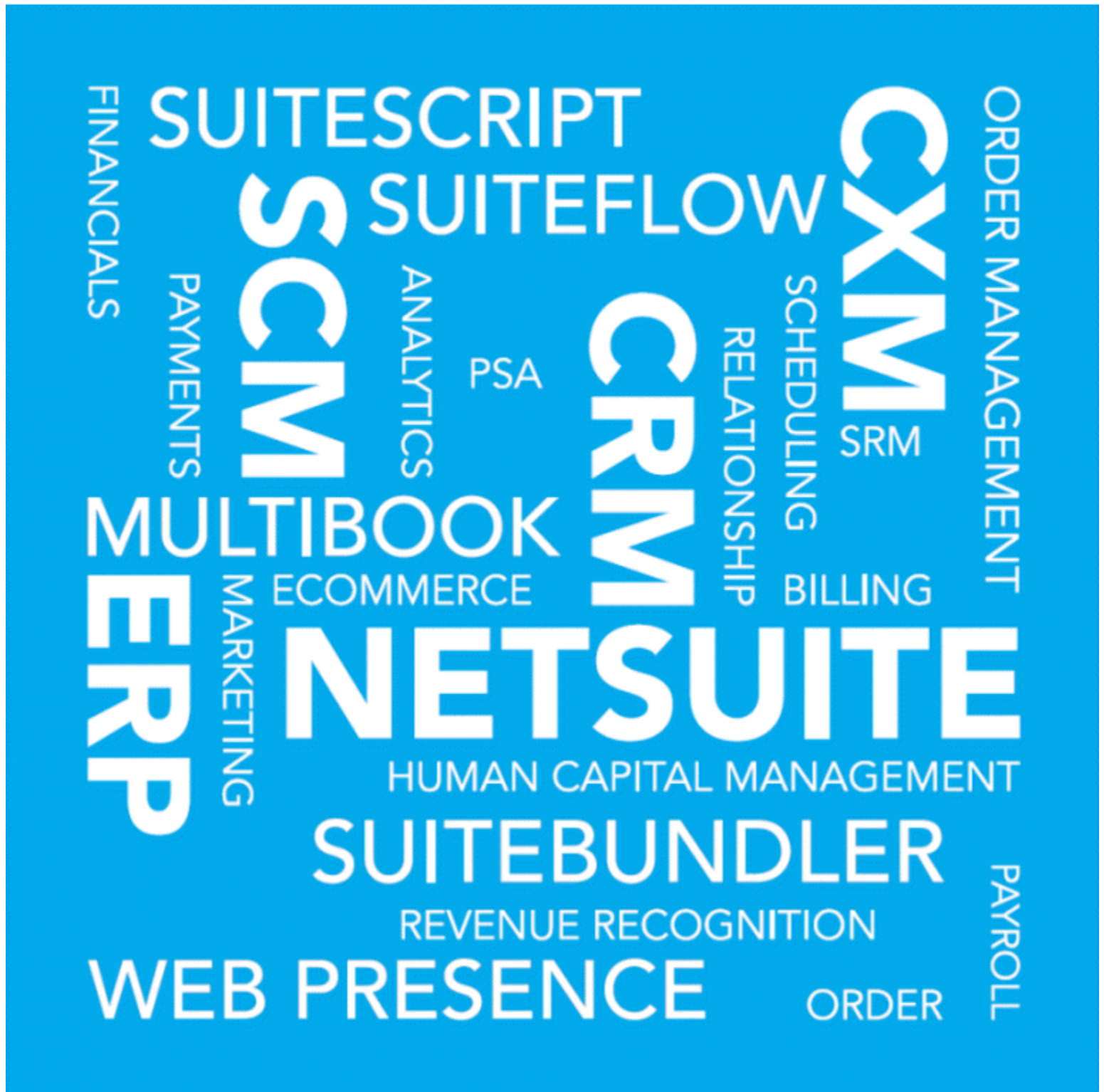


# NetSuite Point of Sale Release Notes 2017.2



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- Did you find any errors?
- Is the information clear?
- Are the examples correct?
- Do you need more examples?
- What did you like most about this document?

Click [here](#) to send us your comments. If possible, please provide a page number or section title to identify the content you're describing.

To report software issues, contact NetSuite Customer Support.

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# NetSuite POS Release Guidelines 2017.2

**Applies to:** NetSuite Point of Sale (NSPOS)

This chapter provides resources, recommendations and additional verification points to ensure your NetSuite Point of Sale (POS or NSPOS) upgrade and day-to-day operations perform optimally and efficiently.

- [Resources and Recommendations](#)
- [Areas to Verify prior to Upgrading](#)

**Warning:** Do not update your bundle without discussion and approval from NetSuite Technical Support or Professional Services. Otherwise, the update could impact the functionality of your NetSuite POS registers.

## Resources and Recommendations

Use the guidelines in this section to help ensure your NetSuite POS upgrade and daily operations are a success.

- [Payment Application Data Security Standards](#)
- [Third Party Software and Licenses](#)
- [Verify your Registers after the upgrade](#)
- [Recommendations about mass Item and Customer updates](#)
- [Planning efficient rollouts for new Stores and Registers](#)
- [Windows® Updates and Performance](#)
- [Register Time Synchronization via the Internet](#)
- [RAFS vs. File System folder](#)

## Payment Application Data Security Standards

NetSuite POS is a PA-DSS validated application. The Payment Application Data Security Standard (PA-DSS) guide describes the Payment Card Industry (PCI) initiative and lists recommendations for using NetSuite POS in a PCI DSS compliant environment.

The guide includes details about installing and configuring a compliant system, best practices for maintaining compliance, and a list of **operating systems (OS) validated for use on your NetSuite POS terminals**.

**Important:** See the **Payment Application Data Security Standard (PA-DSS) guide** appropriate to your NetSuite POS version in the NetSuite Help > [User Guides](#). Log into NetSuite ERP first.

## Third Party Software and Licenses

A NetSuite POS implementation can include software governed by licenses from third parties ("Third Party Software" and "Third Party License"). All third party software licensed for use with NetSuite POS is subject

to the terms and conditions of the corresponding Third Party License, notwithstanding anything to the contrary in the agreement governing the POS Software. NetSuite | Oracle makes no representation or warranty concerning Third Party Software and shall have no obligation or liability with respect to Third Party Software.

If you have questions about Third Party Software and Licenses used with NetSuite POS, we recommend logging into NetSuite ERP and reviewing the following PDF:

[NetSuite Point of Sale \(NSPOS\) Third Party Software and Licenses - 17.2 thru 18.1](#)

## Verify your Registers after the upgrade

When your NSPOS upgrade is complete, we recommend testing at least one register in each store. You can find our **Terminal Verification Checklist – NSPOS 2017.1** in the NetSuite Help Center > [User Guides](#) NetSuite Point of Sale section. Log into NetSuite ERP first.

## Recommendations about mass Item and Customer updates

**We recommend against performing mass item and customer updates during business hours when transactions are occurring on your registers.** NetSuite POS integrates with NetSuite to provide Enterprise Resource Planning (ERP) tools for managing your items, customers and other aspects of your business. You can update items and customers in NetSuite manually or through CSV imports.

Updates in NetSuite periodically download to your POS registers to ensure all information is synchronized and current. NetSuite POS performs synchronization uploads to NetSuite of sales and other transactions that occur at the register. This is distributed to other registers in your store through the Amazon cloud server.



**Important:** Item and customer updates of **over 60,000 records per day** can impact synchronization across the network. If mass updates must occur during business hours, we recommend limiting each update to 60,000 records or less within a single 24-hour period.

## Planning efficient rollouts for new Stores and Registers

When opening one or more new stores, it is important to consider the time needed to prepare the registers with current information from your NetSuite ERP setup. This consideration also applies to registers that were previously active but have been turned off for a long time.

When a register is staged, all information is fully loaded and up to date. After staging, registers receive only the information needed to keep them current. When a register is turned off, NetSuite holds all new transactions, price changes and customer information for download to the register later.

If a register is turned off for an extended period and then turned back on, the size of the update can be large and take a while to download. This might delay a register from being ready when you need it.



**Important:** Excessive download times can delay registers from being ready to accept sales transactions and can affect overall server performance. This delay can be critical in the event of a new store opening.

To ensure your new registers are ready for business, NetSuite recommends the following:

1. Stage registers **24-48 hours before first use**. If no major changes to NetSuite ERP data will occur before using the register, the time between staging and first use can be longer without a significant impact on performance.

2. If a store rollout requires new item and customer information, if possible, be sure to add or import the information to NetSuite ERP **before** staging new registers. Then the new information will be included during the staging process.
3. To reduce the impact to existing registers, large item and customer changes in NetSuite ERP should be performed in small increments. A good guideline is **limiting changes to 60,000 records** or less **per day**, performed outside of business hours.

If you are not certain how to limit the number of records or if this guideline does not fit your rollout schedule, please contact NetSuite Technical Support for assistance.

4. For registers that have been turned off for a long time, **restaging a register can be the fastest method** for bringing it up to date. Staging is generally quicker than waiting for large downloads to complete.



**Important:** Before restaging a register workstation that was set to **Inactive** in NetSuite ERP, clear the **Inactive** box on the NetSuite RA-Workstation record, **Save** and then wait **15 minutes** for the active status to sync between the server and the workstation.

## Windows® Updates and Performance

Applying a Windows update to registers during business hours can significantly affect performance. NetSuite recommends applying updates only when the location is closed.

## Register Time Synchronization via the Internet

A register's clock can become out of sync with the internet time used by the Amazon Web Services (AWS) server. Clock variations of more than plus or minus five minutes can cause data replication functions to fail. Gift card functionality and other POS services are also dependent on keeping the time synchronized.

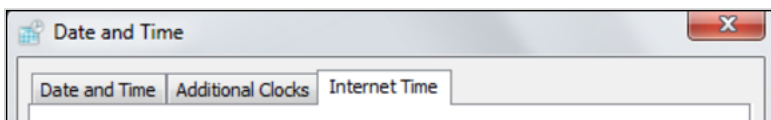
The Push Agent log can be used to determine if replication errors were caused by times being out of sync. Technical Support can help you make the determination.



**Note:** Some businesses restrict access to the Internet Time tab described in this procedure.

### To resynchronize a register's clock:

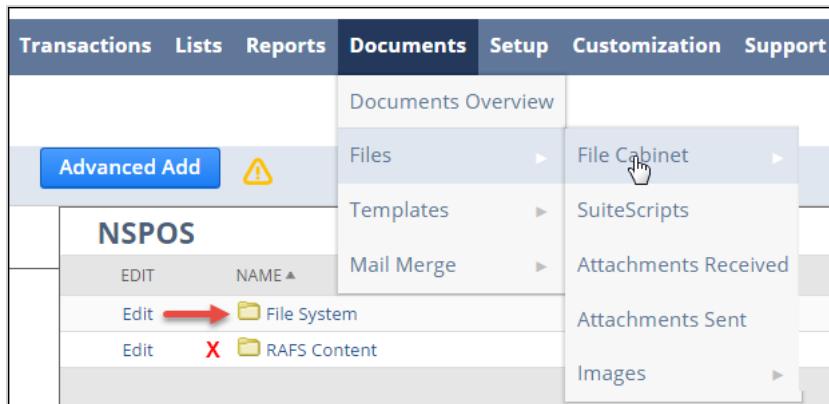
1. Tap the Windows **Start** button and search for **date and time**.  
Or go to Control Panel > Date and Time.
2. Open the **Internet Time** tab.
3. Tap **Change Settings**.
4. Tap **Update now** and then **OK**.



## RAFS vs. File System folder

We no longer use the RAFS Content storage location in NetSuite ERP to manage files. All storage should take place in the **File Cabinet > File System**. You can ignore the RAFS folder but, to avoid confusion, you can also remove it. You should back up any files still in the RAFS location if you choose to remove it.





**Important:** Back up any files remaining in the **RAFS Content** folder before removing the folder.

Contact NetSuite Technical Support if you have any questions.

## Areas to Verify prior to Upgrading

We recommend verifying these areas before upgrading to NetSuite POS 2017.2.

- [Verify MS SQL 2008 R2 SP 3 loaded on Workstations](#)
- [Verify Gift Card and Gift Certificate setup](#)
- [Verify RA-Location Type is set for all Location records](#)
- [Verify Buttons updated for Remove Discounts](#)

### Verify MS SQL 2008 R2 SP 3 loaded on Workstations

For NetSuite POS 2016.2 and above, you must have Microsoft® SQL Server 2008 R2 Service Pack 3 installed on each workstation. You can use either of the following methods to verify the pack installed. Note that the methods may vary across different versions of Windows.

- **Run a T-SQL command.** Enter the command `SELECT @@VERSION`.
- **View installed updates.** Go to Control Panel > Programs and Features > View installed updates.

Or you can use the following methods to obtain a version number you can combine with **SQL Server 2008** for internet search criteria.

- **Use the SQL Server Management Studio.** Right-click on the instance name and select Properties.
- **Review the SQL server file.** Go to C:\Program Files\Microsoft SQL Server\MSSQL10\_50.MSSQLSERVER\MSSQL\Binn. (Your file path may vary.) Right-click on sqlservr.exe and select Properties.

Please contact NetSuite Technical Support if you require assistance.

### Verify Gift Card and Gift Certificate setup

Release 2016.2 and above requires that the **Location** record > **RA-Currency** field be set to the correct currency for **every** retail location selling a gift card or certificate. Otherwise, sales of gift cards or certificates may fail after upgrading to 2016.2 or greater.

See the help topic [Set up NSPOS Gift Cards/Certificates in NetSuite ERP](#) in the NetSuite POS Administrator Guide for the steps to verify and configure your Location records for use with gift cards and certificates. Log into NetSuite first.

**This action binds gift cards and certificates sold in each updated Location to use that currency only.** By default, the **Location > RA-Currency** field is blank.

## Verify RA-Location Type is set for all Location records

After updating the bundle to the latest version, you should ensure that the RA-Location Type is set on each of your NetSuite ERP Location records. This field is required, but it may not have been set for customers that were using NetSuite ERP prior to being implemented on NetSuite POS. This one-time task is critical to allowing multiple NetSuite POS features to function correctly.

The possible values include Headquarters, Retail Store, Distribution Center and others. Please choose the value that meets your business needs for each Location.

A single Location must be set to **Headquarters**.

### To review or set the RA-Location Type:

1. Log in to NetSuite as an administrator.
2. Go to Setup > Company > Locations.
3. Click **View** for the first Location.
4. If the **RA-Location Type** is not set:
  1. Click **Edit**.
  2. Select the **RA-Location Type**.
  3. Click **Save**.
5. Repeat for the next Location record as needed.

The screenshot shows the 'Edit' form for a Location record in NetSuite. At the top, there is a 'Search' button and an 'Actions' dropdown. Below these are several fields: 'RA - PRICES INCLUDE TAX' with an unchecked checkbox, 'RA - LOCATION TYPE' with a dropdown menu showing 'Retail Store' (highlighted by a red arrow), 'RA - DEFAULT CUSTOMER' with a dropdown menu showing 'Customer Name 135 anonymous location', and 'RA - CURRENCY' with a dropdown menu showing 'US Dollar'.

**Note:** Only one Location can be set as **Headquarters**.

## Verify Buttons updated for Remove Discounts

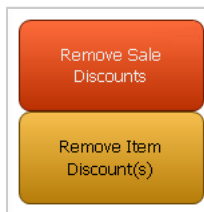
Starting in NetSuite POS 2016.2.4, the underlying functions changed for the buttons that remove discounts from sales transactions. Your sales associates use these buttons to remove line-item or overall sale discounts applied to transactions before tendering out the sale.

The procedures for using the buttons did not change, but you might need to update the functions mapped to the Remove Discount buttons. If you have already performed the function updates using these steps, it is **not** necessary to repeat the process.

### Who should verify and update?

- Customers new to NSPOS with 2017.1 or 2017.2 as their first install **do not** need to update the buttons.
- Customers who made the button updates in NSPOS 2016.2.4 through 2016.2.8 or greater **do not** need to update. However, we recommend that you **verify** the button setup.
- Customers upgrading from 2016.2.0 through 2016.2.3 **must perform the button update** after upgrading to 2017.1 or 2017.2.

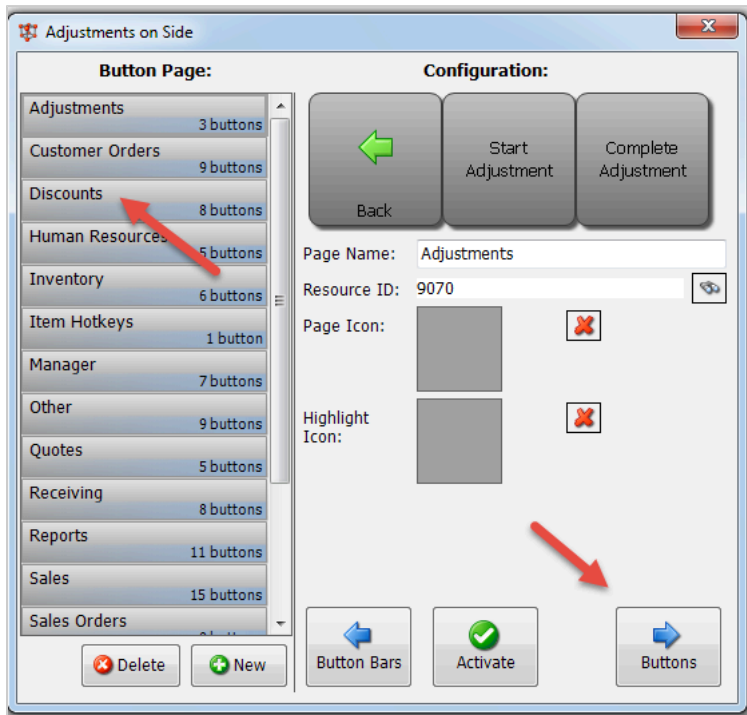
If you need to perform the update, do so on one register in each **Workstation Group** set up for your business. Changes made to one register replicate to other registers in the group. Note that your button names, appearance, and locations may vary.



**Important:** If you have questions about any step or cannot locate the new functions, please open a case with Technical Support as soon as possible.

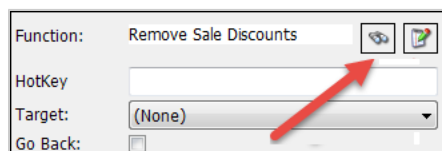
### A. To open the Button Edit screen for Discounts:

1. Sign on to a NetSuite POS register as an administrator.
2. Tap Manager Functions > System Configuration > Button Edit.  
Or press **Ctrl+F12**, search for and tap **Button Edit**.
3. Tap the **Side** button bar option and tap **Pages**.
4. Tap **Discounts**, and then **Buttons**.

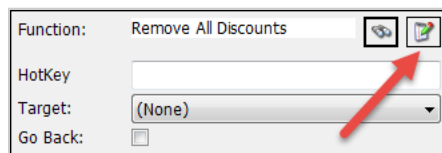


## B. To verify and update Remove Sale Discounts:

1. Tap **Remove Sale Discounts**.
2. On the **Function** field, tap the binoculars (search) icon.



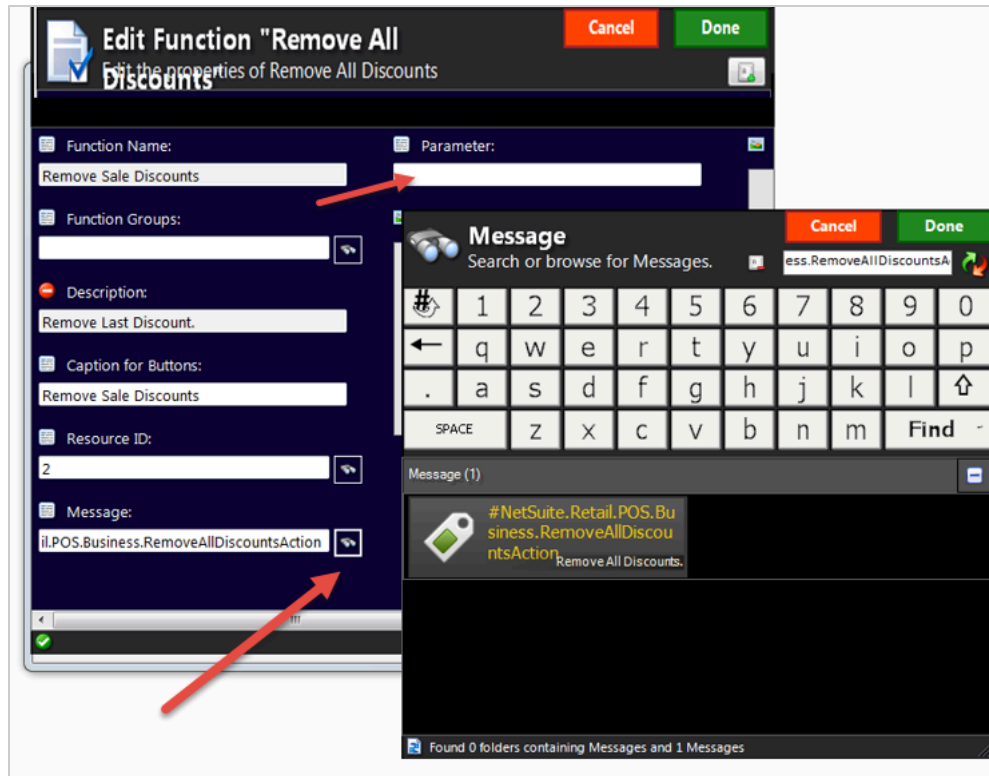
3. Search for **Remove All Discounts**.  
Both Remove All Discounts and Remove Sale Discounts will display.
4. Tap **Remove All Discounts**.
5. Tap **Done**.
6. On the **Function** field, tap the **Edit** icon.



7. Tap **Yes**.  
The **Message** field should show:  
`#NetSuite.Retail.POS.Business.RemoveAllDiscountsAction`.



8. If not, tap the **Message** binoculars (search) icon.  
If yes, tap **Cancel** and go to the steps to **Verify and update Remove Item Discounts**.
9. Clear any text from the **Parameter** field.
10. Search for: `#NetSuite.Retail.POS.Business.RemoveAllDiscountsAction`.



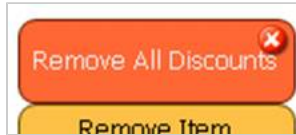
11. Tap `#NetSuite.Retail.POS.Business.RemoveAllDiscountsAction`.
12. Tap **Done**.

### C. To verify and update Remove Item Discounts:

1. Tap **Remove Item Discount(s)**.  
Your setup may show Remove Discount instead.
2. On the **Function** field, tap the binoculars (search) icon.
3. Search for **Remove Last Discount**.  
Both Remove Discount and Remove Last Discount will display.
4. Tap **Remove Last Discount**.
5. Tap **Done**.
6. On the **Function** field, tap the **Edit** icon and tap **Yes**.  
The **Message** field should show:  
`#NetSuite.Retail.POS.Business.RemoveLastDiscountAction`.
7. If not, tap the **Message** binoculars (search) icon.  
If yes, tap **Cancel** and exit the **Button Edit** window.
8. Clear any text from the **Parameter** field.
9. Enter: `#NetSuite.Retail.POS.Business.RemoveLastDiscountAction`.

10. Tap **#NetSuite.Retail.POS.Business.RemoveLastDiscountAction**.
11. Tap **Done**.
12. Tap the **X** in the right-hand corner to exit.

If a setup failed, the button will display a red x.



13. Restart **NetSuite POS** on this register and all other registers in the Workstation Group. The changes will replicate to other registers within 15 minutes, but only become effective after each register is restarted.



**Important:** Repeat all steps for one register in each Workstation Group.

# NetSuite POS 2017.2.2 Release Notes

**i Applies to:** NetSuite Point of Sale (NSPOS)

This chapter lists the important updates provided in NetSuite Point of Sale (POS or NSPOS) version 2017.2.2. Updates are not available to NetSuite POS customers until they have upgraded to the release. NetSuite will modify these release notes when needed to provide our customers with additional information.

- [Required User Action](#)
- [Prerequisites](#)
- [2017.2.2 Release Contents](#)
- [Update the NetSuite Point of Sale Bundle to 2017.2.1.2](#)

## Required User Action

To use the functionality provided in the 2017.2.2 release, you must update your NSPOS bundle to 2017.2.1.2.

- [Update the NetSuite Point of Sale Bundle to 2017.2.1.2](#)

**i Note:** There is no new bundle version for 2017.2.2. You will install the bundle versioned as 2017.2.1.2.

**Your assistance will be required to perform the upgrade.** Technical Support or another representative will contact you in advance to agree on the details.

**Upgrade verification and UAT:** When your NetSuite POS upgrade is complete, we recommend testing at least one register in each store. You can find our **Terminal Verification Checklist - NSPOS 2017.1 - 2017.2** in the NetSuite Help Center > [User Guides](#) > NetSuite Point of Sale section. Log into NetSuite before clicking the link.

You can use the checklist for verification after the upgrade and as a guide for performing initial User Acceptance Testing (UAT).

## Prerequisites

Besides the bundle, all 2017.2.X releases require certain software packages to be installed on each register or server terminal. For the requirements list and guidelines, see [Prerequisites](#) in the NetSuite POS 2017.2 Release Notes section.

## 2017.2.2 Release Contents

### Product Enhancements 2017.2.2

This release does not include any enhancements to NetSuite Point of Sale (NSPOS).

## Fixes 2017.2.2

NSPOS 2017.2.2 includes the following fixes.

### Customer Profile Report corrected for Purchased Item Amounts


We corrected an issue that caused the NSPOS Customer Profile Report to list incorrect values for the number of items purchased by customers.


### NSPOS Validated Return searches now include Cash Sales from NetSuite ERP

In the previous release, NSPOS searches for validated returns did not include cash sale transactions made through NetSuite ERP. NSPOS will now show NetSuite ERP cash sales and invoices.



## Update the NetSuite Point of Sale Bundle to 2017.2.1.2

To use the functionality provided in the 2017.2.2 release, you must update your NetSuite Point of Sale bundle to 2017.2.1.2. Follow the instructions below.

 **Note:** There is no new version of the bundle for 2017.2.2. You will install the bundle versioned as 2017.2.1.2.

 **Important:** Updating a bundle requires an Administrator role. If you need assistance performing this update and verifying settings, please contact NSPOS Support or Professional Services.

### To update the NetSuite Point of Sale bundle:

1. Log in to NetSuite as an administrator.
2. Go to Customization > SuiteBundler > Search & Install Bundles > List.
3. On the Installed Bundles page, locate **NetSuite Point of Sale Bundle** with Bundle ID **27525**.  
Under the version number, the blue  icon indicates there is a newer version available. Placing your mouse over the icon displays more information. If you do not see this icon, your installed bundle is already up to date and no further action is required.
4. Place your mouse over the green  icon and click **Update**. Allow time for the page to load.
5. Review the updates to be installed.  
NetSuite alerts you on-screen of any conflicts or issues that may occur with the installation. If in doubt, please stop and contact NetSuite Technical Support.
6. Click **Update Bundle**.
7. Click **OK** at the prompt.  
The Updated Bundles page displays the install progress. When complete, if the bundle updated correctly, a green check mark displays in the **Status** column.



# NetSuite POS 2017.2.1 Release Notes

**i Applies to:** NetSuite Point of Sale (NSPOS)

This chapter lists the important updates provided in NetSuite Point of Sale (POS or NSPOS) version 2017.2.1. Updates are not available to NetSuite POS customers until they have upgraded to the release. NetSuite will modify these release notes when needed to provide our customers with additional information.

- [Required User Action](#)
- [Prerequisites](#)
- [2017.2.1 Release Contents](#)
- [Update the NetSuite Point of Sale Bundle to 2017.2.1](#)

## Required User Action

To use the functionality included in this release, your business must perform the following steps:

- [Update the NetSuite Point of Sale Bundle to 2017.2.1](#)
- Modify buttons where applicable.

**Your assistance will be required to perform the upgrade.** Technical Support or another representative will contact you in advance to agree on the details.

**Upgrade verification and UAT:** When your NetSuite POS upgrade is complete, we recommend testing at least one register in each store. You can find our **Terminal Verification Checklist - NSPOS 2017.1 - 2017.2** in the NetSuite Help Center > [User Guides](#) > NetSuite Point of Sale section. Log into NetSuite before clicking the link.

You can use the checklist for verification after the upgrade and as a guide for performing initial User Acceptance Testing (UAT).

## Prerequisites

Besides the bundle, release 2017.2.1 requires that certain software packages are installed on each register or server terminal. For the requirements list and guidelines, see [Prerequisites](#) in the NetSuite POS 2017.2 Release Notes section.

## 2017.2.1 Release Contents

### Product Enhancements 2017.2.1

This NetSuite POS (NSPOS) release provides improved support for restricting item discounts, an increased character limit for the receipt comments field, and an enhancement for the FreedomPay gateway to

streamline credit card refunds. NSPOS 2017.2.1 also includes behind the scenes improvements that prepare NSPOS for future features.

- [Advanced Promotion support for Do Not Allow Discount on Item](#)
- [Grouping Logic for Transaction Discounts](#)
- [Character limit increased for Receipt Comments field](#)
- [Automated FreedomPay Refunds to Credit Card](#)

For full steps on how to use a feature, see the [NetSuite Point of Sale Administrator Guide](#). Log into NetSuite before clicking this link to the guide.

## Advanced Promotion support for Do Not Allow Discount on Item

In previous releases, the **Do Not Allow Discount** option on the NetSuite ERP **Item** record only restricted the cashier from applying manual discounts to an item at the register. Items with the box checked could receive a manual discount only upon store manager or administrator approval. The option did not prevent an item from being discounted through a promotion or from being included in a transaction discount.

Now, with the NSPOS 2017.2.1 release, we expanded support for the option through our **Advanced Promotions Engine**.

The screenshot shows the NetSuite ERP Item record interface. On the left is a navigation menu with tabs: Lists, Reports, Documents, Setup, Customization, and Su. Under the 'Setup' tab, there are sub-menus: Accounts, Currencies, Currency Exchange Rates, Items, and Units Of Measure. The 'Items' sub-menu is selected, showing a 'New' button and a 'Search' button. On the right is the 'Classification' section, which includes a dropdown menu for 'SUBSIDIARY' with options: Parent Company, Parent Company : Alabama, Parent Company : Canada, and Parent Company : Germany. Below this are two checkboxes: 'INCLUDE CHILDREN' (unchecked) and 'DO NOT ALLOW DISCOUNT' (checked). A red arrow points to the 'DO NOT ALLOW DISCOUNT' checkbox. At the bottom of the 'Classification' section are two tabs: 'Purchasing/Inventory' and 'Sales / Pricing'.

### Manual Discounts

For manual discounts, the restriction now includes transaction discounts applied at the register. If a cashier wants to manually discount a restricted item, or discount a transaction and include a restricted item, they must get a store manager or administrator to log in and approve.

The screenshot shows a confirmation dialog box with a black header containing the text: 'Allow restricted manual discount for item DND1. Do you want to proceed?'. Below the header are two large buttons: a green button labeled 'Yes' and a red button labeled 'No'.

If the cashier taps **Yes**, they are prompted for authorized approval. If **No**, the transaction continues without discounting the restricted item. If a transaction discount includes one or more restricted items, the cashier is prompted for approval on each restricted item.



Transaction discounts work by taking an amount or percent off each item purchased. If an item included in the purchase is marked Do Not Allow Discount, and a manager does not approve the restricted item's discount, that item's price is not included in the calculation. For example:

<b>Regular Price</b>	
Item A.....	\$ 100
Item B .....	\$ 50
Item C.....	\$ 85 < Do Not Allow Discount>
<hr/>	
Amt Due .....	\$ 235
 <b>Apply 10% Transaction Discount</b>	
Item A.....	\$ 100 - \$10 = \$ 90
Item B .....	\$ 50 - \$ 5 = \$ 45
Item C.....	\$ 85 <Do Not Allow Discount>
<hr/>	
Amt Due .....	\$ 235 - \$15 = \$ 220

## Promotion Discounts

For **Advanced Promotions**, items restricted with **Do Not Allow Discount** cannot be used as **Reward** items. If included in a purchase discounted by a transaction promotion, the item's price is not included in the promotion calculations.

The restriction is ignored in Classic Promotions.

## Do Not Allow Discount restriction summary

The following rules apply when an item is marked **Do Not Allow Discount** and your implementation uses the **Advanced Promotion Engine**. Store manager and administrators can override restrictions against manual discounts at the register.

- Cashier – Cannot manually discount a restricted item at the register.
- Cashier – Cannot include a restricted item's price in transaction discounts.
- Promotions – Cannot use a restricted Item as Reward for purchasing a Trigger item.
- Promotions – Restricted item prices are ignored in transaction discounts.



**Important:** The enhanced **Do Not Allow Discount** option applies to setups using the Advanced Promotions Engine.

For setups using the **Classic Promotion Engine**, the option has not changed. It only restricts item-based discounts applied manually. The option does not affect transaction discounts and is ignored by classic promotions.

## Grouping Logic for Transaction Discounts

In earlier NSPOS releases, retailers could perform a transaction discount against a group or subset of items in a purchase. The discount was commonly called a “Sale Discount.” It was removed in favor of transaction discounts using the Advanced Promotion Engine in 2017.1, but we returned this functionality by request in NSPOS 2017.2.1.

The grouping discount logic works as follows:

1. Cashier scans the items that will receive the discount, adding them to the journal.
2. Cashier taps the Sale Discount button. (You can choose your own button name.)
3. Cashier can manually enter the discount, or it can be a preset amount off or a percent off.
4. NSPOS reduces the price of items above the discount line in the journal.
5. Cashier scans additional items for purchase at their regular price or other promotional price.

Only the group of items scanned before the discount is applied are reduced. Items added after the reduction do not receive the discount.

### Mapping a Button for the Grouping Transaction Discount

To begin using the grouping logic for transaction discounts, you must map one or more buttons in NSPOS. The number of buttons depends on the functionality desired. Note that NSPOS distributes transaction discounts evenly across all items affected. When applied, a 10% transaction discount deducts 10% from the price of each included item.

You can preset a default discount amount by adding a parameter to a button function, or you can leave the parameter empty to require the cashier to enter the discount each time. If a parameter is used, the cashier can override the preset discount if allowed. The parameter is the Discount ID assigned to a Discount Item in NetSuite ERP plus a value.

The available functions tied to NSPOS messages are:

FUNCTION	MESSAGE	RESULT
Distribute Transaction Discount	DistributeTransactionDiscount	<ul style="list-style-type: none"> <li>■ Distributes a transaction discount to all items currently in the journal. The cashier taps the button after tapping a different button to add the discount.</li> <li>■ Use this function when you do not want NSPOS to automatically distribute the discount.</li> </ul>
% Sale Discount and Distribute	Transaction.DiscountWithDistribution	<ul style="list-style-type: none"> <li>■ Adds and distributes a transaction discount to items currently in the journal. The default discount is a percent off. For example, Sale % Off.</li> <li>■ You can use the Parameter field to map the button to a different Discount Item ID, enabling a different discount type and a default value.</li> </ul>

\$ Sale And Distribute	Transaction.DiscountAmountOffWith Distribution	<ul style="list-style-type: none"> <li>■ Adds and distributes a transaction amount off discount to all items currently in the journal. For example, Sale \$ Off.</li> <li>■ You can use the Parameter field to enter a default amount off. It is not necessary to include a Discount Item ID before the discount value.</li> <li>■ You cannot set this function to percent off.</li> </ul>
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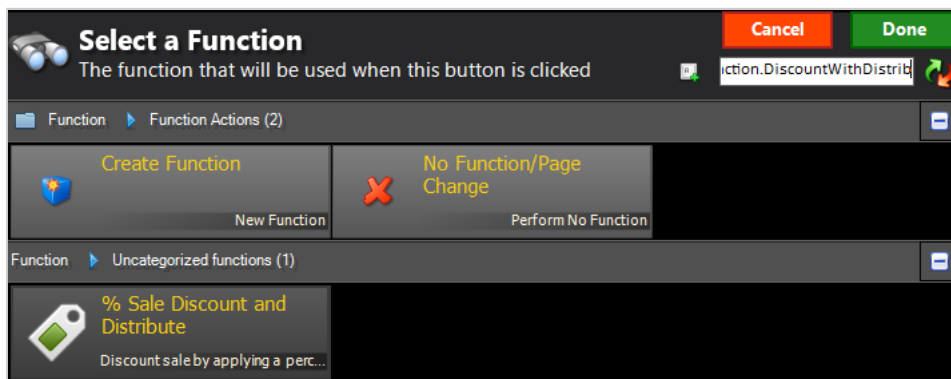
**Important:** If you have questions about any step or cannot locate the new functions, please open a case with Technical Support as soon as possible.

#### A. To open the Button Edit screen for Discounts:

1. Sign on to a NSPOS register as an administrator.
2. Tap Manager Functions > System Configuration > Button Edit.  
Or press **Ctrl+F12**, search for and tap **Button Edit**.
3. Tap the **Side** button bar option and tap **Pages**.
4. Tap **Discounts**.
5. Tap **Activate** so that you can see the changes immediately.
6. Tap **Buttons**.

#### B. Add the Button

1. Tap **New**.
2. In the top right-hand field, search for the desired message. You can copy and paste from this PDF or Help Center topic. Choose one:
  - `DistributeTransactionDiscount`
  - `Transaction.DiscountWithDistribution`
  - `Transaction.DiscountAmountOffWithDistribution`

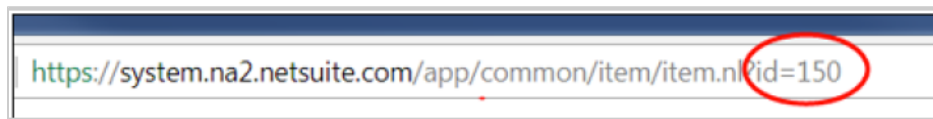


3. Tap the function returned by the message search.
4. Enter a name for the button in the **Caption** field or leave it at the default.
5. Choose a color from the **Style** list.
6. Set the placement for your button by changing the **Column** and **Row** fields.
7. If you want to make your button smaller or larger, adjust the **Width** and **Height**.

8. If you do not want to add a **Parameter**, close the **Button Edit** form.  
Your task is complete.
9. For the function: **% Sale Discount and Distribute**, message: **Transaction.DiscountWithDistribution**, you can add a **Parameter** to map to a different Discount Item ID. This will provide a discount type and optional value that is different from the default.

You will need the ID of the Discount Item in NetSuite ERP.

1. Log in to NetSuite as an administrator.
2. Go to Lists > Accounting > Items.
3. Expand the **Filters** and select a **Type** of **Discount**.
4. Click **View** by the desired Discount Item.
5. With the Discount Item displayed, note the **id=** at the end of the URL in your browser's address bar. For example:



This example Discount Item ID is **150**. Record the ID shown in your address bar.

6. On the **Function** field, tap the **Edit** icon.

Caption: % Sale Discount and Distribute  
 Style: Green  
 Function: % Sale Discount and Distribute  
 HotKey:   
 Target: (None)  
 Go Back: ☐

7. Enter the **Discount Item ID** in the NSPOS **Parameter** field.

Parameter: 150

10. Tap **Done**.
11. Close the **Button Edit** form when your setup is complete.

**Important:** Repeat all steps for one register in each Workstation Group.

## Character limit increased for Receipt Comments field

To meet the needs of retailers that include rental agreements, return policies or other details on receipts, we increased the limit for the sales receipt comments field to 5000 characters. The change includes receipts for sales order transactions.

## Automated FreedomPay Refunds to Credit Card

For our latest payment gateway – FreedomPay – we enhanced the integration to enable automatic refunds to a credit or debit card. Designed primarily for refunding a purchase online in NetSuite ERP, this enhancement uses the purchase Transaction ID to process the refund. The refund is automatically applied to the card holder's account. This automation assists your support personnel with handling mail-in returns or cancelling orders over the phone.



For in-store use, customers making a return at a register using FreedomPay are not required to have the original credit card available to swipe or give to the cashier. The cashier handles the transaction like normal validated returns by using the customer's receipt or looking up the purchase in NSPOS.

### Restrictions on Split-Tender Payment Refunds

This FreedomPay refund enhancement is limited to purchases involving only a single card. Split-tender refunds, where two or more cards were used for payment, require that all cards or card numbers be available to swipe or enter manually. If a split-tender payment was cash and a single credit card, the card-portion of the payment can be automatically refunded to the card holder's account.

## Fixes 2017.2.1

NSPOS 2017.2.1 includes behind the scenes fixes.



# Update the NetSuite Point of Sale Bundle to 2017.2.1

To use the functionality provided in the 2017.2.1 release, you must update your NetSuite Point of Sale bundle. Follow the instructions below.



**Important:** Updating a bundle requires an Administrator role. If you need assistance performing this update and verifying settings, please contact NSPOS Support or Professional Services.

## To update the NetSuite Point of Sale bundle:

1. Log in to NetSuite as an administrator.
2. Go to Customization > SuiteBundler > Search & Install Bundles > List.
3. On the Installed Bundles page, locate **NetSuite Point of Sale Bundle** with Bundle ID **27525**.  
Under the version number, the blue  icon indicates there is a newer version available. Placing your mouse over the icon displays more information. If you do not see this icon, your installed bundle is already up to date and no further action is required.
4. Place your mouse over the green  icon and click **Update**. Allow time for the page to load.
5. Review the updates to be installed.  
NetSuite alerts you on-screen of any conflicts or issues that may occur with the installation. If in doubt, please stop and contact NetSuite Technical Support.
6. Click **Update Bundle**.
7. Click **OK** at the prompt.  
The Updated Bundles page displays the install progress. When complete, if the bundle updated correctly, a green check mark displays in the **Status** column.



# NetSuite POS 2017.2.0 Release Notes

**i Applies to:** NetSuite Point of Sale (NSPOS)

This chapter lists the important updates provided in NetSuite Point of Sale (NSPOS) version 2017.2. Updates are not available to NetSuite POS customers until they have upgraded to the release. NetSuite will modify these release notes when needed to provide our customers with additional information.

- [Required User Action](#)
- [Prerequisites](#)
- [2017.2.0 Release Contents](#)
- [Update the NetSuite Point of Sale Bundle to 2017.2](#)

## Required User Action

To use the functionality included in this release, your business must perform the following steps:

- [Update the NetSuite Point of Sale Bundle to 2017.2.](#)
- Modify buttons and set flags for the features desired.

**Your assistance will be required to perform the upgrade.** Technical Support or another representative will contact you in advance to agree on the details.

**Upgrade verification and UAT:** When your NetSuite POS upgrade is complete, we recommend testing at least one register in each store. You can find our **Terminal Verification Checklist – NSPOS 2017.1 — 2017.2** in the NetSuite Help Center > [User Guides](#) > NetSuite Point of Sale section. Log into NetSuite before clicking the link.

You can use the checklist for verification after the upgrade and as a guide for performing initial User Acceptance Testing (UAT).

## Prerequisites

Release 2017.2.0 or greater requires that the following be installed on each register or terminal server. You should perform the installations in phases to ensure you always have working registers available.

- **Microsoft® SQL Server 2008 R2 Service Pack 3** – See [Verify MS SQL 2008 R2 SP 3 loaded on Workstations.](#)
- **Microsoft Point of Service for .NET v1.14**
- **Microsoft .NET Framework 4.6.2**

**i Note:** For **Windows 10**, Microsoft .NET Framework 4.6.2 framework is included and installed automatically in the Windows 10 **Anniversary Update**.

- **OPOS 1.14** for some devices.  
OPOS v1.14 is not required for peripheral hardware devices from the following manufacturers. It might be required for devices from other manufacturers. Please consult your hardware installation guides.
  - Epson®

- Hewlett Packard (HP)®
- Logic Controls®
- Star Micronics®
- Toshiba®

## Verify your peripheral hardware

**HP, Logic Controls, Star Micronics and Toshiba:** We have tested these peripherals after installing the software required for NSPOS 2017.X. If you have the latest drivers installed, no further driver setup should be required. However, we recommend that you install the latest peripheral drivers and test all peripherals after installing the required software.

**Epson printers:** Our tests show that some Epson driver versions will not work with NSPOS 2017.X, particularly the Epson OPOS ADK for .NET driver.

The recommended OPOS driver is Epson OPOS ADK v2.80 or later.

### To verify which Epson OPOS driver is installed:

1. Click the Windows **Start** button.
2. Open the **Control Panel**.
3. Click **Programs** or **Programs and Features**.
4. Review the list for the following drivers:
  - Epson OPOS ADK v2.70 or below
  - Epson OPOS ADK for .NET, any version
5. If either of these drivers is installed, replace it with **Epson OPOS ADK v2.80** or later. Be aware that replacing the driver will reset your device configurations.

**Device manufacturers not listed:** Install the latest peripheral drivers and test all peripherals after installing the required software.

## 2017.2.0 Release Contents

### Product Enhancement 2017.2.0

This NSPOS release provides the “first only” promotion feature and behind the scenes improvements that prepare NetSuite Point of Sale (NSPOS) for future features, such as third-party tax integrations. The following is an overview and basic setup information.

For full steps on how to use a feature, see the [NetSuite Point of Sale Administrator Guide](#). Log into NetSuite before clicking this link to the guide.

### First Purchase only Promotions

You can now set up promotion discounts that reward your first-time customers.

We designed this enhancement to provide a purchasing incentive for customers new to your stores. By setting the RA-Promotion record **Repeat** option to **First**, only customers making their first purchase on an NSPOS register can receive the discount.

REPEAT \*

First

- New -

First

Once

Multiple

**RA-Promotion** List Search Cus

\$10 hat promotion at 10% off

Save Cancel Reset Actions

CUSTOM FORM \* Custom RA-Promotion Form

NAME \* \$10 hat promotion at 10% off

LAST MODIFIED BY 7/21/2017 6:22 am Veronika Kotyzova

☐ INACTIVE

DISCOUNT ITEM \* Percent Off

EFFECTIVE DATE \* 7/21/2017

EXPIRATION DATE \* 7/21/2018

PROMOTION TYPE \* % Off

☒ MIX AND MATCH

BUY \* 0

GET 0

% OFF 10.0%

AMOUNT OFF

NEW PRICE

☐ APPLY TO TRANSACTION

AMOUNT SPEND 10.00

REPEAT \* First

Cashiers can add the customer at the time of purchase or you can preload your customers through an import. The trigger is whether a transaction attached to that customer exists in the NetSuite ERP database. Purchases made through other applications that log transactions to NetSuite ERP will cause a customer to be ineligible for a “first” NSPOS promotion.

Available in NSPOS 2017.2 or later only

The **First** option displays for release 2017.1, but it is active only for release 2017.2 or later using the Advanced version of the RA-Promotion record.

## Fixes 2017.2.0

NSPOS 2017.2.0 includes behind the scenes fixes.

## Update the NetSuite Point of Sale Bundle to 2017.2



To use the functionality provided in the 2017.2 release, you must update your NetSuite Point of Sale bundle. Follow the instructions below.



**Important:** Updating a bundle requires an Administrator role. If you need assistance performing this update and verifying settings, please contact NSPOS Support or Professional Services.

### To update the NetSuite Point of Sale bundle:

1. Log in to NetSuite as an administrator.

2. Go to Customization > SuiteBundler > Search & Install Bundles > List.
3. On the Installed Bundles page, locate **NetSuite Point of Sale Bundle** with Bundle ID **27525**.  
Under the version number, the blue  icon indicates there is a newer version available. Placing your mouse over the icon displays more information. If you do not see this icon, your installed bundle is already up to date and no further action is required.
4. Place your mouse over the green  icon and click **Update**. Allow time for the page to load.
5. Review the updates to be installed.  
NetSuite alerts you on-screen of any conflicts or issues that may occur with the installation. If in doubt, please stop and contact NetSuite Technical Support.
6. Click **Update Bundle**.
7. Click **OK** at the prompt.  
The Updated Bundles page displays the install progress. When complete, if the bundle updated correctly, a green check mark displays in the **Status** column.


# NetSuite POS Documentation Resources

**i Applies to:** NetSuite Point of Sale (NSPOS)

NetSuite|Oracle provides a variety of NetSuite Point of Sale (NSPOS) documentation resources. These resources ensure you can receive the training and information you need to use and administer NSPOS. Use the links in this topic to access a guide or video. You can review materials online or download a PDF to your computer or register.

 **Tip:** Log into [NetSuite ERP](#) before clicking a link.

Documentation Resource	What it provides
NetSuite POS Release Notes <ul style="list-style-type: none"> <li>■ <a href="#">Release 2017.2</a></li> <li>■ <a href="#">Release 2017.1</a></li> </ul>	NSPOS release notes list the customer-facing updates included in each release. We modify these release notes on occasion to provide our customers with additional information.
<a href="#">NetSuite POS Administrator Guide</a>	This document is a guide to configuring and maintaining NSPOS. It includes: <ul style="list-style-type: none"> <li>■ Overviews and steps for basic tasks, such as setting up employees and running reports.</li> <li>■ Steps for modifying the buttons and related security settings for your registers.</li> <li>■ Steps to work with promotions.</li> <li>■ How to stage and re-stage registers, either individually or as a scheduled mass update.</li> <li>■ Setting up credit card payment providers.</li> <li>■ Configuring process options for promotions, sales orders, and other features vital to your business.</li> </ul>
<a href="#">NetSuite POS User Guide</a>	The NSPOS user guide provides how-to steps for cashiers and store managers. It includes: <ul style="list-style-type: none"> <li>■ An overview of NSPOS.</li> <li>■ Instructions for handling transactions at the register, including sales, sales orders, returns and gift card/certificate tasks.</li> <li>■ How to work with customer information.</li> <li>■ Start and end of day tasks performed by store managers.</li> </ul>
<a href="#">PA-DSS 3.2 Implementation Guide - NSPOS 2017.2</a>	NetSuite POS is a PA-DSS validated application. The Payment Application Data Security Standard (PADSS) guide describes the Payment Card Industry (PCI) initiative and lists recommendations for using NetSuite POS in a PCI DSS compliant environment.  The guide includes: <ul style="list-style-type: none"> <li>■ Details about installing and configuring a compliant system.</li> <li>■ Best practices for maintaining compliance.</li> <li>■ A list of operating systems (OS) validated for use on your NetSuite POS terminals.</li> </ul>
<a href="#">Terminal Verification Checklist: NSPOS 2017.1 – 2017.2.X</a>	This document lists steps for verifying the basic functionality of NSPOS terminals/registers in stores or other locations.

	<ul style="list-style-type: none"> <li>Customers or other representatives should perform verifications as part of the user acceptance testing (UAT) process and after deployment of an upgrade.</li> <li>Each section will help to identify issues prior to a store recommencing customer transactions.</li> </ul> <div>  <b>Important:</b> We recommend testing at least one terminal (register) in every store.         </div>
NetSuite POS Video Overview and Training Links <ul style="list-style-type: none"> <li><a href="#">SuiteCommerce NSPOS Overview</a></li> </ul>	Our videos deliver a convenient method for understanding and using NSPOS. Housed on the Oracle Learning Library, each video is brief and concise. Watch our videos to get the information you require in a relaxed learning environment.
Also available from the NetSuite ERP application: <ul style="list-style-type: none"> <li><a href="#">Help Center</a></li> <li><a href="#">SuiteAnswers</a></li> </ul>	Some NPSOS-related tasks are common across different NetSuite  Oracle applications. Use the Help Center and SuiteAnswers links to research NetSuite ERP topics that cover: <ul style="list-style-type: none"> <li>Your general ledger.</li> <li>Item and price updates.</li> <li>Other areas not specific to working with your registers.</li> </ul>