grid Template Preference.

   To rearrange the grid, click and drag the column header and drop it on its new position.
4. Click **Save**.

Deleting a Grid Matrix Template

When you delete a grid matrix template assigned to an item, the **Preferred Grid Template** field in the **Custom** subtab of the item record becomes blank. Additionally, if the template is assigned to a parent matrix item, the preferred grid template for its child matrix items also becomes blank.

Use the following procedure to delete a grid matrix template.

To delete a grid matrix template:

1. Go to the Grid Templates page.
   - If you are using an Administrator role, go to Lists > Grid Order Entry > Grid Templates.
   - If you are using other roles, read Roles and Permissions for Grid Order Management.
2. On the Grid Templates page, click **Edit** or **View** beside the grid matrix template you want to delete.
3. Click **Delete**.

Creating Grid Matrix Templates in Bulk

Grid matrix templates created in bulk can be used in all supported transactions. Use the following procedure to create grid matrix templates in bulk.
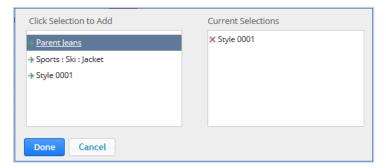
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To create a single grid matrix template, see Creating a Single Grid Matrix Template.

To create grid matrix templates in bulk:

1. Go to the Grid Templates page.
   - If you are using an Administrator role, go to Lists > Grid Order Entry > Grid Templates.
   - If you are using other roles, read Roles and Permissions for Grid Order Management.
2. In the Grid Templates list, click **Bulk Create Grid Matrix Templates**.
3. On the Bulk Create Grid Matrix Templates page, click the dropdown arrow beside the **Parent Matrix Items** list box.
4. In the popup list, click an item name from the left pane to select it.

   Selected items are transferred to the right pane. To remove an item from the Current Selections list, click the **x** icon.

5. Click **Done**.
6. In the **Column Attribute** field, select the attribute that you want to show as the column header in the grid matrix template.

   After you select the column attribute, the other attributes become row attributes in the grid template.

   The system can only generate grid templates for parent matrix items that have at least one column attribute selected.

7. To set this template as the preferred grid template, leave the **Set As Preferred Grid Template** box checked.

   When a template is set as preferred, it automatically becomes the template for the selected assembly or inventory matrix item, including all its child items. If you do not want to set this template as the preferred grid template, clear the **Set As Preferred Grid Template** box.

   By default, this box is checked and follows the setting on the preferred grid template preference. For more information, see Setting the Preferred Grid Template Preference.

8. Click **Submit**.

   The bulk creation of grid matrix templates may take some time to process. To monitor the status, go to Lists > Grid Order Entry > Grid Template Creation Log.

Creating a Copy of the Grid Matrix Template

You can create copies of a grid matrix template for the same item. All template and item information are copied, except for the template name. You can edit the details of the copy before saving the template.

To create a copy of a grid matrix template:

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1. Go to the Grid Templates page.
   - If you are using an Administrator role, go to Lists > Grid Order Entry > Grid Templates.
   - If you are using other roles, read Roles and Permissions for Grid Order Management.
2. In the Grid Templates list, click **View** beside the grid template that you want to copy.
3. On the Grid Matrix Template page, click **Make Copy**.

   This button is only available in View mode.
4. On the template copy, enter a name for the grid matrix template.

   You can update the **Name**, **Description**, **Available In**, and **Percent** fields.

   You can also check or clear the **Set As Preferred Grid Template** box. By default, this box is checked and follows the setting on the preferred grid template preference. For more information, see Setting the Preferred Grid Template Preference.
5. Click **Save**.

For more information, see Creating a Single Grid Matrix Template.

Assigning a Preferred Grid Template

Setting a preferred grid template streamlines the process of assigning a grid template for each matrix item. This feature is available for matrix items, including assembly, lot numbered assembly, serialized assembly, inventory, lot numbered inventory, and serialized inventory items.

You can use the following methods to assign a preferred grid template:

- **Through the item record** – See Assigning a Preferred Grid Template Using the Item Record.
- **Through CSV Import** – See Assigning a Preferred Grid Template Using CSV Import.
- **Through creating or editing a grid matrix template** – See Creating a Single Grid Matrix Template and Creating Grid Matrix Templates in Bulk.

Assigning a Preferred Grid Template Using the Item Record

You can set a preferred grid template for matrix items when you edit the item record.

Guidelines for Assigning a Preferred Grid Template Using the Item Record

Note the following guidelines when you assign a preferred grid template using the item record:

- Assigning a preferred grid template using the item record is optional for parent and child matrix items.
- If a parent matrix item has a preferred grid template, its existing child matrix items inherit the same template.
- A new or existing child matrix item can have a different preferred grid template from its parent matrix item.
- A new child matrix item, which is created after assigning a preferred grid template to its parent matrix item, also inherits its parent's preferred grid template.
- You can only update the **Preferred Grid Template** field of the item record in Edit mode.
- You can assign a preferred grid template to the following matrix item types:
  - Assembly/Bill of Materials
    - Lot Numbered
    - Serialized

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- ☐ Inventory Items
  - Lot Numbered
  - Serialized

Follow these instructions to assign a preferred grid template using the item record.

To assign a preferred grid template using the item record:

1. Go to Lists > Accounting > Items.
2. Click **Edit** beside the matrix item.
3. On the **Custom** subtab, select a **Preferred Grid Template** from the list.
4. Click **Actions**, then select **Update Matrix**.

Assigning a Preferred Grid Template Using CSV Import

You can set a preferred grid template for matrix items using CSV Import.

Guidelines for Assigning a Preferred Grid Template using CSV Import

- Assigning a preferred grid template using CSV Import is optional for parent and child matrix items.
- If a parent matrix item has a preferred grid template, its existing child matrix items inherit the same template.
- A new or existing child matrix item can have a different preferred grid template from its parent matrix item.
- A new child matrix item, which is created after assigning a preferred grid template to its parent matrix item, also inherits its parent's preferred grid template.
- The CSV file must contain valid grid template IDs in the **Preferred Grid Template** column.
- When you create a new parent matrix item, you must leave the **Preferred Grid Template** field blank.
- When you update a parent matrix item and the **Preferred Grid Template** column in the CSV file is blank, the item inherits its latest preferred grid template. If there is no template assigned to the item, the field becomes blank.
- When you create a new child matrix item and the **Preferred Grid Template** column in the CSV file is blank, the item inherits its parent's preferred grid template. If there is no preferred grid template set for its parent, the field becomes blank.
- You can assign a preferred grid template to the following matrix item types:
  - ☐ Assembly/Bill of Materials
    - Lot Numbered
    - Serialized
  - ☐ Inventory Items
    - Lot Numbered
    - Serialized

Follow these instructions to assign a preferred grid template using CSV Import.

To assign a preferred grid template using CSV Import:

1. Create a CSV Import file for matrix items. For more information, see the help topic Setting Up Your CSV File for Matrix Items Import.

The file must include the **Preferred Grid Template** column with valid grid template IDs. To view valid grid templates, go to List > Grid Order Entry > Grid Templates. Use the internal ID that corresponds to the grid template. To view the internal IDs, the **Show Internal ID** preference must be enabled. For more information, see the help topic Setting the Show Internal IDs Preference.

2. Go to Setup > Import/Export > Import CSV Records.

3. In the Scan & Upload CSV File step, do the following:

   a. In the **Import Type** field, select **Items**.

   b. In the **Record Type** field, select **Assembly/BOM item** or **Inventory Item**.

   c. Click **Browse** to locate and select your CSV file.

   d. Click **Next**.

4. In the Import Options step, do the following:

   a. In the **Data Handling** field, select from the following options:

      - **Add** – Select this option to import new data.

      - **Update** – Select this option to update existing data.

      - **Add or Update** – Select this option to add new or update existing data.

   b. To display additional settings, expand **Advanced Options**.

   c. If you upload a CSV Import file that contains blank fields, you can check the **Overwrite Missing Fields** box. This action clears the value in the NetSuite fields mapped to the fields in the CSV file.

   d. To enable the data validations in the CSV file, check the **Run Server SuiteScript and Trigger Workflows** box.

   e. Click **Next**.

5. In the Field Mapping step, verify that the fields in the CSV file are mapped to the correct NetSuite fields and click **Next**.

6. In the Save Mapping & Start Import step, click **Run**.

7. To view the status of the import, click the **Import Job Status** link.

   The page displays **Complete** after a successful import. To check if there are errors in the import, click the **CSV Response** link.

For more information on CSV Imports, see the help topic Importing CSV Files with the Import Assistant.

Setting Up Grid Item Templates

To enter orders for multiple assembly and inventory items in the grid order, you must first configure items in a grid item template. Similar to grid matrix templates, grid item templates determine the categories and quantity distribution that are shown in the grid for an item.

Read the following topics to learn about setting up grid item templates:

- Setting Up Grid Attributes
- Setting Up Grid Attribute Values
- Applying Grid Attributes to Items
- Using Grid Item Templates

To understand setup guidelines and limitations, see Setting Up Grid Templates. For limitations related to Grid Order Management in general, see Limitations of Grid Order Management.

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Setting Up Grid Attributes

Grid attributes define product categories or dimensions of an item. For example, a company that sells apparel can create attributes common to items like size, color, style, and cut.

You can use the Import Assistant to create and edit grid attributes. To enable data validations during import, go to Setup > Import/Export > CSV Import Preferences, and check the **Run Server SuiteScript and Trigger Workflows** box. For more information, see the help topic Importing CSV Files with the Import Assistant.

Creating Grid Attributes

To make a well-defined grid item template, you must create attributes for the hierarchical structure of categories, properties, characteristics, and dimensions of your items.

To create a grid attribute:

1. Go to Lists > Grid Order Entry > Define Grid Attribute > New.

   Alternatively, go to Lists > Grid Order Entry > Define Grid Attribute and click **New Grid Attribute**.
2. On the Grid Attribute page, enter a name for the attribute.
3. Click **Save**.

   The new grid attribute record is created.

Editing Grid Attributes

When you create a grid attribute, the record gets added to the Grid Attribute List. To view the list, go to Lists > Grid Order Entry > Define Grid Attribute. If the grid attribute is not mapped to an item used in a grid template, you can edit the grid attribute record.

To edit a grid attribute:

1. Go to Lists > Grid Order Entry > Define Grid Attribute.
2. On the Grid Attribute List page, click **Edit** beside the grid attribute you want to modify.

   Alternatively, click the **Edit** button if you are already on the Grid Attribute page.
3. On the Edit Grid Attribute page, you can do any of the following:

   - In the **Name** field, you can change the grid attribute name.
   - To delete the grid attribute record, select **Delete** from the Actions list.

     You cannot delete the record if the grid attribute is mapped to an item that is assigned to a grid template.
4. Click **Save**.

Setting Up Grid Attribute Values

Grid attribute values are created to represent the available options for each grid attribute. For example, the grid attribute for size can include small, medium, and large as its grid attribute values.

Creating Grid Attribute Values

To make a well-defined grid item template, you must create grid attribute values that represent the range of available options for each attribute.

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To create a grid attribute value:

1. Go to Lists > Grid Order Entry > Define Grid Attribute.
2. On the Grid Attribute List page, click **Edit** beside the grid attribute.
3. On the Grid Attribute page, click the **Create New** icon and select **New Grid Attribute - Value**.
4. On the Grid Attribute - Value page, enter a name for the attribute value.
5. Click **Save**.

   The new grid attribute value is created. You can only use unique grid attribute values. Duplicate values are not allowed.

Editing Grid Attribute Values

When you create a grid attribute value, the record gets added to the Grid Attribute – Value list.

To edit a grid attribute:

1. Go to Lists > Grid Order Entry > Define Grid Attribute.
2. On the Grid Attribute List page, click **Edit** beside the grid attribute that contains the grid attribute value you want to modify.

   Alternatively, click the **Edit** button if you are already on the Grid Attribute – Value page.
3. On the Edit Grid Attribute – Value page, you can do any of the following:
   - In the **Value** field, you can change the grid attribute value.
   - To delete the grid attribute value record, select **Delete** from the Actions list.

     If the grid attribute value is mapped to an item that is assigned to a grid template, you cannot delete the record.
4. Click **Save**.

After creating the grid attribute and grid attribute value, you must apply the attribute to the item. For mapping instructions, see Applying Grid Attributes to Items.

Applying Grid Attributes to Items

To configure items in a grid item template, an item must first be mapped to its attributes. The system uses attributes to search for and organize the items in the grid item template. You can apply grid attributes to child matrix items if you want to assign item options to grid item templates.

There are three ways to map grid attributes to items:

- **Through the Item Record page** – This option is used to map a single grid attribute to a single item. For instructions, see Applying a Grid Attribute to an Item.
- **Through the Apply Attribute to Item page** – This option is used to map multiple grid attributes to multiple items. For instructions see Applying Multiple Grid Attributes to Items.
- **Through CSV Import** – This option is used to map grid attributes to items based on the values in the CSV Import file. For instructions, see the help topic Importing CSV Files with the Import Assistant.

Guidelines for Applying Grid Attributes to Items

Read the following guidelines for applying grid attributes to items:

- You can apply grid attributes only to inventory, assembly, and child matrix items.

- When using the Apply to Attribute Item page, the setup of your items may affect how they are shown in the Apply to Attribute popup list:
  - Item names that exceed the maximum of 180 characters may be shown incorrectly.
  - Complete item names are used, including all ancestors of an item. A sample of a complete item name is shown in this pattern – Parent 1: Child 1: Grand Child 1. Avoid using long names with minimal variation across parent and child items, which causes duplicate items to be shown. For example – LongItemName1: LongItemName2: LongItemName3.
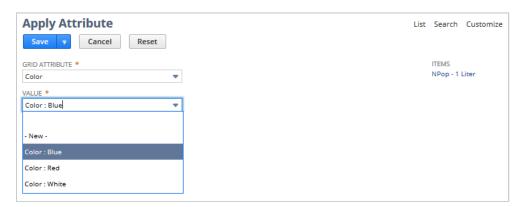
For limitations of Grid Order Management in general, see Limitations of Grid Order Management.

Applying a Grid Attribute to an Item

On the Item page, you can map a grid attribute – value to an item, one at a time. You can also change or delete the mapping, if the item has not been used in a grid template.

To apply a grid attribute to an item:

1. Go to Lists > Accounting > Items.
2. In the Items list, click the link for the item to be mapped.
3. On the Item page, click the **Grid Attribute** subtab.

   The attributes mapped to the item are shown in the list.
4. Click **New Apply Attribute**.
5. On the Apply Attribute page, select a grid attribute and attribute-value.

When you select a grid attribute, only the associated attribute-values are included in the **Value** list. If you want to add a new attribute or value, select **New** from the list. The corresponding Grid Attribute or Grid Attribute-Value form is shown in a popup window. For instructions on completing the forms, see Setting Up Grid Attributes.

6. Click **Save**.

   Click **Save & New** if you want to apply another attribute to the item.

   If you need to change or delete a mapping, you can do the following on the **Grid Attribute** subtab:
   a. Click **Edit** beside the attribute you want to update. On the Apply Attribute page, select another attribute or attribute-value.
   b. If an item has not been assigned to a grid template, you can delete the grid attribute value applied to it. To remove the mapping, select **Delete** from the Actions list.

      To see the list of mappings, click the **List** link. On the Apply Attribute List page, the grid attribute, attribute-value, and item mappings are shown.

    c.   Save your changes to the record.
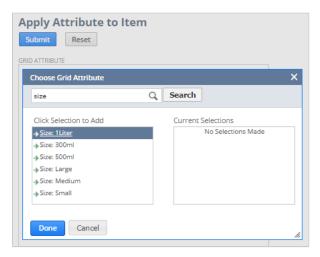
Applying Multiple Grid Attributes to Items

The Apply Attribute to Item page enables you to map several attributes to items in one transaction.

To apply multiple grid attributes to items:

1. Go to Lists > Grid Order Entry > Apply Attribute to Item.
2. To select grid attributes, click the double arrows beside the **Grid Attributes** pane.
3. In the Choose Grid Attribute popup list, select the grid attributes from the left pane.

   The grid attributes that you select are shown in the right pane. To remove an attribute from the Current Selections list, click its **x** icon.

   If there are too many attributes on the left pane, use the **Search** field to narrow down the list. For example, the following screenshot shows only the attributes with the word "size" in their name.

4. After selecting the grid attributes, click **Done** to close Choose Grid Attribute the popup list.
5. To select items, click the double arrows beside the **Items** pane.
6. In the Choose Item popup list, select the items from the left pane. These items will be mapped to the attributes you selected.
7. After selecting the items, click **Done** to close the Choose Item popup list.
8. After selecting grid attributes and items, click **Submit**.

   To clear all selections, click **Reset**.

The mapping of attributes to items may take some time to process, especially if you need to map multiple attributes to items. When the mapping is complete, each item record shows the corresponding attributes.

If you have access to the Script Deployment page, you can check the status of mapping process in the **Status** field.

Using Grid Item Templates

After you apply attributes to items, you can use the items in a grid item template. To place items in the grid, search for items by categories and assign grid attributes to the rows and columns. You can enter percentages for each item to be used in calculating the distribution of quantities across all items in the grid item template.

You can assign matrix item options to a grid item template if the items are mapped to grid attributes. For more information, see Applying Grid Attributes to Items. For guidelines and limitations when creating grid templates, see Setting Up Grid Templates.

Creating a Grid Item Template

Use the following procedure to create a grid item template.

To create a grid item template:

1. Go to the Grid Templates page.
   - If you are using an Administrator role, go to Lists > Grid Order Entry > Grid Templates.
   - If you are using other roles, read Roles and Permissions for Grid Order Management.
2. On the Grid Templates page, click **New Grid Item Template**.
3. On the Grid Item Template page, enter values in the fields in the Grid Item Definition section:
   a. For OneWorld accounts, select a subsidiary in the **Subsidiary** field.
   b. Enter a name for the grid item template.
   c. In the **Description** field, enter a grid template description of not more than 300 characters.
   d. In the **Select Filter** field, select the grid attributes you want to use as filters for the items

   The **Select Filter** field lists all grid attributes. The values you select in this field are the first categories used to designate items on the template. These may be the primary requirements for the items you want to assign to the template. For example, if you want to create a grid item template for dresses and skirts of the same brand, select the attribute for the brand, as well as attributes for dresses and skirts. Sample grid attributes that you select as filters are Brand: Brand A, Apparel Category: Dresses, and Apparel Category: Skirts.
4. In the Grid Template section, enter the values in the fields.
   a. In the **Column Attribute** field, select the attribute you want to use as category for the grid columns. When an attribute is selected, the associated attribute values are listed in the **Column Values** field.
   b. In the **Column Values** field, select the attribute values for the grid columns. The system uses the attributes to search for items that are mapped to them. The names of the attribute values are shown in the grid as column labels.
   c. In the **Row Attribute** field, select the attribute you want to use as the category for the grid rows. When an attribute is selected, the associated attribute values are listed in the **Row Values** field.
   d. In the **Row Values** field, select the attribute values for the grid rows. The system uses the attributes to search for items that are mapped to them. The names of the attribute values are shown in the grid as row labels.

   Select column and row attributes from the **Select Filter** field. These filters further define the items you assign to the template. These values may designate a subset of the items that are initially defined by the attributes you selected as filters.

   There is no limit to the number of attributes or attribute values you can select. However, after you select the attributes, it is possible that the number of items returned will exceed the limit defined for the grid item template. If the number of retrieved items exceeds the limit, consider setting up more than one grid template to set up subsets of the items defined by the attributes in the **Select Filter** field.
5. Select the transactions where you want the grid template to be available.

   This enables you to open the Grid Order Entry form on the selected transactions.

6. Click **Get Item**.

   The retrieved items are shown in the grid with the following limitations:

   - The row and column attribute values are arranged in alphabetical order by default. You can rearrange the columns by drag and drop.

   - Where multiple items are mapped to a cell, you can select the item you want from the dropdown list. You can also select a blank value.

   - A maximum of 200 values as grid attributes can be saved in the grid template. For more information, see Setting Up Grid Templates.

   - Same items in multiple cells are not allowed.

   - Item records that have been assigned to a grid template cannot be deleted.

7. In the grid, enter the percentage of the total order quantity for each attribute value in the column and row heading.

   As you enter a percentage, the **Row** and **Column Percentage** fields display the total percentage. The computed total should be equal to 100 percent. The percentages defined on the item template are used when you enter the total quantity in your grid order. If you do not set the percentages, the total quantity is equally distributed across the items in your grid order.

   If multiple items are retrieved for the attributes you selected, click the item in the grid cell to view the other options, and then select the item you want.

8. Click **Save**.

   Clicking **New** clears the fields and displays a blank form.

Editing a Grid Item Template

Use the following procedure to edit a grid item template.

To edit a grid item template:

1. Go to the Grid Templates page.

   - If you are using an Administrator role, go to Lists > Grid Order Entry > Grid Templates.

   - If you are using other roles, read Roles and Permissions for Grid Order Management.

2. On the Grid Templates list, click **Edit** beside the grid item template you want to update.

3. Edit the grid item template as needed. You can update the **Name**, **Description**, **Available In**, and **Percent** fields.

   To rearrange the grid, click and drag the column header and drop it on its new position.

4. Click **Save**.

Deleting a Grid Item Template

You can only delete a grid item template that is not being used in any order transaction.

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If you use a Sales Person role, you cannot delete grid item templates. For more information, see Roles and Permissions for Grid Order Management.

Use the following procedure to delete a grid item template.

To delete a grid item template:

1. Go to the Grid Templates page.
   - If you are using an Administrator role, go to Lists > Grid Order Entry > Grid Templates.
   - If you are using other roles, read Roles and Permissions for Grid Order Management.
2. On the Grid Templates list, click **Edit** or **View** beside the grid item template you want to delete.
3. Click **Delete**.

Managing Grid Orders

Use the grid templates that you have set up to add orders to your transactions. Grid order entry follows the standard procedures for creating order transactions. You can use one or more templates in a grid order. For more information, read the following topics:

- Entering Single Grid Orders
- Entering Multi-Grid Orders

Guidelines for Creating Grid Orders

Read the following guidelines for creating grid orders:

- For better performance, add a maximum of 500 line items per transaction. You may encounter errors or slow processing when there are more than 500 line items in the transaction.

- Grid order entry does not include validation or autopopulation of values in standard mandatory fields, such as the Tax Code. This applies on the sales order form and custom mandatory fields for other SuiteApps.

- Item inventory count is based on the location that has been set in the transaction header if line-item locations is not used. Otherwise, item inventory count is based on line-item locations even if a location has been set in the transaction header. For more information about line-item locations, see the help topic Configuring Per-Line Locations for Transactions.

- If you use Multiple Currencies, values for the rate and amount of line items are initially based on the base price set as currency of the parent company. When grid items are added as line items, the values follow applicable multicurrency rules and are reflected on the Grid Order Entry form.

- On the Grid Order Entry form, row level price totals and price totals use the pricing assigned at the item level. The total order, including all items, is priced on the **Items** subtab and incorporates order level discounts. To view actual price totals on the Grid Order Entry form, click the **Open** link for the template on the **Items** subtab.

- If you use Demand Planning for grid sales orders that are submitted for the first time, the ship date that you entered on the Grid Order Entry form is assigned to all items in the grid.

- For grid inventory adjustments:
  - If you use Advanced Bin/Numbered Inventory Management, you cannot use grid item templates that only have lot numbered or serialized items. When you use grid item templates with different item types, the grid cells for serialized and lot numbered items are disabled.

▫ If you enter **0** in a grid cell for a specific item, the item is not added to the transaction line item.

For general guidelines and limitations of Grid Order Management, see Limitations of Grid Order Management.

Entering Single Grid Orders

You can add orders to transactions using one template per Grid Order Entry form. To do this, ensure that the item price for all price levels and currencies have been set up in the item record. Items without a price cannot be added to the item sublist of a transaction. To review the guidelines for grid order entry, see Managing Grid Orders.

If you want to use multiple templates in one Grid Order Entry form for sales orders, see Entering Multi-Grid Orders.

To enter a grid order:

1. Go to Transactions > (Transaction type).

   Follow the standard path for creating the transaction. For example, to create a sales order, go to Transactions > Sales > Enter Sales Orders.

2. On the order page, enter values in the Primary Information and Classification sections as you would in a standard order transaction. On the order page, you can also enter values in the Sales Information section.

   For instructions on creating each of the order transactions, read the following topics:

   - Creating Sales Orders
   - Entering a Purchase Order
   - Entering a Transfer Order
   - Inventory Adjustments
   - Preparing an Estimate

3. Click the **Items** subtab, and then click **Open Grid**.

   Alternatively, you can add the parent matrix item on the **Items** subtab if the matrix item is already assigned to a grid matrix template. Ensure that your browser is set to enable popup lists from **system.netsuite.com** to use the Grid Order Entry popup form.

   The **Open Grid** button is available only to users who have access to the custom record types supported by Grid Order Management. For more information, see Roles and Permissions for Grid Order Management.

4. On the Grid Order Entry form, enter values in the Grid Order Information section.

   The following steps apply to single grid and multi-grid order entry.

   a. In the **Name** field, select the name for the grid item or grid matrix template.

      To use the **%** wildcard in the **Name** field, see Limitations of Grid Order Management for the supported combinations. Results may not be shown due to incorrect values or role restrictions. For Administrators, you can view the execution logs for error details.

      Based on your selected template, the **Type** and **Grid Attribute** fields are populated.

   b. Enter or select values based on the type of transaction.

      - **Sales orders and estimates** - In the **Expected Ship Date** field, enter the date you expect this item to be shipped from the vendor. You must enable the Demand Planning feature in your account to display this field.

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- **Inventory adjustments** - Select a location from the list of options, which are based on the subsidiary. You must enable the Multi-Location feature in your account to display this field.

- **Transfer orders** - In the **Expected Receipt Date** field, enter the date when you expect to receive the item at the warehouse.

  If the Demand Planning feature is enabled in your account, enter the date in the **Expected Ship Date** field.

c. Specify a value for the order priority in the **Order Priority** field.

For sales orders, the default order priority set for the customer is initially shown. To assign an order priority to a transaction item, replace the default value in the **Order Priority** field.

If you edit the items of a sales order through Grid Order Entry, the default order priority set for the customer is used for added items. To change the order priority of added items, specify a value in the **Order Priority** column of the **Items** sublist.

Default order priority applies only to to sales orders and transfer orders.

5. Enter values in the Order Details section.

The following steps apply to single grid and multi-grid order entry.

If the **Enable Quantity Distribution** preference is selected on the Grid Preference page, perform steps **a** and **b**. For more information, see Setting Grid Order Management Preferences.

Changes to values in the line items are reflected when you reopen the Grid Order Entry form. For more information, see Editing Grid Orders.

a. In the **Order Quantity** field, enter your total order quantity.

b. Click **Calculate**.

The quantities are shown for each row and column cell based on the percentages set in the grid template, as well as all totals and inventory levels. Any order quantity that is more than the available quantity for the item is indicated in red.

c. In the grid, click a cell to review information for that item.

The Item Information section displays selected details from the item record, including the grid attribute values that show for the item.

d. Review and specify rates.

Sales Orders:

For sales orders, the **Price Level** field on the Grid Order Entry form and the **Price Level** column in the Items sublist are available if the Multiple Pricing feature is enabled in your NetSuite account.

By default, the **Edit Rate** box or **Edit Rate and Price Level** box is not checked. This means that the system will use the NetSuite pricing hierarchy to populate the **Price Level** and **Rate** columns in the Items sublist (customer item pricing, group pricing, and customer pricing):

- In accounts with the Multiple Pricing feature enabled, the **Estimated Rate** field shows the item price based on the selected price level:

  Price = Item Price Level starting from Base Price down to the Last Price Level (whichever has the first value)

- In accounts without the Multiple Pricing feature:

  Price = Item.Base Price (baseprice)

If the NetSuite item pricing hierarchy is used, it is possible that the values in the **Price Level** and **Estimated Rate** fields on the Grid Order Entry form do not match the values in the **Price Level** and **Rate** columns in the Items sublist.

If you check the **Edit Rate** box or **Edit Rate and Price Level** box, then the system uses the value in the **Price Level** and **Estimated Rate** fields to populate the price level and rate values in the Items sublist.

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To override the estimated rate:

- In accounts with Multiple Pricing enabled:
    1. Check the **Edit Rate and Price Level** box.
    2. Select a price level.
    3. To enter a custom rate, select **Custom** in the **Price Level** field, then enter a rate in the **Estimated Rate** field.
- In accounts without the Multiple Pricing feature
    1. Check the **Edit Rate** box.
    2. Enter a rate in the **Estimated Rate** field.

If you change the currency in the **Accounting** tab of the transaction, the **Estimated Rate** field displays the currency rate set in the item record.

If the currency rate is not available, the exchange rate applies to the base currency of the customer record. The Quantity Pricing feature is not considered for the rate value.

Purchase Orders:

For purchase orders, the **Estimated Rate** field on the Grid Order Entry form shows the value that was saved in the **Purchase Price** field of the item record:

Price = Item.Purchase Price (cost)

By default, the **Edit Rate** box is not checked. This means that the system will use the NetSuite pricing hierarchy to populate the **Rate** column of the Items sublist.

If the NetSuite item pricing hierarchy is used, it is possible that the value in the **Estimated Rate** field does not match the value in the **Rate** column in the Items sublist. For example, if the vendor has a preferred purchase price on the item record, the system uses that price to populate the **Rate** column.

If the **Edit Rate** box is checked, the **Estimate Rate** field becomes available for editing. The system then uses the value in the **Estimated Rate** field to populate the rate values in the Items sublist.

To override the estimated rate:

Check the **Edit Rate** box and enter a rate in the **Estimated Rate** field.

If you change the currency in the **Accounting** tab of the transaction, the **Estimated Rate** field displays the currency rate set in the item record.

If the currency rate is not available, the exchange rate applies to the base currency of the customer record. The Quantity Pricing feature is not considered for the rate value.

    e. To change an item quantity, click the cell, then enter the new value. Computed values in the grid are automatically recalculated when you change item quantities.

       If you select the **Enable Quantity Distribution**, you cannot edit the item quantities in the grid. Percentages must be changed in the grid template. For more information, see Setting Up Grid Matrix Templates and Using Grid Item Templates.

6. Click **Submit** to enter the grid order and return to the order transaction.

- Click **Submit & New** if you want to save the grid order and then enter another one.
- Click **Submit & Save** to enter the grid order and save the transaction. Use this option to enter transactions with large grid orders.

7. Verify the line items on the **Items** subtab of the Order Transaction page and click **Save**.

Guidelines for Editing Grid Items on the Order Transaction Page

Read the following guidelines for editing grid items on the Order Transaction page:

- Changing the percentage in the **Quantity** field of a line item overrides the percentages defined in the grid template.

- For grid inventory adjustments:
    - The new quantity value is automatically computed and shown in the line items.
    - You cannot enter the unit cost for new orders. The unit cost automatically reflects the average cost when you have saved a new order. You can change the default value of the unit cost.
    - If you use the Multi-Locations feature, changing the location of a grid line item automatically updates the location on the Grid Order Entry form.

Entering Multi-Grid Orders

Multi-Grid Order Entry preference enables you to enter orders in multiple grid templates on one Grid Order Entry form. You can combine grid matrix and item templates on a form. Orders are listed in the Order Summary, which is available only when creating multi-grid orders. For more information about the preference, see Setting Grid Order Management Preferences.

Guidelines for Entering Multi-Grid Orders

Read the following guidelines for entering multi-grid orders:

- You can enter multi-grid orders only for sales orders.
- If you use the Demand Planning feature, you can enter the expected ship date on the Grid Order Entry form. This date applies to all items across all grid templates used on the form.
    - If you want to combine orders in one form, it is best that they have the same expected ship date.
    - You can change the expected ship date of items in the line items of the sales order. Change the dates one item at a time.
- If you enter 0 in a grid cell when entering new orders in the grid, it is not added to the Order Summary. If you enter 0 or leave a grid cell blank when editing orders, the corresponding items are deleted from the Order Summary.
- Duplicate templates cannot be added to the Order Summary. When you enter new orders using a template that has been added to the Order Summary, the quantities in the existing template are updated. However, in the transaction sublist, items are submitted as new orders and not added to existing templates that have been used in other grid orders.
- After you have submitted a multi-grid order, you cannot view or edit it as a whole. You can edit submitted orders per template. For more information, see Editing Grid Orders.
- For limitations and guidelines when entering grid orders, see Managing Grid Orders.

Follow these instructions to enter multi-grid orders.

To enter multi-grid orders:

1. Go to Transactions > Sales > Enter Sales Orders.
2. On the Sales Order page, enter the details in the following sections: Primary Information, Sales Information, Classification. Specify the details as you would in a standard sales order transaction.

    For detailed instructions, see Creating Sales Orders.
3. On the **Items** subtab, click **Open Grid**.
4. On the Grid Order Entry popup form, enter or select the values in the following sections: Grid Order Information and Order Details.

    For detailed instructions, see steps 4 and 5 of Entering Single Grid Orders.

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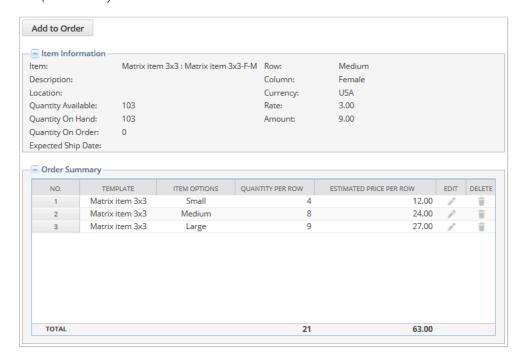
5. After entering the quantity of your orders in the grid template, click **Add to Order**. Your order is entered in the Order Summary table.

6. To enter orders in another template, select the grid template from the list in the **Name** field. Every time you change the template selection, the grid cells are cleared. For each grid template that you use, you must enter the orders in the Order Summary by clicking **Add to Order**.

7. Click **Submit** to enter your grid orders and return to the sales order.

   On the Sales Order page, you can review the items from the grid on the **Items** subtab. You can update the details for specific items or add more items to the transaction.

8. After completing the sales order, click **Save**.

Viewing Order Summary Details

You can view multi-grid orders in the Order Summary table before submitting them in the sales order. When you add orders to the table, each item option from the grid template is listed with the subtotal quantity of your order and estimated price. Refer to the following table for the list of Order Summary details:

Column Name	Description
No.	Line number of the row item option
Template	Name of the grid template where you entered the order for the item option
Item Options	Row item option listed in the **Matrix Item Options** column of the grid template
Quantity per Row	Subtotal quantity of your order per row item option
Estimated Price per Row	Estimated subtotal price of your order per row item option

For reference, you can view the rate and quantity details in the Item Information table. For more information about the Order Summary table, see Viewing Order Summary Details. If you want to edit or delete orders from the Order Summary, see Updating Multi-Grid Orders. See the screenshot below for a sample summary.
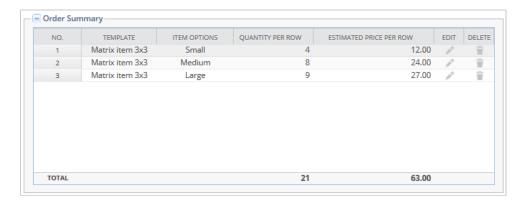
Updating Multi-Grid Orders

Before submitting a multi-grid order, you can edit or delete orders that have been added to the Order Summary. Quantity and price values are automatically recalculated based on your updates. You can edit the submitted grid orders by editing the template. For more information, see Editing Grid Orders.

In the Order Summary table, the edit and delete icons for each item option are located in their respective columns.

- To edit a row item option, click its corresponding pencil icon in the **Edit** column.

  When you edit a row item option, the complete order is shown in the grid in Edit mode. Before editing a row item, ensure that there no entries in the grid that have not been added to the Order Summary table. All grid cells are cleared and replaced with values from the complete order.

  - Update the quantity of the row item, including other items in the order. If you change the value of a grid cell to 0 or leave it blank, the corresponding items in the Order Summary are deleted when you enter the updates.

  - To enter your updates in the Order Summary, click **Add to Order**.

- To delete a row item option, click its corresponding delete icon in the **Delete** column. The system displays a confirmation message. When you delete a row item option, the complete order is shown in the grid. In case you deleted the row item option by mistake, you can add it again to the Order Summary table.

  To delete the selected row item only, click **Delete Row**.

  To delete all rows that belong to the selected template, click **Delete Template**.

For more information about the Order Summary table, see Viewing Order Summary Details.

Editing Grid Orders

You can edit grid orders that have been submitted through single or multi-grid order entry.

Guidelines for Editing Grid Orders

Read the following guidelines for editing grid orders:

- Grid inventory adjustments cannot be edited.
- Changes to a grid template do not automatically reflect in the grid orders where the template is used. To update a grid order, you either manually edit it and reload the grid template, or manually enter the changes in the line items.

- Users that do not have grid access cannot edit items that have been added through grid orders. When they edit other items and details on the transaction, the grid item details are retained.

- The Order Summary table is not shown on the Grid Order Entry form in Edit mode.

- When you create sales orders from estimates with grid orders, the grid order is carried over. You can edit the item quantities in the grid of the sales order. When you convert estimates to transactions not supported by grid ordering, you can edit the order in the item sublist of transactions. For the list of transactions supported by grid order entry, refer to the table on Grid Order Management.

To view other guidelines for grid order entry, see Managing Grid Orders. To view specific guidelines when updating multi-grid orders, see Updating Multi-Grid Orders

Follow these instructions to edit grid orders.

To edit a grid order:

1. Go to Transactions > (Transaction type).

   Follow the standard path for editing the transaction. For example, to edit a sales order, go to Transactions > Sales > Enter Sales Orders.

2. In the list of orders, click **Edit** beside the transaction.

3. On the **Items** subtab of the order page, perform any of the following:

   - To enter a new grid order, click **Open Grid**.

     For instructions, read the following topics:

     - Entering Single Grid Orders
     - Entering Multi-Grid Orders

     The **Open Grid** button is only available to users who have access to at least one of the supported custom record types. For more information, see Roles and Permissions for Grid Order Management.

   - To edit an existing grid order, perform the following steps:

     1. In the **Grid Template** column, look for the grid template name used in the grid order.

     2. In the **Link** column, click the Open icon to display the existing grid order.

     3. On the Grid Order Entry form, you can make the following changes depending on the grid preferences defined in your account.

        - If you use the Enable Quantity Distribution preference, you can change the total order quantity. Enter the new value in the **Order Quantity** field, then click **Calculate**.

        - To change specific item quantities, click the cell, then enter the value. Percentages and total values are automatically recalculated.

        For grid inventory adjustments, setting the value of the cell to zero removes the corresponding grid line item from the transaction. For more information about grid preferences, see Setting Grid Order Management Preferences.

     4. Click **Submit**.

        - Click **Submit & New** if you want to save the grid order and then enter another grid order.

        - Click **Submit & Save** to enter the grid order and save the transaction. Use this option to enter transactions with large grid orders.

   - Click a line item to change or add values.

     Changing the percentage in the **Quantity** field of a line item updates the percentage in its associated grid template when you open the grid.

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- Apply line item discounts.

    - Remove line items. To remove all transaction lines from the order, click **Clear All Lines**.

4. After completing the changes, click **Save** on the order page.

Importing Grid Orders

You can import the data for grid purchase order and sales order transactions using the following methods:

- CSV Imports for Grid Purchase Order and Sales Order Transactions
- SOAP Web Services Support for Grid Purchase Orders and Grid Sales Orders

CSV Imports for Grid Purchase Order and Sales Order Transactions

You can use the CSV Import method to import multiple grid purchase order and sales order transactions. When you import these transactions, you may view and print the transaction using the grid template assigned to the item records. Read the following topics to learn more:

- Grid Item ID Assignment
- Grid Template Assignment
- Viewing the Grid for the Item Record
- Printing Transaction Records Using the Grid Template

Guidelines for Importing Grid Purchase Order and Sales Order Transactions

Read the following guidelines for importing grid purchase order and sales order transactions:

- You can only import up to 100 distinct grid templates for each transaction.

- The system automatically assigns the value of the **Grid Item ID** and **Grid Template** fields for assembly and inventory matrix items in the transaction. These fields are no longer required in the CSV Import file.

- If the value of the **Grid Item ID** field is specified in the CSV Import file, the value gets ignored.

- The value of the **Grid Template** field is based on the current preferred grid template assignment in the item record. If you want to manually assign the grid template, ensure that the field in the CSV Import file contains the valid internal ID of the grid template.

Grid Item ID Assignment

When you use CSV Import for grid purchase order and sales order transactions, the grid item ID assignment for assembly and inventory matrix items depends on the following fields:

- **Item** – This field is located in the CSV Import file.

- **Grid Item ID** – This field is located in the CSV Import file.

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- **Grid Template** – This field is located in the CSV Import file.
- **Available In** – This field is located on the Grid Matrix Template page.
- **Preferred Grid Template** – This field is located on the **Custom** subtab of the item record.

The SuiteApp examines the row sequence of the **Item** field and its corresponding **Grid Template** in your CSV Import file.

The row sequence of the **Item** field determines if they are the same or different items. The row sequence of the **Grid Template** field determines if the items are grouped or ungrouped.

The value of the **Grid Item ID** in the item record also depends on the item's current **Preferred Grid Template** setup. The grid template must include the order transaction in its **Available In** field.

To identify the item's grid item ID assignment, you may refer to the following table of scenarios:

Scenarios	Grid Template Grouping	Grid Template Applicable? [1]	Sample Item and Grid Template Input in the CSV Import File	Grid Item ID Assignment in the Transaction Record
Three same items with the same template	Grouped	Y	Item A, Grid Template N Item A, Grid Template N Item A, Grid Template N	Grid Item ID 1 Grid Item ID 2 Grid Item ID 3
Three different items with different templates	Ungrouped	Y	Item A, Grid Template N Item B, Grid Template O Item C, Grid Template P	Grid Item ID 1 Grid Item ID 2 Grid Item ID 3
Three different items with the same template	Grouped	Y	Item A, Grid Template N Item B, Grid Template N Item C, Grid Template N	Grid Item ID 1 Grid Item ID 1 Grid Item ID 1
Three different items with different templates - Two different items with the same template - One different item with a different template in between	Ungrouped	Y	Item A, Grid Template N Item C, Grid Template O Item B, Grid Template N	Grid Item ID 1 Grid Item ID 2 Grid Item ID 3
Three different items with different templates - Two different items with the same template - One item with a different template	Grouped	Y	Item A, Grid Template N Item B, Grid Template N	Grid Item ID 1 Grid Item ID 1 Grid Item ID 2

Scenarios	Grid Template Grouping	Grid Template Applicable? [1]	Sample Item and Grid Template Input in the CSV Import File	Grid Item ID Assignment in the Transaction Record
			Item C, Grid Template O	
Three different items with the same template ■ Two same items with the same template ■ One different item with the same template	Grouped	Y	Item A, Grid Template N Item A, Grid Template N Item B, Grid Template N	Grid Item ID 1 Grid Item ID 2 Grid Item ID 2
Three different items with different templates ■ Two different items with the same template ■ One different item with no grid template in between	Ungrouped	Y	Item A, Grid Template N Item B, No Grid Template Item C, Grid Template N	Grid Item ID 1 Nongrid [2] Grid Item ID 2
Three different items with different templates ■ Two different items with the same template ■ One item with a grid template that is not applicable to the transaction in between	Ungrouped	N	Item A, Grid Template N Item D, Grid Template is not applicable to the transaction Item C, Grid Template N	CSV Import failure. The system will display an error message in the CSV response.

(1) Grid Template Applicable determines if the **Preferred Grid Template** used includes the order transaction in the **Available In** field.

(2) Nongrid refers to an item that does not display in grid format.

Grid Template Assignment

When you use CSV Import for grid purchase order and sales order transactions, the grid template assignment for assembly and inventory matrix items depends on the following fields:

■ **Grid Item ID** – This field is located in the CSV Import file.

■ **Grid Template** – This field is located in the CSV Import file.

■ **Preferred Grid Template** – This field is located on the **Custom** subtab of the item record.

To identify the grid template assignment in the transaction record, you may refer to the following table of scenarios:

Grid Item ID Input in the CSV Import File	Grid Template Input in the CSV Import File	Preferred Grid Template Input in the Item Record	Grid Template Assignment in the Transaction Record
Blank	Blank	With Value	Preferred Grid Template
Blank	With Value	Blank	Grid Template
Blank	Blank	Blank	Nongrid [2]

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Grid Item ID Input in the CSV Import File	Grid Template Input in the CSV Import File	Preferred Grid Template Input in the Item Record	Grid Template Assignment in the Transaction Record
Blank	With Value	With Value	Grid Template
With Value[1]	Blank	With Value	Preferred Grid Template
With Value [1]	With Value	Blank	Grid Template
With Value [1]	Blank	Blank	Nongrid [2]
With Value [1]	With Value	With Value	Grid Template
(1) The system ignores any value given to the **Grid Item ID** in the CSV Import file.			
(2) Nongrid refers to an item that does not display in grid format.			

For more information on CSV Imports, see the help topic Importing CSV Files with the Import Assistant.

Viewing the Grid for the Item Record

After importing grid purchase orders and sales orders using CSV Import, the transactions appear on the Purchase Orders and Sales Orders pages respectively. You can view the templates associated to the item records in the transaction.

To view the grid for the item record:

1. Go to Transactions > Purchases > Enter Purchase Orders > List or Transactions > Sales > Enter Sales Orders > List, depending on the selected transaction type.
2. On the transactions list, search for the transaction from your CSV Import file and click **Edit**.
3. On the **Items** subtab, the items included in the transaction are listed. To view the grid for the item, scroll to the right and click the icon in the **Link** column.

Printing Transaction Records Using the Grid Template

After importing grid purchase orders and sales orders using CSV Import, you can print the transaction using the grid template assignment.

To print the transaction record:

1. Go to Transactions > Purchases > Enter Purchase Orders > List or Transactions > Sales > Enter Sales Orders > List, depending on the selected transaction type.
2. On the transactions list, search for the transaction from your CSV Import file and click **View**.
3. Click **Print Grid**.
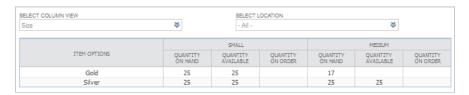
SOAP Web Services Support for Grid Purchase Orders and Grid Sales Orders

SOAP web services is another method to import transactions to your account. For more information on using SOAP web services, see the help topic SuiteTalk SOAP Web Services Platform Overview.

Viewing the Grid Matrix Information

Grid Order Management enables you to view item quantities and stock levels in grid format. On parent matrix item records, the **Grid Matrix Information** subtab displays the following item details for the parent and its child items: Quantity on hand, Quantity available, and Quantity on order. For information about these item quantities, see the help topic Assessing Stock Levels.

ITEM OPTIONS	SMALL			MEDIUM		
	QUANTITY ON HAND	QUANTITY AVAILABLE	QUANTITY ON ORDER	QUANTITY ON HAND	QUANTITY AVAILABLE	QUANTITY ON ORDER
Gold	25	25		17		
Silver	25	25		25	25	

SELECT COLUMN VIEW: Size

SELECT LOCATION: - All -

Guidelines for Viewing Grid Matrix Information

Read the following guidelines for viewing matrix items in grid format:

- The **Grid Matrix Information** subtab is available on parent matrix item records for assembly and inventory items only.
- In the grid, take note of the following behaviors:
  - Items with no quantities are left blank.
  - Quantities or grid cells that are shaded gray indicate that the items are inactive or do not exist. For OneWorld accounts, this could indicate that items cannot be accessed within your subsidiary.
  - If you use Multiple Units of Measure and a stock unit setting, grid item quantities are shown in base unit.
  - There is a maximum limit of 500 items that can be shown in the grid. Exceeding this limit causes values in columns to overlap.
- Considerations for matrix item options:
  - Item options are assigned to rows and columns in alphabetical order. The first and any succeeding item options are assigned as rows. The last item option is assigned as the column. To replace the default column, see Changing the Item Column Display.
  - Item option values are arranged based on settings and order of entry on the custom list of matrix options. For more information, see the help topic Setting up an Item Matrix.
  - If you use numerical values for an item option, add a **0** to single digits to retain the order.
  - If only one item option has been set up for the parent matrix, no grid information can be shown.
  - Updates to matrix item options are automatically reflected in the grid.

Changing the Item Column Display

You can change the item option shown in the column headers. From the list in the **Select Column View** field, select the item option you want to assign. The replaced item option is automatically assigned to the row and quantities.

Filtering Items by Location

If you use Multi-Location Inventory, you can view items from multiple locations available in your account. For OneWorld accounts, subsidiary locations are included. If your role does not have access to a subsidiary, you can view items based on the subsidiary on your employee record.

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By default, item quantities from all locations are shown in the grid. To narrow the results, select the specific location of items to be shown in the **Select Location** field.

To use the **%** wildcard in the **Name** field, see Limitations of Grid Order Management for the supported combinations. Results may not be shown due to incorrect values or role restrictions. For Administrators, you can view the execution logs for error details.

If you want to switch to another location, click the double down arrows to see the list of all locations. Alternatively, you can enter the location name in the field to display the list of matching locations.

Grid Printing

Before you use grid printing, ensure that your account is updated with the required features and permissions. To learn more about the requirements, read the following topics:

- Prerequisites for Grid Order Management
- Roles and Permissions for Grid Order Management

For instructions on how to set the preferences for grid printing, see Setting Grid Printing Preferences.

Grid Printing Options

You can use grid printing to display relevant transaction information into a single file. There are two options in grid printing: Standard Grid Order Printing and Grid Print Templates.

Both printing options use the same method of assigning a template for each transaction. On the Grid Preferences page, the grid print template refers to the XML files on the **Grid Printing** subtab. These templates control how the elements in the printout appear in the PDF file. You can select a template for the following transactions:

- Cash sale
- Invoice
- Packing slip
- Picking ticket
- Purchase order
- Quote
- Sales order

With grid print templates, the grid tables display matrix items according to the grid template assignment. The printout also shows a consolidated item list to display other items in the transaction that do not belong to the grid table.

You can customize these grid print templates according to your printing preferences.

Guidelines for Grid Printing

Read the following guidelines for grid printing:

- Both standard grid order printing and grid print template options generate printouts in PDF format. Each PDF has a maximum file size of 10 MB.

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- The default page orientation is in portrait mode. If the transaction contains extremely long field values, text wrapping may occur in the document. You can edit the grid print template to adjust the column width. For more information, see Customizing the Printout using Advanced PDF/HTML Templates.

- The printout header contain addresses in the company, vendor, billing, and shipping information. Using the Address subrecord, you can edit these addresses to include additional details, such as phone and email. For more information, see the help topic About the Address Subrecord.

- You must first assign a grid template for matrix items to appear on the grid table in the printout.

- For invoice, packing slip, picking ticket, purchase order, and sales order, the maximum number of column attributes for each grid table is six. Meanwhile, for cash sale and quote, the maximum is five. When the grid template exceeds the number of column attributes allowed, the printout will display multiple grid tables.

- You can display child matrix items, which belong to the same parent matrix item, into different grid tables. For more information, see Assigning a Preferred Grid Template Using the Item Record.

- The number format in the printout follows your user preferences. If you want to change the number formats, select your preferred settings in the **Number Format** and **Negative Number Format** lists on the Set Preferences page. For more information, see the help topic General Personal Preferences.

- You can personalize how amounts appear in the printout. If the Multiple Currency feature is enabled, you can change the default currency format in the currency record. If the Multiple Currency feature is disabled, you can adjust the default currency format in the Company Information page. Check the **Override Currency Format** box to show the **Currency Symbol** and **Symbol Placement** fields. For more information, see the help topic Customizing Currency Formats.

- Single transaction grid printing is available only in view mode of the supported transaction records. Grid printing is not available on the Print Checks & Forms page.

For other considerations and limitations, see Limitations of Grid Order Management.

Standard Grid Order Printing

Standard grid order printing refers to the type of printing used in purchase order and sales order transactions.

As you create or edit the transaction, you can use the Grid Order Entry feature to select the appropriate grid template for matrix items on the transaction record.

When you use CSV Import, the system automatically assigns the **Grid Item ID** and **Grid Template** values based on the **Preferred Grid Template** field on the item record. You can assign a different grid template using the **Grid Template** column in your CSV Import file. For more information, see Importing Grid Orders.

You can use either grid matrix templates or grid item templates to create the grid table for matrix items in the printout. Nongrid matrix items appear in the item list following the grid tables.

Grid Print Templates

Aside from the XML files on the Grid Preferences page, the grid print template also refers to the grid printing option used for other supported transactions. These transactions are created outside the Grid Order Entry feature. Cash sale, invoice, packing slip, picking ticket, and quote transaction records use this type of grid printing.

For packing slips, grid print templates apply only for item fulfillments created from sales order and transfer order transactions.

Unlike in standard grid order printing, you can only use grid matrix templates to create the grid table for matrix items in the printout. Nongrid matrix items appear in the item list following the grid tables. This list includes items that use grid item templates.

The following table outlines the differences between standard grid order printing and grid print template options.

Concept	Standard Grid Order Printing	Grid Print Template
Supported transaction records	- Purchase Order - Sales Order	- Cash Sale - Invoice - Packing Slip - Picking Ticket - Quote
Setting the grid print template	**For purchase order** – wd_gom_template_pogridprintout.xml **For sales order** – wd_gom_template_sogridprintout.xml	**For cash sale** – wd_gom_template_csgridprintout.xml **For invoice** – wd_gom_template_ivgridprintout.xml **For packing slip** – wd_gom_template_psgridprintout.xml **For picking ticket** – wd_gom_template_ptgridprintout.xml **For quote** – wd_gom_template_qtgridprintout.xml
Using grid templates	You can use either grid matrix templates or grid item templates to create the grid table.	You can only use grid matrix templates to create the grid table.
Creating the transaction using Grid Order Entry	When you create the transaction using Grid Order Entry, the grid table depends on the **Grid Item ID** and **Grid Template** field values. These fields are located on the **Items** subtab of the transaction record. For more information, see Entering Single Grid Orders.	The Grid Order Entry feature is not available for transactions using this grid printing option.
Creating the transaction using CSV Import	When you create the transaction using CSV Import, the grid table depends on the **Grid Item ID** and **Grid Template** field values. These fields are located on the **Items** subtab of the transaction record. For more information, see Importing Grid Orders.	For transactions using this option, the **Grid Item ID** and **Grid Template** fields on the **Items** subtab are irrelevant to the grid table. These fields are either ignored or do not exist in the transaction record. The grid table only displays items that have an assigned grid matrix template. To confirm the template assignment, go to the item record. On the **Custom** subtab, verify that the **Preferred Grid Template** field value is a grid matrix template. If the **Preferred Grid Template** field is blank, the oldest grid matrix template on the Grid Templates page becomes the template.
Manually adding items using the **Items** subtab in	When you manually add items on the **Items** subtab of the transaction record, the **Grid Item ID** and **Grid Template** fields are blank and	For cash sales, invoices, picking tickets, and quotes, manually added items appear in the grid table only if the items have an assigned grid matrix template.

Concept	Standard Grid Order Printing	Grid Print Template
the transaction record	disabled. Therefore, these items appear on the item list in the printout.	For packing slips, you cannot add items using the **Items** subtab of the transaction record.
Button Labels	For purchase orders and sales orders, use the **Print Grid** button.	For cash sales, invoices, and quotes, use the **Print Grid** button. For packing slips, use the **Print Grid Packing Slip** button. For picking tickets, use the **Print Grid Picking Ticket** button.
Mapping fields in grid print templates	For purchase orders, see Purchase Order Printout Fields. For sales orders, see Sales Order Printout Fields.	For invoices, see Invoice Printout Fields. For packing slips, see Packing Slip Printout Fields. For picking tickets, see Picking Ticket Printout Fields.
Identifying the grid print template elements	See Grid Table for Standard Grid Order Printing.	See Grid Table for Grid Print Templates.

Single Transaction Grid Printing

You can use grid printing to generate a PDF file that contains a single transaction record. The printout contains relevant data from the record, such as company information, order details, and a summary of quantity and amounts.

You can print single transactions using the appropriate print button, which appears only in view mode.

To print a single transaction using grid printing:

1. Go to the transactions list page.
   - For invoices, go to Transactions > Sales > Create Invoices > List.
   - For packing slips, go to Transactions > Sales > Fulfill Orders > List.
   - For picking tickets and sales orders, go to Transactions > Sales > Enter Sales Orders > List.
   - For picking tickets from transfer orders, go to Transactions > Inventory > Enter Transfer Orders > List.
   - For purchase orders, go to Transactions > Purchases > Enter Purchase Orders > List.
2. On the transaction list page, click **View** beside the record you want to print.
3. On the transaction record page, click the appropriate print button.
   - For Invoices, purchase orders, and sales orders, click **Print Grid**.
   - For picking tickets, click **Print Grid Picking Ticket**.
   - For packing slips, click **Print Grid Packing Slip**.

   The system opens a preview of the printout in an Adobe application document.
4. Click the printer icon in the Adobe application frame and choose your print settings.
5. Click **Print**.

Bulk Grid Printing

Bulk grid printing is available only for transactions where you use grid print templates. You can generate a PDF file that contains multiple transactions for printing. For information about grid print templates, see Grid Print Templates.

Guidelines for Bulk Grid Printing

Read the following guidelines for bulk grid printing:

- File generation for more than 200 transactions may take more than an hour to complete. To lessen the processing time, reduce the number of transactions.

- To avoid exceeding the allowed script governance and PDF file size limit of 10 MB, separate files are generated automatically when printing a large number of transactions. For more information, see the help topic Script Type Usage Unit Limits.

- On the Bulk Grid Printing page, the maximum number of rows shown in the sublist per page depends on your general preference setting for list segments. For more information, see the Optimizing NetSuite section in the topic, General Personal Preferences.

- Email notifications about the outcome of the generated files are routed based on your email recipient preference. For information about this preference, see Setting Grid Order Management Preferences.

Follow these instructions if you want to use bulk grid printing.

To print transactions in bulk using grid printing:

1. Go to Lists > Grid Order Entry > Bulk Grid Printing.

2. In the **Document Type** field on the Bulk Grid Printing page, select the form or transaction type of the records to be printed.

   Use the available filtering and printing options:

Field Name	Description
Date From / Date To	Enter the start and end of the date range in their respective fields. The order date is used for filtering the documents, except for packing slips where the ship date is used. - Use Date From without Date To, if you want to retrieve all documents based on or later than the start date. - Use Date To without Date From, if you want to retrieve all documents based on or earlier than the end date.
Location	Select the location of the documents you want to retrieve. Only locations in the transaction header are available for selection. For packing slips, filtering by location is not applicable. - Selecting **All** retrieves documents across all locations and includes those without location settings in the transaction header. - Selecting **None** retrieves only documents without location settings in the transaction header.
Allow Reprinting	Check the box to retrieve documents that have been previously printed. Otherwise, these documents are not included in your search results.

Changing filtering options automatically displays new results and clears any selected records from your previous results. View the number of retrieved records in the **Total** field, located above the sublist header.

3. Check the box for the records you want to include in the bulk grid printing file.

   Click the **Mark All** button to select all records on the current page. You can do the same for records on any succeeding pages. Click the **Unmark All** button to clear records across all pages.

   View the number of currently selected records in the **Selected Records** field.

4. Click **Print**.

   To clear the filter and any selected records across all pages, click **Reset**.

   The scheduled script that generates the bulk grid printing files is queued for processing. On the information banner at the top of the page, you can click the link to view the processing status. You are redirected to the Bulk Grid Printing Status page where you can monitor the progress. After the files have been generated, look for the log record in the sublist to view the PDF file and processing details:

   ▪ In the **File Link(s)** column, click the link to view and print the PDF file.

   ▪ In the **Error Detail(s)** column, you can view information about errors encountered during processing.

   For more information about bulk grid printing logs, see Viewing and Maintaining Bulk Grid Printing Logs.

Viewing and Maintaining Bulk Grid Printing Logs

Read the following topics on how to view and maintain bulk grid printing logs:

▪ Viewing Bulk Grid Printing Logs

▪ Viewing Bulk Grid Printing Files

▪ Deleting Bulk Grid Printing Logs and Files

Viewing Bulk Grid Printing Logs

You can view the bulk grid printing log records that contain links to the PDF file and processing details.

In case of errors encountered during bulk grid printing file generation, a user with the Administrator role can view the log records for any error details. To see more information about a specific error, administrators can view the script execution logs by going to Customization > Scripting > Scripts Customization > Scripting > Scripts.

To view bulk grid printing logs:

1. Go to Lists > Grid Order Entry > Bulk Grid Printing Status.

   On the Bulk Grid Printing Status page, all existing log records are shown.

2. Use the available filtering options to narrow down the list of bulk grid printing logs.

Field Name	Description
Document Type	Select the form or transaction type of the files associated with the bulk grid printing logs.
Status	Select the bulk grid printing status of the files associated with the logs.

Field Name	Description
Date From / Date To	Enter the start and end of the date range in their respective fields. The date in the print timestamp is used to filter the bulk grid printing logs. ■ Use Date From without Date To, if you want to retrieve all records based on or later than the start date. ■ Use Date To without Date From, if you want to retrieve all records based on or earlier than the end date.
Printed By	For Administrators, you can click one or more users from the list to retrieve all associated logs. Only users, both active and inactive, who have submitted bulk grid printing requests are included in the list. Only administrators can use the **Printed By** filter. Only they can view the logs for PDF files they print.

Changing filtering options automatically displays new results and clears any selected records from your previous results. View the number of retrieved records in the **Total** field, located above the sublist header.

To reload the bulk grid printing logs and clear the selected records, click **Refresh**.

After filtering and viewing the bulk grid printing logs, you can view the files for printing or delete log records.

Viewing Bulk Grid Printing Files

The generated PDF files are attached to their log records. In the **File Link(s)** column of a log record, click one or more PDF files to view and print.

Use the PDF filename to help you find which files to print. PDF filenames have the following format:

■ `Printout_<document type>_<print timestamp>.pdf`

■ If multiple files are generated, the following suffix is added to the filename: `_<file sequence number>`.

Deleting Bulk Grid Printing Logs and Files

On the Bulk Grid Printing Status page, do either of the following:

■ To delete selected logs and files, check the box beside each record and then click **Delete**.

■ To delete all retrieved logs and files shown on the current page, click **Delete All Logs & Files**.

Bulk grid printing logs and files that are already being processed cannot be deleted.

Customizing the Grid Print Templates

On the **Grid Printing** subtab of the Grid Preferences page, you can select the standard grid print templates available in your account.

You can further customize the layout of the document by creating custom templates based on these standard grid print templates.

An administrator or developer with knowledge of FreeMarker and JSON codes can create these custom templates.

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The following table shows the recommended steps to customize the grid print templates for selected transaction records.

Step	Procedure

1. Download the standard grid print template from the File Cabinet.	**To download the standard grid print template:**
	
	1. Go to Documents > Files > File Cabinet.
	2. Go to the SuiteBundles > Bundle 41296 > src > template > GridPrinting folder.
	3. Click the **Download** link beside the grid print template that you want to customize:
	  ■ **wd_gom_template_csgridprintout.xml** – for cash sale
	  ■ **wd_gom_template_ivgridprintout.xml** – for invoice
	  ■ **wd_gom_template_pogridprintout.xml** – for purchase order
	  ■ **wd_gom_template_psgridprintout.xml** – for packing slip
	  ■ **wd_gom_template_ptgridprintout.xml** – for picking ticket
	  ■ **wd_gom_template_qtgridprintout.xml** – for quote
	  ■ **wd_gom_template_sogridprintout.xml** – for sales order

2. Edit the template and save as a new custom grid print template.	For information on the available printout fields and grid print template elements, read the following topics: ■ Identifying the Printout Fields ■ Identifying the Grid Print Template Elements
3. Upload the custom grid print template to the File Cabinet.	**To upload the custom grid print template:** 1. Go to Documents > Files > File Cabinet. 2. Go to the Templates > Grid Printing Templates folder. 3. Click **Add File** and select the custom grid print template file from your computer.
4. Select the custom grid print template on the Grid Preferences page.	**To select the custom grid print template:** 1. Go to Lists > Grid Order Entry > Set Grid Preferences. 2. On the **Grid Printing** subtab, select the custom grid print template you created for the transaction. 3. Click **Save**. For more information, see Setting Grid Printing Preferences.

Identifying the Printout Fields

The printout contains various fields that depend on the transaction record you print. To learn more about these printout fields, refer to the following tables.

■ Purchase Order Printout Fields

■ Sales Order Printout Fields

■ Invoice Printout Fields

■ Picking Ticket Printout Fields

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- Packing Slip Printout Fields

Purchase Order Printout Fields

Section	Field Name	Field ID	Description
Header	Company Logo	companyinformation.logoUrl	Company logo on the Company Information record
	Record Title	record@title	Purchase Order
	Company Name	companyinformation.company name	Company name on the Company Information record
	Company Address	companyinformation.addresst ext	Company address on the Company Information record
	Date	record.trandate	**Date** field value on the transaction record
	PO #	record.tranid	**Transaction ID** field value on the transaction record
	Receive By	record.duedate	**Receive By** field value on the transaction record
	Terms	record.terms	**Terms** field value on the **Billing** subtab of the transaction record
	Incoterm	record.incoterm	**Incoterm** field value on the **Billing** subtab of the transaction record
Vendor Information	Vendor:	record.billaddress	**Vendor Address** field value on the **Billing** subtab of the transaction record
Shipping Information	Ship To:	record.shipaddress	Company address on the Company Information record For drop-ship purchase orders, this field contains the shipping address on the **Shipping** subtab of the transaction record. For special order purchase orders created from a sales order, this field contains the shipping address on the related Sales Order record.
Grid Table	Grid Table Name	Any of the following: - item.custcol_gridoe_hidden_ parentdispname (parent item's display name) - item.custcol_gridoe_hidden_ parentname (parent item's item name) - gridData.name (item's grid template)	For grid matrix templates, if the parent item's **Display Name/Code** field value is available, this value becomes the grid table name. Otherwise, the parent item's **Item Name/Number** field value becomes the grid table name. For grid item templates, the **Grid Template** field value on the transaction record becomes the grid table name.
	Quantity	-	Calculated sum of quantities for each row attribute
	Total Quantity	-	Calculated total of grid table quantities This value is located at the bottom of the **Quantity** column on the grid table.

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Section	Field Name	Field ID	Description
	Row Attribute Values	gridData.grid.data[n].rowattribute	Row attributes on the grid template
	Column Attributes Header Label	gridData.grid.header[n].name	Column attributes on the grid template
	Column Attributes Item Quantity	item.quantity	Item quantity for each column attribute
	Column Attributes Total Quantity	-	Calculated total of column attribute quantities This value is located at the bottom of each column attribute on the grid table, which appears only on single grid tables.
	Rate	item.rate	Rate of each item
	Amount	item.amount	Calculated sum of amounts for each row attribute Ideally, this value is equivalent to the aggregate total of each item quantity multiplied by the respective rate. When you override the price of any item in the amount column on the transaction record, the **Amount** field value in the printout also changes, causing amount discrepancies.
	Total Amount	-	Calculated total amount This value is located at the bottom of the **Amount** column on the grid table.
Item List	Quantity	item.quantity	Quantity of each item on the item list
	Total Quantity	-	Calculated total of item list quantities This value is located at the bottom of the **Quantity** column on the item list.
	Item	item.item	Item name on the transaction record
	Name	Any of the following: ■ item.vendorname (item's vendor name) ■ item.custcol_gridoe_hidden_displayname (item's display name) ■ item.item (item name)	The label for the name depends on the following conditions: ■ If the item's **Vendor Name/Code** field value is available, this value becomes the name. ■ If the item's **Vendor Name/Code** field value is blank, the item's **Display Name/Code** becomes the name. ■ If both **Vendor Name/Code** and **Display Name/Code** are blank, the **Item Name/Number** becomes the name.
	Rate	item.rate	Rate of each item
	Amount	item.amount	Amount of each item Ideally, this value is equivalent to the aggregate total of each item quantity multiplied by the respective rate. When you override the price of any item in the amount column on the transaction

Section	Field Name	Field ID	Description
			record, the **Amount** field value in the printout also changes, causing amount discrepancies.
	Total Amount	-	Calculated total amount This value is located at the bottom of the **Amount** column on the item list.
Summary	Subtotal	-	Calculated sum of all grid table total amounts and item list total amounts
	Discounts	item.amount (Discount)	Calculated sum of all line-item and transaction discounts on the transaction record For more information on discount items, see the help topic Discount Items on the Help Center.
	Markups	item.amount (Markup)	Calculated sum of all markup items on the item sublist of the transaction record For more information on markup items, see the help topic Markup Items on the Help Center.
	Tax Total	record.taxtotal	**Tax Total** field value in the Summary section of the transaction record
	GST/HST	record.taxtotal	(For Canadian subsidiaries only) **GST/HST** field value in the Summary section of the transaction record
	PST	record.tax2total	(For Canadian subsidiaries only) **PST** field value in the Summary section of the transaction record
	Grand Total Quantity	-	Calculated sum of all item quantities on the transaction record
	Grand Total Amount	record.total	**Total** field value in the Summary section of the transaction record ⚠ **Important:** The grand total amount may be different from the aggregate sum of amounts on the transaction, especially in cases where you use line item discounts and custom price levels.
Footer	Bar Code	-	Transaction bar code
	Page Number	-	Current page number

For more information about the fields and field IDs that you can use in customizing the grid print template for purchase order, see the help topic Standard Purchase PDF/HTML Template.

Sales Order Printout Fields

Section	Field Name	Field ID	Description
Header	Company Logo	companyinformation.logoUrl	Company logo on the Company Information record
	Record Title	record@title	Sales Order

Section	Field Name	Field ID	Description
	Company Name	companyinformation.companyname	Company name on the Company Information record
	Company Address	companyinformation.address text	Company address on the Company Information record
	Date	record.trandate	**Date** field value on the transaction record
	Order #	record.tranid	**Transaction ID** field value on the transaction record
	Terms	record.terms	**Terms** field value on the **Billing** subtab of the transaction record
	PO #	record.otherrefnum	**PO #** field value on the transaction record
	Shipping Method	record.shipmethod	**Shipping Method** field value on the **Shipping** subtab of the transaction record
Billing Information	Bill To:	record.billaddress	**Billing Address** field value on the **Billing** subtab of the transaction record
Shipping Information	Ship To:	record.shipaddress	**Shipping Address** field value on the **Shipping** subtab of the transaction record When the **Multiple Shipping Routes** feature is enabled, the **Enable Item Line Shipping** box is shown on the **Item** subtab of the sales order. This feature allows you to add different shipping addresses for each item in the Item sublist. If there are multiple shipping addresses available in the transaction, the **Ship To** field in the printout becomes hidden.
Grid Table	Grid Table Name	Any of the following: ■ item.custcol_gridoe_ hidden_parentdispname (parent item's display name) ■ item.custcol_gridoe_ hidden_parentname (parent item's item name) ■ gridData.name (item's grid template)	For grid matrix templates, if the parent item's **Display Name/Code** field value is available, this value becomes the grid table name. Otherwise, the parent item's **Item Name/Number** field value becomes the grid table name. For grid item templates, the **Grid Template** field value on the transaction record becomes the grid table name.
	Quantity	-	Calculated sum of quantities for each row attribute
	Total Quantity	-	Calculated total of grid table quantities This value is located at the bottom of the **Quantity** column on the grid table.
	Row Attribute Values	gridData.grid.data[n]. rowattribute	Row attributes on the grid template
	Column Attributes Header Label	gridData.grid.header[n].name	Column attributes on the grid template

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Section	Field Name	Field ID	Description
	Column Attributes Item Quantity	item.quantity	Item quantity for each column attribute
	Column Attributes Total Quantity	-	Calculated total of column attribute quantities This value is located at the bottom of each column attribute on the grid table, which appears only on single grid tables.
	Rate	item.rate	Rate of each item
	Amount	item.amount	Calculated sum of amounts for each row attribute Ideally, this value is equivalent to the aggregate total of each item quantity multiplied by the respective rate. When you override the price of any item in the amount column on the transaction record, the **Amount** field value in the printout also changes, causing amount discrepancies.
	Total Amount	-	Calculated total amount This value is located at the bottom of the **Amount** column on the grid table.
Item List	Quantity	item.quantity	Quantity of each item on the item list
	Total Quantity	-	Calculated total of item list quantities This value is located at the bottom of the **Quantity** column on the item list.
	Item	item.item	Item name on the transaction record
	Name	Any of the following: ■ item.custcol_gridoe_hidden_displayname (item's display name) ■ item.item (item name)	If the item's **Display Name/Code** field value is available, this value becomes the name. Otherwise, the item's **Item Name/Number** field value becomes the name.
	Rate	item.rate	Rate of each item
	Amount	item.amount	Amount of each item Ideally, this value is equivalent to the aggregate total of each item quantity multiplied by the respective rate. When you override the price of any item in the amount column on the transaction record, the **Amount** field value in the printout also changes, causing amount discrepancies.
	Total Amount	-	Calculated total amount This value is located at the bottom of the **Amount** column on the item list.
Summary	Subtotal	-	Calculated sum of all grid table total amounts and item list total amounts
	Discounts	item.amount (Discount)	Calculated sum of all line-item and transaction discounts on the transaction record

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Section	Field Name	Field ID	Description
			For more information on discount items, see the help topic Discount Items on the Help Center.
	Markups	item.amount (Markup)	Calculated sum of all markup items on the item sublist of the transaction record For more information on markup items, see the help topic Markup Items on the Help Center.
	Tax Total	record.taxtotal	**Tax Total** field value in the Summary section of the transaction record
	GST/HST	record.taxtotal	(For Canadian subsidiaries only) **GST/HST** field value in the Summary section of the transaction record
	PST	record.tax2total	(For Canadian subsidiaries only) **PST** field value in the Summary section of the transaction record
	Shipping Total	record.altshippingcost + record.althandlingcost	Calculated sum of **Shipping Cost** and **Handling Cost** field values in the Summary section of the transaction record
	Gift Certificate	record.giftcertapplied	**Gift Certificate** field value in the Summary section on the transaction record
	Grand Total Quantity	-	Calculated sum of all item quantities on the transaction record
	Grand Total Amount	record.total	**Total** field value in the Summary section of the transaction record ⚠️ **Important:** The grand total amount may be different from the aggregate sum of amounts on the transaction, especially in cases where you use line item discounts and custom price levels.
Footer	Bar Code	-	Transaction bar code
	Page Number	-	Current page number

For more information about the fields and field IDs that you can use in customizing the grid print template for sales order, see the help topic Standard Sales Order PDF/HTML Template.

Invoice Printout Fields

Section	Field Name	Field ID	Description
Header	Company Logo	companyinformation.logoUrl	Company logo on the Company Information record
	Record Title	record@title	Invoice
	Company Name	companyinformation.companyname	Company name on the Company Information record
	Company Address	companyinformation.addresstext	Company address on the Company Information record

Section	Field Name	Field ID	Description
	Date	record.trandate	**Date** field value on the transaction record
	Invoice #	record.tranid	**Transaction ID** field value on the transaction record
	Due Date	record.duedate	**Due Date** field value on the transaction record
	Terms	record.terms	**Terms** field value on the **Billing** subtab of the transaction record
	PO #	record.otherrefnum	**PO #** field value on the transaction record
	Shipping Method	record.shipmethod	**Shipping Method** field value on the **Shipping** subtab of the transaction record
Billing Information	Bill To:	record.billaddress	**Billing Address** field value on the **Billing** subtab of the transaction record
Shipping Information	Ship To:	record.shipaddress	**Shipping Address** field value on the **Shipping** subtab of the transaction record
Grid Table	Grid Table Name	Any of the following: ▪ item.custcol_gridoe_hidden_parentdispname (parent item's display name) ▪ item.custcol_gridoe_hidden_parentname (parent item's item name)	For grid matrix templates, if the parent item's **Display Name/Code** field value is available, this value becomes the grid table name. Otherwise, the parent item's **Item Name/Number** field value becomes the grid table name. Items using grid item templates are shown on the item list.
	Quantity	-	Calculated sum of quantities for each row attribute
	Total Quantity	-	Calculated total of grid table quantities This value is located at the bottom of the **Quantity** column on the grid table.
	Row Attribute Values	gridData.grid.data[n].rowattribute	Row attributes on the grid template
	Column Attributes Header Label	gridData.grid.header[n].name	Column attributes on the grid template
	Column Attributes Item Quantity	item.quantity	Item quantity for each column attribute
	Column Attributes Total Quantity	-	Calculated total of column attribute quantities This value is located at the bottom of each column attribute on the grid table, which appears only on single grid tables.
	Rate	item.rate	Rate of each item
	Amount	item.amount	Calculated sum of amounts for each row attribute Ideally, this value is equivalent to the aggregate total of each item quantity multiplied by the respective rate. When you override the price

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Section	Field Name	Field ID	Description
			of any item in the amount column on the transaction record, the **Amount** field value in the printout also changes, causing amount discrepancies.
	Total Amount	-	Calculated total amountThis value is located at the bottom of the **Amount** column on the grid table.
Item List	Quantity	item.quantity	Quantity of each item on the item list
	Total Quantity	-	Calculated total of item list quantities This value is located at the bottom of the **Quantity** column on the item list.
	Item	item.item	Item name on the transaction record
	Name	Any of the following: ■ item.custcol_gridoe_hidden_displayname (item's display name) ■ item.item (item name)	If the item's **Display Name/Code** field value is available, this value becomes the name. Otherwise, the item's **Item Name/Number** field value becomes the name.
	Rate	item.rate	Rate of each item
	Amount	item.amount	Amount of each item Ideally, this value is equivalent to the aggregate total of each item quantity multiplied by the respective rate. When you override the price of any item in the amount column on the transaction record, the **Amount** field value in the printout also changes, causing amount discrepancies.
	Total Amount	-	Calculated total amount This value is located at the bottom of the **Amount** column on the item list.
Summary	Subtotal	-	Calculated sum of all grid table total amounts and item list total amounts
	Discounts	item.amount (Discount)	Calculated sum of all line-item and transaction discounts on the transaction record For more information on discount items, see the help topic Discount Items on the Help Center.
	Markups	item.amount (Markup)	Calculated sum of all markup items on the item sublist of the transaction record For more information on markup items, see the help topic Markup Items on the Help Center.
	Tax Total	record.taxtotal	**Tax Total** field value in the Summary section of the transaction record
	GST/HST	record.taxtotal	(For Canadian subsidiaries only) **GST/HST** field value in the Summary section of the transaction record

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Section	Field Name	Field ID	Description
	PST	record.tax2total	(For Canadian subsidiaries only) **PST** field value in the Summary section of the transaction record
	Shipping Total	record.altshippingcost + record.althandlingcost	Calculated sum of **Shipping Cost** and **Handling Cost** field values in the Summary section of the transaction record
	Gift Certificate	record.giftcertapplied	**Gift Certificate** field value in the Summary section on the transaction record
	Grand Total Quantity	-	Calculated sum of all item quantities on the transaction record
	Grand Total Amount	record.total	**Total** field value in the Summary section of the transaction record ⚠️ **Important:** The grand total amount may be different from the aggregate sum of amounts on the transaction, especially in cases where you use line item discounts and custom price levels.
Footer	Bar Code	-	Transaction bar code
	Page Number	-	Current page number

For more information about the fields and field IDs that you can use in customizing the grid print template for invoice, see the help topic Standard Invoice PDF/HTML Template.

Picking Ticket Printout Fields

Section	Field Name	Field ID	Description
Header	Company Logo	companyinformation.logoUrl	Company logo on the Company Information record
	Record Title	record@title	Picking Ticket
	Company Name	companyinformation.companyname	Company name on the Company Information record
	Company Address	companyinformation.addresstext	Company address on the Company Information record
	Date	record.trandate	**Date** field value on the related Sales Order or Transfer Order record
	Order #	record.tranid	**Transaction ID** field value on the related Sales Order or Transfer Order record
	Shipping Method	record.shipmethod	**Shipping Method** field value on the **Shipping** subtab of the related Sales Order or Transfer Order record
Shipping Information	Ship To:	record.shipaddress	**Shipping Address** field value on the **Shipping** subtab of the related Sales Order or Transfer Order record

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Section	Field Name	Field ID	Description
			When the **Multiple Shipping Routes** feature is enabled, the **Enable Item Line Shipping** box is shown on the **Item** subtab of the sales order. This feature allows you to add different shipping addresses for each item in the Item sublist. If there are multiple shipping addresses available in the transaction, the **Ship To** field in the printout becomes hidden.
Grid Table	Grid Table Name	Any of the following: ■ item.custcol_gridoe_hidden_parentdispname (parent item's display name) ■ item.custcol_gridoe_hidden_parentname (parent item's item name)	For grid matrix templates, if the parent item's **Display Name/Code** field value is available, this value becomes the grid table name. Otherwise, the parent item's **Item Name/Number** field value becomes the grid table name. Items using grid item templates are shown on the item list.
	Quantity	-	Calculated sum of quantities for each row attribute
	Total Quantity	-	Calculated total of grid table quantities This value is located at the bottom of the **Quantity** column on the grid table.
	Row Attribute Values	gridData.grid.data[i].rowattribute	Row attributes on the grid template
	Column Attributes Header Label	gridData.grid.header[i].name	Column attributes on the grid template
	Column Attributes Item Quantity	item.quantity	Item quantity for each column attribute This value is derived from the **Quantity** column of the related Sales Order or Transfer Order record.
	Column Attributes Total Quantity	-	Calculated total of column attribute quantities This value is located at the bottom of each column attribute on the grid table, which appears only on single grid tables.
Item List	Quantity	item.quantity	Quantity of each item on the item list
	Total Quantity	-	Calculated total of item list quantities This value is located at the bottom of the **Quantity** column on the item list.
	Item	item.item	Item name on the related Sales Order or Transfer Order record
	Name	Any of the following: ■ item.custcol_gridoe_hidden_displayname (item's display name) ■ item.item (item name)	If the item's **Display Name/Code** field value is available, this value becomes the name. Otherwise, the item's **Item Name/Number** field value becomes the name.
Footer	Bar Code	-	Transaction bar code
	Page Number	-	Current page number

For more information about the fields and field IDs that you can use in customizing the grid print template for picking ticket, see the help topic Standard Picking Ticket PDF/HTML Template.

Packing Slip Printout Fields

Section	Field Name	Field ID	Description
Header	Company Logo	companyinformation.logoUrl	Company logo on the Company Information record
	Record Title	record@title	Packing Slip
	Company Name	companyinformation.companyname	Company name on the Company Information record
	Company Address	companyinformation.addresstext	Company address on the Company Information record
	Date	salesorder.trandate	**Date** field value on the related Sales Order or Transfer Order record
	Order #	salesorder.tranid	**Order #** field value on the related Sales Order or Transfer Order record
	Ship Date	salesorder.shipdate	**Ship Date** field value on the **Shipping** subtab of the related Sales Order or Transfer Order record
	Tracking #	salesorder.linkedtrackingnumbers	**Tracking #** field value on the **Shipping** subtab of the related Sales Order or Transfer Order record This field contains the **Package Tracking Number** field value on the **Packages** subtab of the Item Fulfillment record. For more information, see the help topic Tracking Numbers.
	Shipping Method	record.shipmethod	**Shipping Method** field value on the **Shipping** subtab of the Item Fulfillment record
Shipping Information	Address	record.shipaddress	**Shipping Address** field value on the **Shipping** subtab of the Item Fulfillment record
Grid Table	Grid Table Name	Any of the following: ■ item.custcol_gridoe_hidden_parentdispname (parent item's display name) ■ item.custcol_gridoe_hidden_parentname (parent item's item name)	For grid matrix templates, if the parent item's **Display Name/Code** field value is available, this value becomes the grid table name. Otherwise, the parent item's **Item Name/Number** field value becomes the grid table name. Items using grid item templates are shown on the item list.
	Ordered	-	Calculated sum of ordered quantities for each row attribute This value is derived from the **Quantity** column of the related Sales Order or Transfer Order record.
	Total Ordered	-	Calculated total ordered quantity

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Section	Field Name	Field ID	Description
			This value is located at the bottom of the **Ordered** column on the grid table.
	Row Attribute Values	gridData.grid.data[i].rowattribute	Row attributes on the grid template
	Column Attributes Header Label	gridData.grid.header[i].name	Column attributes on the grid template
	Column Attributes Item Quantity	item.quantity	Fulfilled item quantity for each column attribute This value is derived from the **Quantity** column of the Item Fulfillment record.
	Column Attributes Total Item Quantity	-	Calculated total of fulfilled item quantities for each column attribute This value is located at the bottom of each column attribute on the grid table, which appears only on single grid tables.
	Back Ordered	-	Calculated sum of back-ordered quantities for each row attribute This value is derived from the **Back Ordered** column of the related Sales Order or Transfer Order record.
	Total Back Ordered	-	Calculated total back-ordered quantity This value is located at the bottom of the **Back Ordered** column on the grid table.
	Shipped	-	Calculated sum of quantities for each item on the Item Fulfillment record
	Total Shipped	-	Calculated total shipped quantity This value is located at the bottom of the **Shipped** column on the grid table.
Item List	Ordered	salesorder.item.quantity	Calculated sum of ordered quantities for each item on the item list This value is derived from the **Quantity** column of the related Sales Order or Transfer Order record.
	Total Ordered	-	Calculated total ordered quantity This value is located at the bottom of the **Ordered** column on the item list.
	Item	item.item	Item name on the transaction record
	Name	Any of the following: ▪ item.custcol_gridoe_hidden_displayname (item's display name) ▪ item.item (item name)	If the item's **Display Name/Code** field value is available, this value becomes the name. Otherwise, the item's **Item Name/Number** field value becomes the name.

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Section	Field Name	Field ID	Description
	Back Ordered	-	Calculated sum of back-ordered quantities for each row attribute This value is derived from the **Back Ordered** column of the related Sales Order or Transfer Order record.
	Total Back Ordered	-	Calculated total back-ordered quantity This value is located at the bottom of the **Back Ordered** column on the item list.
	Shipped	item.quantity	Quantity of each item on the Item Fulfillment record
	Total Shipped	-	Calculated total shipped quantity This value is located at the bottom of the **Shipped** column on the item list.
Customer Return Form	Company Name	companyinformation. companyname	Company name on the Company Information record
	Return Address	companyInformation. returnaddress_text	Return address on the Company Information record
	Order #	salesorder.tranid	**Order #** field value on the related Sales Order or Transfer Order record
	R.A.#	-	Blank field where you can input the return authorization number
Footer	Bar Code	-	Transaction bar code
	Page Number	-	Current page number

For more information about the fields and field IDs that you can use in customizing the grid print template for packing slip, see the help topic Standard Packing Slip PDF/HTML Template.

Identifying the Grid Print Template Elements

This section identifies the elements included in the grid print templates. Refer to the following tables to help you create custom grid print templates.

FreeMarker Objects in the Grid Print Templates

This table lists the FreeMarker objects used in the source code of the grid print templates. These records appear only when you print transactions using grid printing.

FreeMarker Objects	Description
parameters	Contains the following values based on the number format you select on your user preferences: ■ **grouping** – thousand separator ■ **decimal** – decimal separator ■ **negative** – negative number symbol
currencyRec	Currency record used in the transaction

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FreeMarker Objects	Description
{FTLUtil}	Contains codes from WD_GridOE_TemplateUtils.xml located in SuiteBundles > Bundle 41296 > src > GridPrinting on the File Cabinet.
{cssContent}	Contains codes from the following CSS files in the File Cabinet: ■ **For purchase order and sales order** – wd_gom_template_style.css located in SuiteBundles > Bundle 41296 > src > css. ■ **For cash sale and quote** – WD_GridOE_GridPrintOut.css located in SuiteBundles > Bundle 41296 > src > GridPrinting.

Custom Fields in the Transaction Record

This table lists the custom fields in the transaction record that references information from the item record.

Field Name	Field ID	Description
Parent Name	custcol_gridoe_hidden_parentname	Item's **Subitem Of** field value
Parent Display Name	custcol_gridoe_hidden_parentdispname	Parent item's **Display Name/Code** field value
Display Name	custcol_gridoe_hidden_displayname	Item's **Display Name/Code** field value

FreeMarker Functions in the Template Utility

This table lists the FreeMarker functions used in the **WD_GridOE_TemplateUtils.xml** template utility file. This file is located in the SuiteBundles > Bundle 41296 > src > GridPrinting folder on the File Cabinet.

Before using other functions, you must first call `getItemDetails` or `getItemOrderedShippedQty` functions. Other functions in the utility file depend on the item details in the JSON data.

You can find the following FreeMarker functions in the utility file when you create custom grid print templates.

FreeMarker Function	Parameters	Description	Sample

min(val1, val2)	**val1, val2** – compares numeric values	This function returns the lower value between parameters val1 and val2.	**FTL:**
			
			`<#assign test = min(1,9)>`
			`{test}`
			
			Output:
			
			1

getItemDetails(items)	**items** – accepts record.item, which is the current transaction's item list	This function traverses through the item lines in the transaction. Then this function returns a JSON data with the following pattern:
		
		`{<item.itemid>: {rate: <item.rate>,quantity: <item.quantity>}}`
		
		The JSON data stores the same items with collated quantities. If the item rates differ, the JSON data stores the rate of the item's latest entry.
			record.item:
			
			`-[{itemid: 10, rate: 10, quantity: 10},`
			
			`{itemid: 20, rate: 20, quantity: 20}.`
			
			`{itemid: 10, rate: 30, quantity: 30}]`
			
			FTL:
			
			`{getItemDetails(record.item)}`
			
			Output:
			
			`{10: {rate: 30, quantity: 40}`
			
			`20: {rate: 20, quantity: 20}}`

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FreeMarker Function	Parameters	Description	Sample

getItemOrderedShippedQty(salesorder, items)	**salesorder** – corresponding sales order or transfer order transaction record of the current item fulfillment
	
	items – accepts record.item, which is the current transaction's item list
		You can use this function in packing slips.
		
		This function traverses through the item lines in the current sales order or transfer order related to the item fulfillment. Then, this function returns a JSON data with the following pattern:
		
		`{itemid: {ordered: <SO.quantity>, shipped: <IF.quantity>, backorder: <SO.backordered>}}`
		
		The JSON data stores only the items found in both item fulfillment and sales order or transfer order transactions. The JSON data also stores the same items with collated quantities, shipped quantities, and backordered quantities.
			salesorder.item:
			
			`-[{itemid: 10, rate: 10, quantity: 10, backordered: 10},`
			
			`{itemid: 20, rate: 20, quantity: 20, backordered: 0}.`
			
			`{itemid: 10, rate: 30, quantity: 30, backordered: 0}]`
			
			record.item: (IF)
			
			`-[{itemid: 10, quantity: 5}]`
			
			FTL:
			
			`{getItemOrderedShippedQty( salesorder, record.item)}`
			
			Output:
			
			`{10: {ordered: 40, shipped: 5, backorder: 10}}`

getRowColLabel(gridData)	**gridData** – grid data from record.custbody_gridoe_ trantemplatedata	When the gridData.type is "MI", the output returns the label stored in gridData.grid.rowcollabel.
		
		When the gridData.type is not "MI", the output returns "gridData.grid.rowlabel / gridData.grid.collabel".
			gridData[0]:
			
			`{type: "MI", grid: {rowcollabel: "Main Label", rowlabel: "Color", collabel: "Size"}}`
			
			gridData[1]:
			
			`{type: "NA", grid: {rowcollabel: "Main Label", rowlabel: "Color", collabel: "Size"}}`
			
			FTL:
			
			`{getRowColLabel{gridData[0]}}`
			
			`{getRowColLabel{gridData[1]}}`
			
			Output:
			
			"Main Label"
			
			"Color / Size"

getRowColumnData(row, col, subcolumn)	**row** – accepts gridData.grid.data element
	
	col – accepts gridData.grid. data.columnids element
	
	subcolumn – accepts subcolumns (Rate, Qty)
		The loop for gridData.grid.data that traverses the rows and columns must call this function.
		
		This function gets the corresponding subcolumn data for the current row and column of the loop from itemDetails.
		
		When subcolumn is **picked**, the output returns blank. When subcolumn is **rate**, the output formats to currency 0.00.
			itemDetails:
			
			`{10: {rate: 100, quantity: 999}}`
			
			FTL:
			
			`{getRowColumnData(row,col, rate)}`
			
			`{getRowColumnData(row,col, quantity)}`
			
			`{getRowColumnData(row,col, picked)}`
			
			Output:
			
			100.00
			
			999
			
			""

getRowTotal(row, subcolumn)	**row** – accepts gridData.grid.data element	The loop for gridData.grid.data that traverses the rows and columns must call this function.	**gridData.grid.data:** `{column01:{ internalid: 10},`

FreeMarker Function	Parameters	Description	Sample
	subcolumn – accepts subcolumns (Rate, Qty)	This function gets the corresponding subcolumn total for the current row of the loop from itemDetails.	column02: { internalid: 20}} **itemDetails:** {10: {rate: 100, quantity: 999}, 20: {rate: 100, quantity: 1}} **FTL:** {getRowTotal(row, rate)} {getRowTotal(row, quantity)} **Output:** 200 1000
getColumnTotal (rows, column, subcolumn)	**row** – accepts gridData.grid.data **column** – accepts gridData.grid.data.columnids element **subcolumn** – accepts subcolumn (Rate, Qty)	The loop for gridData.grid.data.columnids that traverses the rows and columns must call this function. This function gets the corresponding subcolumn total for the current column of the loop from itemDetails.	**gridData[0].grid.data::** {column01:{ internalid: 10}} **gridData[1].grid.data:** {column01:{ internalid: 20}} **itemDetails:** {10: {rate: 100, quantity: 999}, 20: {rate: 100, quantity: 1}} **FTL:** {getColumnTotal(rows, col, rate)} {getColumnTotal(rows, col, quantity)} **Output:** 200 1000

JSON Codes for the Grid Table

This section provides the JSON codes that contain the data for the grid table in the grid print templates. You can use this information to identify the grid table elements for each transaction.

Before using these JSON codes, consider the following tips in customizing the grid table in the template:

- Item details come from the item sublist in the transaction record. To display the item details, you must use the record.item field. The fields `record.custbody_gridoe_productgrpdata` and `record.custbody_gridoe_trantemplatedata` do not contain item details.
- You may overwrite the CSS file by updating the {`cssContent`} inside the style tag.
- To change the maximum number of column attributes for each table, update the value in the `<#assign maxcol = 6>` line.

Grid Table for Standard Grid Order Printing

The grid print templates for purchase order and sales order transactions contain the `record.custbody_gridoe_productgrpdata` field. This field contains the data for the grid table. Refer to the following information to learn more about this field.

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JSON Code Snippet for Standard Grid Order Printing

The following JSON code snippet shows a sample 2x2 grid table from
`record.custbody_gridoe_productgrpdata`:

```json
[
  {
    "type": "MI",
    "nameId": "2369",
    "name": "Basic Crew Neck T-shirt",
    "category": "Color, Size",
    "rowattr": "custitem2",
    "colattr": "custitem1",
    "grid": {
      "rowlabel": "Color",
      "collabel": "Size",
      "rowcollabel": "Matrix Item Option",
      "header": [
        {
          "id": "Column1",
          "colAttr": "1",
          "name": "Small",
          "percentage": "0.0"
        },
        {
          "id": "Column2",
          "colAttr": "2",
          "name": "Medium",
          "percentage": "0.0"
        }
      ],
      "data": [
        {
          "id": "Row1",
          "rowattributeid": "1",
          "rowattribute": "Red",
          "rowpercents": 0,
          "columnids": [
            "Column1",
            "Column2"
          ],
          "columnpercents": [
            0,
            0
          ],
          "Column1": {
            "internalid": 4220,
            "defaultpercent": 25
          },
          "Column2": {
            "internalid": 4222,
            "defaultpercent": 25
          }
        },
        {
          "id": "Row2",
          "rowattributeid": "2",
          "rowattribute": "Blue",
          "rowpercents": 0,
          "columnids": [
            "Column1",
            "Column2"
          ],
          "columnpercents": [
            0,
            0
          ],
          "Column1": {
            "internalid": 4221,
            "defaultpercent": 25
          },
          "Column2": {
```

```
68            "internalid": 4223,
69            "defaultpercent": 25
70          }
71        }
72      ]
73    }
74  }
75 ]
```

Sample 2x2 Grid Table Representation for Standard Grid Order Printing

For grid tables in standard grid order printing, consider the following details:

- The index of the grid in `record.custbody_gridoe_productgrpdata` is the same as the item's grid ID column in item sublist.

- The template may contain an empty `record.custbody_gridoe_productgrpdata` field.

- The template may contain an empty `{}` entry member in `record.custbody_gridoe_productgrpdata`. If the entry member is empty, it means that the whole template and its items are deleted in item sublist.

The following table represents the sample JSON code into a 2x2 grid table in purchase order and sales order printouts.

Matrix Item Option	Small	Medium
(record.custbody_gridoe_ productgrpddata[0].grid.rowcollabel)	(record.custbody_gridoe_ productgrpddata[0].grid.header[0]. name)	(record.custbody_gridoe_ productgrpddata[0].grid.header[1]. name)
Blue	**Row 1 Col 1 Item ID:**	**Row 1 Col 2 Item ID:**
(record.custbody_gridoe_ productgrpddata[0].grid.data[0]. rowattribute)	(record.custbody_gridoe_ productgrpddata[0].grid.data[0]. Column1)	(record.custbody_gridoe_ productgrpddata[0].grid.data[0]. Column2)
Red	**Row 2 Col 1 Item ID:**	**Row 2 Col 2 Item ID:**
(record.custbody_gridoe_ productgrpddata[0].grid.data[1]. rowattribute)	(record.custbody_gridoe_ productgrpddata[0].grid.data[1]. Column1)	(record.custbody_gridoe_ productgrpddata[0].grid.data[1]. Column2)

Grid Table for Grid Print Templates

The grid print templates for cash sale, invoice, picking ticket, packing slip and quote transactions contain the `record.custbody_gridoe_trantemplatedata` field. This field contains the data for the grid table. Refer to the following information to learn more about this field.

JSON Code Snippet for Grid Print Templates

The following JSON code snippet shows a sample 2x2 grid table from `record.custbody_gridoe_trantemplatedata`:

```
1  {1:
2    {
3      "type": "MI",
4      "nameId": "4",
5      "name": "Basic Crew Neck Tee"
6      "grid": {
7        "rowlabel": "Color",
8        "collabel": "Size",
9        "rowcollabel": "Matrix Item Options",
10       "header": [
11         {
12           "id": "Column1",
13           "colAttr": "1",
14           "name": "Small"
```

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```
15        },
16        {
17          "id": "Column2",
18          "colAttr": "2",
19          "name": "Medium"
20        }
21      ],
22      "data": [
23        {
24          "id": "Row1",
25          "rowattributeid": "1",
26          "rowattribute": "blue"
27          "columnids": [
28            "Column1",
29            "Column2"
30          ],
31          "Column1": {"internalid": 6316},
32          "Column2": {"internalid": 6318},
33        },
34        {
35          "id": "Row2",
36          "rowattributeid": "2",
37          "rowattribute": "red",
38          "columnids": [
39            "Column1",
40            "Column2"
41          ],
42          "Column1": {"internalid": 6317},
43          "Column2": {"internalid": 6319}
44        }
45      ]
46    }
47  }
48 }
```

Sample 2x2 Grid Table Representation for Grid Print Templates

For grid tables in grid print templates, note that the template may contain an empty `record.custbody_gridoe_trantemplatedata` field.

The following table represents the sample JSON code into a 2x2 grid table in cash sale, invoice, packing slip, picking ticket, and quote printouts.

Matrix Item Option	Small	Medium
(record.custbody_gridoe_ trantemplatedata[0].grid.rowcollabel)	(record.custbody_gridoe_ trantemplatedata[0].grid.header[0]. name)	(record.custbody_gridoe_ trantemplatedata[0].grid.header[1]. name)
Blue	**Row 1 Col 1 Item ID:**	**Row 1 Col 2 Item ID:**
(record.custbody_gridoe_ trantemplatedata[0].grid.data[0]. rowattribute)	(record.custbody_gridoe_ trantemplatedata[0].grid.data[0]. Column1)	(record.custbody_gridoe_ trantemplatedata[0].grid.data[0]. Column2)
Red	**Row 2 Col 1 Item ID:**	**Row 2 Col 2 Item ID:**
(record.custbody_gridoe_ trantemplatedata[0].grid.data[1]. rowattribute)	(record.custbody_gridoe_ trantemplatedata[0].grid.data[1]. Column1)	(record.custbody_gridoe_ trantemplatedata[0].grid.data[1]. Column2)

Customizing the Printout using Advanced PDF/HTML Templates

You can use advanced PDF/HTML templates to customize the printouts for grid printing. Advanced PDF/ HTML templates can access the same FreeMarker codes in the `record.custbody_gridoe_productgrpdata`

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and `record.custbody_gridoe_trantemplatedata` fields. However, not all references used in custom grid print templates are accessible in Advanced PDF/HTML templates.

You must have sufficient CSS and HTML knowledge to update advanced PDF/HTML templates. For more information, see the help topic Source Code Editing in the Template Editor.

To see the list of fields and sublists available in advanced PDF/HTML templates, see the help topic SuiteBuilder Advanced Templates Reference.

Follow these instructions to customize advanced PDF/HTML templates for grid print templates.

To customize the printout using advanced PDF/HTML templates:

1. Go to Customization > Forms > Advanced PDF/HTML Templates.
2. On the Advanced PDF/HTML Templates list, click the Customize or Edit link for the advanced print template that you want to update.
3. On the Advanced PDF/HTML Template page, click **Source Code** to transfer to this mode.
4. Insert the following codes:
   a. Insert {cssContent} within the `<style> </style>` tags. This record is used for formatting the grid.
   b. Insert {FTLUtil} before the `<head> </head>` tags. This record contains FreeMarker functions to manipulate the grid data.
5. Click **Save**.
6. If you want to view the changes before saving, click **Preview**.
7. Copy the contents of the template and paste into a new XML file.
8. Upload the XML file in the Grid Printing Templates folder in the File Cabinet. See Uploading Custom Grid Print Templates.

You can also setup the advanced PDF/HTML template in custom forms. For more information, see the help topic Setting Custom Forms to Use Advanced Templates

For more information about advanced templates, see the help topic Advanced PDF/HTML Templates.

Uploading Custom Grid Print Templates

Follow these instructions to upload your customized grid print templates in the NetSuite File Cabinet.

To upload your customized grid print templates:

1. Go to Documents > Files > File Cabinet.
2. On the File Cabinet page, go to the Templates > Grid Printing Templates folder.
3. Click **Add File**.
4. On the File Upload popup window, select your custom XML file, and then click **Open** to add the file to the folder.

After saving custom grid print templates in the File Cabinet, the templates become available in the dropdown list on the **Grid Print** subtab of the Grid Preferences page. To assign grid print templates to transactions, see Setting Grid Order Management Preferences.

Sales Order Reports

To view open customer orders that have not yet been billed, see Open Sales Orders Report.

To view backordered items, see Sales Back Order Report.

To view all orders per customer, see Sales Order Register Report.

To view all open transaction lines for items that are ready to be fulfilled, see Sales Orders Pending Fulfillment Report.

Open Sales Orders Report

The Open Sales Orders report lists open customer orders that have not yet been billed. The report includes the date of each sales order, order number, customer, status, and amount.

To view the Open Sales Orders report:

1. Go to Reports > Order Management > Open Sales Orders.

   NetSuite displays a message indicating that your report is loading. The status bar indicates the progress as your report loads.

2. To stop the report from loading, you can click **Cancel Report**.

3. (Optional) To customize the report, click **Customize**.

   The Report Builder opens, which lets you add, move, or remove columns, add fields, and add totals.

> ℹ **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

For information on viewing and editing customer dashboards, see the help topic Customer Dashboards.

For more information on reporting, see the help topic Reporting Overview.

For information on customizing reports, see the help topic Report Customization.

Sales Back Order Report

The Sales Back Order report shows items that are backordered grouped by transaction.

For each transaction, the report shows:

- transaction number
- transaction date
- item name
- customer name
- quantity ordered
- quantity fulfilled
- quantity back ordered
- quantity on hand
- quantity on order

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To view the Sales Back Order report:

1. Go to Reports > Order Management > Sales Back Order Report.

   NetSuite displays a message indicating that your report is loading. The status bar indicates the progress as your report loads.

2. To stop the report from loading, you can click **Cancel Report**.

3. (Optional) To customize the report, click **Customize**.

   The Report Builder opens, which lets you add, move, or remove columns, add fields, and add totals.

When using reports that display item quantities, you should be aware of how kits and kit parts can affect the quantities displayed on reports. Using the filter Sold as a Kit/Assembly Member, you can modify reports to not display quantities for kit parts. See the help topic How Kits and Kit Parts Affect Quantities Displayed in Reports

> ⓘ **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

Sales Order Register Report

The Sales Order Register report lists all orders for a customer, giving the status and amount for each order.

If you are operating an online store with NetSuite, this report can help you keep track of the orders from your online store.

> ✔ **Tip:** To request access to the Sales Order Register report, contact your administrator.

> ⓘ **Note:** The Orders and the Sales (Orders) key performance indicators (KPI) can be added to your dashboard to provide at-a-glance views of totals from the Sales Order Register. For more information on KPIs, see the help topic Key Performance Indicators.

To view the Sales Order Register report:

1. Go to Reports > Order Management > Sales Orders Register.

   NetSuite displays a message indicating that your report is loading. The status bar indicates the progress as your report loads.

2. To stop the report from loading, you can click **Cancel Report**.

3. (Optional) To customize the report, click **Customize**.

   The Report Builder opens, which lets you add, move, or remove columns, add fields, and add totals.

> ⓘ **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

Sales Orders Pending Fulfillment Report

The Sales Orders Pending Fulfillment report shows all open transaction lines for items committed and ready to be fulfilled on sales orders, grouped by sales order.

To view the Sales Orders Pending Fulfillment report:

1. Go to Reports > Order Management > Sales Orders Pending Fulfillment.

   NetSuite displays a message indicating that your report is loading. The status bar indicates the progress as your report loads.

2. To stop the report from loading, you can click **Cancel Report**.

3. (Optional) To customize the report, click **Customize**.

   The Report Builder opens, which lets you add, move, or remove columns, add fields, and add totals.

When using reports that display item quantities you should be aware of how kits and kit parts can affect the quantities displayed on reports. Using the filter Sold as a Kit/Assembly Member, you can modify reports to not display quantities for kit parts. See the help topic How Kits and Kit Parts Affect Quantities Displayed in Reports

> ⓘ **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

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Software Vertical Contract Renewals

- Contract Renewals Overview
- Setting Up Contract Renewals
    - Installing the Contract Renewals SuiteApp
    - Roles and Permissions for Contract Renewals
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- Contract Workflow
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    - Contract Upsell
    - Contracts and Returns
- Contract Renewals Reports and KPIs
- Scripting Contract and Contract Item Records
    - Adding Transaction Fields to a Web Service Request for Contract Renewals
- Contract Renewals Best Practices
- Software Vertical Contract Renewals References
    - Contract Value Calculation
    - Contract Term Calculation

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Contract Renewals Overview

Software Vertical Contract Renewals SuiteApp gives your software company unprecedented ease in managing contract renewals of your install base.

This SuiteApp is designed for software companies who offer perpetually-licensed and term-licensed products, enabling you to effectively manage the recurring billing of both on-premise and on-demand software licenses and entitlements.

This SuiteApp offers:

- A flexible and powerful automated renewal process that lets you track renewable assets and maximize renewal revenue
- Seamless tracking of upsell and returns
- Complete visibility into your install base
- Multi-tier channel sales management

The Software Vertical Contract Renewals SuiteApp enables you to manage your renewable products and services as well as non-renewable items like training and consulting. In addition, maintenance and support fees can be applied and included in the renewal contract.

A flexible, automated renewal process generates a transaction at the end of a contract term that is, in turn, used to generate the renewal contract. This new contract includes items that you have set as renewable, such as products and module licenses, user licenses (or seats), and support and maintenance entitlements. One-time, non-renewable items like training and consulting are not typically renewed.

Availability

Software Vertical Contract Renewals is provided as a SuiteApp developed by NetSuite. For information about this SuiteApp, contact your NetSuite account representative.

Read the following topics for more information about the features offered by this SuiteApp:

- Contracts and Renewals
- Upsell and Returns
- Support for Multiple Sales Channels
- Discounts

Contracts and Renewals
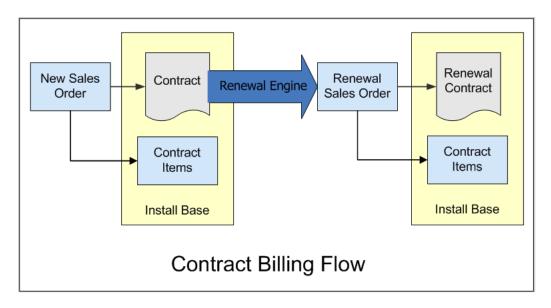
With Contract Renewals, when you create an initial sales order for a customer, the information from that order is used to generate a contract. The overall start and end dates of the sales order define the contract term, and items on the sales order generate contract items on the resulting contract.

The contract and contract items make up the install base of the customer. Contracts are listed on the Contracts subtab on customer records. You can also click the contract ID link on the original sales order to view a specific contract.

Prior to the end of the contract term, a renewal transaction is generated based on your setting for the Transaction Type to Create preference at Contract Renewals > Setup > Contract Renewals Preferences. When saved and billed, this order generates a new contract that includes the items from the customer's install base that are configured as renewable.

If you are using the channel management fields on customer records to track indirect sales relationships (including resellers and distributors), a single renewal transaction is generated for each combination of End User and Bill To Customer.

Contract Billing Flow

For more information about creating contracts, see Creating a New Contract. For information about renewals, see Contract Renewals Process.

Upsell and Returns

During the term of a contract, you can make changes by entering sales orders for additional items (upsell) or by issuing returns (downsell).

When you want to add items to an existing contract, you create another sales order for the customer and attach it to the existing contract. You can also create a new order from the contract by selecting the contract items for upsell and clicking the Create Upsell Order button.

Items added to a contract must have start and end dates within the contract term. To add items that extend beyond the existing contract's start and end dates, you need to create a separate contract. For more information, see Contract Upsell.

If the customer reduces their service during the contract term, you create a return authorization tied to the contract. These items are then offset from the contract and are not renewed. For more information, see Contracts and Returns.

Support for Multiple Sales Channels

The Software Vertical Contract Renewals SuiteApp enables you to track and manage multi-tiered sales interactions with distributors, resellers, and end users.

The Channel Tier field on the customer record defines the relationship each customer has with your company. You can choose one of the following:

- **End User** - The end user is the customer who uses or registers the product. The end user may purchase the product from you or from a reseller or a distributor.
- **Reseller** - The reseller purchases the product from you and resells it to an end user. The product can be delivered from you either through the reseller or directly to the end user.
- **Distributor** - Distributors purchase from your company and sell the product to a reseller or end user. The distributor delivers the product and bills the purchaser.

> ⚠️ **Important:** Every end user of your products needs a customer record in your NetSuite account even if they purchase through a distributor or a reseller.

With Contract Renewals, these channels are managed through two fields on sales transactions: End User and Bill To Customer.

On the Channel subtab of the transaction form, do the following:

- If you are creating a contract for an end user who purchased through a reseller, on the Channel subtab of the transaction form, select the reseller or distributor for the transaction, and select Reseller in the Bill To Tier field.
- If the contract is for an end user who purchased through a distributor, select Distributor in the Bill To Tier field.
- Select the end user in the End User field.

> ℹ️ **Note:** For transactions submitted through SOAP web services, the SuiteApp throws an error if the Bill To Customer value is not the same as either the End User, Reseller, or Distributor specified on the web service request. If a Distributor is specified on the request, the Bill To Tier field on the transaction is set to Distributor. If a Reseller is provided on the request instead of a Distributor, the Bill To Tier field on the transaction is set to Reseller. If neither Distributor nor Reseller is provided on the request, the Bill To Tier field on the transaction is set to End User.

If you have partners who sell your products, you can track them with partner records in your NetSuite account. You can associate partners with customers and with sales transactions. For more information, see the help topic Associating Partners With Customers and Transactions.

A variety of channel-based reports are available on the Contract Renewals tab.

Discounts

There are three types of discounts available in the Software Vertical Contract Renewals SuiteApp:

- Transaction body discounts affect all transaction lines and cannot be renewed.
- Transaction line discounts affect the line above the discount in a transaction and also cannot be renewed.
- In-line discounts affect an individual transaction line and are stored in the corresponding contract item. These discounts can be renewed.

> ℹ️ **Note:** When a contract is renewed, if there is a customer discount set on the customer record, this customer discount is applied to the renewal contract items in place of any in-line discounts set on the original contract.

Setting Up Contract Renewals

For information about how you can add the Software Vertical Contract Renewals SuiteApp to your NetSuite account, contact your account representative.

Read the following topics for information about installing and setting up the Software Vertical Contract Renewals SuiteApp:

- Installing the Contract Renewals SuiteApp
- Roles and Permissions for Contract Renewals
- New Forms, Fields, and Records for Contract Renewals

- Initial Setup Tasks for Contract Renewals
- Setting Up Contract Renewals Preferences
- Setting Up Multiple Script Queues or Processors to Process Contract Renewals
- Setting Up Install Base Field Mapping

After installing the SuiteApp, you can configure the feature to work according to your company's contract and renewal workflow. Before you begin using the Software Vertical Contract Renewals SuiteApp, you should set up the following records that you will use when creating contracts:

- Creating Uplift Types for Contract Renewals
- Setting Up Maintenance/Support for Contract Renewals
- Setting Up Product Lines for Contract Renewals
- Setting Up Items for Contract Renewals

Installing the Contract Renewals SuiteApp

Prerequisites

Make sure that the following features are enabled in your account prior to installing Contract Renewals:

- Custom Records
- Client SuiteScript
- Server SuiteScript

For information about enabling these features, see the help topic Enabling Features.

Installing the Contract Renewals SuiteApp

Install the following bundle for the Contract Renewals SuiteApp:

- Bundle Name: SWV Contract Renewals Module
- Bundle ID: 187488
- Availability: Shared

For information about purchasing the Software Vertical Contract Renewals SuiteApp, contact your account representative.

For information about installing SuiteApps, see the help topic Installing a Bundle.

The Software Vertical Contract Renewals SuiteApp is a managed SuiteApp and is automatically updated whenever there are updates. These issue fixes and enhancements are available after the SuiteApp is updated in your account.

Roles and Permissions for Contract Renewals

The following custom roles are included in the Software Vertical Contract Renewals SuiteApp:

- Renewals Manager
- Customer Center - Distributor
- Customer Center - End User
- Customer Center - Reseller

- CEO
- CFO
- Marketing Executive
- PS Executive
- PS Person
- Sales Executive
- Sales Rep
- Support Manager
- Support Person

These roles are pre-configured with a default set of associated permissions required to use the Contract Renewals SuiteApp. A NetSuite administrator can assign them to users or use them as templates when creating new roles or modifying existing roles. For more information, see the help topics Assigning Roles to an Employee and Customizing or Creating NetSuite Roles.

To view the default permissions assigned to these roles, go to Setup > User/Roles > Manage Roles, and then click the link for the role.

The following table lists the record permissions required to use the Contract Renewals SuiteApp:

> ⚠ **Important:** Be sure to add the Contract Renewals Preferences permission to non-administrator roles to allow them to view or edit Contract Renewals transaction forms.

Permission	Subtab	Permission Level
SuiteScript	Setup	View
Contract	Custom Record	Full
Contract Item	Custom Record	Full
Contract Renewals Preferences	Custom Record	Full
Deleted Contract Audit	Custom Record	Full
Deleted Contract Item Audit	Custom Record	Full
Install Base Field Mappings	Custom Record	Full
Maintenance/Support Types	Custom Record	Full
Product Lines	Custom Record	Full
Renewal Tran Form Mapping	Custom Record	Full
Transaction Status	Custom Record	Full
Uplift Cap Types	Custom Record	Full
Uplift Types	Custom Record	Full
Contract Renewal Action	Custom Record	Full

New Forms, Fields, and Records for Contract Renewals

The Software Vertical Contract Renewals SuiteApp uses forms, fields, and records that are available only when the SuiteApp is installed.

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The following objects are created in your NetSuite account when you install this SuiteApp:

Contract Renewals tab	The Software Vertical Contract Renewals SuiteApp creates a custom center tab named Contract Renewals. This tab contains reports and other links related to Contract Renewals.
	You can customize this tab to show the KPIs and other metrics that you use in managing your software business. For more information, see Contract Renewals Reports and KPIs.
Contract record	The contract record holds all of the install base information including start and end dates, customer and end user, renewal date, and each contract item.
	You can access contract records from the sales transaction or customer record that is associated with the contract. You can also view a list of contracts when logged in as an administrator by going to the Contract List page. For more information, see Viewing a Contract.
	For information about contracts, see Contract Creation Process and Managing Contracts.
Contract Item records	Contract items are created from the line items of transactions.
	You can access contract item records from the contract or customer record, or by going to the Contact Item List page.
	On the Contract Items subtab of item records, you can also view a list of contracts that is associated with the item.
	ⓘ Note: In accounts with **Make Copy** available under **Actions**, do not use this to create copies of Customer records with Contract Items. Doing so may also create copies of the Contract Items in the duplicate Customer record, which will cause issues. If you want to use Make Copy to create a duplicate of a Customer record with Contract Items, you should remove the Contract Items from the Customer record first. Or, you can avoid using the Make Copy action and create a new Customer record instead.
Platform transaction forms	The SuiteApp includes platform forms for each transaction type that can generate contracts and contract items: quote, opportunity, sales order, cash sale, credit memo, and return authorization. You can customize these forms.
	For more information, see Setting Preferred Forms for Contract Renewals.
Platform item fields	Item records define how contracts and contract items are generated. For more information, see Setting Up Items for Contract Renewals.
Channel subtab on transactions	If you manage reseller and distributor relationships, you can track this on the Channel subtab of transaction forms. For more information, see Support for Multiple Sales Channels.
Contract Items script (R03)	This script generates contract items from transactions at scheduled times.
	The following script deployment records are included with this script:
	▪ R3: Create Contract Items
	▪ R03: Create Contract Item hourly
	Both script deployments are initially set to Not Scheduled. You can use the R03: Create Contract Item hourly script deployment record to set a regular schedule for contract item creation. For information about setting the timing of this script, see Setting Up Schedules for Contract Item Creation and Contract Renewal.
Contract Renewals script (R05)	This script creates contract renewal transactions some time before the end of contract terms. By default, renewal transactions are generated based on the value of the Days Before Renewal preference. For more information, see Setting Up Contract Renewals Preferences.
	The following script deployment records are included with this script:
	▪ Create Renewal Transactions

- R05: Create Renewal Trans nightly

Both script deployments are initially set to Not Scheduled. You can use the R05: Create Renewal Trans nightly script deployment record to set a regular schedule for contract renewal. For information about setting the timing of this script, see Setting Up Schedules for Contract Item Creation and Contract Renewal.

For a complete list of objects that are included in the Software Vertical Contract Renewals SuiteApp, go to Customization > SuiteBundler > Search & Install Bundles > List. Click the SWV Contract Renewals SuiteApp, and click the Components subtab.

Default Forms for Contract and Contract Item Records

Enhanced contract and contract item forms are available in Software Vertical Contract Renewals version 16.1. The enhanced forms display the Contract Items subtab as the default subtab for contract records, and the Contract Item Details subtab as the default subtab for contract item records. The following table shows the details of the old standard forms and the enhanced forms for contract and contract item records.

Record Type	Standard Form	Enhanced Form
Contract	Form Name: **Standard Contract Form** Subtabs: - Notes - Files - Contract Items - Transactions - Renewal Contracts - Deleted Contract Items	Form Name: **Contracts Form** Subtabs: - Contract Items - Transactions - Renewal Contracts - Notes - Files - Deleted Contract Items
Contract Item	Form Name: **Standard Contract Item Form** Subtabs: - Notes - Files - Contract Item Details	Form Name: **Contract Item Form** Subtabs: - Contract Item Details - Notes - Files

By default, these enhanced forms are assigned as the default form for contract and contract item records for users with a Renewals Manager [SWE] or Sales Person role. If you want to set these forms as the preferred forms for custom roles, do the following.

To set the preferred contract and contract item forms for custom roles:

1. Go to Setup > User/Roles > Manage Roles.
2. Edit the role.
3. Click the **Forms** subtab.
4. Click the **Custom Records** subtab.
5. Check the box in the **Preferred** column for **Contracts Form** and **Contract Item Form**.
6. Click **Save**.

Initial Setup Tasks for Contract Renewals

Before using the Software Vertical Contract Renewals SuiteApp, complete the following tasks:

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Setting Preferred Forms for Contract Renewals

Before you begin using the Software Vertical Contract Renewals SuiteApp, set the custom forms you want to use as Preferred.

To set your preferred forms:

1. Go to Customization > Forms > Entry Forms.
2. Check the box in the **Preferred** column for the following entry forms (From Bundle: 187488):
   - Customer Form - Contract Renewals
   - Item Group - Contract Renewals
   - Inventory Item - Contract Renewals (available only if the Inventory feature is enabled)
   - Non-Inventory Item - Contract Renewals
   - Project Form - Contract Renewals
   - Vendor Form - Contract Renewals
3. Click **Submit**.
4. Go to Customization > Forms > Transaction Forms.
5. Check the box in the **Preferred** column for the following transaction forms (From Bundle: 187488):
   - Cash Sale - Contract Renewals
   - Credit Memo - Contract Renewals
   - Invoice - Contract Renewals
   - Opportunity - Contract Renewals
   - Quote - Contract Renewals
   - Return Authorization - Contract Renewals
   - Sales Order - Contract Renewals
6. Click **Submit**.

Alternatively, you can also create copies and customize these locked forms to meet the specific needs of your business. For more information, see the help topic Creating Custom Entry and Transaction Forms.

> **Note:** When you customize transaction forms, make sure that the **Renewals Exclusion** column is shown in the item sublist. On the **Screen Fields** tab on the custom transaction form, make sure that the **Show** box for **Renewals Exclusion** on the **Columns** subtab is checked. This field is used by the contract item creation script (R03) to determine whether to set the contract's **Renewals Exclusion** field to true or false.

Creating a Zero Price Item

Zero price item is used by Contract Renewals to retrieve dynamic values when generating renewal transactions; but it is not saved or added to any transactions. To make it work, you must set it up as an

item that is available to all transactions in the account. For OneWorld accounts, the zero price item should be allowed on all subsidiaries.

To create a zero price item:

1. Go to Lists > Accounting > Items > New (Administrator), and select the item type.

2. In the **Item Name/Number** field, enter a name for the item.

3. On the **Sales / Pricing** subtab, set the **Base Price** to **0**.

4. For OneWorld accounts, select the root parent subsidiary in the **Subsidiary** field, and then check the **Include Children** box.

5. Click **Save**.

Setting Initial Renewals Preferences

After you have created the zero price item, go to Contract Renewals > Setup > Contract Renewals Preferences. Click Edit to set the following preferences:

- On the **Contract Items Creation** subtab, set the following preferences if you want to use a custom saved search to define the list of transactions that will be processed for contract item creation.

  - Check the **Use CI Pending Creation Search** box.

  - In the **Search: CI Pending Creation** field, specify the custom saved search that you want to use for contract item creation. For more information, see Using a Custom Saved Search for Contract Item Creation.

  > **ⓘ Note:** If you do not want to use a custom saved search, keep the **Use CI Pending Creation Search** box cleared. If this box is cleared, the contract item creation script (R03) will use its default search to identify the transactions to be processed for contract item creation.

- On the **Contract Renewals Creation** subtab:

  - Set the **Default Renewal Form ID** field to **Sales Order - Contract Renewals.**

  - In the **Zero Dollar Item** field, select the zero-price item you created in the previous section. See Creating a Zero Price Item.

  - In the **Assign to Employee/Default** field, select an employee who has been marked as a sales rep.

- On the **Item "Renew With" Sync** subtab:

  - Set the **Contract Item Search** field to **Contract Item Renew With Sync.**

For more information about these preferences, see Setting Up Contract Renewals Preferences.

Setting the Order of Contract Renewal Scripts on Transaction Records

To set the order of Contract Renewal scripts on transaction records:

1. Go to Customization > Scripting > Scripted Records (Administrator).

2. Click the **Record** column heading to sort the list by record.

3. Click **Edit** next to a record, and then do the following:

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- On the **User Event Scripts** subtab, make sure the scripts are listed in the following order:
    - R02A-UES-1: Check Tran Into Log
    - R02A-UES-2: Calculate Tran Lines
    - R02A-UES-3: Calc In-Line Discounts

> (i) **Note:** By default, these user event scripts are deployed only on the sales order transaction form. If you want to use CSV import and SOAP web services on the estimate record, you must deploy these scripts on the estimate transaction form.

> (i) **Note:** The old scripts R01C-SS: Calculate Tran Lines and R01D-SS: Calc In-Line Discounts are no longer supported by the Contract Renewals SuiteApp, so they are disabled by default (Status = Testing, Deployed = Not Checked). These scripts are replaced by R02A-UES-2: Calculate Tran Lines and R02A-UES-3: Calc In-Line Discounts. Make sure that you are using the new user event scripts on your transaction forms.

- On the **Client Scripts** subtab, make sure the scripts are listed in the following order:
    - R01A-CS: HeaderAutomate&Validate
    - R01B-CS: TranLinesAutomate&Validate

> (i) **Note:** Make sure the client scripts are also deployed in these transaction forms: credit memo, invoice, opportunity, quote, return authorization, sales order, and estimates.

4. Click **Save**.

Setting Up Contract Renewals Preferences

Before using Contract Renewals for the first time, you should set your preferences according to Setting Initial Renewals Preferences.

To set your Software Vertical Contract Renewals SuiteApp preferences, go to Contract Renewals > Setup > Contract Renewals Preferences, and click **Edit**. When you are finished making changes, click **Save**.

- Auto Place Decimal
- Transactions Validation
- Contracts Creation & Validation
- Contract Items Creation
- Contract Renewals Creation
- Item "Renew With" Sync
- Item Fields Validation
- Contract Item Fields

Auto Place Decimal

Go to Home > Set Preferences > General. In the Formatting section, make sure the Auto Place Decimal box is cleared. Enabling this preference may cause unwanted updates to transaction amounts calculated by Contract Renewals transaction processing.

Transactions Validation

The following preferences determine how transaction lines operate with the Software Vertical Contract Renewals SuiteApp:

Field	Description
Enable Script R01A	Check this box to enable the script that validates transaction start and end dates.
Item Cats for Tran Line Automation	Select the item categories that automatically update with start and end dates from the transaction body when you enter line items on a transaction. ⓘ **Note:** **Service - Perpetual** and **License - Perpetual** items are automatically updated with contract start dates but have no end dates.
Enable Script R01B	Check this box to enable the script that validates the channel tiers on transactions. ⚠️ **Important:** When the R01B script is disabled, you cannot downsell or upsell from the contract record. When the R01B script is enabled: ■ The **Bill to Customer** field is disabled on the transaction form. The script will automatically set the value of this field based on the channel tier selected in the **Bill to Tier** field. ■ The **Bill to Tier** and **Ship to Tier** fields are set to **End User** by default. You can manually change the values of these fields, but the script automatically sets them when you change either the **Distributor** or **Reseller** field, or both. ▫ If you set the value of the **Distributor** field, regardless if the **Reseller** field is set or blank, the script sets **Bill to Tier** and **Ship to Tier** to **Distributor**. ▫ If you set the value of the **Reseller** field and leave the **Distributor** field blank, the script sets **Bill to Tier** and **Ship to Tier** to **Reseller**.
Enable Script R01C	Check this box to enable the script that calculates the rate of each item on transactions. When the R01C script is enabled: ■ The **Amount** and **List Rate** of line items are editable. ■ **List Rate** is calculated based on the **Rate**. ■ **Rate** is calculated based on the **Term/Contract Pricing**.
Default M/S Pricing Option	Select the default pricing option for maintenance and support (M/S) items. ■ **Itemized M/S Price** – Enables you to set maintenance or support rates on transactions. ■ **M/S as a % of License List Price** – Calculates M/S item price as percentage of the total of the lines on the transaction. Discounts are not considered in this calculation. This option is the default setting. ■ **M/S as a % of License Net Price** – Calculates M/S item price as percentage of the total of the lines on the transaction. Discounts are considered in this calculation. When you create an item record for an M/S item, the value that you set in this field will be the default selection in the **M/S Pricing Option** field on the item record. This value will also be the default pricing option for M/S items with a blank **M/S Pricing Option** field on the item record. For more information, see Setting Up Items for Contract Renewals.
Item Cats Skipped on Renewal Calcs	Select the item categories whose price level must always be set to Custom. This setting is important for maintenance and support item categories that are based on a percentage of license on the original order but exist alone on the renewal order.

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Field	Description
Item Category = For Custom Price Block	Select the item categories whose price level cannot be set to Custom. This setting enables sales representatives to apply discounts to line item rates but not change them. ⓘ **Note:** Items whose Item Category is selected or set For Custom Price Block (items that cannot have custom price) are excluded or cannot be added to sales orders used for creating transactions through web service, unless Block Custom Price Level is set to No (2). See Adding Transaction Fields to a Web Service Request for Contract Renewals.
Default Customer Discount on Trans	Check this box if you want to apply customer discounts to transactions by default. You can remove or change this discount on individual transaction lines if the box for **Inline Discounting on Trans** preference is checked.
M/S Customer In-Line Discount	Check this box if you want to apply customer discounts to the cost of maintenance and support by default. You can remove or change this discount on individual transaction lines if the box for **Inline Discounting on Trans** preference is checked.
Enable Script R01D	Check this box to enable the script that validates items with inline discounts. If this box is checked, inline discounts are automatically applied to the **Rate** and **Amount** fields on transaction lines.
Inline Discounting on Trans	Check this box to enable inline discounts on transaction lines. This preference is applied only when the inline discount calculation script (R01D) is deployed.
Enable Script R01E	Check this box to enable the script that prevents applying contract item uplift when the status is not active. This preference applies only on edit mode.
No. of Decimal Places for List Rate	Enter the number of decimal places to include for list rates. Maximum value is 8, which is the core NetSuite limit for list rate. ⓘ **Note:** Value for list rate is rounded to the nearest decimal place specified in this preference before it is used for rate calculation.
No. of Decimal Places for Rate	Enter the number of decimal places to include for rates. Maximum value is 8, which is the core NetSuite limit for rate.
Auto-select Single Contract	Check this box if you want to automatically select the open contract if only one active contract is available for the **Bill To** and **End User** customers selected on the transaction. This setting ensures that you always upsell to an existing contract instead of creating a new one.
Override Default Ship To Address	Check this box if you want to automatically set the **Ship To** address on transactions to the default shipping address of the entity selected in the **Ship To Tier** field.
Entry Forms to Deploy Scripts	If you want the Contract Renewals scripts to run only for specific entry forms, select the entry forms in this field. If no form is selected, the scripts are deployed to all entry forms in this list.

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Field	Description
Transaction Forms to Deploy Scripts	If you want the Contract Renewals scripts to run only for specific transaction forms, select the transaction forms in this field. If no form is selected, the scripts are deployed to all transaction forms in this list. > ⓘ **Note:** The **Make Copy** button is hidden on forms selected in this preference. If no form is selected, the **Make Copy** button is hidden on all transaction forms where Contract Renewals user event scripts are deployed.
Enable Flexible Start Date for Renewal Transactions	Check this box if you want to enable flexible start dates for contract items on renewal transactions. If this box is checked, you can set up contract items to start earlier than the renewal contract start date. This feature is applicable only for renewal transactions and for upsell sales orders for renewal contracts. For more information, see Editing a Renewal Transaction.

Contracts Creation & Validation

The following preferences affect contract creation and validation of contract items:

Field	Description
Enable Script R02A	Check this box to enable the script that validates items before creating contracts.
Enable Script R02B	Check this box to enable the script that validates contract items.
Sales Order Status to Create Contract	Select the minimum sales order status that will be processed for contract creation. ■ **Sales Order: Pending Approval** – Select this option if you want to create a contract upon saving of the sales order, even if the status of the order is still Pending Approval. This option is the default setting. ■ **Sales Order: Pending Fulfillment** – Select this option if you want to create a contract when a sales order is approved. You can manually create a contract for specific sales orders by clicking the **Create Contract** button on the transaction record. This button is available on sales orders with no associated contract record yet. For more information, see Creating a New Contract. This preference applies only to new sales orders. For renewals, a renewal contract is automatically generated if the renewal transaction is a sales order or when a renewal opportunity or estimate is converted to a sales order. For more information, see Renewing a Contract.

Contract Items Creation

The following preferences affect how contract items are generated:

Field	Description
Enable Script R03	Check this box to enable the script that creates contract items.

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Field	Description
	Note: The R03 script does not support multiple queues. To prevent unexpected behavior, make sure that all R03 deployments are assigned to the same queue.
Search: CI Pending Creation	If you want to use a saved search to define the list of transactions that will be processed by the R03 script for contract item creation, check the **Use CI Pending Creation Search** box and specify the saved search that you want to use in this field. The list returned by the saved search will be further filtered by the status selected in the **Transaction Status to Process** preference.
	Note: To avoid any errors, do not select the default search (**Contract Item Pending Creation**) in this field if the **Use CI Pending Creation Search** box is checked. For information about creating a custom saved search for contract item creation, see Using a Custom Saved Search for Contract Item Creation.
Transaction Status to Process	Select which transactions status will be processed to create contract items.
Item Category to Process	Select the item categories that generate contract items.
	Note: For service items, select **Service - Perpetual** to generate perpetually-licensed service items that have no expiration date and no renewal action is required or select **Services** to generate term-licensed service items.
Require License for M/S Items (Renewal)	Check this box if you want the contract item creation script (R03) to require product license items in transactions. Clear this box if you want to enable creation of contracts from transactions with no product license.
Use CI Pending Creation Search	Check this box if you want to use a saved search to define the list of transactions that will be processed by the R03 script for contract item creation. You can specify the saved search that you want to use in the **Search: CI Pending Creation** field. For information about creating a custom saved search for contract item creation, see Using a Custom Saved Search for Contract Item Creation. If this box is cleared, R03 will use its default search to filter transactions that will be processed for contract item creation.
	Note: Regardless if this box is checked or cleared, the transactions to be processed by R03 will be filtered based on the status selected in the **Transaction Status to Process** field.

Contract Renewals Creation

The following preferences affect how renewal transactions are created:

Field	Description
Enable Script R05	Check this box to enable the script that creates renewal transactions.
Restrict to Customer	Check this box to create renewal transactions only for a specific customer.

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Field	Description
	⚠ **Important:** This setting is used for testing purposes. Be sure to clear this box when you are finished testing.
Default Renewal Form ID	Select the custom transaction form you want to use when creating renewal transactions. For more information about contract renewals transaction forms, see Setting Preferred Forms for Contract Renewals.
Renewal Form Based From	If you are using multiple renewal transaction forms, select whether you want the form chosen based on subsidiary or channel tier. If this field is blank, the form selected in the **Default Renewal Form ID** field is used.
Zero Dollar Item	Zero price item is used by Contract Renewals to retrieve dynamic values when generating renewal transactions. For more information, see Creating a Zero Price Item.
Renewals License Pricing Model	Select the pricing model that you want to use for contract value calculation and pricing of renewed items. For information about how contract values are calculated for each pricing model, see Contract Value Calculation. ▪ **Current License List Rate – Price Level on Customer Record** – Calculates the contract value based on the price level set on the customer record and its corresponding price specified on the item record. If there is no price level specified on the customer record, the base price on the item record is used to calculate the contract value. ▪ **Historical License List Rate – From Tran Line** – Calculates the contract value based on the price level and list rate specified on the contract's source transaction. ▪ **Current License List Rate – Price Level on Contract** – Calculates the contract value based on the price level set on the contract's source transaction and its corresponding price specified on the item record. If a custom price level is specified on the source transaction (that is, contract price level is blank), the base price on the item record is used to calculate the contract value. ▪ **Current License List Rate – Price Level on Contract with Custom Price Handling** – Calculates the contract value based on the price level set on the contract's source transaction and its corresponding price specified on the item record, with the option to set a custom price on the source transaction. If a custom price level is specified on the source transaction (that is, contract price level is blank), the original list rate specified on the source transaction is used to calculate the contract value. When a custom price is set on the contract and the Renew With item is the same as the original item, the renewal contract uses the custom price for the item on the source transaction. If the Renew With item is different, the renewal contract uses the base price of the renewal item.
Days Before Renewal	Enter the number of days prior to a contract's end date when a renewal transaction is generated. Default value is 90. You can override this preference for specific contracts by specifying a value in the **Contract Days Before Renewal** field on the contract record. For more information, see Editing a Contract.
Default Renewal Period	Enter the default renewal term in months.
Transaction Type to Create	Select the type of transaction that is created by the renewal process.

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Field	Description
	ⓘ Note: When creating a renewal transaction form mapping, the transaction type on the mapping must match the value set in this preference. Otherwise, the contract will not be renewed. To create a renewal transaction form mapping, go to Setup > Custom > Renewal Tran Form Mapping > New.
Assign To	Select whether the renewal transaction is assigned to a sales representative of the customer or to a specific employee. If you select **An Employee**, choose an employee in the **Assign to Employee/Default** field.
Assign to Employee/ Default	Select the employee to be assigned to renewal transactions by default.
Transaction Department Based On	Select how the department is set on the renewal transaction: ▪ **Sales Rep (Department, Location, and Class)** - The sales representative's department is set on the transaction. ▪ **None** – Department is not set on the transaction.
Transaction Location Based On	Select how the location is set on the renewal transaction: ▪ **Sales Rep (Department, Location, and Class)** - The sales representative's location is set on the transaction. ▪ **None** - Location is not set on the transaction.
Transaction Class Based On	Select how the class is set on the renewal transaction: ▪ **Sales Rep (Department, Location, and Class)** – The sales representative's class is set on the transaction. ▪ **Order Type** – Class is set with all order types. ▪ **None** – Class is not set on the transaction.
Include Tran Line Description	Check this box to copy transaction line descriptions to renewal transaction lines. Transaction line descriptions are always copied to contract item records.
Default Customer Discount Renewals	Check this box to apply customer discounts on renewal transactions by default.
M/S In-Line Discount	Check this box to apply a line item discount to maintenance and support items. This preference applies only when the **Inline Discounting on Trans** preference is checked.
Combine Like Items	Check this box to combine similar line items on renewal transactions. Line items are combined if the item, end date, and list rate all match.

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Field	Description
	ⓘ **Note:** When items have different discount rates, no discount rate will be applied to the combined item.
	ⓘ **Note:** When the original transaction contains same items that use custom price levels with different list rates, these items are not combined if the Renewals License Pricing Model is either **Current License List Rate — Price Level on Contract with Custom Price Handling** or **Historical License List Rate — From Tran Line**. Otherwise, the said same items are combined.
Require Same Discount when Combining Like Items	Check this box to combine like items only when the items have the same discount rates.
Apply Upsell and Downsell on Renewal Transaction	Check this box if you want to include upsell and downsell items when generating contract items on renewal transactions. Contract items will be classified by order type on the renewal transaction. Added items are classified as upsell and removed items are classified as downsell. Clear this box if you want to include only the final items (after upsell and downsell orders are applied to the original contract) when generating contract items for renewal transactions.

Item "Renew With" Sync

Field	Description
Enable Script R09	Check this box to enable the script that obtains the **Renew With** value from the item record and copies it to the corresponding field on the contract item record.
Contract Item Search	Select the saved search used by the process that updates the **Renew With** field on contract item records based on the updated item records.

Item Fields Validation

Field	Description
Enable Script R10	Check this box to enable the script that validates item details on item records.

Contract Item Fields

Field	Description
Enable Script R12A	Check this box to enable the script that validates contract item details.
Enable Script R12B	Check this box to enable the script that calculates the contract's current value and its renew value.

Using a Custom Saved Search for Contract Item Creation

The contract item creation script (R03) uses a default search to identify the list of transactions that will be processed for contract item creation. If you want to use a custom transaction search for contract item creation, you should set the following preferences:

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- **Use CI Pending Creation Search** – Check this box if you want to use a custom saved search to define the list of transactions for contract item creation.

- **Search: CI Pending Creation** – Specify the custom saved search that you want to use for contract item creation. For more information, see Guidelines for Creating a Custom Search for Contract Item Creation.

These preferences are available on the Contract Items Creation subtab of the Contract Renewals Preferences page. For more information, see Setting Up Contract Renewals Preferences.

Guidelines for Creating a Custom Search for Contract Item Creation

If the **Use CI Pending Creation Search** box is checked, you cannot use the default saved search **Contract Item Pending Creation** (or any custom search based on this saved search) in the **Search: CI Pending Creation** field. Instead, you must create a new saved search following these guidelines:

- Search type must be Transaction.

- Search must be set to Public.

- To avoid any errors, the search must not include the following filters:
  - Main Line
  - Check Log Status (Custom Body)
  - Contract: Status
  - Created From
  - Contract (Custom Body)
  - Status
  - End User: Inactive
  - Distributor: Inactive
  - Reseller: Inactive
  - Type
  - Quantity Type (hidden) (Custom Column)
  - Item Category (hidden) (Custom Column)

For information about creating saved searches, see the help topic Defining a Saved Search.

Setting Up Schedules for Contract Item Creation and Contract Renewal

You can also set up the timing of the scripts that generate contract items and renewal transactions.

To change the timing of the contract items script (R03):

1. With the Administrator role, go to Customization > Scripting > Script Deployments.
2. Set the filters to show only script deployment records for the **R03-SS: Create Contract Items hrly** script.
3. Click the **Edit** link next to the **R03: Create Contract Item hourly** script deployment record.
4. On the **Schedule** subtab, set the frequency with which you want the script to run.

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5. Click **Save**.

To change the timing of the contract renewal script (R05):

1. With the Administrator role, go to Customization > Scripting > Script Deployments.
2. Set the filters to show only script deployment records for the **R05-SS: Create Renewals nightly** script.
3. Click the **Edit** link next to the **R05: Create Renewal Trans nightly** script deployment record.
4. On the **Schedule** subtab, set the frequency with which you want the script to run.
5. Click **Save**.

Setting Up Multiple Script Queues or Processors to Process Contract Renewals

You can use multiple script queues or processors to divide contract renewals processing and run it in parallel. As of 2017.2, the SuiteCloud Processors feature supports a new system based on script processors rather than queues. It is possible to change script deployments to use processors instead of queues. With this feature, even queue-based processing runs on processors. For more information about this feature, see the help topic SuiteCloud Processors.

You can increase the number of queues or processors available to your account by purchasing SuiteCloud Plus licenses. For information, see the help topic SuiteCloud Plus Settings.

> **Note:** The R03 script does not support multiple queues. For deployments that continue to use queues, make sure that all R03 deployments are assigned to the same queue to prevent unexpected behavior.

To run the contract renewal scheduled script on multiple script queues or processors, you can create a new deployment definition. You must be logged in with the Administrator role to create new script deployments.

Take note of the following when creating and setting up additional deployments of the contract renewal script, **R05-SS: Create Renewals nightly**:

- **Using custom search** – You can specify a custom contract search in the **Custom Search** field on the **Parameters** subtab of the deployment record. Take note of the following when using custom searches:
  - You must use the same custom search on all R05 deployments. If there is no custom search specified for one deployment, all other deployments must also have a blank **Custom Search** field.
  - The custom search must be sorted by contract ID in ascending order.
- **Renewing specific contracts** – If you want to renew specific contracts only, you can use the following fields on the **Parameters** subtab of the deployment record:

> **Important:** The following parameters should be set only on R05 deployments that are not scheduled. To avoid encountering issues on scheduled runs of the contract renewal script, be sure to remove any values set in these fields after any unscheduled runs.
>
> Alternatively, you can renew contracts on demand using the **Renew Now** button on individual contract records or the Renew Now: Batch Process page for bulk renewals. For more information, see Renewing a Contract.

  - **Contract ID** – Specify the ID of the contract that you want to renew. You can specify only one contract ID in this field.

- □ **Single Contract** – Check this box if you want to renew only the contract specified in the **Contract ID** field. If this box is cleared, R05 will renew contracts starting with the contract ID specified, followed by succeeding contract IDs in ascending order.

- **Other parameters** – Do not specify values for the other fields on the **Parameters** subtab. These parameters are used by the R05 script during contract renewal processing.

Setting Up Install Base Field Mapping

With the Contract Renewals SuiteApp, you can copy values of custom fields from one record to another by setting up field mappings. You can select any of the following mapping directions:

- From original transaction to install base
- From install base to renewal transaction
- From original transaction to install base to renewal transaction
- From original transaction to renewal transaction

The install base can be the contract or contract item record.

Before setting up field mappings, be sure to do the following additional setup requirements:

- Create the corresponding custom fields on the source and target records.
- Use the same field type for the fields that you are mapping.
- For list/record type fields, make sure that the field values from the source field are also available in the target field.

> ⚠️ **Important:** No validation is done during the field mapping setup process. If you are mapping from or to an invalid field (for example, a field ID that does not currently exist or an incorrectly spelled field ID), no field mapping will be executed.

To set up an install base field mapping:

1. Go to Setup > Custom > Install Base Field Mappings > New.
2. Enter a name for the field mapping.
3. Select a mapping direction:

   - **Orig Tran > Install Base** – Copies field values from the original transaction to the install base. Field values will be copied upon creation of the contract.

   - **Install Base > Renewal Tran** – Copies field values from the install base to the renewal transaction. Field values will be copied to the renewal transaction upon renewal.

   - **Orig Tran > Install Base > Renewal Tran** – Copies field values from the original transaction to the install base and renewal transaction. Upon contract creation, field values will be copied from the original transaction to the install base. Upon renewal, field values will be copied from the install base to the renewal transaction.

   - **Orig Tran > Renewal Tran** – Copies field values from the original transaction to the renewal transaction. For this option, you do not need to define the install base field because the field value is not copied to the install base.

4. In the **Install Base Type** field, select whether you want to map a custom field to a contract field or contract item field.

5. In the **Transaction Field Type** field, select whether you want to map a custom field to a body field or line field of a transaction.

6. In the **Transaction Field ID** field, enter the field ID of the transaction field that you want to map.

7. In the **Install Base Field ID** field, enter the field ID of the install base field that you want to map.

8. Click **Save**.

> ⓘ **Note:** Mapping to multi-select fields is currently not supported.

The Install Base Field Mappings list is loaded in alphabetical order.

Creating Uplift Types for Contract Renewals

Specifying uplift values enables you to maintain a consumer price index (CPI) or similar uplift. If you use an "original list rate" contract renewals pricing model, assigning an uplift type to your customers is important since the per-customer pricing on contract items is static in that pricing model.

To create uplift types:

1. Go to Contract Renewals > Setup > Uplift Types > New.

2. Enter a name for the uplift type.

3. In the **Uplift** field, enter the percentage the contract prices increase with renewal.

4. Click **Save**.

You can set the uplift type on the Contracts subtab of customer records. When the customer's contracts renew, the price will be increased by the percentage of the uplift type on the record.

Setting Up Maintenance/Support for Contract Renewals

Before you begin using the Software Vertical Contract Renewals SuiteApp, you should set up your maintenance and support items. Maintenance and support is often abbreviated as M/S on preferences and in other settings.

By default, maintenance and support costs ignore any discounts. If you want to consider customer discounts when calculating the cost of maintenance or support, you can enable the M/S Customer In-Line Discount preference on the Contract Renewals Preferences page. The M/S Customer In-Line Discount preference applies in-line discounts before calculating maintenance and support costs.

First, set your maintenance and support preferences at Contract Renewals > Setup > Contract Renewals Preferences:

- Default M/S Pricing Option
- Item Categories Skipped on Renewal Calculations
- M/S Customer In-Line Discount
- M/S In-Line Discount

For information about these preferences, see Setting Up Contract Renewals Preferences.

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Next, an administrator can create maintenance and support types to represent the tiers of maintenance and support that you offer.

To create a maintenance and support type:

1. Go to Setup > Custom > Maintenance/Support Types > New.
2. Enter a name for the maintenance and support tier.
3. If you calculate maintenance or support as a percentage of license, enter the percentage for this tier.
4. Click **Save**.
5. Repeat these steps for each tier that you offer.

Finally, set up your support and maintenance items.

To create a maintenance or support item:

1. Go to Lists > Accounting > Items > New.
2. Select the item type for the M/S item that you want to create.
3. On the item form, make sure that the Contract Renewals custom form is selected in the **Custom Form** field. For more information, see Setting Preferred Forms for Contract Renewals.
4. Enter values in the fields on the Primary Information and Classification sections as you would in a standard item form. For more information, see the help topic Creating Item Records.
5. On the Vertical Classification section:
   1. In the **Term/Contract Pricing Type** field, select a pricing type for the item.
   2. In the **Product Line** field, select which product line this item belongs to.
   3. In the **Item Category** field, select the item category where this item should be included in. Choose one of the following categories for M/S items:
      - Maintenance - New
      - Maintenance - Renewal
      - Support - New
      - Support - Renewal
   4. In the **Quantity Type** field, select **M/S Entitlement**.
   5. In the **Renew With** field, select an item to replace the current item when it is renewed. If this item renews with itself, you can select this item in this field after you saved the item record.
   6. In the **Maintenance/Support Type** field, select the tier this item belongs to. The **Maintenance/Support %** field shows the percentage of the maintenance or support type that you selected.

      If your role grants you permission, click the plus sign icon to create a new maintenance or support tier.
6. In the **M/S Pricing Option** field, select the pricing option that you want to use for this M/S item. By default, this field shows the value that you set in the Default M/S Pricing Option preference. If you set this field to blank, the value in the Default M/S Pricing Option preference will be applied whenever this item is used on contracts.
7. On the **Pricing** subtab, enter the price of this item:
   - If the M/S pricing option is set to either **M/S as a % of License List Price** or **M/S as a % of License Net Price**, enter the base price as 0.00.

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- If the M/S pricing option is set to **Itemized M/S Price**, enter the price of this item.

8. Enter other information related to this item. For information about setting up items for Contract Renewals, see Setting Up Items for Contract Renewals.

9. Click **Save**.

> **(i) Note:** If a contract includes a maintenance item and a support item from the same product line, only one of these items will be renewed. The Contract Renewals SuiteApp renews the M/S item with the highest internal ID and with an aggregated quantity greater than zero.

Setting Up Product Lines for Contract Renewals

Tracking product lines gives you another level of reporting beneath the item. Product lines also determine which transaction lines are considered when calculating support or maintenance costs if you charge maintenance or support as a percentage of license. For example, you might have a software product line that includes individual items for product licenses, module licenses, and maintenance/support contracts. You can also inactivate any product lines at any time.

An administrator can create product lines that reflect your company's product offerings.

To create product lines:

1. Go to Customization > List, Records, & Fields > Record Types.

2. Click the **New Record** link for Product Lines.

3. Enter a name for the product line.

4. Click **Save**.

You can set the product line in the **Product Line** field of item records. For information about setting up items for Contract Renewals, see Setting Up Items for Contract Renewals.

Setting Up Items for Contract Renewals

Item records define how renewal transactions and contracts are generated. If an item is set up for automated renewal, it is automatically included in contracts and renewal transactions.

Typically, contract items are defined with an item type of Non-inventory Item for Sale in NetSuite. The renewal behavior is determined by the fields under the Vertical Classification section on item records.

To set up items for Contract Renewals

1. Go to Lists > Accounting > Items > New.

2. Select the item type for the contract item that you want to create. Most contract items are defined with an item type of Non-inventory Item for Sale. For more information about NetSuite item types, see the help topic Creating Item Records.

3. On the Item form, make sure that a Contract Renewal custom form is selected in the **Custom Form** field. For more information about setting preferred forms, see Setting Preferred Forms for Contract Renewals.

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4. Enter values in the fields on the Primary Information and Classification sections as you would in a standard item form. For more information, see the help topic Creating Item Records.

5. On the Vertical Classifications section, specify values for the fields that will determine the renewal behavior of the item.

Field Name	Description
Term/Contract Pricing Type	Select a contract pricing type for the item. The contract pricing type determines how the rate will be calculated for an item. The following contract pricing types are available: ■ **Monthly** – Item price entered on the **Pricing** subtab is treated as a monthly price. ■ **Annually** – Item price entered on the **Pricing** subtab is treated as an annual price. ■ **Actual Item Price** – Item price entered on the **Pricing** subtab is considered as the actual rate. If you select this option, the term will not be considered in the rate calculation. ■ **Not Applicable** – Select this option if none of the other options are applicable for the item. For example, for Perpetual Licenses or non-renewing items.
Product Line	Choose which product line this item belongs to. A product line is a family of items that are organized around one flagship product. For more information, see Setting Up Product Lines for Contract Renewals.
Item Category	Select the item category where this item should be included in. The item category determines whether an item is renewed and also when it is billed. The following item categories are available: ■ License - Perpetual ■ License - Term ■ Maintenance - New ■ Maintenance - Renewal ■ Support - New ■ Support - Renewal ■ Services ■ Services - Perpetual ■ Training ■ Other ■ Hardware ■ Parent Item ⓘ **Note:** The Item Categories custom list is locked and cannot be edited. Perpetual items are not renewed and are paid in full up front. Examples of perpetual items are License - Perpetual, Services - Perpetual, Trainings, Hardware, and Other. For a perpetual item to appear on a renewal contract record, it must be accompanied by a corresponding maintenance item on the original contract. Both the perpetual item and the maintenance item must belong to the same product line. On a renewal contract record, perpetual items are listed in the Perpetual Contract Items field on the Contract Items subtab. Term-based items have start and end dates, and must have the **Term/Contract Pricing Type** field set to **Monthly** or **Annually** to be priced correctly in new

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Field Name	Description
	and renewal transactions based on the Term In Months of the transaction line. Examples of term-based items are License - Term, Support - New, Support - Renewal, and Services. Term licenses are always renewed. Maintenance entitlements include software updates and support, are associated with perpetual licenses, and are always renewed. Support entitlements provide support for software only, are associated with term licenses, and are renewable.
Quantity Type	Select the quantity type that defines this item's units. The quantity type affects the renewal behavior of an item. ⚠️ **Important:** The Quantity Type must match the selected Item Category for the item. An incorrect combination may cause unprocessed renewals for the item. The following quantity types are available: ▪ **Product License** – This refers to core licensed items. You should have at least one product set up in your account per product line. A product license creates a Product and an Install Base record to represent a new sale. A follow-on sale creates an Install Base record tied to the existing Product record. Product License quantity type is used for items under the following item categories: ▫ License - Perpetual ▫ License - Term ▫ Services ▪ **Module License** – This refers to add-on items related to products. A module license cannot exist without a corresponding Product, and should not be sold this way. Module License quantity type is used for items under the following categories: ▫ License - Perpetual ▫ License - Term ▫ Services ▪ **M/S Entitlement** – This quantity type is used for items with item category of maintenance or support. Maintenance and support items require start and end dates that are a key part of the renewals automation. If the Require License for M/S Items (Renewal) preference is enabled, transactions with an M/S item must also have an item with a license quantity type for it to be processed for renewal. ▪ **User License - Production**, **User License - Other** – This represents the seats sold for the products and modules within the product line. Production Users can be differentiated from Other Users for reporting purposes. User License quantity type is used for items under the following item categories: ▫ License - Term ▫ Training ▪ **CPU License** – This refers to the number of Central Processing Units or CPU Cores that are licensed to the customer. CPU License quantity type is used for items under the following item categories: ▫ Hardware ▫ License - Term ▪ **Other** – This quantity type can be used for any item that does not fit in any of the preceding quantity types.

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Field Name	Description
Renew With	Select an item to replace the current item when it is renewed. This setting is for renewable items only, that is, items with an item category of License - Term, Maintenance, or Support.
	Often, an item is renewed with itself, but you can choose any item in this field. You can also use this setting for versioning. For example, Version 1 can renew with Version 2.
Maintenance/Support Type	For maintenance or support items, if you offer tiered maintenance or support, choose the tier in this field. For information about maintenance and support types, see Setting Up Maintenance/Support for Contract Renewals.
Maintenance/Support %	This field shows the percentage price of the maintenance or support type that you selected.
Opt-Out M/S	Check this box if this item is not considered when calculating the cost of support or maintenance. For example, you do not count a sandbox license when determining the cost of support.
Replaced With	If the item has an end of life date after which it is no longer offered, choose the item that replaces the current item. The item you select here is added to future renewals in place of the item you are entering.
End of Life Date	Enter the date after which this item is no longer offered.
End of M/S Date	Enter the date after which support and maintenance will no longer be offered for this product. This is often some time after the end of life date.
Renewals Exclusion	Check this box if you do not want this item to be renewed.
M/S Pricing Option	If you are creating a maintenance or support item, select the pricing option that you want to use to determine the M/S item price.
	When you are creating a new item record, this field defaults to the value that you selected in the Default M/S Pricing Option preference. For more information, see Setting Up Contract Renewals Preferences.
	When you use this M/S item on transactions, the pricing option that you set on the item record is saved on the transaction and on the generated contract item record. If you set this field to blank, the value in the Default M/S Pricing Option preference will be applied whenever this item is used on contracts.
	If the item is set to renew with itself, the stored M/S Pricing Option value on the contract item record will be used for the renewal item. If the item is set to renew with a different item, the M/S Pricing Option value on the item record for the Renew With item will be used for the renewal item.

6. Specify the item price on the **Pricing** subtab.

> ℹ **Note:** When you enter pricing for percentage based maintenance and support items, you must set the base price to zero so that pricing is calculated correctly.

If you use the Project Management feature, be sure to enter a base price on the service item record or enter zero (instead of leaving the Base Price field blank) if the service item does not have a base price. For information about setting the base price of a service item see, Setting Up Item Pricing. For more information about the Project Management feature, see the help topic Using Project Management.

7. Enter values in the fields on the other subtabs as you would in a standard item form. For more information, see the help topic Creating Item Records.
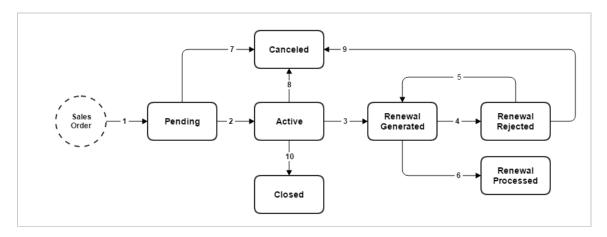
If you use the Advanced Billing and Advanced Shipping features and you do not want to fulfill orders, be sure to clear the **Can be Fulfilled/Received** box on the **Preferences** subtab for items that you include in contracts.

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You must not use kits or assemblies for renewable software items because these item types do not include the derived information required to generate contract items. You can, however, use item groups to make entering transaction line renewable items easier. For more information about item groups, see the help topic Item Groups.

Contract Workflow

The following diagram shows the different states of a contract.

The contract's status is shown in the **Status** field on the contract record. For information about contract fields, see Contract Fields.

Non-perpetual items have the same status as the contract where they belong, while perpetual items always have a status of Active. The contract item's status is shown in the **Contract Item Status** field on the contract item record.

The following table describes the contract lifecycle. For information about what processes or actions are applicable for each contract status, see Managing Contracts.

Contract Status	Action ID	Description	Automated and Manual Processes That Affect Contract Status
Pending	1	When a contract record is created, its initial status is set to Pending. A contract remains in this state until its contract items are generated. For information about creating contracts, see Creating a New Contract.	Contracts are automatically generated by the R07 script (R07-MR: Create New Contracts) for new sales orders that match the Sales Order Status to Create Contract preference. To manually generate a contract for a new sales order, click the Create Contract button on the transaction record. For renewals, a renewal contract is automatically generated if the renewal transaction is a sales order, or when a renewal opportunity or estimate is converted to a sales order.
Active	2	When contract items are generated for the contract, its status changes from Pending to Active.	Contract items are generated by the R03 script (R03-SS: Create Contract Items hrly).
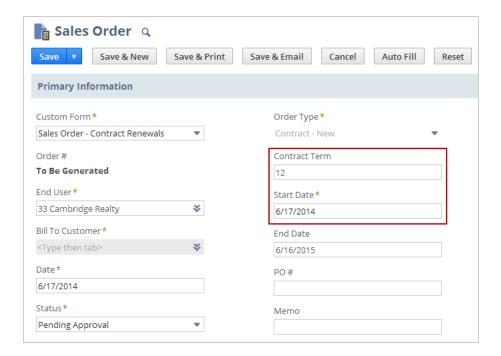
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Contract Status	Action ID	Description	Automated and Manual Processes That Affect Contract Status
Renewal Generated	3	When a renewal transaction is generated for the contract, its status changes from Active to Renewal Generated. A contract remains in this state until contract items are generated for the renewal contract. A renewal contract is automatically generated with an initial status of Pending if the renewal transaction is a sales order, or when a renewal quote or opportunity is converted to a sales order. The renewal contract's status remains in Pending until its contract items are generated. For information about renewing contracts, see Renewing a Contract.	Renewal transactions are generated by the R05 script (R05-SS: Create Renewals nightly) for active contracts with a target renewal date that is on or before the current date. To manually generate a renewal transaction, click the Renew Now button on the contract record. You can also perform batch renewals by going to Contract Renewals > Renewals Automation > Renew Now: Batch Process.
Renewal Rejected	4	When a contract's renewal transaction is rejected, its status changes from Renewal Generated to Renewal Rejected. You can reject a renewal transaction (opportunity, estimate, or sales order in Pending Approval status) if contract items are not yet generated for the renewal contract (that is, renewal contract is still in Pending status). For more information, see Rejecting a Renewal Transaction. When a renewal transaction is rejected, the status of the renewal contract changes from Pending to Canceled.	To reject a renewal transaction, click the Reject Renewal button on the transaction record.
	5	When you generate a new renewal transaction for a contract record with a status of Renewal Rejected, its status changes back to Renewal Generated.	To generate a new renewal transaction for a contract with a Renewal Rejected status, click the Renew Now button on the contract record.
Renewal Processed	6	When contract items are generated for the renewal contract, the preceding contract's status changes from Renewal Generated to Renewal Processed. Meanwhile, the renewal contract's status changes from Pending to Active after its contract items are generated.	Contract items are generated by the R03 script (R03-SS: Create Contract Items hrly) for renewal contracts.
Canceled	7 8 9	When a contract with a status of Pending, Active, or Renewal Rejected is canceled, its status changes to Canceled. Also, when a renewal transaction is rejected, the renewal contract's status changes from Pending to Canceled. Canceled contracts will not be processed for contract item creation, renewal, upsell, or downsell. For information about canceling contracts, see Canceling a Contract.	To cancel a contract, click Cancel Contract button on the contract record.
Closed	10	When you run the script that closes contracts, it searches for expired contracts and changes its status from Active to Closed.	To set the status of expired contracts to Closed, manually run the R08 script (SWV CR MR R08 Close Contracts).

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Contract Status	Action ID	Description	Automated and Manual Processes That Affect Contract Status
		Expired contracts are contracts with a current status of Active and an end date that is before the current date. For information about closing expired contracts, see Closing Expired Contracts.	

Contract Creation Process

With the Software Vertical Contract Renewals SuiteApp, contracts are generated from sales orders. When you enter a sales order using the Sales Order - Contract Renewal form, you define the term of the contract by setting the contract term and start date. For information about contract term, see Contract Term Calculation.
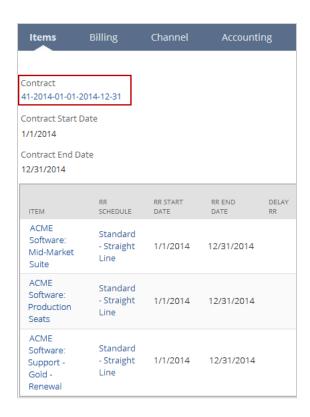
By default, line items added to the order are given the same start and end dates as the body of the transaction. You can modify the term length and the dates for individual line items.

The value that you selected in the **Sales Order Status to Create Contract** preference determines when a new contract is generated for a sales order. If you selected **Sales Order: Pending Approval**, a contract is generated and associated with the order after the sales order is saved (even if the sales order is not yet approved). If you selected **Sales Order: Pending Fulfillment**, a contract is generated when the sales order is approved. For information about this preference, see Setting Up Contract Renewals Preferences.

You can also create a contract for a specific sales order by clicking the **Create Contract** button on the transaction record. This button is available on sales orders with an empty **Contract** field (that is, a contract is not yet created for the order).

When a contract is generated for the order, a link to the contract record is shown in the **Contract** field on the **Items** subtab of the sales order.

When the order is fully billed (which is the default preference setup), contract items are added to the contract based on the line items on the sales order. By default, these contract items are set to be generated on an hourly basis, but you can change the frequency of this process by setting the schedule on the deployment record. For information about setting the timing of the contract item script (R03), see Setting Up Schedules for Contract Item Creation and Contract Renewal. For information about billing sales orders, see Invoicing Sales Orders.

On the contract record, the value of the contract is shown in the following fields:

- **Contract Value (Base Curr)** – For NetSuite OneWorld accounts, this field displays the value of the contract in the base currency of the customer's subsidiary. Otherwise, this field displays the value of the contract in the currency of your company.
- **Contract Value (Customer Primary Curr)** – This field displays the value of the contract in the primary currency of the customer.

For information about contract values, see Contract Value Calculation.

By default, 90 days prior to the end date of the contract, a renewal transaction is automatically generated for the contract. You can change when contract renewals are processed by setting the **Days Before Renewal** preference on the Contract Renewals Preferences page. For more information, see Setting Up Contract Renewals Preferences.

You can also override the **Days Before Renewal** global preference for specific contracts by specifying a value in the Contract Days Before Renewal field on the contract record. For more information, see Editing a Contract.

Any items that are set up as renewable are automatically included on the renewal contract. For more information, see Contract Renewals Process.

Creating a New Contract

With Software Vertical Contract Renewals SuiteApp, contracts and their contract items are generated from sales transactions: opportunities, estimates, and sales orders. Opportunities and estimates must be converted to a sales order before a contract record can be generated. Contracts are created from sales orders using the Sales Order – Contract Renewals form or any customized version of this form.

You can choose when a contract record will be generated from a sales order in the **Sales Order Status to Create Contract** field on the Contract Renewals Preferences page. For more information, see Setting Up Contract Renewals Preferences.

> (i) **Note:** Contracts and contract items cannot be created manually, but you can import contracts using CSV import. For more information, see Importing Contracts.

To create new contract from a sales order:

1. Go to Transactions > Sales > Enter Sales Order.

2. In the **Custom Form** field, select **Sales Order - Contract Renewals**.

3. In the **End User** field, select a customer. If necessary, on the **Channel** subtab, define who this end user is relative to the customer in the **Bill To Customer** field.

4. In the **Contract Term** field, enter the number of months this contract runs. You can enter decimal numbers if you need to represent a term in days.

5. In the **Start Date** field, enter the start date for this contract. The end date is calculated automatically based on the contract term and start date values. For information about contract term, see Contract Term Calculation.

   > (i) **Note:** By default, transactions created from an opportunity do not have a start date. You must manually enter the start date for these transaction records.

6. Enter values in the other fields on the transaction header as you would in a standard sales order. For more information, see Creating Sales Orders.

7. On the **Items** subtab:

   1. If this is an order for a new contract, leave the **Contract** field blank.

      If this is an upsell order for an existing contract, select a contract in the **Contract** field. For more information, see Contract Upsell.

   2. In the **Item** column, select items that you want to include in the contract. If you are creating a sales order from an estimate or opportunity, the items are populated from that transaction.

      If you want to apply a percentage uplift for a renewable item, enter the value in the Contract Item Uplift column. For more information, see Contract Item Uplift.

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> **(i) Note:** You may need to edit these items to ensure that the dates are set properly. The start and end dates for each item are populated from the transaction body. You can change these dates for items that do not apply to the full contract term.

> **(i) Note:** If the sales order status is Pending Fulfillment, you will not be able to edit the line item dates after adding the item. Also, after adding the first line item, the start date column will be grayed out for succeeding line items. If you want to be able to modify the dates for each line item, change the status of the sales order to Pending Approval.

> **⚠ Important:** Items that do not co-terminate with the end of the contract are not renewed even if they are set up to be renewable.

8. If you want to set a custom price for any of the item, click the **Options & Log** subtab and set the following fields:

   - **Block Custom Price Level** – Default value is **Yes**. Set this field to **No** if you want to enable setting a custom price level for items in this transaction. This setting overrides the settings you made in the **Item Category = For Custom Price Block** preference on the Contract Renewals Preferences page, which blocks custom pricing for specific item categories. This setting applies only to non-maintenance/support items.

   - **Allow Custom Price Level for M/S Items** – Default value is **No**. Set this field to **Yes** if you want to enable setting a custom price level for maintenance and support items in this transaction. This setting overrides the settings you made in the **Item Category = For Custom Price Block** preference on the Contract Renewals Preferences page, which blocks custom pricing for specific item categories.

   - **Custom Price Entered is Annual Rate** – Check this box if you want to enter custom price level list rates as annual rates. This setting enables you to enter annual rates in the List Rate column for items with custom price level, to ensure proper calculation of the amount. In the end, the list rate will be divided by 12 months and stored as a monthly rate.

9. Click **Save**.

The value in the **Sales Order Status to Create Contract** preference determines when a new contract is generated for a sales order based on its status.

- If you selected **Sales Order: Pending Approval**, a contract is generated upon saving of the sales order (even if the order is not yet approved).

- If you selected **Sales Order: Pending Fulfillment**, a contract is generated upon approval of the sales order. In this case, a contract will not be automatically generated for sales orders with a status of Pending Approval. However, you have the option to create contracts on demand for sales orders with no contract yet by clicking the **Create Contract** button on the transaction record.

When a contract is saved or approved (depending on the preference set), a user event script saves the transaction record and creates a contract in the background. After the contract is created, the user event script triggers a workflow action that attaches the contract record to the sales order.

To improve performance, the contract creation user event script does not wait for the workflow action to finish attaching the contract to the sales order. For this reason, there may be instances when the **Contract** field on the **Items** subtab displays an incomplete contract ID and the **Check Log Status** field on the **Options & Log** subtab is empty after a sales order is saved.

To check if the workflow action has successfully attached the contract to the sales order, refresh the Sales Order page and check if the **Contract** field is displaying the complete contract ID and the value in the **Check Log Status** field on the **Options & Log** subtab is **Pending**.

Contracts are given an ID in the following format: **ID_<Start Date>_<End Date>**. Click the link in the **Contract** field on the sales order to go to the contract record.

Guidelines for Creating New Contracts

- Contract items are generated from the line items on the sales transaction. By default, contract items on new contracts are generated on an hourly basis, during the scheduled run of the R03 script. You can change the frequency of the contract item creation process by setting the schedule on the script deployment record. For more information, see Setting Up Schedules for Contract Item Creation and Contract Renewal.

  Alternatively, you can create contract items for a contract on demand. For more information, see On-Demand Create Contract Items.

- When Install Base Field Mapping contains conflicting field types, for example, from Date to Percent, no contract will be created upon saving the transaction.

- If the workflow action fails, the initial incomplete contract ID remains displayed on the Sales Order page in View mode. To completely attach the contract to the sales order, edit or update the page. When edited, the final contract name that is based on the initial contract record is assigned to the sales order and the **Check Log Status** field on the **Options & Log** subtab is set to **Pending**. If the sales order is updated through CSV import or Web service, a final contract record that is different from the initial record is assigned to the sales order, the **Check Log Status** field on the **Options & Log** subtab is set to **Pending**, and the initial contract record becomes an orphan.

- When creating a transaction saved search, do not include **Contract Field: Target Renewal Date** on the **Criteria** or **Results** subtab for transactions other than contracts. Doing so will result in error.

On-Demand Create Contract Items

You can create contract items on demand by clicking the **Create Contract Items** button on the contract record. This button is available for contracts that satisfy the following conditions:

- Contract is not Inactive.
- Contract status is Pending.
- Contract has no contract items.

To create contract items for a contract:

1. Go to Contract Renewals > View Records > Contracts.
2. Click the **View** link next to the contract that you want to create contract items for.
3. Click the **Create Contract Items** button.

A confirmation message is shown at the top of the contract record to confirm the creation of contract items. If contract items are successfully created, the status of the contract changes to Active and the **Check Log Status** field on the **Options & Log** subtab of the originating transaction is set to Processed.

The SuiteApp implements a validation logic to prevent contract items from being processed simultaneously, which may result to duplicate contract items on contracts. An error message is shown at the top of the contract record if you click the **Create Contract Items** button when an instance of the contract items script (R03) is already running.

Importing Contracts

You can import your existing contract and contract items using the CSV Import Assistant. For information about CSV files, see the help topic General CSV File Conventions

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To import contracts into your NetSuite account, you must import both contracts and the associated contract items.

To import contract records:

1. Prepare a CSV file with your contract data.

   The following contract fields are required:

   - Name
   - End User
   - Bill To Customer
   - Contract Start Date
   - Contract End Date
   - Currency (if the Multiple Currencies feature is enabled)
   - Renewal Terms

   For more information about contract fields, see Contract Fields.

2. Go to Setup > Import/Export > Import Tasks > Import CSV Records.
3. In the **Import Type** field, select **Custom Records**.
4. In the **Record Type** field, select **Contract**.
5. Select the CSV import file with your contract data.
6. Click **Next**.
7. Follow the rest of the steps in Import Assistant. For more information, see the help topic CSV Imports.

To import contract item records:

1. Prepare a CSV file with your contract item data.

   The following contract item fields are required:

   - Bill To Customer
   - End User
   - Contract
   - Item
   - Contract Item Start Date
   - Contract Item End Date
   - Quantity
   - Original List Rate
   - Owner

2. Go to Setup > Import/Export > Import Tasks > Import CSV Records.
3. In the **Import Type** field, select **Custom Records**.
4. In the **Record Type** field, select **Contract Item**.
5. Select the CSV import file with your contract item data.
6. Click **Next**.
7. Follow the rest of the steps in Import Assistant. For more information, see the help topic CSV Imports.

Important things to note when importing transactions for contract renewals:

- When an imported sales order record (of Import Type: Transactions) includes conflicting contract term and end date values, the contract term value overwrites the end date's value with the calculated value. For information about contract term, see Contract Term Calculation.
- In transaction imports, line items for non-Perpetual item categories must have contract term and end date values to generate the end date for each item. If the values are missing, the import fails. The end date value can be mapped for a line item if the date is prior to or the same as the contract's end date.

Contract Renewals Process

On the scheduled run of the script that creates renewal transactions, a renewal sales order is generated for contracts that are within 90 days of its end date. The renewal sales order includes any renewal contract items from the expiring contract that extend to the contract end date. For information about editing renewal transactions, see Editing a Renewal Transaction.

> **Note:** You can change when renewal transactions are generated (Days Before Renewal) and the type of renewal transaction created (Transaction Type to Create) on the **Contract Renewals Creation** subtab of the Contract Renewals Preferences page. To set the these preferences, go to Contract Renewals > Setup > Contract Renewals Preferences. For more information, see Setting Up Contract Renewals Preferences.
>
> You can also override the Days Before Renewal preference for specific contracts by specifying a value in the **Contract Days Before Renewal** field on the contract record. For more information, see Editing a Contract.

If contract items on the expiring contract are the same, they are combined on the renewal contract. This occurs when additional items are added to a contract some time during its contract term. For items to be combined, the rates on each line must match. For more information, see Contract Upsell.

If you need to remove an item from a renewal transaction, change the quantity for the line item to 0 (zero) rather than removing the line item. This ensures that downsell is tracked properly and that any invoices created do not include 0 quantity line items.

If you are provisioning based on fulfillment transactions, transaction line items with zero quantity can be a signal to de-provision those items. If you are provisioning based on contract items, you can signal items to de-provision with negative-quantity contract items.

If there are return authorizations associated with a contract that are not approved before the active contract renewal, those return authorizations are not reflected in the renewal. For more information, see Contracts and Returns.

You can create reminders or saved searches for your dashboard to alert you when renewal transactions are generated. You can base your reminder on transactions with the Order Type set to **Renewal**. For more information, see the help topic Setting Up Reminders.

Software Vertical Contract Renewals SuiteApp also supports renewing contracts on demand by clicking the **Renew Now** button on a contract record. For more information, see Renewing a Contract.

Example
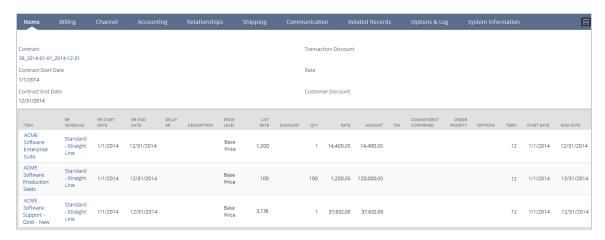
A software company sells a twelve-month software product license, a support entitlement, and 100 seats. Additionally, the contract includes a professional services item that ends three months into the contract.

When a contract is created from the sales order, the contract ID is shown in the Contract field on the saved sales order.

Initial Sales Order (Details of the Original Contract)

| Items | Billing | Channel | Accounting | Relationships | Shipping | Communication | Related Records | Options & Log | System Information | |

Contract
39_2014-01-01_2014-12-31

Contract Start Date
1/1/2014

Contract End Date
12/31/2014

Transaction Discount

Rate

Customer Discount

ITEM	RR SCHEDULE	RR START DATE	RR END DATE	DELAY RR	DESCRIPTION	PRICE LEVEL	LIST RATE	DISCOUNT	QTY	RATE	AMOUNT	TAX	COMMITMENT CONFIRMED	ORDER PRIORITY	OPTIONS	TERM	START DATE	END DATE
ACME Software: Enterprise Suite	Standard - Straight Line	1/1/2014	12/31/2014			Base Price	1,200		1	14,400.00	14,400.00					12	1/1/2014	12/31/2014
ACME Software: Production Seats	Standard - Straight Line	1/1/2014	12/31/2014			Base Price	100		100	1,200.00	120,000.00					12	1/1/2014	12/31/2014
ACME Software: Support - Gold - New	Standard - Straight Line	1/1/2014	12/31/2014			Base Price	3,136		1	37,632.00	37,632.00					12	1/1/2014	12/31/2014

By default, 90 days prior to the end date of the contract, a renewal sales order is created automatically.

In this example, the product license, the seats, and the support entitlement are all renewable items. The term of these items extends to the contract end date, so all three of these line items appear on the renewal order.

The professional services item is not renewable and ends prior to the contract end date, so this item is not included in the renewal order.

Renewal Transaction (Details of the Renewal Contract)

| Items | Billing | Channel | Accounting | Relationships | Shipping | Communication | Related Records | Options & Log | System Information | |

Contract
41_2014-01-01_2014-12-31

Contract Start Date
1/1/2014

Contract End Date
12/31/2014

Transaction Discount

Rate

Customer Discount

ITEM	RR SCHEDULE	RR START DATE	RR END DATE	DELAY RR	DESCRIPTION	PRICE LEVEL	LIST RATE	DISCOUNT	QTY	RATE	AMOUNT	TAX	COMMITMENT CONFIRMED	ORDER PRIORITY	OPTIONS	TERM	START DATE	END DATE
ACME Software: Mid-Market Suite	97	1/1/2014	12/31/2014			Custom	700		1	8,400.00	8,400.00					12	1/1/2014	12/31/2014
ACME Software: Production Seats	98	1/1/2014	12/31/2014			Custom	100		100	1,200.00	120,000.00					12	1/1/2014	12/31/2014
ACME Software: Support - Gold - Renewal	99	1/1/2014	12/31/2014			Base Price	2,996		1	35,952.00	35,952.00					12	1/1/2014	12/31/2014

Managing Contracts

Read the following topics for information about managing contract records.

- Viewing a Contract
- Editing a Contract
- Updating Contracts using Mass Update
- Renewing a Contract
    - Editing a Renewal Transaction
- Rejecting a Renewal Transaction
- Canceling a Contract
- Closing Expired Contracts
- Contract Upsell

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- Contracts and Returns

The following table shows which actions are applicable to a contract based on its current status. For information about contract states, see Contract Workflow.

Contract Status	Available Actions (Contract Record Buttons)				
	Edit	Upsell[1] (Edit Mode)	Downsell[1] (Edit Mode)	Renew Now (View Mode)	Cancel Contract (View/Edit Mode)
Pending	Yes	Yes	Yes	No	Yes
Active	Yes	Yes	Yes	Yes	Yes
Renewal Generated	Yes	Yes	Yes	No	No
Renewal Processed	Yes	Yes	Yes	No	No
Renewal Rejected	Yes	Yes	Yes	Yes[2]	Yes
Canceled	No	No	No	No	No
Closed	No	No	No	No	No

[1] Contract is also available for selection in the Contract field on a standalone upsell sales order or downsell RMA.

[2] Contract is renewable only through the Renew Now button. Renewal rejected contracts will not be renewed by the contract renewal script (R05) or by Renew Now: Batch Process.

Viewing a Contract

You can access a contract record from the sales transaction or customer record that is associated with the contract. A list of all contracts is also available on the Contract List page.

To view a contract record:

- From the Sales Order – Go to Transactions > Sales > Enter Sales Orders > List. View the sales order that is associated with the contract. On the **Items** subtab, click the link in the **Contract** field.

- From the Customer record – Go to Lists > Relationships > Customers. View the customer record that is associated with the contract. On the **Contracts** subtab, click the name of the contract.

- From the Contract List page – Go to Contract Renewals > View Records > Contracts. You can also access the Contract List page from Lists > Custom > Contract. Click the **View** link next to the contract.

Editing a Contract

To edit a contract, go to the contract record and click the Edit button. You can access the contract record from the sales transaction or customer record that is associated with the contract. A list of all contracts is also available on the Contract List page. For more information about viewing contract records, see Viewing a Contract.

You can edit a contract to make any of the following changes:

- Create an upsell order for the contract by clicking the **Create Up-Sell Order** button. For more information, see Contract Upsell.

- Create a downsell RMA for the contract by clicking the **Create Down-sell RMA** button. For more information, see Contracts and Returns.

- Cancel the contract by clicking the **Cancel Contract** button. For more information, see Canceling a Contract.

- Modify the renewal term for the contract by specifying a value in the **Renewal Terms** field.
- Override the Days Before Renewal preference for the contract by specifying a value in the **Contract Days Before Renewal** field.
- Override the customer uplift for the contract by specifying a value in the **Contract Uplift** field.
- Override the customer uplift, contract uplift, or both by specifying a value in the **Contract Item Uplift** field on the contract item record. For more information, see Contract Item Uplift.

For information about contract fields, see Contract Fields.

Contracts can also be updated using CSV import or mass update. For more information, read the following help topics.

- Importing Contracts
- Updating Contracts using Mass Update

Contract Fields

The following table provides descriptions for the fields on contract records.

Field Name	Description
Name[1]	This field displays the name of the contract in the following format: **ID_<Start Date>_<End Date>**.
ID	This field displays the internal ID of the contract.
Inactive	On edit mode, check this box to set the contract to inactive.
Status	This field shows the status of the contract. Depending on the contract's current state, the status can be one of the following: - Pending - Active - Renewal Generated - Renewal Processed - Renewal Rejected - Canceled - Closed For information about contract states, see Contract Workflow.
Contract Start Date[1]	This field displays the date when the contract starts. This value is set in the **Start Date** field of the sales order from which the contract is created.
Contract End Date[1]	This field displays the date when the contract is due for termination. This value is set in the **End Date** field of the sales order from which the contract is created. On the sales order, the end date is determined by the values in the **Contract Term** and **Start Date** fields, if not entered manually. Items with a perpetual license do not have contract end dates. For information about contract term, see Contract Term Calculation.
Contract Days Before Renewal	On edit mode, enter the number of days before the contract's end date when a renewal transaction will be generated. This value applies only to the contract where it is specified. If a value is specified in this field, it overrides the Days Before Renewal preference that sets the target renewal date for existing contracts. You can also update this field through contract mass update. For more information, see Updating Contracts using Mass Update.

Field Name	Description
	If this field is blank, the value in the **Days Before Renewal** field on the Contract Renewals Preferences page is used to determine the target renewal date for the contract. For more information about this preference, see Setting Up Contract Renewals Preferences. This field is disabled when a renewal transaction has been created for the contract.
Contract Type	This field displays the contract type.
Bill To Customer[1]	This field displays the name of the customer who buys the product. This value is set in the **Bill To Customer** field of the sales order from which the contract is created.
End User[1]	This field displays the name of the customer who uses or registers the product. This value is set in the **End User** field of the sales order from which the contract is created.
Distributor	If the contract is created for a multi-tiered sales transaction, this field displays the name of the distributor from which the reseller or end user purchased the product. This value is set on the **Channel** subtab of the sales order from which the contract is created. For more information, see Support for Multiple Sales Channels.
Reseller	If the contract is created for a multi-tiered sales transaction, this field displays the name of the reseller from which the end user purchased the product. This value is set on the **Channel** subtab of the sales order from which the contract is created. For more information, see Support for Multiple Sales Channels.
Bill To Tier	If the contract is created for a multi-tiered sales transaction, this field displays the channel tier of the customer to be billed. This value is set on the **Channel** subtab of the sales order from which the contract is created. For more information, see Support for Multiple Sales Channels.
Ship To Tier	If the contract is created for a multi-tiered sales transaction, this field displays the channel tier of the customer to whom the product will be shipped to. This value is set on the **Channel** subtab of the sales order from which the contract is created. For more information, see Support for Multiple Sales Channels.
Currency[1]	This field shows the currency used by the contract. This field is available only if the Multiple Currencies feature is enabled in your account. This value is set in the **Currency** field of the sales order from which the contract is created.
Contract Value (Base Curr)	For accounts that are not OneWorld, this field displays the value of the contract in the currency of the company. For OneWorld accounts, this field displays the value of the contract in the base currency of the customer's subsidiary. For information about contract values, see Contract Value Calculation.
Contract Value (Customer Primary Curr)	This field displays the value of the contract in the primary currency of the customer. For information about contract values, see Contract Value Calculation.
Annual Contract Value (Gross)	This field displays the average annual value of the contract before deducting item discounts. For information about contract values, see Contract Value Calculation.
Annual Contract Value (Net)	This field displays the average annual value of the contract after deducting item discounts. For information about contract values, see Contract Value Calculation.

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Field Name	Description
Contract Document	On edit mode, select a document related to the contract or sales transaction from the NetSuite File Cabinet. For more information, see the help topic File Cabinet Overview.
Contract Uplift	On edit mode, enter a percentage uplift for the contract. This value applies only to the contract where it is specified. When the contract is renewed, the price on the renewal contract will be increased by the percentage uplift set in this field. If a value is specified in this field, it overrides the uplift value set on the **Contract** subtab of the customer record. This field accepts positive values from 0 to 100. A contract uplift value set to zero means that you do not want to apply an uplift, even if a value is set on the customer record. You can also update this field through contract mass update. For more information, see Updating Contracts using Mass Update. If this field is blank, the percentage uplift specified on the customer record will be applied on the renewal contract. If there is no uplift specified on the contract and on the customer record, no uplift will be applied on the renewal contract. This field is disabled when a renewal transaction has been created for the contract. **Note:** If a value is specified in the **Contract Item Uplift** field on a contract item, it overrides the uplift value set on the contract or customer record. For more information, see Contract Item Uplift.
Target Renewal Date	This field displays the date when a renewal transaction is automatically generated for the contract. Upon creation of the contract, the value in this field is determined by the value in the **Days Before Renewal** field on the Contract Renewals Preferences page. The default value in the **Days Before Renewal** field is 90 days before the contract's end date. For more information about this preference, see Setting Up Contract Renewals Preferences. If you want to override the Days Before Renewal global preference for a specific contract, edit the contract and specify a value in the **Contract Days Before Renewal** field. Upon saving the contract, the value in the **Target Renewal Date** field is adjusted based on the value in the **Contract Days Before Renewal** field.
Contract Renewed On	This field displays the date when the contract is renewed. This field is blank if the contract is not yet renewed.
Renewal Transaction	This field displays the link to the renewal transaction generated for the contract. This field is blank if the contract is not yet renewed.
Original Contract	This field displays the link to the original contract. On the original contract, this field is blank.
Renewal Terms[1]	This field displays the duration of the renewal contract in months. This value is set in the **Renewal Terms** field of the sales order from which the contract is created. On edit mode, you can update the value of the term for the renewal contract.
Annual Renew Value (Gross)	This field displays the average annual value of the renewal contract prior to deducting item discounts. For information about contract values, see Contract Value Calculation.
Annual Renew Value (Net)	This field displays the average annual value of the renewal contract after deducting item discounts. For information about contract values, see Contract Value Calculation.

Field Name	Description
Renewal Term Renew Value (Gross)	This field displays the average per term value of the renewal contract prior to deducting item discounts. For information about contract values, see Contract Value Calculation.
Renewal Term Renew Value (Net)	This field displays the average per term value of the renewal contract after deducting item discounts. For information about contract values, see Contract Value Calculation.

(1) This field is required if you are creating a contract using CSV import. For more information, see Importing Contracts.

Contract Item Uplift

In Software Vertical Contract Renewals 17.1, a **Contract Item Uplift** field is available on the contract item record.

When a value is set in this field, it overrides the uplift value set in the Contract Uplift field on the contract or the Uplift value set on the **Contract** subtab of the customer record. This field accepts positive values from 0 to 100.

A contract item uplift value set to zero means that you do not want to apply an uplift to the contract item, even if a value is set on the contract or customer record. If this field is blank, the percentage uplift specified on the contract will be applied to the renewal contract. If no uplift value is set on either the contract item or contract, the uplift specified on the customer record will be applied on the renewal contract.

You can specify percentage uplift only to Active contract items of an Active contract.

You can also specify percentage uplift for renewable items on the Item subtab of custom transaction forms. See also Creating a New Contract.

Updating Contracts using Mass Update

You can update specific fields on a contract record through mass update.

The following updates are supported:

- Update the contract level days before renewal setting
- Apply a contract level uplift

To update contract fields using mass update:

1. Go to Lists > Mass Update > Mass Updates.
2. Click **General Updates** to expand.
3. Under Custom Records, click **Contract**.
4. On the **Criteria** subtab, select filters that you want to use to set the criteria for contracts that will be updated.
5. On the **Mass Update Fields** subtab, check the box in the **Apply** column and specify a value in the **Value** or **Formula** field for the contract fields that you want to update. Only the following contract fields are currently supported for mass update:
   - Contract Days Before Renewal

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- Contract Uplift

For information about these fields, see Contract Fields.

> **ⓘ Note:** Although there are other fields shown on the **Mass Update Fields** subtab, only the **Contract Days Before Renewal** and **Contract Uplift** fields are supported and tested for contracts mass update. Do not update other contract fields.

6. Click **Preview** to select which contracts will be included in the update.

7. On the Mass Update Preview Results page, check the box in the **Apply** column for the contracts that you want to include in the update.

8. Click **Perform Update** to execute the mass update.

For more information about mass update, see the help topic Defining a Mass Update.

Renewing a Contract

On the scheduled run of the contract renewals script (R05), renewal transactions are automatically generated for active contracts that have a target renewal date that is earlier than or equal to the current date.

The Software Vertical Contract Renewals SuiteApp also lets you generate renewal transactions for specific contracts on demand. The Renew Now feature enables you to renew contracts without any dependency on the Days Before Renewal and Restrict to Customer preferences. This feature supports single and batch renewals. For more information, see Renew Now and Renew Now: Batch Process.

The generated renewal transaction is based on the value that you set in the Transaction Type to Create field on the Contract Renewals Preferences page. You can set this preference to Opportunity, Quote (Estimate), or Sales Order. If the renewal transaction is a sales order, or when the renewal opportunity or estimate is converted to sales order, a renewal contract with a Pending status is automatically created. For information about Contract Renewals preferences, see Setting Up Contract Renewals Preferences.

After a renewal transaction is generated for the original contract, its status changes from Active to Renewal Generated. The original contract's status changes from Renewal Generated to Renewal Processed when the status of the renewal contract becomes Active (that is, contract items are generated for the renewal contract). For more information about contract states, see Contract Workflow.

Renew Now

You can generate a renewal transaction for specific contracts on demand by clicking the **Renew Now** button on the contract record. This button is available for contracts that satisfy the following conditions:

- Contract is not inactive.

- Contract status is Active or Renewal Rejected.

- Contract has at least one item that is not perpetual.

- Contract has at least one item that is not excluded from renewal.

- Contract has at least one item with an end date that matches the contract end date.

To generate a renewal transaction for a contract:

1. Go to Contract Renewals > View Records > Contracts.

2. Click the **View** link next to the contract that you want to generate a renewal transaction for.

3. Click the **Renew Now** button.

A confirmation message is shown at the top of the contract record to confirm the contract renewal status. If the renewal transaction is successfully generated, the status of the contract changes to Renewal Generated. To view the renewal transaction, click the link in the **Renewal Transaction** field. To view the renewal contract, go to the **Renewal Contracts** subtab of the original contract.

> ⓘ **Note:** Contract Renewals SuiteApp implements a locking mechanism to prevent contracts from being processed for renewal simultaneously, which may result to duplicate renewal transactions. When a contract is processed for renewal either by Renew Now button or by R05 script, the renewal process locks the contract by setting its Queued for Renewal (hidden field) value to True to prevent the contract from being picked up again for renewal. If an error is encountered while the contract is being renewed, the renewal process sets the Queued for Renewal value back to False so that the contract can be processed again for renewal.

Renew Now: Batch Process

Software Vertical Contract Renewals supports bulk renewal of contracts.

First, you need to create a saved search that defines the contracts to be renewed. The saved search must be Contract type and set to Public. Then, you can select this saved search on the Renew Now: Batch Process page to process the bulk renewal of contracts.

By default, only users with an administrator role have access to the Renew Now: Batch Process page. Administrators can edit the Renew Now: Batch Process script deployment record to give access to other roles who will perform bulk renewals.

To set up the roles for Renew Now: Batch Process:

1. Using an Administrator role, go to Customization > Scripting > Scripts.
2. Click the plus icon on the Filters to expand, and select **Suitelet** in the **Type** field.
3. Look for **SWE R05 Renew Now Batch Process**, and click the **Deployments** link.
4. Click the **Edit** link for **customdeploy_swe_r05_batch_renew_now**.
5. On the **Audience** subtab, select the roles that will perform batch processing of renewals in the **Roles** field. Users with the roles that you selected in this field will have access to the Renew Now: Batch Process page. To select multiple roles, hold down the CTRL key on your keyboard while clicking each role.
6. Click **Save**.

To renew contracts by bulk:

1. Create a contract saved search that defines the list of contracts that you want to renew.
   1. Go to Lists > Search > Saved Search > New.
   2. Select **Contract**.
   3. On the saved search definition page, enter a title for the contract saved search and check the **Public** box.
   4. On the **Criteria** subtab, specify the criteria for the contracts that you want to renew.
   5. On the **Results** subtab, set the **Sort By** field to **ID** and keep the **Descending** box cleared.
   6. Click **Preview** to preview the list of contracts that will be processed for renewal based on the criteria that you specified for this saved search. Review the list of contracts. Click **Return to Criteria** to modify the search criteria or to save the contract search.

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7. When you are done setting the criteria for the saved search, click **Save**.

   For more information about defining a saved search, see the help topic Defining a Saved Search.

2. Go to Contract Renewals > Renewals Automation > Renew Now: Batch Process.

3. On the Renew Now: Batch Process page, select the contract saved search that you created. The **Saved Search** field shows only Contract type saved searches that are set to Public.

4. Click **Submit**.

   A message appears at the top of the page to confirm the status of the bulk renewal. If your role permits, you can click the link on the confirmation message or go to Customization > Script > Scheduled Script Status to check the status of the renewal script.

   For information about the contracts processed, check the script execution logs.

Editing a Renewal Transaction

On the scheduled run of the contract renewal script (R05), a renewal transaction is automatically generated for a contract when its target renewal date is earlier than or equal to the current date. You can also manually generate a renewal transaction for specific contracts on demand using the Renew Now feature. For information about generating renewal transactions, see Renewing a Contract.

Any contract items from the preceding contract that are set up as renewable are automatically included on the renewal transaction when the transaction it is generated. The term of the renewal transaction is based on the renewal terms set on the preceding contract, and the start date is set to one day after the preceding contract's end date. By default, contract items on the renewal transaction are set up with the same term, start date, and end date as the body of the transaction.

If the renewal transaction is not yet processed by the contract item creation script (R03), you can edit the renewal transaction to modify the contract items that you want to include on the renewal contract.

> **Note:** If the renewal sales order has been processed by the R03 script and contract items have been generated for the renewal contract, any changes to the renewal transaction will not be applied to the renewal contract. If you want to modify the items for the renewal contract, you can create an upsell sales order. For more information, see Contract Upsell.

To edit a renewal transaction:

1. Open the renewal transaction record in edit mode.

   - To open the renewal transaction from the transaction list page:
     - From the Opportunities list page: Go to Transactions > Sales > Create Opportunities > List.
     - From the Estimates list page: Go to Transactions > Sales > Prepare Estimates > List.
     - From the Sales Orders list page: Go to Transactions > Sales > Enter Sales Orders > List.

     Then, click the **Edit** link for the renewal transaction that you want to edit.

   - To open the renewal transaction from the contract record:
     1. Go to Contract Renewals > View Records > Contract.
     2. Click the **View** link for the contract that you want to edit the renewal transaction for.
     3. On the contract record, click the link in the **Renewal Transaction** field to open the renewal transaction.
     4. On the renewal transaction, click the **Edit** button.

2. Go to the **Items** subtab to modify the contract items on the renewal transaction.

> ⚠ **Important:** Avoid modifying the details (such as the item and quantity) of an existing line item. Doing so creates duplicate contract items when the transaction is processed by the R03 script.
>
> If you want to change an item, remove the line first then add another line for the new item.

- To remove an item, select the line that contains the item that you do not want to renew and click **Remove**.
- To add an item, select the item in a new line.
  - Set the quantity and price level.
  - Specify the item start and end dates. If you did not specify any, the item will be given the same term, start date, and end date as the body of the transaction.

  Click **Add** to add the item. Repeat this step for each item that you want to add.
- If you want to modify the start and end dates for the contract items on the renewal transaction, take note of the following:
  - If you did not check the **Enable Flexible Start Date for Renewal Transactions** preference, you can set start date of the contract items to any date between the renewal contract's start and end dates.
  - If you checked the **Enable Flexible Start Date for Renewal Transactions** preference, you can set up the items on renewal transactions to start earlier than the renewal contract start date. If this preference is enabled, you can set the start date of contract items to any date between the current date and the contract end date.

    This feature is applicable only for renewal transactions and for upsell sales orders for renewal contracts. To set this preference, go to Contract Renewals > Setup > Contract Renewals Preference and check the **Enable Flexible Start Date for Renewal Transactions** box on the **Transactions Validation** subtab. For more information, see Setting Up Contract Renewals Preferences.
  - Items with end dates that are earlier than the contract end date will not be renewed.

3. You can still revert to the original values of all the fields and lines you modified. To do this, click **Reset Lines**, which restores the initial values of all fields and line items when the renewal transaction was generated.
4. Click **Save**.

> ⓘ **Note:** Unless the renewal transaction is processed by the R03 script, you can still use the Reset Lines button in edit mode, even after a renewal transaction has been modified and saved multiple times.

When the renewal transaction is processed by the R03 script, the items set up on the transaction are added as contract items on the renewal contract. The **Check Log Status** field on the **Options & Log** subtab of the sales order changes from **Pending** to **Processed** when the sales order is successfully processed for contract item creation.

Also, when the contract items have been generated for the renewal contract, the renewal contract's status changes to Active and the preceding contract's status changes to Renewal Processed. For more information, see Contract Workflow.

Rejecting a Renewal Transaction

On the scheduled run of the contract renewal script (R05), a renewal transaction is automatically generated for a contract when its target renewal date is earlier than or equal to the current date. You

can also manually generate a renewal transaction for specific contracts on demand using the Renew Now feature. For information about generating renewal transactions, see Renewing a Contract.

You can reject a renewal transaction if you do not want to process the renewal of a specific contract. When you reject a renewal transaction, the status of the contract changes from Renewal Generated to Renewal Rejected. For information about contract states, see Contract Workflow.

The **Reject Renewal** button is available on a renewal opportunity, estimate (quote), or sales order (in Pending Approval status) when the following conditions are true:

- The preceding contract where the renewal transaction is generated from has a status of Renewal Generated.
- The renewal transaction has no renewal contract yet, or has a renewal contract in Pending status (that is, contract items are not yet created for the renewal contract).

To reject a renewal transaction:

1. Open the renewal transaction record that you want to reject in view or edit mode.
   - From the Opportunities list page: Go to Transactions > Sales > Create Opportunities > List.
   - From the Estimates list page: Go to Transactions > Sales > Prepare Estimates > List.
   - From the Sales Orders list page: Go to Transactions > Sales > Enter Sales Orders > List.
   - From the contract record: Go to Contract Renewals > View Records > Contract. Click the **View** link for the contract that you want to reject the renewal transaction for. On the contract record, click the link in the **Renewal Transaction** field to open the renewal transaction.
2. On the renewal transaction, click the **Reject Renewal** button.
3. On the pop-up window, enter the reason why you are rejecting the renewal transaction in the **Reason** field.
4. Click **OK** to continue with the renewal rejection.

When you reject a renewal transaction, the status of the preceding contract where the renewal transaction is generated from changes to Renewal Rejected. If a renewal contract has been created before the transaction is rejected, the pending renewal contract is canceled (that is, the status of the renewal contract changes from Pending to Canceled).

Rejected renewal contracts will not be processed by the contract renewal script (R05). However, if you want to renew the contract again, you can click the **Renew Now** button on the contract record to generate a new renewal transaction. When you click this button, the status of the contract changes from Renewal Rejected to Renewal Generated. For information about the Renew Now feature, see Renewing a Contract.

Renewal rejected contracts can still be processed for upsell or downsell. You can perform a contract upsell or downsell by clicking the **Create Upsell Order** or **Create Downsell RMA** button on contract edit mode, or by creating a standalone sales order or return authorization. For more information, see Contract Upsell and Contracts and Returns.

For information about contract states and processes, see Contract Workflow and Managing Contracts.

Canceling a Contract

You can cancel a contract if you do not want it to be processed by Contract Renewals scripts.

The **Cancel Contract** button is available on contract records with a status of Pending, Active, or Renewal Rejected. When you click this button, the status of the contract changes to Canceled. For information about contract states, see Contract Workflow.

To cancel a contract:

1. Go to Contract Renewals > View Records > Contracts.
2. Click the View or Edit link next to the contract that you want to cancel.
3. On the contract record, click the **Cancel Contract** button.

Canceled contracts cannot be edited, and will no longer be processed for the following:

- Contract item creation – Canceled contracts are ignored by the R03 script.
- Contract renewal – Canceled contracts are ignored by the R05 script. Also, the Renew Now button is not available on the contract record.
- Contract upsell – Canceled contracts are not available for selection in the Contract field on an upsell order. Also, Create Upsell Order (which is available only on edit mode) will no longer be available on the contract record.
- Contract downsell – Canceled contracts are not available for selection in the Contract field on a downsell RMA. Also, Create Downsell RMA (which is available only on edit mode) will no longer be available on the contract record.

Closing Expired Contracts

When a contract is not renewed or canceled, it remains in active state even if its end date has passed. You can run a script to set the status of expired contracts from Active to Closed. For information about contract states, see Contract Workflow.

To close expired contracts:

1. Go to Customization > Scripting > Scripts.
2. Filter the list to show only Map/Reduce script types.
3. Look for SWV CR MR R08 Close Contracts (customscript_swv_cr_mr_r08_closecontract) and click the **Deployments** link next to it.
4. Click the **Edit** link for customdeploy_swv_cr_mr_r08_closecontract.
5. Make sure that the **Status** is set to **Not Scheduled**, and the **Deployed** box is checked.
6. Click **Save and Execute** in the Save button dropdown menu.

The script searches for contracts with a current status of Active and an end date that is before the current date. Then, it sets the status of these expired contracts to Closed.

Closed contracts cannot be edited and will no longer be processed for the following:

- Contract renewal – Closed contracts are ignored by the R05 script. Also, the Renew Now button is not available on the contract record.
- Contract upsell – Closed contracts are not available for selection in the Contract field on an upsell order. Also, Create Upsell Order (which is available only on edit mode) will no longer be available on the contract record.
- Contract downsell – Closed contracts are not available for selection in the Contract field on a downsell RMA. Also, Create Downsell RMA (which is available only on edit mode) will no longer be available on the contract record.

Contract Upsell

The Software Vertical Contract Renewals SuiteApp is designed to account for additional items that are added to a contract during the contract term.

By creating a sales order and associating it with an existing contract, new contract items are created on the existing contract.

> **Note:** The start and end dates for upsell items must be within the contract's term to be included in the contract. Any items that are sold for a period outside of the existing contract's term should be tracked on a separate, new contract.

> **Note:** If you are creating an upsell sales order for a renewal contract, you can set up the items to start earlier than the renewal contract start date if you checked the **Enable Flexible Start Date for Renewal Transactions** box on the Contract Renewals Preference page. If this preference is enabled, you can set the start date of contract items to any date between the current date and the contract end date. For more information, see Setting Up Contract Renewals Preferences.

You can process an upsell from the contract record or by creating a sales order and associating it with an existing contract. For information about which contracts can be processed for upsell, see Managing Contracts.

> **Note:** Contract items created using CSV import are not supported for upsell.

To process an upsell from the contract record:

1. Open the contract record. For information about viewing a contract record, see Viewing a Contract.
2. On the contract record, click **Edit**.
3. On the **Contract Items** subtab, check the box in the **Process** column and click **OK** for each item that you want to upsell.

   To check the **Process** box for all contract items, click **Mark All**. To clear the **Process** box for all contract items, click **Unmark All**.
4. Click the **Create Up-sell Order** button.
5. On the transaction page, verify that the contract items that you are upselling are properly set on the **Items** subtab.
6. Click **Save**.

To process an upsell by creating a standalone sales order:

1. Create a new sales order. Go to Transactions > Sales > Enter Sales Order.
2. Select the customer you are adding service for in the **End User** field.
3. In the **Contract** field on the **Items** subtab, select the contract where you are adding contract items to. This field is filtered to show only contracts for the selected end user, with the appropriate contract status. For more information, see Managing Contracts.

   Selecting the contract does two things:
   - The end date of the sales order is co-terminated with the end date of the contract you selected.
   - The contract term for the items added reflects this end date.

   By default, the items that you add to the order are given the same term, start date, and end date as the body of the sales order. You can change these start and end dates, but items with end dates that are earlier than the contract end date will not be automatically renewed.
4. Enter or accept the date of the transaction.
5. Select an item you want to add to the contract.
   - Set the quantity and price level.
   - Make any changes to the start and end dates if needed.

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6. Click **Add**.
7. Repeat Steps 5 and 6 for each item that you want to add.
8. Click **Save**.

> **ⓘ Note:** If you added items that affect percentage-based maintenance or support items, you are prompted to verify the maintenance/support line item before saving.

If the Combine Like Items preference is enabled on the Contract Renewals Preferences page, when the contract is renewed, identical items that were added by upsell sales orders are combined with matching items from the original contract if the rates are the same. For information about preference, see Setting Up Contract Renewals Preferences.

When the order is approved and then billed (which is the default setting), the items are added as contract items on the contract.

Contracts and Returns

In the Software Vertical Contract Renewals SuiteApp, removal of contract items is processed through return authorizations (RMAs). You can issue returns for items at any time during a contract's term.

You can process contract item returns from the contract record or from the sales order associated with the contract. For information about which contracts can be processed for downsell, see Managing Contracts.

> **ⓘ Note:** Validation of the items in the RMA will be performed upon saving only if the Check Log Status field is blank or set to Pending.

> **ⓘ Note:** Contract items created using CSV import are supported for downsell. If the price level is blank, the custom price level will be used in the RMA.

To process a return from the contract record:

1. Open the contract record. For information about viewing a contract record, see Viewing a Contract.
2. On the contract record, click **Edit**.
3. On the **Contract Items** subtab, check the box in the **Process** column and click **OK** for each item that you want to return.

   To check the **Process** box for all contract items, click **Mark All**. To clear the **Process** box for all contract items, click **Unmark All**

4. Click the **Create Down-sell RMA** button. A progress bar appears while the RMA is being created in the background. When the RMA is created, the page redirects to the RMA record in edit mode, with the contract items for return automatically added on the **Items** subtab.

   > **ⓘ Note:** If you have contract items with the same name and rate, these items will be combined as a single line item on the RMA created from the contract record. The initial quantity of the item on the RMA will be equal to the combined total quantity of contract items that can be returned.

5. On the **Items** subtab of the return authorization form, set the quantity of the contract items that you want to issue a return for. Also, verify that the other details of the contract items are properly set. For a return to be valid, the items and rates on the return authorization must match the items and rates on the contract.
6. Click **Save**. The page refreshes and reloads the RMA in view mode.

To issue a return from the original sales order:

1. Go to Transactions > Sales > Enter Sales Orders > List.
2. Click the **View** link next to the sales order that contains the contract items that you are returning.
3. On the sales order form, click the **Authorize Return** button. A return authorization opens, with the items and other information from the contract sales order automatically filled in.
   - The end user is selected in the **End User** field.
   - The **Order Type** field is automatically set to **Contract-Downsell**.
   - The contract is selected in the **Contract** field.
   - The contract items are shown on the **Items** subtab.

   The header dates on the RMA match the date and term fields on the sales order.
4. Adjust the items listed on the **Items** subtab to show only the items and quantities you are issuing a return for.
5. Adjust the term, start, and end dates to reflect the portion of the contract term you are issuing the return for.
6. Click **Save**.

When the return is approved, the transaction lines are available for the creation of contract items. The downsell items appear as offsetting items with a negative quantity on the contract and on the Contract Items subtab of the customer record.

When the contract is renewed, downsell contract items are omitted from the renewal transaction.

You can also enter a standalone RMA, but you must make sure that the rates for the lines items on the RMA are the same as the rates on the sales order. To create a standalone RMA, go to Transactions > Customers > Issue Return Authorizations. For more information, see the help topic Entering a Standalone Return Authorization.

> **(i) Note:** For downsell of contract items that use quantity pricing, creating a standalone RMA or manually adding the item to an RMA (regardless of how the RMA is created) may result in validation error.

Example – Renewal Impact of Upsell and Returns

Contract renewal automatically reflects upsell and returns that occur during the original term of the contract. Upsell items that extend to the end of the contract term are renewed, and items that are returned are not renewed.

For example, a software company creates an order for a new contract that includes the following items:

- A twelve-month term product license
- Three-months of on-site professional services training
- 100 seats
- A support entitlement
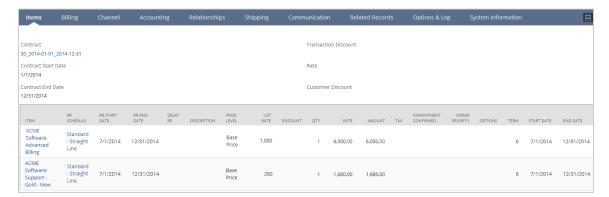
All of these items are renewable except for the training, which ends after three months. The training is not generated as a contract item.

When the order is approved and fulfilled, a contract is generated that includes all of the order line items (except for the training) as contract items.

Six months into the contract, the company purchases an add-on module. A new order is created and tied to the existing contract. When the existing contract is selected in the Contract field, the term, start and end dates are automatically updated on the transaction.

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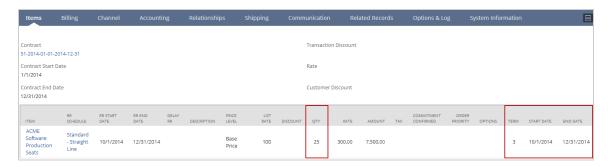
The new order includes the module as well as a support entitlement for the module.

After the order is approved and billed, the contract is updated with the new contract items.

Nine months into the contract, there is an economic downturn, and the company decides to reduce the number of seats from 100 to 75. A return authorization is entered.

The return shows as a negative line on the contract.

When the contract renews, only the renewable items from the original contract and the add-on module that was added mid-term are renewed. The 25 seats that were removed through the RMA are not renewed. Also, the support entitlement from the upsell order is combined with the support item that was included in the original contract.

Contract Renewals Reports and KPIs

The following Contract Renewals reports are available on the Contract Renewals tab:

- Under Metrics and KPIs:
  - Current Licenses | All
  - Current Licenses | Production Users
  - Current Maintenance
  - Customer Retention
  - Customer by Product Retention
  - Customer Maintenance Retention
- Under Channel Reporting:
  - Sales by Channel
  - Sales by Distributor Summary

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- Sales by Reseller Summary
- Sales by End User Summary
- Open Sales Orders

The following key performance indicators (KPIs) are available on the Contract Renewals tab under Metrics and KPIs:

- Current Licenses | Production Users | KPI
- Current Maintenance | KPI
- Customer Retention | KPI
- Customer Maintenance Retention | KPI

To set up these KPIs on your dashboard, click Set Up on the Key Performance Indicators portlet. Then, click Add Custom KPIs on the Set Up Key Performance Indicators popup window.

Scripting Contract and Contract Item Records

Use the following tables when scripting the contract or contract item records.

Contract Record

Internal ID: customrecord_contracts

Field Internal ID	FIeld UI Label	Type	List/Record	Tab	Required
custrecord_contracts_start_date	Contract Start Date	Date			Yes
custrecord_contracts_end_date	Contract End Date	Date			Yes
custrecord_swe_contract_type	Contract Type	List/Record	Contract Type		No
custrecord_contracts_bill_to_customer	Bill To Customer	List/Record	Customer		Yes
custrecord_contracts_end user	End User	List/Record	Customer		Yes
custrecord_swe_contract_value	Contract Value (Base Curr)	Currency			Yes
custrecord_swe_contract_value_base	Contract Value (Customer Primary Curr)	Currency			Yes
custrecord_swe_annual_contract_val_gross	Annual Contract Value (Gross)	Currency			No
custrecord_swe_annual_contract_val_net	Annual Contract Value (Net)	Currency			No
custrecord_swe_contract_document	Contract Document	Document			No
custrecord_swe_target_renewal_date	Target Renewal Date	Date			No

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Field Internal ID	FIeld UI Label	Type	List/Record	Tab	Required
custrecord_contract_date_renewed	Contract Renewed On	Date			Yes
custrecord_swe_original_contract	Original Contract	List/Record	Contract		No
custrecord_swe_contract_value_olr	Contract Value (OLR)	Currency			No
custrecord_swe_contract_value_clr	Contract Value (CLR)	Currency			No
custrecord_swe_annual_cv_gross_olr	Annual Contract Value - Gross (OLR)	Currency			No
custrecord_swe_annual_cv_gross_clr	Annual Contract Value - Gross (CLR)	Currency			No
custrecord_swe_annual_cv_net_olr	Annual Contract Value - Net (OLR)	Currency			No
custrecord_swe_annual_cv_net_clr	Annual Contract Value - Net (CLR)	Currency			No
custrecord_swe_days_b4_renewal	Days Before Renewal (hidden)	List/Record	Contract Renewal Preferences		No
custrecord_swe_renewals_pricing_model	Renewals License Pricing Model (hidden)	List/Record	Contract Renewal Preferences		No
custrecord_swe_contract_perp_cntrct_itms	Perpetual Contract Items	Multiple Select	Contract Items	Contract Items	No

Contract Item Record

Internal ID: customrecord_contract_item

Field Internal ID	Field UI Label	Type	List/Record	Required
custrecord_ci_contract_id	Contract ID	List/Record	Contract	Yes
custrecord_ci_process_item	Process	Check Box		Yes
custrecord_ci_quantity	Quantity	Decimal Number		Yes
custrecord_ci_item	Item	List/Record	Item	Yes
custrecord_ci_item_category	Item Category	List/Record	Item Categories	Yes
custrecord_ci_startdate	Contract Item Start Date	Date		Yes
custrecord_ci_enddate	Contract Item End Date	Date		Yes
custrecord_ci_status	Contract Item Status	Free-Form Text		Yes
custrecord_ci_state	Contract Item State	Free-Form Text		Yes
custrecord_ci_bill_to_customer	Bill To Customer	List/Record	Customer	Yes

Field Internal ID	Field UI Label	Type	List/Record	Required
custrecord_ci_end_user	End User	List/Record	Customer	Yes
custrecord_ci_customer_discount	Bill To Customer Discount	Percent		No
custrecord_ci_product_line	Product Line	List/Record	Product Lines	No
custrecord_ci_quantity_type	Quantity Type	List/Record	Quantity Types	No
custrecord_ci_quantity_cap	Quantity Cap (hidden)	List/Record	Quantity Caps (hidden)	No
custrecord_ci_maximum_quantity	Maximum Quantity (hidden)	Integer Number		No
custrecord_ci_renew_with	Renew With	List/Record	Item	No
custrecord_ci_renewal_processed_on	Renewal Processed On	Date		No
custrecord_ci_historical_install_base	Historical Install Base	Check Box		No
custrecord_ci_original_so_lineno	Original Line No	Integer Number		No
custrecord_ci_term	Contract Item Term	Decimal Number		No
custrecord_ci_order_type	Contract Item Order Type	List/Record	Order Types	No
custrecord_ci_original_transaction	Original Transaction	List/Record	Transaction	No
custrecord_ci_original_list_rate	Original List Rate	Decimal Number		No
custrecord_ci_current_list_rate	Current List Rate	Currency		No
custrecord_ci_original_discount	Original Discount	Percent		Yes
custrecord_ci_vendor	Vendor (hidden)	List/Record	Vendor	No
custrecord_ci_party	Party (hidden)	List/Record	Parties	No
custrecord_ci_ms_type	Maintenance/Support Type	List/Record	Maintenance/Support Types	No
custrecord_ci_ms_percentage	Maintenance/Support %	Percent		No
custrecord_ci_uplift_cap_basis_rate	Uplift Cap Basis Rate (hidden)	Currency		No
custrecord_ci_uplift_cap	Uplift Cap (hidden)	Percent		No
custrecord_ci_license_status	License Status	List/Record	License Statuses	No
custrecord_ci_tran_line_description	Tran Line Description	Long Text		No
custrecord_ci_end_of_life_date	End of Life Date	Date		No

Field Internal ID	Field UI Label	Type	List/Record	Required
custrecord_ci_end_of_ms_date	End of Mtce/Support Date	Date		No
custrecord_ci_replaced_with	Replaced With	List/Record	Item	No
custrecord_ci_replaced_with_renew_with	Replaced With Renew With	List/Record	Item	No
custrecord_ci_opt_out_ms	Opt-Out M/S	Check Box		No
custrecord_ci_renewals_exclusion	Renewals Exclusion	Check Box		No

Adding Transaction Fields to a Web Service Request for Contract Renewals

Contract Renewals uses some transactions (sales orders, in particular) as the basis for contract creation and renewal. When creating transactions using a web service, you must ensure that the fields being used by the Contract Renewals SuiteApp have a value in the web service request.

The following table lists the fields on a sales order that must be included in the web service request:

Field Internal ID	Field UI Label	Description	Required
Primary Information			
entity	Bill To Customer	Enter the internal id of the customer.	Yes
custbody_end_user	End User	Enter the internal id of the customer.	Yes
custbody_order_type	Transaction Order Type	Enter the transaction order type: - **1** – Contract-New - **2** – Contract-Renewal - **3** – Contract-Upsell - **13** – Contract-Downsell	Yes
custbody_tran_term_in_months	Term	Enter the contract term in months. If a value is not supplied, a default value of 12 will be used.	No
startdate	Start Date	Enter the transaction start date.	Yes
enddate	End Date	Enter the transaction end date. If no value is supplied, the end date will be computed based on the start date and contract term.	No
custbody_renewal_terms	Renewal Terms	Enter the new term of the contract (in months) when it is renewed.	No
Item Subtab			
item	Item	Enter the internal ID of the item to be added in the item sublist.	Yes
quantity	Quantity	Enter the quantity of the items to be added.	No
price	Price	Enter the price level used for the item:	No

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Field Internal ID	Field UI Label	Description	Required
		▪ **1** – Use the base price. This is the default value. ▪ **-1** – Use a custom price. If this option is used, you must also set a value for List Rate and Rate. Block Custom Price Level must also be set to 2 (No) to allow custom pricing. ▪ Internal ID of the price level created on the account.	
custcol_list_rate	List Rate	Enter a value for the item list rate.	Yes (if custom price level is used) No (if non-custom price level is used)
custcol_inline_discount	Discount	Specify the discount percentage, if applicable. Enter a value from 0 to 100. Do not append the percent sign (%).	No
rate	Rate	Enter the rate for the item. The value should be equivalent to: [list_rate]*[term]*[discount]	Yes (if custom price level is used) No (if non-custom price level is used)
amount	Amount	This is the computed amount based on the rate and quantity.	No
custcol_swe_contract_item_term_months	Term	Enter the item term in months. By default, this is automatically populated based on the contract term.	No
custcol_swe_contract_start_date	Start Date	Enter the item start date. By default, this is automatically populated based on the transaction start date.	No
custcol_swe_contract_end_date	End Date	Enter the item end date. By default, this is automatically populated based on the transaction end date.	No
Options & Log Subtab			
custbody_block_custom_price_level	Block Custom Price Level	Enter either **1** (Yes) or **2** (No). Yes – This blocks or does NOT allow items whose Item Category is selected or set For Custom Price Block preference (see Setting Up Contract Renewals Preferences) to be included or added to the sales order for web service processing. No – This allows items whose Item Category is selected or set For Custom Price Block preference (see Setting Up Contract Renewals Preferences) to be included or added to the sales order for web service processing.	Yes (if custom price level is used) No (if non-custom price level is used)

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Field Internal ID	Field UI Label	Description	Required
custbody_allow_custom_price_lvl_for_ms	Allow Custom Price Level for M/S Items	Enter either **1** (Yes) or **2** (No).	No
custbody_custom_price_is_annual_rate	Custom Price Entered is Annual Rate	Enter either **true** or **false**.	No

Contract Renewals Best Practices

The following are best practices that you can follow to avoid known issues and optimize use of the Contract Renewals SuiteApp.

Customizations Affecting Items

Any customization that restricts item availability should allow the Zero Price Item to be accessible to all transactions.

Issue with Using Make Copy on Customer Records with Contract Items

In accounts with **Make Copy** available under **Actions**, do not use this to create copies of Customer records with Contract Items. Doing so may also create copies of the Contract Items in the duplicate Customer record, which will cause issues. If you want to use Make Copy to create a duplicate of a Customer record with Contract Items, you should remove the Contract Items from the Customer record first. Or, you can avoid using the Make Copy action and create a new Customer record instead.

Transaction and Renewal Limits

SWV Contract Renewals SuiteApp follows the transaction record limits on the number of lines that can be submitted and displayed for transactions. Follow the guidelines in this section to ensure that your contract renewals do not exceed the maximum number of lines or items. For more information, see the help topic Limits for Display of Transaction Lists and Sublists.

These limits were tested for the sales order creation process within the SuiteApp:

- For display of transaction lines – The maximum number of lines that can appear on a transaction record sublist is 10,000 lines.

- For submission of transactions – The maximum number of lines submitted through the user interface is 500 lines. For transactions submitted through CSV import or SOAP web services, the limit is 5,000 lines.

For more information about line limitations in NetSuite, see the help topic Line Limitations for Transactions.

The contract item creation script (R03) can successfully process sales orders (including upsells) with up to 10,000 lines. However, the contract renewal script (R05) can process only up to 5,000 items for renewal. When a contract with more than 5,000 items is processed for renewal, the R05 script will fail and the contract will not be renewed.

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The following data has been tested for the SuiteApp. Tests were done using basic processes for sales order creation, contract item creation, and contract renewal, without any customizations.

Items on the sales order (including upsell)	Items on the contract record (processed by R03)	Items on the renewal contract (processed by R05)
800 (combination of license term items and M/S items)	800	800 (excluding non-renewable items)
1,000 license term items	1,000	1,000
1,500 license term items	1,500	1,500
3,000 license term items	3,000	3,000
5,000 license term items	5,000	5,000
5,001 license term items	5,001	No renewal transaction
10,000 license term items	10,000	No renewal transaction

Software Vertical Contract Renewals References

The following sections provide information about how the Software Vertical Contract Renewals SuiteApp calculates values that are reflected on contract records.

- Contract Value Calculation
- Contract Term Calculation

Contract Value Calculation

Contract values are calculated based on the Renewals License Pricing Model that you selected on the Contract Renewals Preferences page. For more information, see Setting Up Contract Renewals Preferences.

This section shows how contract values are calculated for each pricing model:

- Historical License List Rate - From Tran Line
- Current License List Rate - Price Level on Customer Record
- Current License List Rate - Price Level on Contract
- Current License List Rate - Price Level on Contract with Custom Price Handling

The following variables are used to calculate the contract value:

Variable	Description
annualTerm	Refers to the contract term. A value of 12 is used when the term type is annual, otherwise a value of 1 is used.
ciTerm	Refers to the contract item term. A value of 1 is used when there is no term defined, otherwise the value of the original contract item term is used.
contractRenewalTerms	Refers to the new term of the contract (in months) when it is renewed.
contractLR	Refers to the current item list rate based on the contract price level.

Variable	Description
currentLR	Refers to the current item list rate based on the base price on the item record.
customerLR	Refers to the current item list rate based on the customer price level.
origLR	Refers to the original item list rate from the transaction.
origDC	Refers to the original discount.
qty	Refers to the quantity of the contract items.

Historical License List Rate - From Tran Line

This pricing model calculates the contract value based on the price level and list rate specified on the contract's source transaction.

For information about the contract value fields on a contract record, see Contract Fields.

Field	Formula
Contract Value (Customer Primary Curr)	`origLR * (1-origDC) * qty * ciTerm`
Contract Value (Base Curr)	`origLR * (1-origDC) * qty * ciTerm`
Annual Contract Value (Gross)	`origLR * qty * annualTerm`
Annual Contract Value (Net)	`origLR * (1-origDC) * qty * annualTerm`
Annual Renewal Value (Gross)	`origLR * qty * 12`
Annual Renewal Value (Net)	`origLR * (1-origDC) * qty * 12`
Renewal Term Renew Value (Gross)	`origLR * qty * contractRenewalTerms`
Renewal Term Renew Value (Net)	`origLR * (1-origDC) * qty * contractRenewalTerms`

> **Note:** Even if a renewal item is different from the original item, this pricing model will still use the list rate of the original item in the source transaction.

Current License List Rate - Price Level on Customer Record

This pricing model calculates the contract value based on the price level set on the customer record and its corresponding price specified on the item record. If there is no price level specified on the customer record, the base price on the item record is used to calculate the contract value.

For information about the contract value fields on a contract record, see Contract Fields.

Field	Has a Customer Price Level	Annual Term	Formula
Contract Value (Customer Primary Curr)	No	Yes	`(currentLR/12) * (1-origDC) * qty * ciTerm`
	No	No	`currentLR * (1-origDC) * qty * ciTerm`
	Yes	Yes	`(customerLR/12) * (1-origDC) * qty * ciTerm`
	Yes	No	`customerLR * (1-origDC) * qty * ciTerm`

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Field	Has a Customer Price Level	Annual Term	Formula
	—	—	`customerLR = customerLR /exchangerate` **Note:** This formula is used when the Multiple Currencies feature is enabled.
Contract Value (Base Curr)	No	Yes	`(currentLR/12) * (1-origDC) * qty * ciTerm`
	No	No	`currentLR * (1-origDC) * qty * ciTerm`
	Yes	Yes	`(customerLR/12) * (1-origDC) * qty * ciTerm`
	Yes	No	`customerLR * (1-origDC) * qty * ciTerm`
Annual Contract Value (Gross)	No	Yes	`(currentLR/12) * qty * annualTerm`
	No	No	`currentLR * qty * annualTerm`
	Yes	Yes	`(customerLR/12) * qty * annualTerm`
	Yes	No	`customerLR * qty * annualTerm`
Annual Contract Value (Net)	No	Yes	`(currentLR/12) * (1-origDC) * qty * annualTerm`
	No	No	`currentLR * (1-origDC) * qty * annualTerm`
	Yes	Yes	`(customerLR/12) * (1-origDC) * qty * annualTerm`
	Yes	No	`customerLR * (1-origDC) * qty * annualTerm`
Annual Renewal Value (Gross)	—	—	`origLR * qty * 12`
Annual Renewal Value (Net)	—	—	`origLR * (1-origDC) * qty * 12`
Renewal Term Renew Value (Gross)	—	—	`origLR * qty * contractRenewalTerms`
Renewal Term Renew Value (Net)	—	—	`origLR * (1-origDC) * qty * contractRenewalTerms`

Current License List Rate - Price Level on Contract

This pricing model calculates the contract value based on the price level set on the contract's source transaction and its corresponding price specified on the item record. If a custom price level is specified on the source transaction (that is, contract price level is blank), the base price on the item record is used to calculate the contract value.

For information about the contract value fields on a contract record, see Contract Fields.

Field	Has a Contract Price Level	Annual Term	Formula
Contract Value (Customer Primary Curr)	No	Yes	`(currentLR/12) * (1-origDC) * qty * ciTerm`

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Field	Has a Contract Price Level	Annual Term	Formula
	No	No	`currentLR * (1-origDC) * qty * ciTerm`
	Yes	No	`contractLR * (1-origDC) * qty * ciTerm`
	—	—	`contractLR = contractLR /exchangerate` ⓘ **Note:** This formula is used when the Multiple Currencies feature is enabled.
Contract Value (Base Curr)	No	Yes	`(currentLR/12) * (1-origDC) * qty * ciTerm`
	No	No	`currentLR * (1-origDC) * qty * ciTerm`
	Yes	No	`contractLR * (1-origDC) * qty * ciTerm`
Annual Contract Value (Gross)	No	Yes	`(currentLR/12) * qty * annualTerm`
	No	No	`currentLR * qty * annualTerm`
	Yes	No	`contractLR * qty * annualTerm`
Annual Contract Value (Net)	No	Yes	`(currentLR/12) * (1-origDC) * qty * annualTerm`
	No	No	`currentLR * (1-origDC) * qty * annualTerm`
	Yes	No	`contractLR * (1-origDC) * qty * annualTerm`
Annual Renewal Value (Gross)	—	—	`origLR * qty * 12`
Annual Renewal Value (Net)	—	—	`origLR * (1-origDC) * qty * 12`
Renewal Term Renew Value (Gross)	—	—	`origLR * qty * contractRenewalTerms`
Renewal Term Renew Value (Net)	—	—	`origLR * (1-origDC) * qty * contractRenewalTerms`

Current License List Rate - Price Level on Contract with Custom Price Handling

This pricing model calculates the contract value based on the price level set on the contract's source transaction and its corresponding price specified on the item record, with the option to set a custom price on the source transaction. If a custom price level is specified on the source transaction (that is, contract price level is blank), the original list rate specified on the source transaction is used to calculate the contract value.

When a custom price is set on the contract and the Renew With item is the same as the original item, the renewal contract uses the custom price for the item on the source transaction. If the Renew With item is different, the renewal contract uses the base price of the renewal item.

For information about the contract value fields on a contract record, see Contract Fields.

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> **ⓘ Note:** The computation is the same for annual or non annual contract terms.

Field	Has a Contract Price Level	Formula
Contract Value (Customer Primary Curr)	No	`origLR * (1-origDC) * qty * ciTerm`
	Yes	`contractLR * (1-origDC) * qty * ciTerm`
	—	`contractLR = contractLR/exchangerate` **ⓘ Note:** This formula is used when the Multiple Currencies feature is enabled.
Contract Value (Base Curr)	No	`origLR * (1-origDC) * qty * ciTerm`
	Yes	`contractLR * (1-origDC) * qty * ciTerm`
Annual Contract Value (Gross)	No	`origLR * qty * annualTerm`
	Yes	`contractLR * qty * annualTerm`
Annual Contract Value (Net)	No	`origLR * (1-origDC) * qty * annualTerm`
	Yes	`contractLR * (1-origDC) * qty * annualTerm`
Annual Renewal Value (Gross)	—	`origLR * qty * 12`
Annual Renewal Value (Net)	—	`origLR * (1-origDC) * qty * 12`
Renewal Term Renew Value (Gross)	—	`origLR * qty * contractRenewalTerms`
Renewal Term Renew Value (Net)	—	`origLR * (1-origDC) * qty * contractRenewalTerms`

Contract Term Calculation

This section shows how the Software Vertical Contract Renewals SuiteApp calculates the contract term based on the start and end dates that you enter on a sales order. For information about creating a contract, see Creating a New Contract.

The following variables are used to calculate the contract term:

Variable	Description
DD	Day of the month
MM	Month number
YYYY	Year
n	Number of full months between start date and end date, integer component of the contract term
f	Decimal component of the contract term

To show how the SuiteApp calculates the contract term, use the following start and end dates as an example.

Start Date		End Date		Term
14 March 2016	Start Date DD = 14 Start Date MM = 03 Start Date YYYY = 2016	31 December 2017	End Date DD = 31 End Date MM = 12 End Date YYYY = 2017	n + f

The SuiteApp uses the following logic to compute for the integer component (n) and the decimal component (f) of the term.

Steps to Calculate Contract Term	Sample calculation	

Step 1: Get the number of months between the contract's start date and end date (n). This is the integer component of the term.	`n = ((End Date YYYY - Start Date YYYY) * 12) - Start Date MM + End Date MM`
	
	`n = ((2017 - 2016) * 12) — 03 + 12`
	
	`n = 21 months`
		`n = 21`

Step 2: Based on the start date, get the date of the last full month before the end date (x). To get x, add the number of months (n) to the start date.
 	
1. If x is later than the end date, subtract 1 month until x becomes earlier than or equal to the end date.
2. If both x and the start date have the same value for DD, subtract 1 day.
3. If x is equal to the end date, then the term is equal to n (from Step 1). Otherwise, continue with Step 3 to calculate the decimal component (f) of the term.
	`x = Start Date + n`
	
	`x = 14 March 2016 + 21 months`
	
	`x = 14 December 2017`
	
	This example falls under condition 2.2, both x and the start date have the same value for DD, which is 14. Therefore, 1 day is subtracted from the initially calculated x value.
	
	`x = 14 December 2017 — 1 day`
	
	`x = 13 December 2017`
		`x = 13 December 2017`

Step 3: Get the date of the start of the month following x (y).	`y = x + 1 day`
	
	`y = 13 December 2017 + 1 day`
	
	`y = 14 December 2017`
		`y = 14 December 2017`

Step 4: Based on the start date, get the date of the last full month after the end date (z).
 	
If both z and the start date have the same value for DD, subtract 1 day.
	`z = Start Date + n + 1 month`
	
	`z = 14 March 2016 + 21 months + 1 month`
	
	`z = 14 January 2018`
	
	For this example, both z and the start date have the same value for DD, which is 14. Therefore, 1 day is subtracted from the initially calculated z value.
	
	`z = 14 January 2018 — 1 day`
	
	`z = 13 January 2018`
		`z = 13 January 2018`

Step 5: Get the number of days between the end date and y, and add 1 day (d1).	`d1 = (End Date — y) + 1 day`
	
	`d1 = (31 December 2017 — 14 December 2017) + 1 day`
	
	`d1 = 17 + 1 = 18`
		`d1 = 18`

Step 6: Get the number of days between the last full month after the end date (z) and the start of	`d2 = (z — y) + 1 day`
	
	`d2 = (13 January 2018 — 14 December 2017) + 1 day`
		`d2 = 31`

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Steps to Calculate Contract Term	Sample calculation	
the month following the last full month before end date (y), and add 1 day (d2).	`d2 = 30 + 1 = 31`	

Step 7: Get the decimal component (f) by dividing d1 by d2. Round off to the nearest three decimal places.	`f = d1/d2`
	
	`f = 18/31 = 0.581`
		`f = 0.581`

Step 8: Calculate the term by adding the integer component (n, from Step 1) and decimal component (f, from Step 7).	`Term = n + f`
	
	`Term = 21 + 0.581 = 21.581`
		`Term = 21.581`

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