ORACLE NETSUITE

Managing Users & Roles

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Note: The following link provides access to a Microsoft Excel worksheet listing the usage of most NetSuite permissions: NetSuitePermissionsUsage.xls. You can use this list to understand the implications of assigning a specific permission, or to find the permission required to provide access to a specific task or page. For more information, see Permissions Documentation.

NetSuite Access Overview

Access to NetSuite data and to the NetSuite user interface is based on users, roles, and permissions:

- Users
- Roles
- NetSuite Account Access
- Internal Controls for NetSuite Access

Users

A user is an individual who has access to a NetSuite account.

- Generally, most users are employees, but vendors, partners, and customers also can be users.
- Users need to be set up in the NetSuite system through the creation of employee, vendor, partner, or customer records. For users to have access to NetSuite, their records must include an email address, which serves as their user ID. Users must also have a password to access NetSuite. Users with the Administrator role can send an access notification email that includes a link that lets users create their own passwords.

For information about creating and setting up different user types, see Manage Different Types of Users.

Roles

A role is a defined access configuration that can be assigned to users.

- Each role includes a set of associated permissions that determine the data users can see and the tasks they can perform. For example, the A/P Clerk role lets users enter bills and vendor credits, pay bills and sales tax, and view A/P and inventory reports.
- Each role is tied to a center, meaning a set of tabbed pages that display as the NetSuite user interface. Each center is tailored to the business needs of users in a specific functional area, such as accounting or sales. A role's center determines the pages that users see when they log into NetSuite.
- A user may be assigned multiple roles. The user may select a default role in an account used for login. Users can switch among roles and accounts by using the Change Roles list available from the NetSuite user interface. For more information, see the help topic Roles and Accounts.

NetSuite Account Access

The person who signs up for a NetSuite account is automatically assigned the Administrator role. The user with the Administrator role has full privileges to all aspects of the system and usually is the person who sets up account access by assigning roles to users.

- The first step for setting up account access is to set up roles. See NetSuite Roles Overview to understand the different types of roles, as well as how to create and manage them.
- After roles have been set up, users can be given access and assigned roles. See NetSuite Users Overview for information about how to manage different types of users and monitor users' login activity using the Login Audit Trail.
- NetSuite has a complex permission structure, with permissions divided into different types and different access levels. See NetSuite Permissions Overview to understand the different types of permissions and how to enable the Global Permissions feature. Please note that usage of the Global Permissions feature is not recommended.
- NetSuite’s Advanced Employee Permissions feature can be enabled to give you more flexibility and control over the employee information that users with certain roles can access in NetSuite. When this feature is enabled, users with the Administrator role can customize or create roles to use the Employee Self, Employee Public, Employee Confidential, Employee Compensation, Employee System Access, Employee Record Full, and Employee Administration permissions. For more information, see the help topic Advanced Employee Permissions Overview. Users with the Administrator role can also create custom employee permissions and custom restrictions when this feature is enabled. For more information, see the help topics Custom Advanced Employee Permissions and Custom Restrictions for Advanced Employee Permissions.
- In addition to permissions, NetSuite has role restrictions that define the record instances of a record type that can be accessed by a role. See Permissions and Restrictions.

> **Note:** Users need the SuiteAnalytics Connect permission for access to the NetSuite SuiteAnalytics Connect schema. See the help topic Connect Permissions.

Internal Controls for NetSuite Access

To achieve effective internal controls, you will need a combination of both automated and manual controls that both prevent and detect misstatements or misappropriation of assets. Companies have several responsibilities for establishing good general controls for NetSuite applications.

- Ensure logical access and application security. Users should have only the information that they need to do their jobs.
- Segregate duties and transaction processing.
- Ensure that your organization has user administration controls in place, including:

- Process for requesting and approving access. If possible, the request, approval, and granting of access should be segregated among different individuals to ensure appropriate application of the process.
- Access should be reviewed periodically for changes in responsibilities, assurance that terminated employees have had their access revoked, list of users with sensitive/critical access is confirmed that the appropriate individuals have access to these permissions.
- Process access termination in a timely manner.

- Maintain a mapping of role assignment to job function, and map role assignment to job title.
- Periodically audit the permissions that make up each role to ensure they are appropriate.
- The Administrator role is very powerful, and access to this role should be extremely limited. Ideally your organization could have one administrator and one back-up administrator.

Standard Roles Permissions Table

The following table lists the permissions and permission levels for each standard role.

It is best to start with a copy of the standard roles built into NetSuite with predefined permissions before customizing them. Granting users only the required access can avoid returning restricted pages, records, and data. You can then add or remove permissions from the roles as needed. See Permissions Documentation for an updated list of permissions and their corresponding usage.

The standard roles available in your account may differ, depending on the modules you have purchased, and the features you have enabled. You can see the roles available in your account at Setup > Users/Roles > Manage Roles, and you can review a role's details by clicking its link on the Manage Roles page.

You cannot modify standard roles. It is recommended that you create a custom version of any standard role before assigning it to users, so that you can modify the role as needed in the future, even after it has been assigned.

The Administrator role has **all** permissions available in your NetSuite account at **all** levels. For more information about the Administrator role, see NetSuite Account Administration.

The Data Warehouse Integrator role allows Connect users to have access to all NetSuite data through the NetSuite2.com data source, except for sensitive data. For more information, see the help topic Role and Permission Considerations for NetSuite2.com.

Note: As of NetSuite 2018.1, Administrators and users with Full Access roles must use two-factor authentication in newly provisioned accounts. For information, see the help topic 2FA in the NetSuite Application.

Important: If you have the Advanced Employee Permissions feature enabled, see the help topic Advanced Employee Permissions and Standard NetSuite Roles for a list of the employee permissions that are assigned to standard NetSuite roles when this feature is enabled.

A/P Clerk					
View	**Create**	**Edit**		**Full**	
Accounts Payable Accounts Payable Graphing Amortization Schedules Bill Of Materials Inquiry	Export Lists Kudos Resource Tableau® Workbook Export	Accounting Lists Accounts Payable Register Bill Purchase Orders Bill of Materials Bills Classes Credit Returns	Pay Bills Pay Sales Tax Purchase Order Receive Order Requisition Statistical Account Registers	Automated Clearing House Calendar Contacts Deleted Records Documents and Files Events Find Transaction	—

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A/P Clerk			
View	**Create**	**Edit**	**Full**
Custom Recognition Event Type Deferred Expense Reports Employee Public Employee Record Expense Amortization Plan Expense Amortization Rule Financial History Inventory Non Posting Registers Notes Tab Purchase Order Reports Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report System Journal Tax Records Tax Reports		Departments Email Template Enter Vendor Credits Item Receipt Items Locations Memorized Transactions Other Lists SuiteAnalytics Workbook Tax Details Tab Track Messages Units Vendor Prepayment Vendor Prepayment Application Vendor Return Auth. Approval Vendor Return Authorization Vendor Returns Vendors	General Token Inbound Shipment Log in using Access Tokens Mobile Device Access Notifications Ownership Transfer Payment Card Payment Card Token Payment Instruments Perform Search Phone Calls Posting Period on Transactions Price Books Price Plans Report Customization Report Scheduling REST Web Services Scanned Vendor Bills SOAP Web Services Subscription Plan Tasks Template Categories Usage Vendor Bill Approval Vendor Payment Approval Vendor Prepayment Approval

A/R Clerk			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Accounts Receivable Accounts Receivable Graphing Bill Of Materials Inquiry Custom Recognition Event Type Employee Public Employee Record Fair Value Dimension Fair Value Formula Fair Value Price Financial History Generate Price Lists Generate Statements Inventory Item Revenue Category Lead Snapshot/Reminders Notes Tab Project Profitability Project Revenue Rules Project Templates Recognition Treatment Recognition Treatment Rule Revenue Arrangement	Export Lists Kudos Recognize Gift Certificate Income Resource Tableau® Workbook Export	Accounting Lists Accounts Receivable Register Bill of Materials Cash Sale Charge Charge Rule Classes Competitors Customer Deposit Customer Payment Customer Payment Authorization Customers Departments Deposit Application Email Template Fulfill Orders Invoice Invoice Sales Orders Item Fulfillment Items Locations	Automated Clearing House Calendar Charge – Run Rules Contacts Deleted Records Documents and Files Events Find Transaction General Token Invoice Approval Log in using Access Tokens Mobile Device Access Notifications Payment Card Payment Card Token Payment Instruments Perform Search Phone Calls Posting Period on Transactions Price Books

A/R Clerk			
View	**Create**	**Edit**	**Full**
Revenue Arrangement Approval Revenue Commitment Revenue Commitment Reversal Revenue Element Revenue Management VSOE Revenue Recognition Field Mapping Revenue Recognition Plan Revenue Recognition Rule Revenue Recognition Schedules System Journal Tax Records Tax Reports Time Tracking Transaction Detail View Gateway Asynchronous Notifications View Payment Events Work Calendar		Memorized Transactions Other Lists Override Payment Hold Print Shipment Documents Projects Sales Order Shipping Partner Package Shipping Partner Shipment Subscriptions Subscription Change Orders SuiteAnalytics Workbook Tax Details Tab Track Messages Transfer Order Unbilled Receivable Registers Units	Price Plans Project Tasks Report Customization Report Scheduling REST Web Services SOAP Web Services Subscription Plan Tasks Template Categories Track Time Usage

Accountant				
View	**Create**	**Edit**		**Full**
Access Payment Audit Log Account Detail Accounts Payable Accounts Payable Graphing Accounts Receivable Accounts Receivable Graphing Amortization Reports Balance Sheet Bill Of Materials Inquiry Check Item Availability Commit Orders Component Where Used Costed Bill Of Materials Inquiry Deferred Expense Reports Employee Public Employee Reminders Expenses Fair Value Dimension Fair Value Formula Fair Value Price Financial Statements General Ledger Generate Price Lists Generate Statements Income Income Statement Inventory Item Revenue Category	Balance Transactions by Segments Balancing Journals Export Lists Kudos Recognize Gift Certificate Income Resource Tableau® Workbook Export	Accounting Lists Accounting Management Accounts Accounts Payable Register Accounts Receivable Register Adjust Inventory Amortization Schedules Bank Account Registers Bill of Materials Bill Purchase Orders Bills Build Assemblies Build Work Orders Cash Sale Charge Charge Rule Check Classes Close Work Orders Competitors Create Allocation Schedules Credit Card Credit Card Refund Credit Card Registers Credit Memo Credit Returns	Fixed Asset Registers Generate Revenue Commitment Generate Revenue Commitment Reversals Invoice Invoice Sales Orders Issue Components Items Locations Long Term Liability Registers Make Journal Entry Mark Work Orders Built Mark Work Orders Firmed Mark Work Orders Released Mass Updates Memorized Transactions Non Posting Registers Other Asset Registers Other Current Asset Registers Other Current Liability Registers Other Lists Other Names Pay Bills Pay Sales Tax	Allocate Orders Approve Order Reservation Automated Cash Application Bills Bill Of Distribution Blanket Purchase Order Calendar Contacts Count Inventory Create Inventory Counts Deleted Records Distribution Network Documents and Files Earliest Availability Employee Record Events Find Transaction Global Inventory Relationship Charge - Run Rules Inventory Cost Template Invoice Approval Item Demand Plan Item Revisions Item Supply Plan Log in using Access Tokens

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Accountant				
View	**Create**	**Edit**		**Full**
Lead Snapshot/ Reminders Net Worth Notes Tab Period End Financial Statements Project Budget Project Profitability Project Revenue Rules Project Templates Purchase Order Reports Purchases Recognition Treatment Recognition Treatment Rule Revenue Arrangement Revenue Arrangement Approval Revenue Element Revenue Recognition Field Mapping Revenue Recognition Plan Revenue Recognition Rule Revenue Recognition Reports Sales Sales By Partner Sales By Promotion Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Subsidiary Settings Manager System Journal Tax Time Tracking Transaction Detail Trial Balance View Gateway Asynchronous Notifications View Payment Events Work Breakdown Structure Work Calendar		CRM Groups Currency Revaluation Custom Recognition Event Type Customer Deposit Customer Payment Customer Payment Authorization Customers Departments Deposit Deposit Application Distribute Inventory Email Template Employees Enter Completions Enter Opening Balances Enter Vendor Credits Equity Registers Expense Amortization Plan Expense Amortization Rule	Period End Journals Post Time Projects Purchase Order Reconcile Reconcile Reporting Requisition Revenue Commitment Revenue Commitment Reversal Revenue Management VSOE Revenue Recognition Schedules Sales Order Statistical Account Registers Subscription Change Orders Subscriptions SuiteAnalytics Workbook Tax Details Tab Tax Records Tax Reports Track Messages Track Time Transfer Funds Transfer Inventory Unbilled Receivable Registers Unbuild Assemblies Units Vendor Return Auth. Approval Vendor Return Authorization Vendor Returns Vendors Work Order Work Order Close Work Order Completion Work Order Issue	Manufacturing Cost Template Manufacturing Routing Material Requirements Planning Mobile Device Access Notifications Order Allocation Strategy Order Management Dashboard Order Reservation Pay Tax Liability Perform Search Phone Calls Planned Standard Cost Post Vendor Bill Variances Posting Period on Transactions Price Books Price Plans Project Tasks Purchase Contract Reallocate Order Item Report Customization Report Scheduling REST Web Services Request For Quote Revalue Inventory Cost Sales Channel SOAP Web Services Standard Cost Version Subscription Plan Tasks Tegata Accounts Tegata Payable Tegata Receivables Template Categories Transfer Order Transfer Order Approval Usage Vendor Bill Approval Vendor Payment Approval Vendor Request For Quote

Accountant (Reviewer)				
View		**Create**	**Edit**	**Full**
Access Payment Audit Log	Income Statement	Export Lists	Bills	Allocate Orders
Accounting Lists	Inventory	Kudos	Email Template	Approve Order Reservation
Accounting Management	Invoice	Resource	Mass Updates	Bill Of Distribution
Accounts	Issue Components	Tableau® Workbook Export	Override Payment Hold	Blanket Purchase Order
Accounts Payable	Item Revenue Category		SuiteAnalytics Workbook	Calendar
Accounts Payable Graphing	Items		Track Messages	Charge - Run Rules
Accounts Payable Register	Lead Snapshot/Reminders			Contacts
Accounts Receivable	Locations			Count Inventory
Accounts Receivable Graphing	Long Term Liability Registers			Create Inventory Counts
Accounts Receivable Register	Make Journal Entry			Deleted Records
Adjust Inventory	Mark Work Orders Built			Distribution Network
Amortization Reports	Mark Work Orders Firmed			Documents and Files
Amortization Schedules	Mark Work Orders Released			Employee Record
Balance Sheet	Memorized Transactions			Events
Balance Transactions by Segments	Net Worth			Find Transaction
Balancing Journals	Non Posting Registers			Global Inventory Relationship
Bank Account Registers	Notes Tab			Inventory Cost Template
Bill Of Materials Inquiry	Other Asset Registers			Item Demand Plan
Bill of Materials	Other Current Asset Registers			Item Revisions
Build Assemblies	Other Current Liability Registers			Item Supply Plan
Build Work Orders	Other Lists			Log in using Access Tokens
Cash Sale	Other Names			Manufacturing Cost Template
Charge	Pay Sales Tax			Manufacturing Routing
Charge Rule	Period End Financial Statements			Material Requirements Planning
Check	Period End Journals			Mobile Device Access
Check Item Availability	Price Books			Notifications
Classes	Price Plans			Order Allocation Strategy
Close Work Orders	Project Budget			Order Management Dashboard
Commit Orders	Project Profitability			Order Reservation
Competitors	Project Revenue Rules			Perform Search
Component Where Used	Projects			Phone Calls
Costed Bill Of Materials Inquiry	Purchase Contract			Planned Standard Cost
Create Allocation Schedules	Purchase Order			Posting Period on Transactions
Credit Card	Purchases			Project Tasks
Credit Card Refund	Recognition Treatment			Reallocate Order Item
Credit Card Registers	Recognition Treatment Rule			Report Customization
Credit Memo	Reconcile Reporting			Report Scheduling
Credit Returns	Request For Quote			REST Web Services
CRM Groups	Requisition			Sales Channel
Currency Revaluation	Revalue Inventory Cost			SOAP Web Services
Custom Recognition Event Type	Revenue Arrangement			Standard Cost Version
Customer Deposit	Revenue Arrangement Approval			Subsidiary - Tax Engine selection
Customer Payment	Revenue Commitment			Tasks
	Revenue Commitment Reversal			Tegata Accounts
	Revenue Element			Tegata Payable
	Revenue Management VSOE			
	Revenue Recognition Field Mapping			
	Revenue Recognition Plan			

Accountant (Reviewer)				
View		**Create**	**Edit**	**Full**
Customer Payment Authorization Customers Deferred Expense Reports Departments Deposit Deposit Application Distribute Inventory Employee Public Employee Reminders Employees Enter Completions Enter Opening Balances Enter Vendor Credits Equity Registers Expense Amortization Plan Expense Amortization Rule Expenses Fair Value Dimension Fair Value Formula Fair Value Price Financial Statements Fixed Asset Registers General Ledger Generate Price Lists Generate Statements Income	Revenue Recognition Reports Revenue Recognition Rule Revenue Recognition Schedules Sales Sales By Partner Sales By Promotion Sales Order Sales Order Reports Sales Order Transaction Report Statistical Account Registers Subscription Plan Subscription Change Orders Subscriptions System Journal Tax Tax Details Tab Tax Records Tax Reports Time Tracking Track Time Transaction Detail Transfer Funds Transfer Inventory Transfer Order Trial Balance Unbilled Receivable Registers Unbuild Assemblies Units Usage Vendor Request For Quote Vendor Return Auth. Approval Vendor Return Authorization Vendor Returns Vendors View Gateway Asynchronous Notifications View Payment Events View Breakdown Structure Work Calendar Work Order Work Order Close Work Order Completion Work Order Issue			Tegata Receivables Template Categories Vendor Bill Approval Vendor Payment Approval

Advanced Partner Center			
View	**Create**	**Edit**	**Full**
Bill Of Materials Inquiry Bill of Materials	Export Lists Kudos	Campaign History Cases	Calendar Contacts

Advanced Partner Center			
View	**Create**	**Edit**	**Full**
Financial History Items Knowledge Base Lead Snapshot/Reminders Marketing Campaigns Non Posting Registers Partner Commission Reports Project Templates Sales Sales By Partner Sales Force Automation Sales Order Reports Sales Order Transaction Report Support Support Case Snapshot/Reminders Tax Details Tab Units Work Calendar	Notes Tab Promotion Tableau® Workbook Export	CRM Groups Cases Estimate Opportunity Sales Order SuiteAnalytics Workbook Track Messages	Customers Deleted Records Email Template Events Find Transaction Log in using Access Tokens Mobile Device Access Notifications Partners Perform Search Price Books Price Plans Phone Calls Project Tasks Report Customization Report Scheduling REST Web Services SOAP Web Services Subscription Change Orders Subscription Plan Subscriptions Tasks Template Categories Usage

Bookkeeper			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Accounting Management Accounts Accounts Payable Accounts Payable Register Accounts Receivable Accounts Receivable Register Bank Account Registers Bill Of Materials Inquiry Check Item Availability Commit Orders Component Where Used Credit Card Registers Deferred Expense Reports Employee Public Employee Reminders Equity Registers Fixed Asset Registers Generate Price Lists Generate Statements Inventory Lead Snapshot/Reminders Long Term Liability Registers Non Posting Registers Notes Tab Other Asset Registers Other Current Asset Registers Other Current Liability Registers	Export Lists Kudos Recognize Gift Certificate Income Resource Tableau® Workbook Export	Accounting Lists Adjust Inventory Bill Purchase Orders Bill of Materials Bills Cash Sale Charge Charge Rule Check Classes Competitors Credit Card Credit Card Refund Credit Memo Credit Returns CRM Groups Currency Revaluation Customer Deposit Customer Payment Customer Payment Authorization Customers Departments Deposit Deposit Application Email Template Employees Enter Opening Balances	Allocate Orders Approve Order Reservation Automated Cash Application Bill Of Distribution Calendar Charge – Run Rules Contacts Count Inventory Create Inventory Counts Deleted Records Distribution Network Documents and Files Earliest Availability Employee Record Events Find Transaction Global Inventory Relationship Inventory Cost Template Invoice Approval Item Demand Plan Item Supply Plan Log in using Access Tokens Manufacturing Cost Template

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Bookkeeper			
View	**Create**	**Edit**	**Full**
Project Profitability Project Templates Purchase Order Reports Revalue Inventory Cost Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Statistical Account Registers System Journal Tax Tax Records Tax Reports Time Tracking Transaction Detail Unbilled Receivable Registers View Gateway Asynchronous Notifications View Payment Events Work Calendar		Enter Vendor Credits Invoice Invoice Sales Orders Item Revisions Items Locations Make Journal Entry Memorized Transactions Other Lists Other Names Pay Bills Pay Sales Tax Projects Purchase Order Reconcile Reconcile Reporting Requisition Sales Order Subscriptions Subscription Change Orders SuiteAnalytics Workbook Tax Details Tab Track Messages Transfer Funds Transfer Order Units Vendor Return Auth. Approval Vendor Return Authorization Vendor Returns Vendors	Manufacturing Routing Material Requirements Planning Mobile Device Access Notifications Order Allocation Strategy Order Management Dashboard Order Reservation Perform Search Phone Calls Planned Standard Cost Price Books Price Plans Post Vendor Bill Variances Posting Period on Transactions Project Tasks Reallocate Order Item Report Customization Report Scheduling REST Web Services Sales Channel SOAP Web Services Standard Cost Version Subscription Plan Tasks Tegata Accounts Tegata Payable Tegata Receivables Template Categories Track Time Usage Vendor Bill Approval Vendor Payment Approval

Buyer			
View	**Create**	**Edit**	**Full**
Accounts Payable Accounts Payable Graphing Amortization Schedules Bill Of Materials Inquiry Custom Recognition Event Type Employee Public Employee Record Expense Amortization Plan Expense Amortization Rule Financial History Inventory Non Posting Registers Notes Tab Purchase Order Reports Sales Order Fulfillment Reports Sales Order Reports	Export Lists Kudos Resource Tableau® Workbook Export	Accounting Lists Accounts Payable Register Bill Purchase Orders Bill of Materials Bills Classes Departments Email Template Item Receipt Items Locations Memorized Transactions Other Lists Receive Order Requisition Statistical Account Registers SuiteAnalytics Workbook Track Messages	Blanket Purchase Order Blanket Purchase Order Approval Calendar Contacts Deleted Records Documents and Files Employee Record Events Find Transaction Inbound Shipment Log in using Access Tokens Mobile Device Access Notifications Ownership Transfer Perform Search Phone Calls Purchase Contract

Buyer			
View	**Create**	**Edit**	**Full**
Sales Order Transaction Report		Units Vendor Returns Vendors	Purchase Contract Approval Purchase Order Report Customization Report Scheduling Request For Quote Requisition Approval REST Web Services SOAP Web Services Tasks Template Categories Vendor Return Auth. Approval Vendor Return Authorization

CEO					
View	**Create**	**Edit**	**Full**		
Access Payment Audit Log Accounts Payable Accounts Payable Graphing Accounts Receivable Accounts Receivable Graphing Amortization Reports Amortization Schedules Balance Sheet Bill Of Materials Inquiry Check Item Availability Commission Reports Commit Orders Component Where Used Costed Bill Of Materials Inquiry Create Allocation Schedules Custom Recognition Event Type Employee Public Employee Reminders Expense Amortization Plan Expense Amortization Rule Expenses Fair Value Dimension	Export Lists Kudos Recognize Gift Certificate Income Tableau® Workbook Export	Email Template Fax Messages Fax Template Letter Messages Letter Template Mail Merge Mass Updates PDF Messages PDF Template Reconcile SuiteAnalytics Workbook Track Messages	Accounting Lists Accounting Management Accounts Accounts Payable Register Accounts Receivable Register Adjust Inventory ADP Import Data Allocate Orders Approve Online Bill Payments Approve Order Reservation Audit Trail Automated Cash Application Automated Clearing House Bank Account Registers Bill Of Distribution Bill Purchase Orders Bill of Materials Bills Blanket Purchase Order Blanket Purchase Order Approval Build Work Orders Calculate Time Calendar Cash Sale Cash Sale Refund Check Classes	Edit Forecast Employee Commission Transaction Employee Commission Transaction Approval Employee Record Employees Enter Completions Enter Opening Balances Enter Vendor Credits Enter Year-To-Date Payroll Adjustments Equity Registers Events Expense Report Finance Charge Financial History Find Transaction Fixed Asset Registers Fulfill Orders General Token Global Inventory Relationship Import Online Banking File Inbound Shipment Internal Publisher Inventory Cost Template Invoice Invoice Approval Invoice Sales Orders Issue Components Item Fulfillment	Pay Bills Pay Sales Tax Payment Card Payment Card Token Payment Instruments Payroll Liability Payments Perform Search Phone Calls Planned Standard Cost Post Vendor Bill Variances Posting Period on Transactions Presentation Categories Price Books Price Plans Print Shipment Documents Process GST Refund Project Tasks Projects Publish Forms Purchase Contract Purchase Contract Approval Purchase Order Quote Reallocate Order Item Receive Order Receive Returns Reconcile Reporting Refund Returns

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CEO					
View	**Create**	**Edit**	**Full**		
Fair Value Formula Fair Value Price Financial Statements General Ledger Generate Price Lists Generate Statements Imported Employee Expenses Income Income Statement Individual Paycheck Inventory Item Revenue Category Lead Snapshot/ Reminders Net Worth Notes Tab Partner Authorized Commission Reports Partner Commission Reports Project Budget Project Profitability Project Revenue Rules Project Templates Purchase Order Reports Purchases Quota Reports Recognition Treatment Recognition Treatment Rule Resource Allocations Return Authorization Reports Revalue Inventory Cost Revenue Arrangement Revenue Arrangement Approval Revenue Commitment Revenue Commitment Reversal			Close Work Orders Competitors Contacts Count Inventory Create Inventory Counts Credit Card Credit Card Refund Credit Card Registers Credit Memo Credit Returns CRM Groups Currency Revaluation Customer Deposit Customer Payment Customer Payment Authorization Customer Refund Customers Deleted Records Departments Deposit Deposit Application Distribution Network Documents and Files Earliest Availability	Item Receipt Item Revisions Item/Category Layouts Items Locations Log in using Access Tokens Long Term Liability Registers Mail Merge Make Journal Entry Manufacturing Cost Template Manufacturing Routing Mark Work Orders Built Mark Work Orders Firmed Mark Work Orders Released Matching Rules for Online Banking Memorized Transactions Mobile Device Access Non Posting Registers Notifications Opportunity Order Allocation Strategy Order Management Dashboard Order Reservation Other Asset Registers Other Current Asset Registers Other Current Liability Registers Other Lists Other Names Outlook Integration 2.0 Ownership Transfer	Report Customization Report Scheduling Request For Quote Requisition Requisition Approval Resource Resource Allocation Approval REST Web Services Return Auth. Approval Return Authorization Sales Channel Sales Order Sales Order Approval Scanned Vendor Bills Set Up Budgets Shipping Partner Package Shipping Partner Shipment SOAP Web Services Standard Cost Version Statement Charge Statistical Account Registers Store Account Registers Store Categories Store Content Categories Store Content Items Store Tabs Subscription Change Orders Subscription Plan Subscriptions System Status Tasks Tegata Accounts Tegata Payable Tegata Receivables Template Categories Timer Track Time Transfer Funds Transfer Order

CEO					
View	**Create**	**Edit**	**Full**		
Revenue Element Revenue Management VSOE Revenue Recognition Field Mapping Revenue Recognition Plan Revenue Recognition Reports Revenue Recognition Rule Revenue Recognition Schedules Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report System Journal Tax Tax Details Tab Tax Records Tax Reports Time Tracking Trial Balance View Gateway Asynchronous Notifications View Payment Events Web Site Report Web Store Report Work Breakdown Structure Work Calendar					Transfer Order Approval Unbilled Receivable Registers Units Usage Vendor Bill Approval Vendor Payment Approval Vendor Request For Quote Vendor Return Auth. Approval Vendor Return Authorization Vendor Returns Vendors View Online Bill Pay Status Work Order Work Order Close Work Order Completion Work Order Issue

CEO (Hands Off)						
View				**Create**	**Edit**	**Full**
Access Payment Audit Log Accounting Lists Accounting Management Accounts Accounts Payable	Credit Memo Credit Returns Currency Revaluation Customer Deposit Customer Payment	Inventory Invoice Invoice Sales Orders Issue Components Item Fulfillment Item Receipt Items	Receive Order Receive Returns Reconcile Reporting Refund Returns Request For Quote Requisition Resource Allocations	Export Lists Kudos Tableau® Workbook Export	Bills Email Template Fax Messages Fax Template Letter Messages Letter Template Mail Merge PDF Messages PDF Template	Automated Clearing House Blanket Purchase Order Calendar Contacts Deleted Records Documents and Files

CEO (Hands Off)						
View				**Create**	**Edit**	**Full**
Accounts Payable Graphing Accounts Payable Register Accounts Receivable Accounts Receivable Graphing Accounts Receivable Register Adjust Inventory ADP Import Data Amortization Reports Approve Online Bill Payments Audit Trail Balance Sheet Bank Account Registers Bill of Materials Bill Of Materials Inquiry Bill Purchase Orders Build Work Orders Calculate Time Cash Sale Cash Sale Refund Check Classes Close Work Orders Commission Reports Competitors Credit Card Credit Card Refund Credit Card Registers	Customer Payment Authorization Customer Refund Customers Departments Deposit Deposit Application Edit Forecast Employee Commission Transaction Approval Employee Public Employee Reminders Employees Enter Completions Enter Opening Balances Enter Vendor Credits Enter Year-To- Date Payroll Adjustments Equity Registers Expense Report Expenses Finance Charge Financial History Financial Statements Fixed Asset Registers Fulfill Orders General Ledger Generate Price Lists Generate Statements Imported Employee Expenses Import Online Banking File Income Income Statement Individual Paycheck	Lead Snapshot/ Reminders Locations Long Term Liability Registers Make Journal Entry Mark Work Orders Built Mark Work Orders Firmed Mark Work Orders Released Memorized Tran sactions Net Worth Non Posting Registers Notes Tab Opportunity Other Asset Registers Other Current Asset Registers Other Current Liability Registers Other Lists Other Names Partner Authorized Com mission Reports Partner Commis sion Reports Pay Bills Pay Sales Tax Payroll Liability Payments Posting Period on Transactions Price Books Price Plans Print Shipment Documents Print Shipping Documents Process GST Refund Projects Project Profitability Purchase Contract Purchase Order Purchase Order Reports Purchases Quota Reports Quote	Return Auth. Approval Return Authorization Return Authorization Reports Revenue Recognition Reports Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Sales Order Approval Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Set Up Budgets Shipping Partner Package Shipping Partner Shipment Statement Charge Statistical Account Registers Subscription Plan Subscriptions Subscription Change Orders System Journal Tax Tax Details Tab Tax Records Tax Reports Tegata Accounts Tegata Payable Tegata Receivables Time Tracking Timer Track Time Transfer Funds Transfer Order Trial Balance Unbilled Receivable Registers Units Usage		SuiteAnalytics Workbook Track Messages	Employee Commission Transaction Employee Record Events Find Transaction General Token Inbound Shipment Log in using Access Tokens Mobile Device Access Notifications Outlook Integration 2.0 Ownership Transfer Payment Card Payment Card Token Payment Instruments Perform Search Phone Calls Project Tasks Report Customization Report Scheduling Resource Resource Allocation Approval REST Web Services SOAP Web Services System Status Tasks Template Categories Transfer Order Approval Vendor Bill Approval Vendor Payment Approval

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CEO (Hands Off)						
View				**Create**	**Edit**	**Full**
			Vendor Request For Quote Vendor Return Auth. Approval Vendor Return Authorization Vendor Returns Vendors View Gateway Asynchronous Notifications View Online Bill Pay Status View Payment Events Web Site Report Web Store Report Work Calendar Work Order Work Order Close Work Order Completion Work Order Issue			

CFO					
View	**Create**	**Edit**	**Full**		
Access Payment Audit Log Account Detail Accounts Payable Accounts Payable Graphing Accounts Receivable Accounts Receivable Graphing Amortization Reports Balance Overview Balance Sheet Bill Of Materials Inquiry Budget Build Assemblies Check Item Availability Commission Reports Commit Orders Component Where Used Costed Bill Of Materials Inquiry	Balance Transactions by Segments Export Lists Kudos Tableau® Workbook Export Vendor Request For Quote	Netting Settlement Approval Override Payment Hold Subsidiary Settings Manager SuiteAnalytics Workbook Tax Details Tab Tax Reports	Accounting Book Accounting Lists Accounting Management Accounts Accounts Payable Register Accounts Receivable Register Adjust Inventory Allocate Orders Amortization Schedules Approve Online Bill Payments Approve Order Reservation Approve Vendor Payments Audit Trail Automated Cash Application Balance Location Costing Group Accounts Balancing Journals	Events Expense Amortization Plan Expense Amortization Rule Expense Report Fax Messages Fax Template Finance Charge Financial History Find Transaction Fixed Asset Registers Foreign Currency Variance Mapping Fulfill Orders Generate Revenue Commitment Generate Revenue Commitment Reversals Global Account Mapping Global Inventory Relationship Import Online Banking File Inbound Shipment	Perform Search Period End Journals Phone Calls Planned Standard Cost Post Time Post Vendor Bill Variances Posting Period on Transactions Price Books Price Plans Process GST Refund Projects Project Budget Project Intercompany Cross Charge Request Project Tasks Publish Search Purchase Contract Purchase Contract Approval Purchase Order Quote

CFO					
View	**Create**	**Edit**	**Full**		
Cross Charge Journal Custom Record Types Deferred Expense Reports Employee Commission Schedules/Plans Employee Public Employee Reminders Expenses Fair Value Dimension Fair Value Formula Fair Value Price Financial Statements General Ledger Generate Price Lists Generate Statements Imported Employee Expenses Income Income Statement Individual Paycheck Inventory Item Fulfillment Item Receipt Item Revenue Category Lead Snapshot/ Reminders Net Worth Partner Authorized Commission Reports Partner Commission Reports Period End Financial Statements Print Shipment Documents Project Profitability Project Revenue Rules Project Templates Purchase Order Reports Purchases			Bank Account Registers Bill Of Distribution Bill of Materials Bill Purchase Orders Bills Blanket Purchase Order Blanket Purchase Order Approval Build Work Orders Calculate Time Calendar Cash Sale Cash Sale Refund Charge Charge Rule Charge - Run Rules Check Class Mapping Classes Close Work Orders Competitors Contacts Copy Budgets Count Inventory Create Allocation Schedules Create Inventory Counts Credit Card Credit Card Refund Credit Card Registers Credit Memo Credit Returns CRM Groups Currency Revaluation Custom Recognition Event Type Customer Deposit Customer Payment Customer Payment Authorization Customer Refund Customers Deleted Records Department Mapping	Intercompany Adjustments Inventory Cost Template Invoice Invoice Approval Invoice Sales Orders Issue Components Item Account Mapping Item Revisions Items Journal Approval Letter Messages Letter Template Location Costing Group Location Mapping Locations Log in using Access Tokens Long Term Liability Registers Mail Merge Make Journal Entry Manage Cross Charge Automation Manufacturing Cost Template Manufacturing Routing Mark Work Orders Built Mark Work Orders Firmed Mark Work Orders Released Mass Updates Matching Rules for Online Banking Memorized Transactions Mobile Device Access Netting Settlement Non Posting Registers Notes Tab Notifications Opportunity Order Allocation Strategy Order Management Dashboard	Reallocate Order Item Receive Order Receive Returns Reconcile Reconcile Reporting Refund Returns Report Customization Report Scheduling Request For Quote Requisition Requisition Approval Resource Resource Allocation Approval REST Web Services Return Auth. Approval Return Authorization Revalue Inventory Cost Revenue Commitment Revenue Commitment Reversal Revenue Management VSOE Revenue Recognition Schedules Sales Channel Sales Order Sales Order Approval Scanned Vendor Bills Set Up Budgets SOAP Web Services Standard Cost Version Statement Charge Statistical Account Registers Subscription Change Orders Subscription Plan Subscriptions Subsidiary - Tax Engine selection Tasks

CFO					
View	**Create**	**Edit**	**Full**		
Quota Reports Recognition Treatment Recognition Treatment Rule Resource Allocations Return Authorization Reports Revenue Arrangement Revenue Arrangement Approval Revenue Element Revenue Recognition Field Mapping Revenue Recognition Plan Revenue Recognition Reports Revenue Recognition Rule Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Shipping Partner Package Shipping Partner Shipment System Journal Tax Tax Records Time Tracking Unbuild Assemblies View Gateway Asynchronous Notifications View Payment Events Work Calendar			Departments Deposit Deposit Application Distribution Network Documents and Files Earliest Availability Email Template Employee Commission Transaction Employee Commission Transaction Approval Employee Record Employees Enter Completions Enter Opening Balances Enter Vendor Credits Enter Year-To-Date Payroll Adjustments Entity Account Mapping Equity Registers	Order Reservation Other Asset Registers Other Current Asset Registers Other Current Liability Registers Other Lists Other Names Outlook Integration 2.0 Override Estimated Cost on Transactions Ownership Transfer Partner Commission Transaction Partner Commission Transaction Approval Pay Bills Pay Sales Tax Pay Tax Liability Payroll Liability Payments PDF Messages PDF Template	Tegata Accounts Tegata Payable Tegata Receivables Template Categories Timer Track Messages Track Time Transaction Detail Transfer Funds Trial Balance Unbilled Receivable Registers Units Usage Vendor Bill Approval Vendor Payment Approval Vendor Return Auth. Approval Vendor Return Authorization Vendor Returns Vendors View Online Bill Pay Status Work Breakdown Structure Work Order Work Order Close Work Order Completion Work Order Issue

Chief People Officer (CPO)			
View	**Create**	**Edit**	**Full**
Commission Reports Employee Commission Transaction Employee Commission Transaction Approval Employee Public Employee Reminders Expense Categories Find Transaction Imported Employee Expenses Individual Paycheck Payroll Check Register Payroll Hours & Earnings Payroll Items Payroll Summary & Detail Reports Personal Banking Information Purchase Order Reports Tax Details Tab Tax Reports Workforce Analytics	Export Lists Resource Tableau® Workbook Export Vendors	Email Template Form W-2 – Wage and Tax Statement Kudos SuiteAnalytics Workbook Track Messages	Advanced Government Issued IDs Amend W-4 Basic Government Issued IDs Calendar Departments Documents and Files Edit Profile Employee Effective Dating Employee Change Reason Employee Change Requests Employee Change Request Types Employee Effective Dating Employee Record Employee Social Security Numbers Employees Events Expense Report Generic Resources Government Issued ID Types Job Management Job Requisitions Locations Manage Users News Item Notes Tab Notifications Onboarding Administration Onboarding Plan Onboarding Task Organization Value Other Lists Perform Search Phone Calls Positions Report Customization Report Scheduling Talent Administration Tasks Template Categories Termination Reasons Time-Off Administration Track Time View Login Audit Trail Work Calendar Workplaces

Consultant			
View	**Create**	**Edit**	**Full**
Accounts Receivable Un-Billed Classes Customers Departments	Kudos Project Tasks	Calendar Cases Documents and Files Find Transaction	Events Expense Report Notification Phone Calls

Consultant			
View	**Create**	**Edit**	**Full**
Imported Employee Expenses Locations Non Posting Registers Price Books Price Plans Project Profitability Projects Statistical Account Registers Subscriptions Subscription Change Orders Time Tracking		Perform Search Purchase Order Requisition SuiteAnalytics Workbook	Report Scheduling Resource Allocations Tasks Track Time

Customer Center			
View	**Create**	**Edit**	**Full**
Accounts Receivable Register Cash Sale Cardholder Authentications Charge Charge Rule Credit Memo Customer Deposit Customer Payment Authorization Estimate Find Transaction Fulfill Orders Invoice Issues Non Posting Registers Price Plans Return Authorization Reports Sales Order Transaction Report Subscription Change Orders Subscriptions Track Messages	Deposit Application Generate Statements Item Fulfillment Print Shipment Documents Return Authorization Shipping Partner Package Shipping Partner Shipment	Automated Clearing House Cases Cardholder Authentication Contacts Customer Payment Customer Profile General Token Payment Card Payment Card Token Sales Order	Charge – Run Rules Deleted Records Log in using Access Tokens Notifications Payment Instruments Perform Search Print/Email/Fax REST Web Services SOAP Web Services

Developer			
View	**Create**	**Edit**	**Full**
—	—	▪ SuiteAnalytics Workbook	Advanced PDF/HTML Templates Allow JS / HTML Uploads Bulk Manage Roles CRM Lists Custom Address Form Custom Body Fields Custom Center Categories Custom Center Links Custom Center Tabs Custom Centers Custom Column Fields Custom Entity Fields Custom Entry Forms Custom Event Fields

Developer			
View	**Create**	**Edit**	**Full**
			Custom Fields Custom Item Fields Custom Item Number Fields Custom Lists Custom PDF Layouts Custom Record Entries Custom Record Types Custom Segments Custom Sublist Custom Sublists Custom Subtabs Custom Transaction Fields Custom Transaction Forms Custom Transaction Types Documents and Files Email Template Enable Features Import CSV File KPI Scorecards Log in using Access Tokens Log in using OAuth 2.0 Access Tokens Manage Custom Permissions Manage Translation Marketing Template Other Custom Fields PDF Template Perform Search Publish Dashboards Publish Search REST Web Services Set Up CSV Preferences Set Up Web Site SOAP Web Services SuiteApp Deployment SuiteApp Marketplace SuiteScript SuiteScript Scheduling User Access Tokens Vicarious emails Website (External) publisher Workflow

Employee Center			
View	**Create**	**Edit**	**Full**
Amend W-4 Bonus Commission Reports Employee Compensation Employee Confidential Employee Public Employee Reminders Employee Self Employee Social Security Numbers Expense Report Policies Financial History	Export Lists Kudos Resource Tableau® Workbook Export	Contacts Edit Profile Employee Record Notes Tab SuiteAnalytics Workbook	Calendar Cases Deleted Records Documents and Files Events Expense Report Find Transaction Log in using Access Tokens Mobile Device Access Notifications Perform Search Phone Calls

Employee Center			
View	**Create**	**Edit**	**Full**
Imported Employee Expenses Individual Paycheck Non Posting Registers Personal Banking Information Project Profitability Resource Allocations Sales Order Transaction Report Time Tracking Work Calendar			Project Tasks Purchase Order Request For Quote Requisition Requisition Approval Resource Allocation Approval REST Web Services SOAP Web Services Tasks Track Messages Track Time User Access Tokens Vendor Request For Quote

Engineer			
View	**Create**	**Edit**	**Full**
Cases Contacts Email Template Employee Public Employee Record Template Categories Track Messages	Export Lists Kudos Tableau® Workbook Export	Issue Reports Issues Mail Merge Mark Issue As Showstopper SuiteAnalytics Workbook	Admindocs Calendar Deleted Records Documents and Files Events Log in using Access Tokens Mobile Device Access Notes Tab Notifications Perform Search Report Scheduling REST Web Services SOAP Web Services System Status Tasks

Engineering Manager			
View	**Create**	**Edit**	**Full**
Cases Contacts Employee Compensation Employee Confidential Employee Public Employee Record Track Messages	Export Lists Kudos Tableau® Workbook Export	Issues Perform Search SuiteAnalytics Workbook	Admindocs Calendar Deleted Records Documents and Files Events Issue Reports Log in using Access Tokens Mark Issue As Showstopper Mobile Device Access Notes Tab Notifications Report Scheduling REST Web Services SOAP Web Services Tasks

Full Access (deprecated)					
View		**Full**			
Account Detail Report Accounts Payable Graphing Accounts Payable Report Accounts Receivable Graphing Accounts Receivable Report Accounts Receivable Un-Billed Balance Sheet Budget Cash Flow Report Certificate access Certificate management Employee Confidential Employee Public Expenses Form 1099 Form 940 Form 941 Form W-2 General Ledger Income Income Statement Inventory Lead Snapshot/ Monthly Summary Reports by Employee Monthly Summary Reports by Item Period End Financial Statements Resource Allocations Suppliers Tax Reports View Gateway Asynchronous Notifications	Net Worth Payroll Check Register Payroll Journal Report Payroll Liability Report Payroll Reports Purchases Reconcile Reporting Reminders Sales Sales By Partner Sales By Promotion Code Sales Force Automation Sales Graphing Support Support Case Snapshot/ Reminders Tax Time Tracking Transaction Detail Trial Balance Web Site Report Web Store Report	Access Token Management (TBA) Accounting Lists Accounting Management Accounting Preferences Accounts Accounts Payable Register Accounts Receivable Register Adjust Inventory Adjust Inventory Worksheet Advanced Government Issued IDs Allow JS / HTML Uploads Allow Non GL Changes Approve Direct Deposit Approve EFT Approve Online Bill Payments Audit Trail Bank Account Registers Bill Purchase Orders Bill Sales Orders Billing Setup Bills Blanket Purchase Order Approval Calculate Time Calendar Campaign Campaign History Cases Cash Sale Cash Sale Refund Categories Check Classes Color Themes Companies Competitors Contacts Cost of Goods Sold Registers	Customer Payment Customer Profile Customer Refund Customers Departments Deposit Direct Deposit Status Distribute Inventory Documents and Files Edit Forecast EFT Status Email Template Employee Change Reason Employee Effective Dating Employee Related Lists(Other Lists) Employees Enter Opening Balances Enter Vendor Credits Enter Year-to-date Payroll Adjustments Equity Registers Establish Quotas Estimate Events Expense Categories Expense Registers Expense Report Finance Charge Financial History Find Transaction Fixed Asset Registers Fulfill Sales Orders Generate Revenue Commitment Generate Revenue Commitment Reversals Generate Statements Global Inventory Relationship	Individual Paycheck Internal Publisher Invoice Item/Category Layouts Items Jobs Job Management Job Requisitions Journal Approval Knowledge Base Kudos Locations Log in using Access Tokens (TBA) Long Term Liability Registers Mail Merge Make Journal Entry Marketing Template Mass Updates Media Items Memorized Transactions Non Posting Registers Notes Tab Online Bank Statement Opportunity Order Reservation Organization Value Other Asset Registers Other Current Asset Registers Other Current Liability Registers Other Expense Registers Other Income Registers Other Names Outlook Integration 2.0 Outlook Integration 3.0 Partners Pay Bills Pay Sales Tax Paychecks Payment Methods Payroll Items	Process Payroll Promotion Code Purchase Order Receive Items Receive Purchase Orders Receive Returns Reconcile Record Custom Field Refund Returns Related Items Report Customization Resource Resource Allocation Approval Return Auth. Approval Return Authorization Revenue Commitment Revenue Commitment Reversal Run Payroll Sales Order Sales Order Approval Scanned Vendor Bills Set Up Budgets Set Up Company Ship Items Shipping Items Shortcuts Statement Charge Store Categories Store Content Categories Store Content Items Store Tabs Subsidiary - Tax Engine selection SuiteAnalytics Workbook Tasks Tax Details Tab Tax Items Termination Reasons Time-Off Administration Timer Track Messages

Full Access (deprecated)					
View		**Full**			
		Credit Card Credit Card Refund Credit Card Registers Credit Memo CRM Group CRM Lists (Other Lists) Currency Currency Revaluation Custom Record Entries	Government Issued ID Types Import CSV File Import Online Banking (QIF) File Import XML Transaction Income Registers	Payroll Liability Payments Period End Journals Posting Period on Transactions Presentation Print Shipment Documents	Track Time Transfer Funds Transfer Inventory Two-Factor Authentication base User Access Tokens (TBA) Vendor In-Transit Payment Approval Vendors View Online Bill Pay Status Website (External) publisher Workplaces

Human Resources Generalist			
View	**Create**	**Edit**	**Full**
Commission Reports Employee Commission Transaction Employee Commission Transaction Approval Employee Public Employee Reminders Expense Categories Find Transaction Imported Employee Expenses Individual Paycheck Payroll Chek Register Payroll Hours & Earnings Payroll Items Payroll Summary & Detail Reports Purchase Order Reports Workforce Analytics	Export Lists Resource Tableau® Workbook Export Vendors	Email Template Form W-2 - Wage and Tax Statement Kudos SuiteAnalytics Workbook Track Messages	Advanced Government Issued IDs Amend W-4 Basic Government Issued IDs Bonus Bonus Types Calendar Departments Documents and Files Edit Profile Employee Effective Dating Employee Change Reason Employee Change Request Employee Change Request type Employee Record Employees Employee Social Security Numbers Events Expense Report Generic Resources Government Issued ID Types Job Management Job Requisitions Locations Manage Users Mass Updates News Items Notes Tab Notifications Onboarding Administration Onboarding Plan Onboarding Task Organization Value Other Lists Perform Search

Human Resources Generalist			
View	**Create**	**Edit**	**Full**
			Personal Banking Information Phone Calls Positions Report Customization Report Scheduling Talent Administration Tasks Template Categories Termination Reasons Time-Off Administration Track Time View Login Audit Trail Work Calendar Workplaces

Intranet Manager			
View	**Create**	**Edit**	**Full**
Bill Of Materials Inquiry Employee Compensation Employee Confidential Employee Public Employee Record Find Transaction Notes Tab Web Site Report Web Store Report	Export Lists Kudos Resource Tableau® Workbook Export	Email Template SuiteAnalytics Workbook Track Messages	Allow JS / HTML Uploads Bill of Materials Calendar Color Themes Custom Item Fields Deleted Records Documents and Files Events Internal Publisher Item/Category Layouts Items Log in using Access Tokens Mobile Device Access Notifications Online Customer Form Perform Search Phone Calls Presentation Categories Publish Employee List Publish Forms Publish RSS Feeds Related Items Report Scheduling REST Web Services Set Up Image Resizing Set Up Web Site SOAP Web Services Store Categories Store Content Categories Store Content Items Store Tabs Tasks Template Categories Units Website (External) publisher

Issue Administrator			
View	**Create**	**Edit**	**Full**
Cases Employee Public Employee Record	Export Lists Kudos Tableau® Workbook Export	SuiteAnalytics Workbook	Calendar CRM Groups Deleted Records Documents and Files Events Import CSV File Issue Reports Issue Setup Issues Log in using Access Tokens Mark Issue As Showstopper Mass Updates Mobile Device Access Notes Tab Notifications Perform Search Publish Dasboards Publish Search Report Scheduling REST Web Services SOAP Web Services Tasks

Marketing Administrator					
View	**Create**	**Edit**	**Full**		
Cases Employee Public Employee Reminders Financial History Find Transaction Lead Snapshot/Reminders Marketing Campaign Reports Price Books Price Plans Project Templates Quota Reports Sales Sales By Partner Sales By Promotion Sales Force Automation Subscription Plan Web Site Report Work Calendar	Export Lists Kudos Tableau® Workbook Export	Classes Departments Email Template Locations SuiteAnalytics Workbook Track Messages Vendors	Backup Your Data Bulk Manage Roles Calendar Campaign History Color Themes Companies Competitors Contact Roles Contacts CRM Groups CRM Lists Custom Body Fields Custom Column Fields Custom Entity Fields Custom Entry Forms Custom Event Fields Custom Fields Custom Item Fields Custom Lists Custom PDF Layouts	Duplicate Detection Setup Duplicate Entity Management Employee Record Employees Events Fax Messages Fax Template Import CSV File Intelligent Recommendations Internal Publisher Item Collection Knowledge Base KPI Scoreboards Letter Messages Letter Template Log in using Access Tokens Mail Merge Manage Users Marketing Campaigns Marketing Template Mass Updates Mobile Device Access Notes Tab	PDF Template Perform Search Phone Calls Presentation Categories Project Tasks Projects Promotion Public Template Categories Publish Dashboards Publish Knowledge Base Publish Search Record Custom Field Report Customization Report Scheduling Resource REST Web Services Sales Force Automation Setup Sales Order Reports Setup Campaign Email Addresses Set Up Domains Setup Campaigns

Marketing Administrator					
View	**Create**	**Edit**	**Full**		
			Custom Record Entries Custom Record Types Custom Subtabs Custom Transaction Fields Custom Transaction Forms Customer Profile Customer Segments Manager Customer Status Customers Delete Event Deleted Records Documents and Files	Notifications Online Custom Record Form Online Customer Form Other Names Partners PDF Messages	Shortcuts SOAP Web Services Subscriptions Subscription Change Orders Tasks Template Categories Two-Factor Authentication base Upsell Assistant Upsell Setup Upsell Wizard Users & Passwords

Marketing Assistant			
View	**Create**	**Edit**	**Full**
Bill Of Materials Bill of Materials Inquiry Employee Public Employee Record Financial History Items Lead Snapshot/Reminders Marketing Campaign Reports Price Books Price Plans Project Templates Quota Reports Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Reports Subscription Plan Units Work Calendar	Export Lists Kudos Knowledge Base Tableau® Workbook Export	CRM Lists Email Template Fax Messages Fax Template Letter Messages Letter Template Mail Merge Partners PDF Messages PDF Template Promotion SuiteAnalytics Workbook Track Messages	Allow JS / HTML Uploads Calendar Campaign History Companies Competitors Contacts CRM Groups Customers Deleted Records Documents and Files Duplicate Entity Management Events Find Transaction Intelligent Recommendations Log in using Access Tokens Marketing Campaigns Marketing Template Mass Updates Mobile Device Access Notes Tab Notifications Perform Search Phone Calls Project Tasks Projects Publish RSS Feeds Report Customization Report Scheduling Resource REST Web Services SOAP Web Services Subscriptions

Marketing Assistant			
View	**Create**	**Edit**	**Full**
			Subscription Change Orders Tasks Template Categories Upsell Assistant Upsell Setup Upsell Wizard Website (External) Publisher

Marketing Manager			
View	**Create**	**Edit**	**Full**
Bill Of Materials Inquiry Bill of Materials Employee Compensation Employee Confidential Employee Public Employee Record Financial History Items Lead Snapshot/Reminders Marketing Campaign Reports Price Books Price Plans Project Templates Quota Reports Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Reports Subscription Plan Units Web Site Report Web Store Report Work Calendar	Export Lists Knowledge Base Kudos Tableau® Workbook Export	CRM Lists Custom Body Fields Custom Column Fields Custom Entity Fields Custom Event Fields Custom Fields Custom Lists Email Template Fax Messages Fax Template Letter Messages Letter Template Mail Merge PDF Messages PDF Template Publish Knowledge Base SuiteAnalytics Workbook Track Messages	Calendar Campaign History Companies Competitors Contact Roles Contacts CRM Groups Custom Transaction Forms Customer Segments Manager Customer Status Customers Deleted Records Documents and Files Duplicate Entity Management Events Find Transaction Intelligent Recommendations Internal Publisher Item Collection Log in using Access Tokens Marketing Campaigns Marketing Template Mass Updates Mobile Device Access Notes Tab Notifications Online Customer Form Outlook Integration 2.0 Partners Perform Search Phone Calls Project Tasks Projects Promotion Public Template Categories Report Customization Report Scheduling REST Web Services Resource Sales Territory Rule Set Up Campaign Email Addresses Set Up Image Resizing Setup Campaigns SOAP Web Services Subscriptions

Marketing Manager			
View	**Create**	**Edit**	**Full**
			Subscription Change Orders Tasks Template Categories Upsell Assistant Upsell Setup Upsell Wizard

Partner Center			
View	**Create**	**Edit**	**Full**
Cases Find Transaction Notes Tab Partner Commission Reports Price Books Price Plans Project Templates Resource Allocations Sales By Partner Sales By Promotion	Export Lists Tableau® Workbook Export	Competitors Customers Jobs Projects Subscriptions Subscription Change Orders SuiteAnalytics Workbook	Deleted Records Log in using Access Tokens Notifications Partners Perform Search Promotion Resource Allocation Approval REST Web Services SOAP Web Services

Payroll Manager			
View	**Create**	**Edit**	**Full**
Employee Compensation Employee Confidential Employee Public Employee Reminders Financial History Find Transaction Form 940 – Employer's Annual Federal Unemployment Tax Return Form 941 – Employer's Quarterly Federal Tax Return Form W4 – Employee's Withholding Allowance Certificate Make Journal Entry Manage Payroll Notes Tab Payroll Hours & Earnings Payroll Check Register Payroll Journal Report Payroll Liability Report Payroll Summary & Detail Reports Project Profitability Time Tracking	Export Lists Kudos Posting Period on Transactions Resource Tableau® Workbook Export	Email Template Form W-2 - Wage and Tax Statement SuiteAnalytics Workbook Track Messages	Calendar Contacts Deleted Records Documents and Files Employee Record Employee Social Security Numbers Employees Enter Year-To-Date Payroll Adjustments Events Individual Paycheck Log in using Access Tokens Mobile Device Access Notifications Paychecks Payroll Items Payroll Liability Payments Perform Search Phone Calls Process Payroll Report Customization Report Scheduling REST Web Services Run Payroll Set Up Payroll SOAP Web Services Tasks Template Categories Track Time

Payroll Manager			
View	**Create**	**Edit**	**Full**
			Vendors Workplaces

Payroll Setup			
View	**Create**	**Edit**	**Full**
Employee Public Employee Reminders Financial History Find Transaction Form 940 – Employer's Annual Federal Unemployment Tax Return Form 941 – Employer's Quarterly Federal Tax Return Form W4 – Employee's Withholding Allowance Certificate Make Journal Entry Manage Payroll Notes Tab Payroll Check Register Payroll Journal Report Payroll Liability Report Payroll Summary & Detail Reports Project Profitability Time Tracking	Export Lists Kudos Posting Period on Transactions Resource Tableau® Workbook Export	Email Template Form W-2 - Wage and Tax Statement SuiteAnalytics Workbook Track Messages	Calendar Contacts Deleted Records Documents and Files Employee Record Employee Social Security Numbers Employees Enter Year-To-Date Payroll Adjustments Events Individual Paycheck Locations Log in using Access Tokens Mobile Device Access Notifications Paychecks Payroll Items Payroll Liability Payments Perform Search Phone Calls Process Payroll Report Customization Report Scheduling REST Web Services Run Payroll Set Up Payroll SOAP Web Services Tasks Template Categories Track Time Vendors Workplaces

PM Manager			
View	**Create**	**Edit**	**Full**
Employee Compensation Employee Confidential Employee Public Employee Record Find Transaction Lead Snapshot/Reminders Partners Project Templates Provisioning Support Support Case Snapshot/Reminders Work Calendar	Export Lists Kudos Resource Tableau® Workbook Export	Companies Contacts CRM Groups Email Template Issue Reports Issues Mark Issue As Showstopper Opportunity Perform Search SuiteAnalytics Workbook Track Messages	Admindocs Calendar Cases Competitors Customers Documents and Files Events Financial History Jobs Knowledge Base KPI Scoreboards

PM Manager			
View	**Create**	**Edit**	**Full**
			Mail Merge Mass Updates Mobile Device Access Notes Tab Notifications Phone Calls Project Budget Project Tasks Publish Dashboards Publish Knowledge Base Report Customization Report Scheduling Resource Allocation Approval Resource Allocations Subscriptions Tasks Template Categories Work Breakdown Structure

Product Manager			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Charge Charge Rule Credit Memo Employee Public Employee Record Find Transaction Invoice Lead Snapshot/Reminders Partners Price Books Price Plans Project Templates Provisioning Sales Order Support Support Case Snapshot/Reminders View Gateway Asynchronous Notifications View Payment Events Work Calendar	Export Lists Kudos Resource Tableau® Workbook Export	Companies Contacts CRM Groups Email Template Issues Opportunity Perform Search SuiteAnalytics Workbook Track Messages	Admindocs Calendar Cases Competitors Customers Deleted Records Documents and Files Events Financial History Charge - Run Rules Issue Reports Knowledge Base Log in using Access Tokens Mail Merge Mark Issue As Showstopper Mass Updates Mobile Device Access Notes Tab Notifications Outlook Integration 2.0 Phone Calls Project Tasks Projects Publish Knowledge Base Report Customization Report Scheduling REST Web Services SOAP Web Services Subscriptions Subscription Change Orders Tasks

Product Manager			
View	**Create**	**Edit**	**Full**
			Template Categories

QA Engineer			
View	**Create**	**Edit**	**Full**
Cases Employee Public Employee Record	Kudos	Issue Reports Issues Mark Issue As Showstopper Perform Search SuiteAnalytics Workbook Track Messages	Admindocs Calendar Documents and Files Events Mobile Device Access Notes Tab Notifications System Status Tasks

QA Manager			
View	**Create**	**Edit**	**Full**
Cases Employee Compensation Employee Confidential Employee Public Employee Record	Kudos	Issues Perform Search SuiteAnalytics Workbook Track Messages	Admindocs Calendar Documents and Files Events Issue Reports Issue Setup KPI Scorecards Mark Issue As Showstopper Mobile Device Access Notes Tab Notifications Publish Dashboards System Status Tasks

Resource Manager				
View		**Create**	**Edit**	**Full**
Audit Trail Bill of Materials Calendar Contacts Custom Entity Fields Custom Entry Forms Custom Event Fields Custom Fields Custom HTML Layouts Custom Item Fields Custom Item Number Fields Custom Lists	Import CSV File Items KPI Scorecards Locations Mass Updates Notes Tab Other Custom Fields Outlook Integration 2.0 Price Books Price Plans Project Profitability Project Templates Report Customization Report Scheduling Subscription Plan Subsidiaries SuiteScript	Custom Body Fields Custom Center Categories Custom Center Links Custom Centers Custom Column Fields Custom Transaction Forms Kudos Perform Search Publish Forms Publish Search	Customers Events SuiteAnalytics Workbook	Deleted Records Documents and Files Employee Record Mobile Device Access Notifications Project Tasks Projects Resource Allocation Approval Resource Allocations Review Custom GL Plug-in Executions Subscriptions Subscription Change Orders Vicarious emails

Resource Manager				
View		**Create**	**Edit**	**Full**
Custom PDF Layouts Custom Record Entries Custom Record Types Custom Sublists Custom Subtabs Email Template Employee Public Employee Reminders Employees Generic Resources	SuiteSignOn Tasks Template Categories Time Tracking Two-Factor Authentication Two-Factor Authentication base Usage Vendors Work Calendar Workflow			

Retail Clerk (Note that this role cannot be customized. See Retail Clerk Roles.)			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Bill Of Materials Inquiry Bill of Materials Calendar Deposit Application Edit Profile Employee Public Employee Record Employee Reminders Events Fulfill Orders Item Fulfillment Items Locations Personal Banking Information Print Shipment Documents Project Profitability Purchase Order Requistion Sales Order Fulfillment Reports Shipping Partner Package Shipping Partner Shipment Tasks Time Tracking Track Messages Track Time Transaction Detail View Gateway Asynchronous Notifications View Payment Events	Kudos Phone Calls	Contacts SuiteAnalytics Workbook	Cases Charge Charge Rule Charge – Run Rules Credit Memo Customer Deposit Customer Payment Customer Payment Authorization Customer Refund Customers Documents and Files Find Transaction Invoice Invoice Approval Invoice Sales Orders Mobile Device Access Notes Tab Notifications Perform Search Sales Order Transfer Order Transfer Order Approval

Retail Clerk (Web Services Only) (Note that this role cannot be customized. See Retail Clerk Roles.)			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Bill Of Materials Inquiry	Kudos	SuiteAnalytics Workbook	Bill of Materials Charge

Retail Clerk (Web Services Only) (Note that this role cannot be customized. See Retail Clerk Roles.)			
View	**Create**	**Edit**	**Full**
Currency Employee Public Employees Locations View Gateway Asynchronous Notifications View Payment Events			Charge Rule Charge – Run Rules Credit Memo Custom Record Entries Customer Deposit Customer Payment Customer Payment Authorization Customer Refund Customers Deleted Records Deposit Application Documents and Files Employee Record Find Transaction Invoice Invoice Approval Items Log in using Access Tokens Mobile Device Access Notifications REST Web Services Sales Order SOAP Web Services Set Up SOAP Web Services Track Time Transfer Order Transfer Order Approval View Unencrypted Credit Cards View SOAP Web Services Logs

Revenue Accountant				
View	**Create**	**Edit**	**Full**	
Account Detail Balance Sheet Bill Of Materials Billing Schedules Create Allocation Schedules Currency Customer Deposit Customer Payment Customer Payment Authorization Customer Refund Employee Public Employee Reminders Employees Financial Statements Fulfill Orders General Ledger Income Income Statement Item Fulfillment	Kudos Resource	Accounts Accounts Receivable Cash Sale Cash Sale Refund Credit Memo Customers Email Template Fair Value Dimension Fair Value Formula Fair Value Price Invoice Invoice Sales Orders Item Revenue Category Non Posting Registers Recognition Treatment Recognition Treatment Rule Return Authorization Revenue Recognition Field Mapping Sales Order	Amortization Reports Amortization Schedules Calendar Custom Recognition Event Type Deferred Expense Reports Documents and Files Employee Record Events Expense Amortization Plan Expense Amortization Rule Find Transaction Generate Revenue Commitment Generate Revenue Commitment Reversals Make Journal Entry Mass Updates Notes Tab	Revenue Management VSOE Revenue Recognition Plan Revenue Recognition Reports Revenue Recognition Rule Revenue Recognition Schedules Tasks Template Categories

Revenue Accountant				
View	**Create**	**Edit**	**Full**	
Item Revisions Items Projects Project Profitability Purchase Order Reconcile Reporting Sales Order Fulfillment Reports Sales Order Reports Tax Details Tab Time Tracking Trial Balance Units		SuiteAnalytics Workbook	Notifications Perform Search Phone Calls Project Revenue Rules Project Tasks Report Customization Report Scheduling Revenue Arrangement Revenue Arrangement Approval Revenue Commitment Revenue Commitment Reversal Revenue Element	

Revenue Manager				
View	**Create**	**Edit**	**Full**	
Account Detail Balance Sheet Create Allocation Schedules Customer Deposit Customer Payment Customer Payment Authorization Customer Refund Employee Public Employee Reminders Employees Financial Statements Fulfill Orders General Ledger Income Income Statement Item Fulfillment Project Profitability Projects Purchase Order Reconcile Reporting Sales Order Fulfillment Reports Sales Order Reports Time Tracking Trial Balance Units	Kudos Resource	Accounts Accounts Receivable Bill Of Materials Billing Schedules Cash Sale Cash Sale Refund Credit Memo Currency Customers Email Template Invoice Invoice Sales Orders Item Revisions Items Non Posting Registers Return Authorization Sales Order SuiteAnalytics Workbook	Accounting Lists Accounting Management Accounting Preferences Amortization Reports Amortization Schedules Calendar Custom Body Fields Custom Column Fields Custom Entity Fields Custom Entry Forms Custom Event Fields Custom Fields Custom Item Fields Custom Lists Custom PDF Layouts Custom Recognition Event Type Custom Record Types Custom Subtabs Custom Transaction Fields Custom Transaction Forms Deferred Expense Reports Documents and Files Employee Record	Enable Features Events Expense Amortization Plan Expense Amortization Rule Fair Value Dimension Fair Value Formula Fair Value Price Find Transaction Generate Revenue Commitment Generate Revenue Commitment Reversals Item Revenue Category Make Journal Entry Mass Updates Notes Tab Notifications Other Lists Perform Search Phone Calls Project Revenue Rules Project Tasks Recognition Treatment Recognition Treatment Rule Report Customization Report Scheduling Revenue Arrangement Revenue Arrangement Approval Revenue Commitment Revenue Commitment Reversal Revenue Element Revenue Management VSOE Revenue Recognition Field Mapping Revenue Recognition Plan Revenue Recognition Reports Revenue Recognition Rule

Revenue Manager				
View	**Create**	**Edit**	**Full**	
				Revenue Recognition Schedules Tasks Template Categories

Sales Administrator				
View	**Create**	**Edit**	**Full**	
Access Payment Audit Log Accounts Receivable Accounts Receivable Register Bill Of Materials Inquiry Bill of Materials Commission Reports Employee Public Employee Reminders Financial History Items Lead Snapshot/ Reminders Marketing Campaign Reports Non Posting Registers Project Templates Quota Reports Resource Allocations Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Shipping Items Shipping Partner Registration Statistical Account Registers Subscription Plan Unbilled Receivable Registers Units Usage View Gateway Asynchronous Notifications View Payment Events Work Calendar	Export Lists Kudos Resource Tableau® Workbook Export	Cash Sale CRM Lists Custom Body Fields Custom Column Fields Custom Entity Fields Custom Event Fields Custom Fields Custom Lists Custom Subtabs Custom Transaction Fields Mass Updates SuiteAnalytics Workbook	Bulk Manage Roles Calendar Commission Feature Setup Companies Competitors Contact Roles Contacts CRM Groups Custom Entry Forms Custom Transaction Forms Customer Segments Manager Customer Status Customers Deleted Records Documents and Files Duplicate Detection Setup Duplicate Entity Management Edit Forecast Edit Manager Forecast Email Template Employee Commission Schedules/Plans Employee Commission Transaction Employee Record Employees Establish Quotas Events Fax Messages Fax Template	Find Transaction Intelligent Recommendations Internal Publisher Item Collection KPI Scorecards Lead Conversion Lead Conversion Mapping Letter Messages Letter Template Log in using Access Tokens Mail Merge Manage Users Marketing Template Mobile Device Access Notes Tab Notifications Online Customer Form Opportunity Outlook Integration 2.0 Override Estimated Cost on Transactions Partner Authorized Commission Reports Partner Commission Reports Partner Commission Schedules/Plans Partner Commission Transaction Partner Contribution PDF Messages PDF Template Perform Search Phone Calls Price Books Price Plans Project Tasks Projects Promotion Publish Dashboards Publish Search Quote Report Customization Report Scheduling Resource Allocation Approval

Sales Administrator				
View	**Create**	**Edit**	**Full**	
				REST Web Services Sales Campaigns Sales Force Automation Setup Sales Order Sales Order Approval Sales Territory Sales Territory Rule Set Up Domains SOAP Web Services Subscriptions Subscription Change Orders Tasks Team Selling Contribution Telephony Integration Template Categories Track Messages Two-Factor Authentication base Upsell Assistant Upsell Setup Upsell Wizard

Sales Manager				
View	**Create**	**Edit**	**Full**	
Access Payment Audit Log Accounts Receivable Accounts Receivable Register Bill Of Materials Inquiry Bill of Materials Cases Check Item Availability Commission Reports Commit Orders Employee Compensation Employee Confidential Employee Public Employee Record Financial History Item Revisions Items Lead Snapshot/Reminders Marketing Campaigns Marketing Campaign Reports Non Posting Registers Project Templates Quota Reports Resource Allocations Sales Sales By Partner	Export Lists Kudos Resource Tableau® Workbook Export	Campaign History Cash Sale CRM Lists Custom Body Fields Custom Column Fields Custom Entity Fields Custom Event Fields Custom Fields Custom Lists Custom Subtabs Custom Transaction Fields Fax Messages Fax Template Letter Messages Letter Template Mail Merge Mass Updates Override Payment Hold PDF Messages PDF Template SuiteAnalytics Workbook	Allocate Orders Approve Order Reservation Bill Of Distribution Calendar Commission Feature Setup Companies Competitors Contact Roles Contacts CRM Groups Custom Entry Forms Custom Transaction Forms Customer Segments Manager Customer Status Customers Deleted Records Distribution Network Documents and Files Earliest Availability Edit Forecast Edit Manager Forecast Email Template Employee Commission Schedules/Plans	Events Find Transaction Global Inventory Relationship Internal Publisher Intelligent Recommendations Item Collection Lead Conversion Lead Conversion Mapping Log in using Access Tokens Marketing Template Mobile Device Access Notes Tab Notifications Online Customer Form Opportunity Order Allocation Strategy Order Management Dashboard Order Reservation Outlook Integration 2.0 Override Estimated Cost on Transactions Partner Commission Schedules/Plans

Sales Manager				
View	**Create**	**Edit**	**Full**	
Sales By Promotion Sales Force Automation Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Statistical Account Registers Subscription Plan Unbilled Receivable Registers Units Usage View Gateway Asynchronous Notifications View Payment Events Web Site Report Web Store Report Work Calendar			Employee Commission Transaction Establish Quotas	Partner Commission Transaction Partner Contribution Perform Search Phone Calls Price Books Price Plans Projects Project Tasks Promotion Quote Reallocate Order Item Report Customization Report Scheduling Resource Allocation Approval REST Web Services Sales Campaigns Sales Channel Sales Order Sales Order Approval Sales Territory Sales Territory Rule Set Up Image Resizing SOAP Web Services Subscriptions Subscription Change Orders Tasks Team Selling Contribution Template Categories Track Messages Upsell Assistant Upsell Setup Upsell Wizard

Sales Person			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Bill Of Materials Inquiry Bill of Materials Cases Commission Reports CRM Lists Duplicate Entity Management Employee Commission Transaction Employee Public Employee Record Financial History Items Lead Snapshot/Reminders Marketing Campaigns Marketing Campaign Reports Non Posting Registers	Export Lists Kudos Notes Tab Resource Tableau® Workbook Export	Campaign History Cash Sale Edit Forecast Fax Messages Fax Template Letter Messages Letter Template Mail Merge Mass Updates Opportunity PDF Messages PDF Template Sales Order SuiteAnalytics Workbook	Calendar Competitors Contacts CRM Groups Customers Deleted Records Documents and Files Email Template Events Find Transaction Lead Conversion Lead Conversion Mapping Log in using Access Tokens Marketing Template Mobile Device Access

Sales Person			
View	**Create**	**Edit**	**Full**
Project Templates Quota Reports Resource Allocations Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Subscription Plan Units Usage View Gateway Asynchronous Notifications View Payment Events Work Calendar			Notifications Outlook Integration 2.0 Perform Search Phone Calls Price Books Price Plans Projects Project Tasks Quote Report Customization Report Scheduling Resource Allocation Approval REST Web Services Sales Campaigns SOAP Web Services Subscriptions Subscription Change Orders Tasks Template Categories Track Messages Upsell Assistant

Sales Vice President			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Accounts Receivable Accounts Receivable Register Bill Of Materials Inquiry Bill of Materials Cases Check Item Availability Commission Reports Commit Orders Component Where Used Costed Bill Of Materials Inquiry Employee Public Employee Record Item Revisions Items Lead Snapshot/Reminders Marketing Campaigns Non Posting Registers Price Books Price Plans Quota Reports Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Statistical Account Registers Subscription Change Orders	Export Lists Kudos Tableau® Workbook Export	Campaign History Cash Sale Fax Messages Fax Template Letter Messages Letter Template Mail Merge Mass Updates Override Payment Hold PDF Messages PDF Template SuiteAnalytics Workbook	Allocate Orders Approve Order Reservation Bill Of Distribution Calendar Companies Competitors Contact Roles Contacts CRM Groups Customers Distribution Network Documents and Files Earliest Availability Edit Forecast Edit Manager Forecast Email Template Establish Quotas Events Find Transaction Global Inventory Relationship Manufacturing Cost Template Manufacturing Routing Mobile Device Access Notes Tab Notifications Opportunity Order Allocation Strategy

Sales Vice President			
View	**Create**	**Edit**	**Full**
Subscriptions Subscription Plan Usage View Gateway Asynchronous Notifications View Payment Events Web Site Report Web Store Report			Order Management Dashboard Order Reservation Perform Search Phone Calls Quote Reallocate Order Item Report Customization Report Scheduling Sales Campaigns Sales Channel Sales Order Sales Order Approval Subsidiary - Tax Engine selection Tasks Template Categories Track Messages

Store Manager				
View	**Create**	**Edit**	**Full**	
Access Payment Audit Log Accounts Receivable Bill Of Materials Inquiry Employee Compensation Employee Confidential Employee Public Employee Record Inventory Lead Snapshot/Reminders Non Posting Registers Price Books Price Plans Project Templates Purchase Order Reports Resource Allocations Sales Sales By Partner Sales By Promotion Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Subscription Plan Usage View Gateway Asynchronous Notifications View Payment Events Web Site Report Web Store Report Work Calendar	Export Lists Kudos Resource Tableau® Workbook Export	Companies Competitors Custom Item Fields Custom Lists Customers Email Template Override Payment Hold Projects Shipping Items Shipping Partner Registration Subscriptions Subscription Change Orders SuiteAnalytics Workbook Track Messages Vendors	Allow JS / HTML Uploads Bill of Materials Calendar Cash Sale Cash Sale Refund Color Themes Commerce Categories Contacts CRM Groups CRM Lists Customer Segments Manager Deleted Records Documents and Files Duplicate Entity Management Events Find Transaction Intelligent Recommendations Internal Publisher Item Collection Item Demand Plan Item Supply Plan Item/Category Layouts Items Log in using Access Tokens Material Requirements Planning Mobile Device Access Notes Tab Notifications Online Customer Form Perform Search	Project Tasks Publish Forms Publish RSS Feeds Purchase Order Related Items Report Customization Report Scheduling Requisition Resource Allocation Approval REST Web Services Sales Order Sales Order Approval Set Up Domains Set Up Image Resizing Set Up Web Site Site Search SOAP Web Services Store Content Items Store Tabs System Email Template Tasks Template Categories Transfer Order Transfer Order Approval Uncategorized Presentation Items Units Upsell Assistant Upsell Setup Upsell Wizard

Store Manager				
View	**Create**	**Edit**	**Full**	
			Phone Calls Presentation Categories	Website (External) publisher Web Site Management

Support Administrator					
View	**Create**	**Edit**	**Full**		
Access Payment Audit Log Bill Of Materials Inquiry Employee Public Employee Reminders Financial History Lead Snapshot/ Reminders Memorized Transactions Price Books Price Plans Project Templates Promotion Quota Reports Resource Allocations Return Authorization Reports Sales Force Automation Subscription Plan Usage Vendors View Gateway Asynchronous Notifications View Payment Events Web Site Report Work Calendar	Export Lists Kudos Receive Returns Refund Returns Return Auth. Approval Return Authorization Tableau® Workbook Export	Bill of Materials Classes Color Themes Departments Email Template Items Locations Marketing Template SuiteAnalytics Workbook Track Messages Units	Admindocs Audit Trail Backup Your Data Bulk Manage Roles Calculate Time Calendar Case Alerts Cases Companies Competitors Contact Roles Contacts Create Public Search CRM Groups CRM Lists Custom Body Fields Custom Column Fields Custom Entity Fields Custom Entry Forms Custom Event Fields Custom Fields Custom Item Fields Custom Lists Custom PDF Layouts Custom Record Entries Custom Record Types Custom Subtabs Custom Transaction Fields Custom Transaction Forms Customer Profile Customers	Delete Event Deleted Records Documents and Files Duplicate Entity Management Employee Record Employees Escalation Assignment Escalation Assignment Rule Events Fax Messages Fax Template Find Transaction Import CSV File Internal Publisher Knowledge Base KPI Scoreboards Letter Messages Letter Template Log in using Access Tokens Mail Merge Manage Users Mass Updates Mobile Device Access Notes Tab Notifications Online Case Form Other Names Partners PDF Messages PDF Template Perform Search Phone Calls Projects Project Profitability Project Tasks Publish Dashboards Publish Knowledge Base	Publish Search Record Custom Field Report Customizati on Report Scheduling Resource Resource Allocation Approval REST Web Services Shortcuts SOAP Web Services Subscriptions Subscription Change Orders Support Support Case Issue Support Case Origin Support Case Priority Support Case Snapshot/ Reminders Support Case Status Support Case Territory Support Case Territory Rule Support Case Type Support Setup System Email Template Tasks Telephony Integration Template Categories Time Tracking Timer Track Time Two-Factor Authent ication base Users & Passwords

Support Manager				
View	**Create**	**Edit**	**Full**	
Bill Of Materials Inquiry Bill of Materials CRM Lists Employee Compensation Employee Confidential Employee Public Employee Record Items Lead Snapshot/Reminders Price Books Price Plans Project Templates Resource Allocations Sales Sales By Partner Sales By Promotion Sales Order Reports Subscription Plan Support Support Case Snapshot/Reminders Units Usage Work Calendar	Export Lists Kudos Resource Tableau® Workbook Export	Competitors Custom Event Fields Customers Email Template Fax Messages Fax Template Issues Letter Messages Letter Template Mail Merge Mass Updates PDF Messages PDF Template Projects Subscriptions Subscription Change Orders SuiteAnalytics Workbook Track Messages	Admindocs Calendar Case Alerts Cases Companies Contact Roles Contacts CRM Groups Deleted Records Documents and Files Duplicate Entity Management Escalation Assignment Escalation Assignment Rule Events Find Transaction Internal Publisher Knowledge Base Log in using Access Tokens Mobile Device Access Notes Tab Notifications	Online Case Form Perform Search Phone Calls Project Tasks Publish Knowledge Base Report Customization Report Scheduling Resource Allocation Approval REST Web Services SOAP Web Services Support Case Issue Support Case Origin Support Case Priority Support Case Status Support Case Territory Support Case Territory Rule Support Case Type Support Setup System Email Template Tasks Template Categories Track Time

Support Person			
View	**Create**	**Edit**	**Full**
Bill Of Materials Inquiry Bill of Materials CRM Lists Duplicate Entity Management Employee Public Employee Record Items Lead Snapshot/Reminders Price Books Price Plans Project Templates Publish Knowledge Base Publish RSS Feeds Resource Allocations Subscription Plan Support Support Case Snapshot/Reminders Units Usage Website (External) publisher Work Calendar	Export Lists Knowledge Base Kudos Notes Tab Resource Tableau® Workbook Export	Companies Competitors Customers Email Template Fax Messages Fax Template Issues Letter Messages Letter Template Mail Merge Mass Updates PDF Messages PDF Template Projects Subscriptions Subscription Change Orders SuiteAnalytics Workbook Track Messages	Admindocs Calendar Cases Contacts Deleted Records Documents and Files Events Find Transaction Log in using Access Tokens Mobile Device Access Notifications Perform Search Phone Calls Project Tasks Report Customization Report Scheduling Resource Allocation Approval REST Web Services SOAP Web Services Tasks Template Categories Track Time

System Administrator				
View	**Create**	**Edit**	**Full**	
Employee Public Employee Reminders Find Transaction Notes Tab Sent Email System Status Undelivered Emails	▪ Kudos	Email Template Override Payment Hold SuiteAnalytics Workbook Track Messages	Admindocs Auto-Generated Numbers Billing Information Bulk Manage Roles Classes Credit Card Processing Custom Body Fields Custom Column Fields Custom Entity Fields Custom Entry Forms Custom Event Fields Custom Fields Custom Item Fields Custom Lists Custom PDF Layouts Custom Record Types Custom Sublist Custom Subtabs Custom Transaction Fields	Custom Transaction Forms Customer Segments Manager Deleted Records Departments Duplicate Detection Setup Employee Record Employee Social Security Numbers Employees Enable Features Events Financial Institution Records Internal Publisher Item Collection KPI Scorecards Locations Log in using Access Tokens Manage Custom Permissions Manage Custom Restrictions Manage Users Notifications Price Books Price Plans Publish Dashboards Publish Search REST Web Services Set Up Company SOAP Web Services Subscription Change Orders Subscription Plan Subscriptions Tasks Template Categories Two-Factor Authentication base Usage Web Services

Tax Engine			
View	**Create**	**Edit**	**Full**
Accounts Auto-Generated Numbers Bills Cash Sale Cash Sale Refund Companies Credit Card Credit Card Refund Credit Memo Credit Returns Currency Customer Deposit Customer Payment Customer Refund			Tax Records

Tax Engine			
View	**Create**	**Edit**	**Full**
Customers			
Deposit			
Deposit Application			
Enter Vendor Credits			
Expense Categories			
Expense Report			
Finance Charge			
Find Transaction			
Imported Employee Expenses			
Invoice			
Item Fulfillment			
Item Receipt			
Items			
Make Journal Entry			
Opportunity			
Other Names			
Perform Search			
Posting Period on Transactions			
Projects			
Promotion			
Purchase Order			
Quote			
Return Authorization			
Sales Order			
Set Up Company			
Shipping Items			
Subsidiaries			
Subsidiary Tax Registrations Tab			
Tax Details Tab			
Vendor Return Authorization			
Vendors			

Vendor Center			
View	**Create**	**Edit**	**Full**
Accounts Payable Register			Deleted Records
Find Transaction			Log in using Access Tokens
Non Posting Registers			Notifications
Notes Tab			REST Web Services
Purchase Order			SOAP Web Services
Requisition			Print/Email/Fax
Sales Order Transaction Report			Track Time
			Vendor Request For Quote

Warehouse Manager			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log	Export Lists	Bills	Adjust Inventory
Bill Of Materials Inquiry	Kudos	Email Template	Allocate Orders
Bill of Materials	Resource	Items	Approve Order Reservation
Check Item Availability	Tableau® Workbook Export	Shipping Items	Bill Of Distribution
Commit Orders		Shipping Partner Registration	Build Work Orders
Component Where Used		SuiteAnalytics Workbook	Calendar
Costed Bill Of Materials Inquiry		Track Messages	Close Work Orders
Customers			Contacts

Warehouse Manager			
View	**Create**	**Edit**	**Full**
Employee Compensation Employee Confidential Employee Public Employee Record Inventory Item Revisions Non Posting Registers Notes Tab Purchase Order Reports Price Books Price Plans Revalue Inventory Cost Sales Order Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Subscription Plan Units Vendors View Gateway Asynchronous Notifications View Payment Events			Count Inventory Create Inventory Counts Deleted Records Distribution Network Documents and Files Enter Completions Events Find Transaction Fulfill Orders Global Inventory Relationship Inbound Shipment Inventory Cost Template Issue Components Item Demand Plan Item Fulfillment Item Process Family Item Process Group Item Receipt Item Supply Plan Log in using Access Tokens Manufacturing Cost Template Manufacturing Routing Mark Work Orders Built Mark Work Orders Firmed Mark Work Orders Released Material Requirements Planning Mobile Device Access Notifications Order Allocation Strategy Order Management Dashboard Order Reservation Ownership Transfer Perform Search Phone Calls Pick Strategy Pick Task Planned Standard Cost Print Shipment Documents Purchase Order Reallocate Order Item Receive Order Receive Returns Report Customization Report Scheduling Requisition Requisition Approval REST Web Services Sales Channel Shipping Partner Package Shipping Partner Shipment SOAP Web Services Standard Cost Version Supply Chain Snapshot List Tasks Template Categories

Warehouse Manager			
View	**Create**	**Edit**	**Full**
			Transfer Order Transfer Order Approval Vendor Bill Approval Wave Work Order Work Order Close Work Order Completion Work Order Issue Zone

Permissions Documentation

The following link provides access to a Microsoft Excel worksheet listing the usage of most NetSuite permissions. You can use this list to understand the implications of assigning a specific permission, or to find the permission required to provide access to a specific task or page. The spreadsheet format lets you search and sort fields in the manner most useful for you. Autofilters are provided for each column.

To access the worksheet, click this link: NetSuitePermissionsUsage.xls.

For information about standard roles and their associated permission levels, see Standard Roles Permissions Table. For information about permissions required to access specific NetSuite features, see Feature Permissions Documentation.

> **Note:** Most browsers will download this file in "Protected View" mode to your Downloads folder. If the Autofilters are not working, click the Enable Editing button on the yellow bar in the worksheet header.

The NetSuitePermissionsUsage.xls file includes the following columns:

- **SUBTAB** – Subtab of the Roles page Permissions subtab where each permission is listed: Lists, Reports, Setup, and Transactions (sorted alphabetically)
- **PERMISSION NAME** – Name of each permission (sorted alphabetically)
- **USAGE DESCRIPTION** – Description of how each permission is used, meaning the record types, tasks, and/or pages that each permission makes accessible (sorted alphabetically)
- **MINIMUM SELECTABLE LEVEL** – The minimum selectable level (view, create, edit, or full) for each permission.
- **MINIMUM SYSTEM LEVEL** – Contains the minimum valid level of permissions in the system. This level takes precedence in case it differs from the level in the Minimum Selectable Level column. This column is blank from most rows.

> **Note:** This worksheet does not detail how different access levels affect each permission usage; it simply lists the minimum level required. Some permissions fit an access model where each successive level (view, create, edit, full) provides increased usage of the related record type, task, or page, as described in Access Levels for Permissions. Note that some permissions do not fit exactly into this model. For some permissions, only the minimum view level is required for usage, and other levels do not provide any additional capabilities. Generally, any user with at least VIEW access to a transaction type on the Transactions subtab, or to a record type on the Lists subtab, has the ability to print records of that type.

The worksheet lists some permissions multiple times because they provide access to multiple record types, tasks, and/or pages. Note that usages of some permissions may have dependencies on other permissions, and this spreadsheet does not include these dependencies.

> **Important:** The contents of NetSuitePermissionsUsage.xls are subject to change. Data is current as of the date listed in the worksheet footer. This worksheet provides information on how each permission works individually. However, since most roles include many different permissions, it is important to assess permission changes in the context of each role and to test permission changes to roles prior to deploying to users in your account.
>
> For a list of permission IDs to use with SuiteScript, see the help topic Permission Names and IDs.

Two-Factor Authentication (2FA) is Required for Specific Permissions

Standard and customized roles with specific permissions assigned require 2FA. For more information, see Permissions Requiring Two-Factor Authentication (2FA).

Feature Permissions Documentation

The following link provides access to a Microsoft Excel worksheet listing the permissions associated with NetSuite features. You can use this list to find which roles have the permissions required to access specific features. The spreadsheet format lets you search and sort fields in the manner most useful for you.

To access the worksheet, click this link: FeaturesStandardRoles.xlsx.

The following topics contain information about permissions required to access specific NetSuite features. The following listings do not represent an exhaustive set of permissions help topics. Additional permissions documentation is available throughout Help Center, including details about the permissions required for access to different records or features. For general permissions documentation, see NetSuite Permissions Overview.

Accounting (ERP) and Banking

- Roles and Permissions for Balancing Segments
- Permissions for Banking Features
- Setting Fixed Assets Management Permission Levels
- Roles and Permissions for NFP Financials
- Roles and Permissions for Period End Journal Entries
- Assigning Revenue Commitment Permissions
- Revenue Management Roles and Permissions
- Required Permissions for Subsidiary Hierarchy Modification
- Subsidiary Settings Manager Permissions
- Tax Permissions
- Intercompany Framework Permissions
- Intercompany Netting Permissions

Administrator Features

- Add SAML Single Sign-on Permissions to Roles

- Required Permissions for CSV Imports
- Permissions Requiring Two-Factor Authentication (2FA)

Advanced Employee Permissions

- Before Enabling the Advanced Employee Permissions Feature
- Advanced Employee Permissions Overview
- Setting Employee Access for Advanced Employee Permissions
- Custom Advanced Employee Permissions
- Custom Restrictions for Advanced Employee Permissions

Country Specific Features

Roles and Permissions for Using Japanese Invoicing

SCM (Supply Chain Management)

Vendors, Purchasing, and Receiving

- Configuring Vendor Bill Approvals in the Employee Center
- Configuring Permissions for Vendor Prepayments

SuiteCloud Platform

SuiteBuilder

- Configuring Permissions by Editing the Role
- Granting a Role Permission to Manage Custom Segments
- Granting Roles Permission to Use Segments in Searches and Reports
- Required Permissions for Editing Custom Segments
- Permissions for Custom Transaction Instances
- Permissions for Managing Custom Segments and Values

SuiteCloud Development Framework

- Assigning the Developer Role (Administrator Only)
- Roles and Permissions as an XML Definition
- Setting Roles and Permissions for SuiteScript

SOAP Web Services

- Assigning the SOAP Web Services Permission to a Role

- Project Task Permissions
- Role and Permission Considerations When Developing in SOAP Web Services
- Roles and Permissions in SOAP Web Services

SuiteFlow

Required Permissions for SuiteFlow

SuiteScript

- Permission Names and IDs
- Script Debugger Metering and Permissions

NetSuite for Mobile

Mobile Device Access Permission

NetSuite for Outlook

NetSuite for Outlook

Order Management

- Dunning Permissions and Access
- Electronic Invoicing Permissions and Access Levels
- Granting the Override Estimated Costs on Transactions Permission
- Roles and Permissions for Contract Renewals
- Roles and Permissions for Grid Order Management
- Setting Up Payments Tab Permissions
- Setting Up Electronic Bank Payments
- SuiteBilling Roles and Permissions
- Recurring Billing — this is a PDF. For permissions information in this document, see Roles and Permissions for Recurring Billing.

SuiteAnalytics

- Access to Reports
- Permissions for Searches
- Providing Users with SuiteAnalytics Connect Permissions
- Publish Dashboards Permission
- Report Customization Permission
- Connect Permissions

SuiteCommerce

- Set Execute as Role Permissions for .ss and .ssp Files
- Audience Permissions for Hosted Sites
- Customer Center Custom Permissions
- Feature Access Permissions
- My Account Menu Permissions
- SCIS Roles and Permissions
- SuiteCommerce InStore Permissions

SuitePeople

- SuitePeople Permission Requirements

NetSuite Roles Overview

A role is a defined access configuration. To set up and manage user access to your NetSuite account, you must have the Administrator role to set up roles that can be assigned to users. Roles include sets of permissions for viewing and editing data. Roles and their permissions determine the pages that users can see in the NetSuite interface and the tasks that they can complete. Each role is associated with a center, a user interface designed for a particular business area.

> **Note:** You can designate a user's role as Web Services Only. When a user logs in with a role that has been designated as Web Services Only, validation is performed to ensure that the user is logging in through web services and not through the user interface. For details, see the help topic Setting a Web Services Only Role for a User.

Standard Roles

NetSuite provides many standard roles with predefined permissions. Most of these roles map to common employee positions, such as Accountant and Sales Rep. Standard roles also are available for vendors, partners, and customers who have account access. For more information, see Standard Roles Permissions Table.

Custom Roles

Standard roles cannot be modified, so it is a good idea to use these roles as templates to create your own customized roles that you assign to users in your account. The process for customizing a standard role is easier than creating a new role from scratch. If you assign custom roles rather than standard roles to users, you can make permission changes to users' assigned roles as needed. The ability to modify a role without having to change multiple users' role assignments simplifies maintenance.

- For instructions for customizing roles, see Customizing or Creating NetSuite Roles.

> **Note:** Because of their design as limited access roles, Retail Clerk roles, unlike other standard NetSuite roles, cannot be customized. For details, see Retail Clerk Roles.

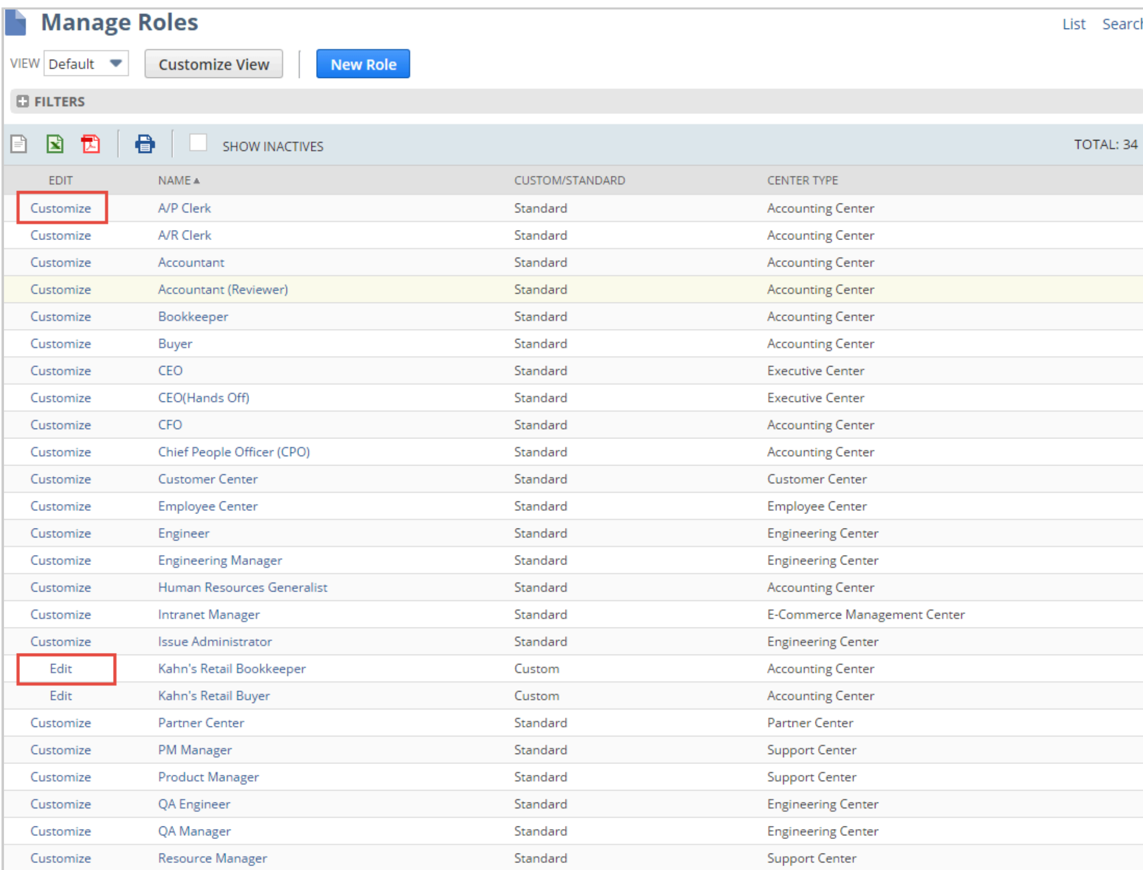
- For information about changes you can make to roles, see the following:

- Changing Custom Roles
- Inactivating Roles
- Setting Default Forms for Roles
- Restricting Accounts for Roles
- Customizing the Customer Center Role
- Setting Role-Based Preferences
- Translating Custom Role Names

Manage Roles Page

To see a list of roles available in your account, go to Setup > Users/Roles > Manage Roles to open the Manage Roles page. This page indicates the center associated with each role and whether the role is standard or custom. Click **Customize** to create a custom version of a standard role. Click **Edit** to make changes to a custom role.

Figure 1. Manage Roles Page



EDIT	NAME ▲	CUSTOM/STANDARD	CENTER TYPE
Customize	A/P Clerk	Standard	Accounting Center
Customize	A/R Clerk	Standard	Accounting Center
Customize	Accountant	Standard	Accounting Center
Customize	Accountant (Reviewer)	Standard	Accounting Center
Customize	Bookkeeper	Standard	Accounting Center
Customize	Buyer	Standard	Accounting Center
Customize	CEO	Standard	Executive Center
Customize	CEO(Hands Off)	Standard	Executive Center
Customize	CFO	Standard	Accounting Center
Customize	Chief People Officer (CPO)	Standard	Accounting Center
Customize	Customer Center	Standard	Customer Center
Customize	Employee Center	Standard	Employee Center
Customize	Engineer	Standard	Engineering Center
Customize	Engineering Manager	Standard	Engineering Center
Customize	Human Resources Generalist	Standard	Accounting Center
Customize	Intranet Manager	Standard	E-Commerce Management Center
Customize	Issue Administrator	Standard	Engineering Center
Edit	Kahn's Retail Bookkeeper	Custom	Accounting Center
Edit	Kahn's Retail Buyer	Custom	Accounting Center
Customize	Partner Center	Standard	Partner Center
Customize	PM Manager	Standard	Support Center
Customize	Product Manager	Standard	Support Center
Customize	QA Engineer	Standard	Engineering Center
Customize	QA Manager	Standard	Engineering Center
Customize	Resource Manager	Standard	Support Center

Show Permission Differences Between Roles Page

NetSuite provides a management tool that enables you to see at a glance the differences among multiple roles' permissions. Go to Setup > Users/Roles > Show Role Differences to open the Show Permission Differences Between Roles page. For more information, see Showing Role Permission Differences.

Figure 2. Role Permission Difference Results

Role Permission Differences

New

CATEGORY	PERMISSION	BOOKKEEPER	KAHN'S RETAIL BOOKKEEPER
Lists	Accounts	View	View
Lists	Accounts Payable Register	View	View
Lists	Accounts Receivable Register	View	View
Lists	Bank Account Registers	View	View
Lists	Calendar	Full	Full
Lists	Commit Orders	View	View
Lists	Competitors	Edit	Edit
Lists	Contacts	Full	Full
Lists	Credit Card Registers	View	View
Lists	CRM Groups	Edit	Edit
Lists	Customers	Edit	Edit
Lists	Documents and Files	Full	Full
Lists	Email Template	Edit	Edit
Lists	Employees	Edit	Edit
Lists	Equity Registers	View	View
Lists	Events	Full	Full
Lists	Export Lists	Create	Create
Lists	Fixed Asset Registers	View	View
Lists	Items	Edit	Edit
Lists	Locations	Edit	Edit
Lists	Long Term Liability Registers	View	View
Lists	Memorized Transactions	Edit	Edit
Lists	Non Posting Registers	View	View
Lists	Notes Tab	View	View

Role Search

You can use the role search to find a particular role or set of roles, or to return a list of roles and their characteristics. To access this search, go to Setup > Users/Roles > Manage Roles > Search. Role fields also are available as criteria filters and results for Employee searches. For more information, see Use Searches to Audit Roles.

> **Note:** To see a list of all users assigned a particular role, go to Setup > Users/Roles > Manage Users, and select the role from the Role dropdown list at the bottom of the Manage Users page.

NetSuite Account Administration

The person who administers NetSuite for your organization is the key contact for NetSuite and your users. This person:

- Oversees the initial implementation of the NetSuite application
- Manages the on-going administration of the NetSuite application

Key administrator tasks may include:

- Daily account maintenance and management

- Technical and system administration, including configuration and integration
- Point of contact for end users and NetSuite Support
- Facilitation of system adoption and satisfaction through user training, user support, and meeting user requirements
- Planning, reviewing, and customizing NetSuite to meet user needs
- Helping with data extraction through reporting and searches
- Monitoring end user usage and system performance
- Ensuring the quality of account data and performance of regular data audits; resolution of data integrity issues
- Development of tests, functional testing, and rollout of customizations, custom objects, new enhancements, application releases, and system integration based on user/business needs

The person who administers NetSuite uses The Administrator Role.

The Administrator Role

The person that signs up for a NetSuite account is automatically given the Administrator role. This is a powerful role and should only be given to those who require full NetSuite functionality for their job. Typically, this is a small number of people. It is recommended that the Administrator role be given to at least two people on an account. With at least two Administrator roles on an account, crucial NetSuite tasks can be reached in the event of absence or employee departure. Although it is recommended that you have more than one administrator for an account, it is also recommended that you choose your administrators wisely. Users assigned the Administrator role should receive enhanced scrutiny of their transactions via audit trails in system notes.

As with other standard roles, the standard Administrator role cannot be customized. NetSuite recommends that you create and use a custom administrator role rather than using the standard role.

The Administrator role has full access to all tasks and pages in NetSuite, including:

- Full visibility into all areas of the NetSuite account
- Complete access to the Setup Manager, the path to common administrator tasks

Users with the Administrator role must use two-factor authentication in newly provisioned accounts. For information, see the help topic 2FA in the NetSuite Application.

The Administrator role is available in the list of roles on the Manage Roles page. However, since you cannot customize the Administrator role, the **Customize** and **Edit** buttons are not available. The Administrator role page shows all permissions in the system assigned with Full access level, or the highest access level available for the given permission. This provides a quick and easy way to see all users who have the Administrator role assigned.

The Administrator role is a global role that applies to the entire NetSuite account. Other localized administrator roles apply to specific areas of the NetSuite application, such as the Issues Administrator, Marketing Administrator, and Sales Administrator roles.

> **Note:** Several administration permissions are separate from the Administrator role so that they can be assigned to non-administrator roles. For more information, see Separate Administration Permissions.

If you need to configure a role that behaves like the standard Administrator role but limits access to sensitive information, consider using Core Administration Permissions. Core Administration Permissions is made up of a set of permissions that mimics the behaviors that the Administrator role has access to. Core Administration Permissions can be assigned to any role and restricted through role configuration. For more information, see Core Administration Permissions.

Separate Administration Permissions

Several Setup type administration permissions are available to be assigned to users without the Administrator role. With these permissions, you can limit the number of Administrator roles by assigning these administrative tasks to other users. The available Setup permissions are:

- Enable Features
- Set Up Company
- View Billing
- View SOAP Web Services Logs
- Integration Application
- SuiteScript Scheduling

These permissions can be found on the role record's Permissions Setup tab.

> **Note:** If you need to configure a role that behaves like the standard Administrator role but limits access to sensitive employee information, consider using Core Administration Permissions. Core Administration Permissions is made up of a set of permissions that mimics the behaviors that the Administrator role has access to. Core Administration Permissions can be assigned to any role and restricted through role configuration. For more information, see Core Administration Permissions.

Full Access Role (Deprecated)

> **Important:** The Full Access role was deprecated in the 2021.1 release as a security enhancement. You cannot assign the Full Access role to new users.

The Full Access role was deprecated because it had become a redundant role as the roles and permissions options have greatly expanded. Here are a few tips for how to replace the Full Access role:

- If any users have another existing role in your account, which they can use instead of the Full Access role, assign this other role to them. For more information, see the help topic Assigning Roles to an Employee.
- Analyze the needs of other users to determine the access granted by the Full Access role that is not available through existing roles or global permission assignments.
    - You can customize standard roles or create new custom roles as needed to provide users with the specific access they require. For more information, see Customizing or Creating NetSuite Roles.
    - If you need a high-access role that you can assign to users, you can use the Administrator role. For more information, see NetSuite Account Administration
    - A new permission called Core Administration Permissions is available. This permission provides access to some of the same functions that were available to users with the Full Access role. You may be able to use Core Administration Permissions as an alternative to the Full Access role. For more information, see Core Administration Permissions.
    - If the Global Permissions feature is enabled in your account, you can also assign additional global permissions to users as needed. Please note that usage of the Global Permissions feature is not recommended. For more information, see the help topic Using the Global Permissions Feature.

The Full Access role is now inactive for users who had this role assigned before it was deprecated. The Full Access role no longer appears in the list of roles available for users who had this role assigned. A user with the Administrator role can make this role active again for a user, but the use of this role is not recommended.

Permissions Requiring Two-Factor Authentication (2FA)

> **Important:** As of 2018.2, the requirement for 2FA for these administrative permissions is enforced in all NetSuite accounts. See the help topic Mandatory Two-Factor Authentication (2FA) for NetSuite Access.

Administrative permissions that require 2FA include:

- Access Token Management (for Token-based Authentication)
- OAuth 2.0 Authorized Applications Management
- Core Administration Permissions (for more information, see Core Administration Permissions)
- Two-Factor Authentication base (permission to designate roles as 2FA authentication required and specify the duration of trusted devices for those roles)

  > **Note:** Standard roles with the Two-Factor Authentication base permission include Marketing Administrator, Sales Administrator, Support Administrator, and System Administrator.

- Set Up OpenID Connect (OIDC) Single Sign-on
- Set Up OpenID Single Sign-on
- Set Up SAML Single Sign-on
- OIDC Provider Setup
- Integration Application
- Device ID Management
- View Unencrypted Credit Cards
- View Unencrypted ACH Account Numbers

For more information about Mandatory 2FA and Two-Factor Authentication, see the following:

- Two-Factor Authentication (2FA).
- 2FA in the NetSuite Application

> **Note:** If a role is already designated as a SAML Single Sign-on (SSO) role, the 2FA requirement is ignored. The requirement for SAML SSO authentication takes precedence.

Customizing or Creating NetSuite Roles

To create a new custom role that tailors the level of access you want to give to users, you can customize a standard role or create a new role from scratch. Complete the following tasks:

- Customizing and Creating Roles
- Entering Basic Role Information
- Assigning Core Administration Permissions
- Restricting Role Access to Accounting Books
- Restricting Role Access to Subsidiaries (OneWorld Only)
- Setting Employee Restrictions
- Setting Department, Class, and Location Restrictions
- Setting a Role as Issue Role for Issue Management
- Setting a Role as Web Services Only Role

- Setting a Role as Single Sign-On Only Role
- Restricting a Role by Device ID
- Restricting a Role by IP Address
- Setting Two-Factor Authentication Requirements
- Setting Permissions
- Setting Default and Restricted Forms
- Setting Search Defaults for a Role
- Setting Role-Based Preferences
- Translating Custom Role Names
- Selecting a Dashboard for a Role

After you create a custom role, you can assign it to users. A role's assigned users are listed on the Users subtab of the role record. See NetSuite Users Overview.

Role customization functionality varies according to the NetSuite product you have purchased and the features you have enabled. Some of the fields described in the steps below may not be available to you. For example, location restrictions are not available for NetSuite Small Business users. Also, because of their design as limited access roles, Retail Clerk roles, unlike other standard NetSuite roles, cannot be customized. For details, see Retail Clerk Roles.

You can apply the class, department, location, and subsidiary restrictions that you define here to custom records. See the help topic Applying Role-Based Restrictions to Custom Records.

Be aware that updates made to the default role are not pushed to custom instances of that role. You must manually update custom roles to include new default role functionality. Additionally, when a new feature is enabled for an account, permissions associated with that feature are not automatically given to custom roles that existed prior to enabling the feature. These permissions must be manually assigned to custom roles that existed prior to enabling the feature.

> **Important:** When the Advanced Employee Permissions feature is enabled, restrictions set on the Role page are only applicable to the Employee Record Full, Employee System Access, and Employee Administration permissions. The Employee Self, Employee Public, Employee Confidential, and Employee Compensation permissions ignore the restrictions set on this page. For more information, see the help topic Advanced Employee Permissions Overview.

Customizing and Creating Roles

The following procedure describes how to customize or create a role.

To begin customizing or creating a role:

1. To customize a standard role, go to Setup > Users/Roles > Manage Roles, and on the Manage Roles page, click **Customize** next to a standard role. This type of custom role inherits all of the standard role's permissions to start; you can make changes as necessary.
2. To create a new role that does not start with a list of associated permissions, go to Setup > Users/Roles > Manage Roles > New.

Entering Basic Role Information

1. In the **Name** field, enter a name for this custom role.

   This name should be easy for you to recognize when assigning it to users.

2. If you use scripting, you can optionally enter an ID used for this role in scripts.
3. If you are creating a new role, select the center type to base the role on. The center type sets default permissions and access levels that you can customize below. (If you are customizing a standard role, the center type is predefined.)

After you enter basic information for the role, set optional restrictions for the role.

To make a copy of an existing standard or a custom role:

1. As **Administrator**, go to Setup > Users/Roles > Manage Roles.
2. Click on **Customize** or **Edit** next to the role you want to copy.
3. Enter a different name in the **Name** field.
4. Click the drop down arrow for **Save** and click **Save As**.

Assigning Core Administration Permissions

You can use the Core Administration Permissions to customize a role so that it behaves almost like the Administrator role, while also restricting access to other areas of NetSuite using the role permissions and restrictions. For example, with Core Administration Permissions you can create a role specifically for an IT administrator who is responsible for the general administration of the system, but who should not have access to sensitive employee information.

The Core Administration Permissions feature is enabled on your account by default. For more information, see Core Administration Permissions.

- To assign Core Administration Permissions to a role, check the **Core Administration Permissions** box.

Warning: Use caution when assigning Core Administration Permissions to a role, because the role will become similar to the standard Administrator role in terms of exclusive administrator privileges.

Administrator – No HR/Employee Access SuiteApp

The Administrator – No HR/Employee Access SuiteApp provides access to the Administrator – No HR/Employee Access role. This role includes all of the permissions that come with the standard Administrator role, except for any permissions associated with employee information. For example, the Administrator – No HR/Employee Access role does not include the Time-Off Administration, Payroll Items, and Employee Record permissions. You can use the Administrator – No HR/Employee Access SuiteApp as an alternative to customizing a standard role and as the starting point for creating a Core Administration Permissions admin role.

Note: You do not need to install the Administrator – No HR/Employee Access SuiteApp to assign the Core Administration Permissions to a role.

Note: From June 2019 onward, SuitePeople HR and U.S. Payroll include an Administrator – No HR/Employee Access role that allows administrative functionality while controlling access to sensitive employee data. Please see your SuiteSuccess SuitePeople Leading Practices for more information, and review the role in your environment.

You can search for the Administrator – No HR/Employee Access SuiteApp using the following information:

- Bundle name: Administrator – No HR/Employee Access
- Bundle ID: 387772

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

After you install the Administrator – No HR/Employee Access SuiteApp, you can customize the role on the Manage Roles page. You can assign the role to employees on the Employees page.

Restricting Role Access to Accounting Books

You can select which accounting books are accessible to users by role. Users with a role that has access to an accounting book can post transactions to that book or see reports from that book. You can use this feature to grant a role access to all accounting books, and users with this role will automatically have access to new accounting books as they are created.

To set accounting book access by role:

1. Go to Setup > Users/Roles > User Management > Manage Roles and select or create a role.
2. In the role record, go to the Accounting Books section and select one of the following in the Selected Accounting Books field:
   - **All** - This role can see all accounting books
   - **Primary** - This role can see only the primary accounting book
   - **Primary and Selected** - This role can see the primary accounting book and any secondary books you select. When you select this option, an **Accounting Book** field appears where you can select which secondary books the role has access to.
3. Click **Save**.

Restricting Role Access to Subsidiaries (OneWorld Only)

If you have NetSuite OneWorld, you can use subsidiary restrictions to restrict what users with this role can access.

When you restrict role access to subsidiaries, consider the following:

- By default, the subsidiary restrictions is set to **User Subsidiary**.
- Only a role with access to all subsidiaries assigned for a department can edit that department.

To restrict role access to subsidiaries:

1. On the **Role** page, under **Subsidiary Restrictions**, choose one of the following options:
   - **All** – Grants the role access to all subsidiaries, including inactive subsidiaries.
   - **Active** – Grants the role access to the active subsidiaries only.
   - **User Subsidiary** – Restricts the role's access to the user's subsidiary only. When users log in with this role, they can only access their own subsidiary. A user's subsidiary is set on the employee record. For more information, see the help topic Assigning a Subsidiary to an Employee.
   - **Selected** – You select the subsidiaries to which you want to restrict the role's access. You must select at least one subsidiary from the list.

2. If you choose **Selected**, in the auto-generated list of active and inactive subsidiaries, select the subsidiaries that you want the role to have access to. To select multiple subsidiaries, hold down the **Ctrl** key while selecting subsidiaries.
3. To allow users logged in with this role to see, but not edit, records for subsidiaries to which the role does not have access, check the **Allow Cross-Subsidiary Record Viewing** box. You cannot use this setting to view employee payroll or commissions data.

> **Note:** If the Book Record Restriction option is enabled for a user, this restriction overrides permissions granted by the Allow Cross-Subsidiary Record Viewing option.

Setting Employee Restrictions

In the **Employee Restrictions** field, you can restrict this role's access to transaction, customer, and employee records, based on values in the employee, sales rep, and supervisor fields on these records. The restrictions set here may also limit the values that users logged in with this role can assign to these fields on records. These restrictions do not affect access to contact records.

- **none - no default** – There is no restriction on what can be selected. Record access is not determined by this field. A default selection does not appear.
- **none - default to own** – There is no restriction on what can be selected. Record access is not determined by this field. Fields of this type will select the user by default.
- **own, subordinate, and unassigned** – Users are restricted when selecting any of the employee, sales rep, or supervisor fields. Users are granted access to records belonging to their supervisor hierarchy. Users may only select themselves or their subordinates. If the select field is optional, then the user may leave the value unassigned. Note that unassigned is technically a null value when used for filtering.
- **own and subordinates only** – Users are restricted when selecting any of the employee, sales rep, or supervisor fields. Users are granted access to records belonging to their supervisor hierarchy with the exception of unassigned records. Consequently, unassigned records are filtered and denied access. Users may only select themselves or their subordinates.

  > **Note:** In some cases, a role might include both the own and subordinates only restriction and the process payroll and commit payroll permissions. In this case, to ensure that the user can create a payroll batch and view all the employees who are included in the payroll batch, the process payroll and commit payroll permissions override the own and subordinates only restriction.

> **Important:** These restrictions can also be used to restrict access to custom records, based on values in an Employee list/record custom field, if the **Apply Role Restrictions** box is checked for the field. See the help topic Applying Role-Based Restrictions to Custom Records.

Check the **Allow Viewing** box to allow users logged in with this role to see, but not edit, data for employees to which the role does not have access.

- Note that this setting does not allow viewing of employee payroll or commissions data. Also, users cannot view non-subordinate employee records other than their own record when the **Employee Restrictions** field is set to **own and subordinates only**.

Check the **Do Not Restrict Employee Fields** box to allow users with this role to select any employee in employee fields.

- For example, a sales manager could select any sales rep in the **Sales Rep** field on a customer record even if that sales rep is part of another team.

Check the **Restrict Time and Expenses** box to restrict the time and expenses employees with this role can enter, edit, and view when you add the Track Time and Expense Report permissions.

- Employees with this role will not be able to enter or edit expense reports or time transactions on behalf of other employees.
- Employees with this role will be able to view expense reports and time transactions for their subordinates.
- Reports and searches will only return time or expense transactions entered by the employee or their subordinates. Class, department, location, and subsidiary restrictions will not be applied for expense and time transactions.

> **Note:** Clearing the **Restrict Time and Expenses** box enables this role to enter, edit, and approve time transactions and expense reports for all other employees when you add the Track Time and Expense Report permissions.

If you have set restrictions in the **Employee Restrictions** field, check the **Sales Role** box if employees using this role should be restricted based on the **Sales Rep** field on records and transactions.

If you use the Customer Service and Support feature and have set restrictions in the **Employee Restrictions** field, check the **Support Role** box if employees using this role should be restricted based on the **Assigned To** field on cases.

If you use the Partner Relationship Management feature and have set restrictions in the **Employee Restrictions** field, check the **Partner Role** box to restrict partners to records and transactions based on the **Partner** field.

Setting Department, Class, and Location Restrictions

If your account has the respective feature enabled, you can restrict this role's access to transaction, employee, partner, and optionally item records, based on the values in the Department, Class, and Location fields on these records. Limit the set of available values of Department, Class, and Locations that users can assign to these records using restrictions. Department, Class, and Location restrictions can be defined per role and then applied to all users logged in with that role.

To set Department, Class, and Location restrictions, click the **Restrictions** subtab. On the Restrictions subtab, set the following fields:

- **Segment** – Select the Segment by which to restrict the role. Select either Class, Department, or Location.
- **Restrictions** – Select the appropriate restriction level for the role:
  - **none - default to own** – There is no restriction on what can be selected. Record access is not determined by this field. Fields of this type will select the user by default.
  - **own, subordinate, and unassigned** – Users are restricted when selecting any of the employee, sales rep, or supervisor fields. Users are granted access to records belonging to their supervisor hierarchy. Users may only select themselves or their subordinates. If the select field is optional, then the user may leave the value unassigned. Note that unassigned is technically a null value when used for filtering.
  - **own and subordinates only** – Users are restricted when selecting any of the employee, sales rep, or supervisor fields. Users are granted access to records belonging to their supervisor hierarchy with the exception of unassigned records. Consequently, unassigned records are filtered and denied access. Users may only select themselves or their subordinates.
- **Allow Viewing** – Check this box to allow users logged in with this role to see, but not edit, data for departments, classes and locations to which the role does not have access. Note that this setting does

not allow viewing of employee payroll or commissions data. Also, users cannot view non-subordinate records other than their own department, class or locations records when the **Restrictions** field is set to **own and subordinates only.**

- **Apply To Items** – Check this box to apply the department, class and locations restrictions defined here to item records, in addition to transaction, employee, and partner records.

> **Important:** Any account in the Chart of Accounts list that does not have an assigned department is not subject to the **own, subordinate, and unassigned** or **own and subordinates only** restrictions.

> **Important:** In NetSuite OneWorld, subsidiary restrictions automatically apply to departments. For example, if Department A is assigned to only Subsidiary X and a role is restricted to Subsidiary X, users with that role have access to only Department A, even if that role does not have any department restrictions.

You can also apply role-based, class restrictions to custom records. For more information, see the help topic Applying Role-Based Restrictions to Custom Records.

Setting a Role as Issue Role for Issue Management

If you use the Issue Management feature and want employees with this role to work with issues, select the issue role in the **Issue Role** field.

Setting a Role as Web Services Only Role

If a role is designed to be used by programs that integrate with NetSuite through web services, check the **Web Services Only Role** box to allow NetSuite account access but disallow UI access and privileges.

This setting prohibits a user from accessing the user interface with permissions and privileges that are created specifically for web services development, adding to the security of your integration. For more details, see the help topic Setting a Web Services Only Role for a User.

Setting a Role as Single Sign-On Only Role

If the role is designed to be used by users accessing NetSuite through inbound single sign-on from an external user-authenticating application, check the **Single Sign-On Only** box to allow NetSuite account access only through an inbound single sign-on mechanism (either certificate-based or OpenID).

This setting prohibits a user from accessing NetSuite through web services or the user interface without going through inbound single sign-on. This type of role supports strict control of credentials from the external application.

> **Important:** You cannot use NetSuite for Outlook with a Single Sign-on Only role.

Restricting a Role by Device ID

If you use the Restrict by Device ID feature, check the **Restrict by Device ID** box to allow access to this role only from the devices listed at Setup > Company > Company Information.

For more information, see the help topic Device ID Authentication.

Restricting a Role by IP Address

If you use the IP Address Rules feature, check the **Restrict this role by IP Address** box to allow access to this role only from the IP addresses listed at Setup > Company > Company Information.

For more information, see the help topic Enabling and Creating IP Address Rules.

> **Note:** Oracle NetSuite does not support traffic that is routed through a split-tunnel Virtual Private Network (VPN) to control user access to NetSuite. For more information, see the help topic VPN Configuration for User Access to NetSuite.

Setting Two-Factor Authentication Requirements

If the role requires two-factor authentication, enter the following settings:

- Select the type of authentication required in the **Two-Factor Authentication Required** field.
- In the **Duration of Trusted Device** field, select the length of time before a device a user has marked as trusted will be subject to a two-factor authentication request.

For more information about two-factor authentication, see the help topic Two-Factor Authentication (2FA).

Setting Permissions

> **Important:** If you have enabled the Advanced Employee Permissions feature in your NetSuite account, see the help topic Advanced Employee Permissions for more information.

- From the Role page, you can set permissions on the **Permissions** subtab. Permissions are divided into four different types on the **Transactions**, **Reports**, **Lists**, **Setup**, and **Custom Record** subtabs.
  - To view the permissions for a role, log in as an Administrator and go to Setup > Users/Roles > User Management > Manage Roles. On the Manage Roles page, choose a role. Click **Edit** to add permissions to a custom role or click **Customize** to create a custom role from a standard role. On the Role page, the Permissions subtab displays the role's permissions.
  - To add a permission, click a line in a list, click **Insert**, and select a permission. Or you can click the blank line at the bottom of a list, select a permission, and click **Add**.
  - To remove a permission, click it in a list, and click **Remove**.
  - To set the level of access for a permission, click a line in a list and select from the **Level** column. For information about these levels, see Access Levels for Permissions.
  - For Custom Record permissions only, you can select a value in the **Restrict** column to limit this role's access to custom records. (Each custom record permission provides access to a custom record type.)
    - Select **Viewing and Editing** to restrict users with this role to viewing or editing only the records of this type that they or their subordinates created.
    - Select **Editing Only** to restrict users with this role to editing only the records of this type that they or their subordinates created. They can view all records of this type.
    - Leave this column blank to allow users with this role to view and edit all records of this type.

    The custom record restrictions you set on this subtab are also available on the record for each custom record type. Changes made on custom record type records related to this role's permissions are reflected here. See the help topic Setting Permissions for a Custom Record Type.

> **Important:** When you newly enable a feature in your account, you must consider permissions associated with the added feature. Customized roles that you have already assigned to users may need to be updated to reflect the proper permissions associated with the added feature. See the help topic Enabling Features.

For general information about permissions, see NetSuite Permissions Overview. For access to a list of NetSuite permissions and their related tasks and records, see Permissions Documentation.

A mass update is available to add, remove, or change the level of a permission for multiple custom roles simultaneously. See Mass Updating a Permission on Custom Roles.

> **Important:** If you have enabled the Advanced Employee Permissions feature in your NetSuite account, see the help topic Advanced Employee Permissions for more information.

Setting Default and Restricted Forms

- Click the **Forms** subtab to set default forms for a role, and/or to restrict a role to only using certain forms. On each of the following subtabs, **Transaction**, **Entity**, **CRM**, **Item**, **Other Record**, **Custom Record**, **Time**, **Bill of Materials**, and **Inventory Detail**, you can do the following:
  - Check the box in the **Enabled** column next to the forms you want to make available to users with this role. (Not available for Customer Center roles.)

    If you disable all forms for a record or transaction type, users with this role will use the standard form.
  - Check the box in the **Preferred** column next to the forms you want the role to use by default.
  - If you want to restrict the role to only the forms you mark as preferred, check the box in the **Restricted** column. (Not available for Customer Center roles.)

  Note the following about marking a transaction or CRM form Preferred for the Customer Center role:
- External forms, meaning forms with names appended with (External), can be marked Preferred for the Customer Center roles, but not for other roles.
- Forms that are not external cannot be marked as Preferred for Customer Center roles, so they are not listed on the Forms tab of Customer Center role records.

Setting Search Defaults for a Role

- Click the **Searches** subtab to set saved search definitions to be used as defaults for the search forms, search results, list views, sublist views, and dashboard views available to a role. For each kind of view, you also can make the selected saved search the only one available for a record type.

  You make these selections by record type. When you select a record type on the Standard or Custom Record subtab, you can do the following:
  - In the **Search Form** column, select a saved search to simplify the default search form for the selected record type.

    By default, the simple search form for each record type displays a system-defined set of fields that can be used as filters. Selecting a saved search here applies the saved search's available filters to be the only fields on this form for this role.

    A preferred search form also can be defined on a saved search record. See the help topic Defining a Saved Search as a Preferred Search Form.
  - In the **Search Results** column, select a saved search to be applied to the default global and quick search results for the selected record type.

This option applies all saved search settings, including criteria, results, and available filters, to the global and quick search results for the selected record type, for this role.

Preferred search results also can be defined on a saved search record. See the help topic Defining a Saved Search as Preferred Results.

- In the **List View** column, you can select a saved search to be the default list view for the selected record type. To make that saved search the only list view available, check the **Restricted** box.

  For each record type that is available in a list, a system-defined set of columns displays by default. The displayed set of records and fields is called a list view. The selection of a saved search here overrides the system default definitions.

- In the **Sublist View** column, you can select a saved search to be the default sublist view for the selected record type. To make that saved search the only sublist view available, check the **Restricted** box.

  Some record lists may be displayed on a subtab of another record. For example, a list of transactions may display on the **History** subtab of an item record. This type of list is called a sublist. The selection of a saved search here overrides the system default definitions.

- In the **Dashboard View** column, you can select a saved search to be the default view in a dashboard List portlet for the selected record type. To make that saved search the only dashboard view available, check the **Restricted** box.

  A record list displayed in a List portlet on the dashboard is called a dashboard view. The selection of a saved search here overrides the system default definitions.

For general information about views, see the help topic Working with List Views, Sublist Views, and Dashboard Views . For information about saved searches as views, see the help topic Using a Saved Search as a View.

Setting Role-Based Preferences

Users with the Administrator role can set preferences that tailor NetSuite accounts to the needs of a particular role. The preferences set for a role serve as the defaults for any account users who log in with that role. Role-based preferences are defined on the Preferences subtab of a custom role record.

To set role-based preferences:

1. Click **Edit** next to a custom role or Customize next to a standard role.
2. On the **Preferences** subtab, select a preference, choose the desired value in the popup, and click Add.

   > **Note:** If a customer who has only the Customer Center role assigned to them specifies a color theme, this color scheme is not used and the theme set up as the default is used instead.

3. Repeat step 3 to set additional preferences as desired.
4. Click **Save**.

Role-Based Preferences vs. Other Preference Levels

The same preferences that can be set for roles also can be set by individual users for themselves only at Home > Set Preferences. Role-based preferences are not intended to override any preferences explicitly set by an individual user. If a user has set a preference to a value other than the system default, company default, or subsidiary default, the corresponding role-based preference is not applied when that user logs in with that role.

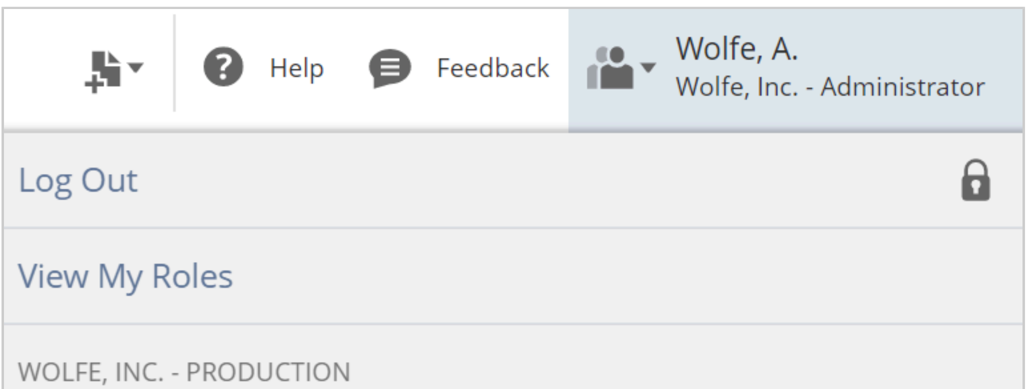
Some role-based preferences are also available at the company level, and in NetSuite OneWorld accounts, at the subsidiary level. A role-based preference overrides the system default setting, the corresponding company-level preference, if any, and the corresponding subsidiary-level preference, if any. Note that if a company preference has been set not to allow override, it is not available to be set as a preference on role records.

For more information, see the help topic NetSuite Preference Levels Overview.

Translating Custom Role Names

If the Multi-Language feature is enabled in an account, users with the Administrator role can define translations for custom role names so they match the language of the NetSuite user interface. Note that NetSuite provides translations for standard role names.

When the NetSuite user interface is set to a different language, translated role names display in roles lists, including the popup that displays when a user clicks the icon next to the current role in the upper right corner.



Before you can translate roles names, you need to select translation languages at Setup > Company > General Preferences, on the Languages subtab. For details, see the help topic Configuring Multiple Languages.

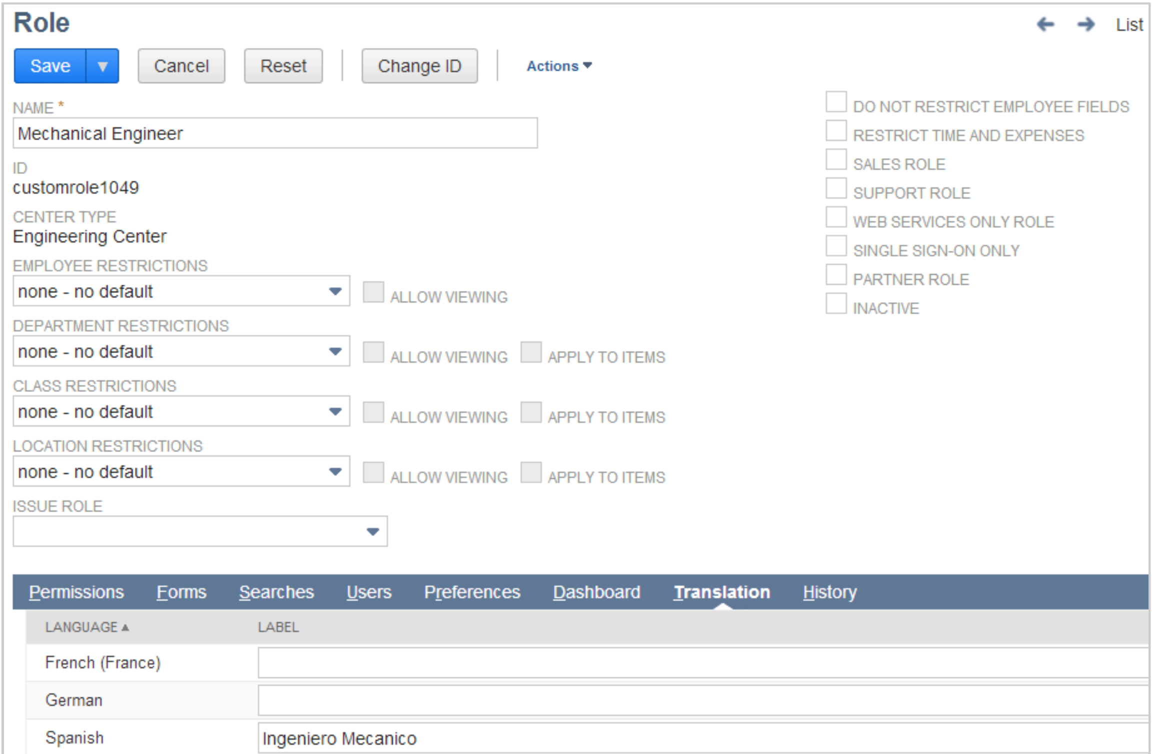
> **Note:** The Languages subtab at Setup > Company > General Preferences lists both system-supported languages that can be used for the NetSuite user interface (and are available at Home > Set Preferences), and additional languages that can be used for website translations only (and are not available at Home > Set Preferences). You should only enter translations for role names in system-supported languages, because these are the only languages that can be displayed in the user interface.

After you have selected languages, you can enter translations on custom role pages, either when you first create a role, or when you later edit it.

To define translations for an existing custom role name:

1. Go to Setup > Users/Roles > Manage Roles.
2. Click **Edit** next to the role name that needs translations.
3. On the role page, enter translated role names on the **Translation** subtab.

Note: The name of a custom role in the Name field is always displayed in the default language of your company.



Note: The maximum length for a role name's translation is 80 characters.

Selecting a Dashboard for a Role

Consider the following information when you select a dashboard for a role.

- For a standard role, click the **Dashboard** subtab to select a published dashboard to be used by the role.

  Only dashboards that have been published to the role's assigned center are available. See the help topic Publishing Dashboards.
- For a custom role, click the **Dashboard** subtab to view the dashboard currently published to the role. Dashboards cannot be published from the Dashboard tab of a custom role. Publishing a dashboard to a custom role can only be done from the Publish Dashboard link in the Home Settings portlet.

Changing Custom Roles

After you customize a role, you may later decide that you want to edit or inactivate it.

Note: If you assign an additional role to a user who is currently logged in to NetSuite, that user will need to log out and log back in to NetSuite to see the newly assigned role. The same is true if you add permissions to an existing role while a user is currently logged in to NetSuite. The user needs to log out and log back in to exercise the new permissions.

To edit a custom role:

1. Go to Setup > Users/Roles > Manage Roles.
2. Click **Edit** next to the role you want to change.
3. On the **Role** page, make desired changes, including:
   - Restricting Role Access to Accounting Books
   - Restricting Role Access to Subsidiaries (OneWorld Only)
   - Setting Employee Restrictions
   - Setting Department, Class, and Location Restrictions
   - Setting a Role as Issue Role for Issue Management
   - Setting a Role as Web Services Only Role
   - Restricting a Role by IP Address
   - Setting Permissions
   - Setting Default and Restricted Forms
   - Setting Search Defaults for a Role
   - Setting Role-Based Preferences
   - Translating Custom Role Names
   - Selecting a Dashboard for a Role
4. Click **Save**.

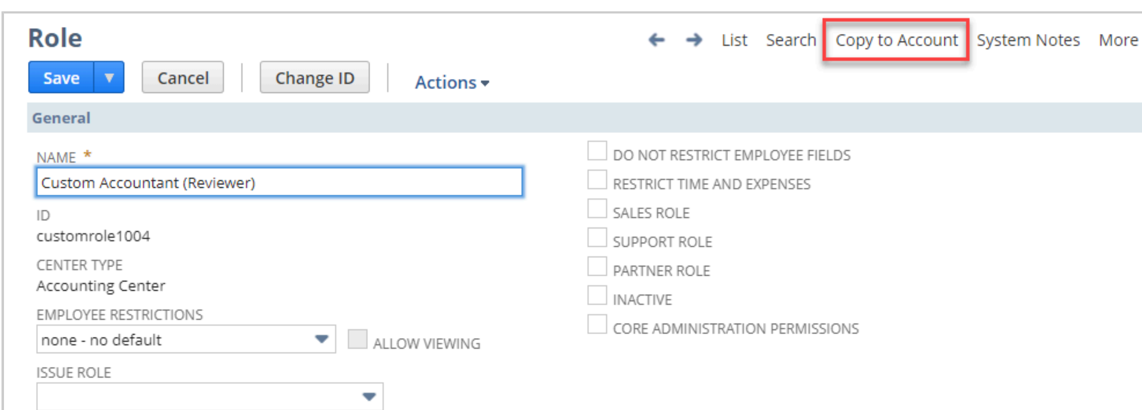
If you edit a custom role after you've assigned it to employees or vendors, the changes are automatically updated.

Note: A mass update is available to add, remove, or change the level of a permission for multiple custom roles simultaneously. See Mass Updating a Permission on Custom Roles.

Using SDF and Copy to Account to Copy Customized Roles

You can use SuiteCloud Development Framework (SDF) to manage custom objects as part of file-based customization projects. For information about SDF, see the help topic SuiteCloud Development Framework Overview.

You can use the Copy to Account feature to copy a customized role to another of your accounts. To copy a customized role, follow the instructions to edit a custom role, and click **Copy to Account** on the **Role** page.



For information about Copy to Account, see the help topic Copy to Account Overview.

Inactivating Roles

You can inactivate custom or standard roles that you do not want to use in your account.

When you inactivate a role, you can no longer select it in the Role field on records, and those assigned to the role can no longer access your account with that role.

> **Warning:** If you inactivate the only role an employee is assigned, you can lock that person out of your account. Before inactivating a role, go to Setup > Users/Roles > Manage Users to view who may be assigned to that role.

To inactivate a custom or standard role:

1. Go to Setup > Users/Roles > Manage Roles.
2. Check the **Show Inactives** box at the top of the list.
3. In the **Inactive** column, check the box next to any role you want to inactivate.

   To prevent errors in the website, you cannot inactivate the standard Customer Center role after you enable the Web Site feature.

   If this role was inactivated before the Web Site feature was enabled, you must temporarily disable the Web Site feature, activate the standard Customer Center role again, and enable the Web Site feature again.

   You will not lose website data in this process.
4. Click **Submit**.

You can delete a custom role if it is not currently assigned to any users AND if has never been used to log in to NetSuite. If a role has previously been used to log in, or is currently assigned to any users, you need to inactivate the role rather than delete it.

Setting Default Forms for Roles

You can set default forms for your users by customizing roles and assigning them to your users. This lets you tailor the level of access you want to give to users.

A role is a set of permissions that lets customers, vendors, and employees access specific areas of your data. You assign roles on customer, vendor, and employee records.

By setting a default form for your users you can control the entry and transaction forms they use to enter data. Note that Employee Center roles are given limited access to forms such that only one form is ever made available to this type of role. For other types of roles, in addition to setting a default, you can also restrict access to particular forms.

For example, you can set a custom case entry form as the only form your support reps can use. This maintains consistency in your company and lets you capture the information that is most important for your business.

> **Note:** To make a custom transaction or entry form a default form, you must first customize and save your forms.

To set a default form for roles:

1. Go to Setup > Users/Roles > Manage Roles.
2. Click **Customize** next to the role you want to set a form for.

3. Enter a name for your custom role.
4. Click the **Forms** subtab.
5. Click the section you want to set default forms for.
   - **Transaction** – Set default forms for transactions such as cash refunds, cash sales, invoices, and sales orders.
   - **Entity** – Set default forms for the records you keep for people and companies in NetSuite, such as employees and customers.
   - **CRM** – Set default forms for CRM-related activities and records such as campaigns, cases, events, and tasks
   - **Time –** Set default forms for time entries.
   - **Item** – Set default forms for item records.
   - **Other Record** – Set default forms for other types of records, such as competitor records.
6. In the **Enabled** column, clear any boxes for forms this role should not have access to. (not available for Customer Center roles)

   If you disable all forms for a record or transaction type, users with this role will use the standard form.
7. Check the box in the **Preferred** column next to any form that should be the default for this role.

   > **Note:** Be aware of the following about marking a transaction or CRM form Preferred for Customer Center roles: External forms, meaning forms with names appended with (External), can be marked Preferred for Customer Center roles, but not for other roles. Forms that are not external cannot be marked as Preferred for Customer Center roles, so they are not listed on the Forms tab of Customer Center role records.
8. To have this form to be the only form available to this role, check the box in the **Restricted** column.
9. Click **Save**.

If you set default forms and do not make the defaults restricted, your users can still change the form they use when they are entering transactions or records.

After you have set default forms, you need to assign your customized roles to your employees. You can assign roles on the Access subtab of employee records.

Restricting Accounts for Roles

You can restrict your accounts by classes, departments, or locations, to control the accounts with which employees work. If you use NetSuite OneWorld, you also can restrict roles by subsidiary. For more information, see Customizing or Creating NetSuite Roles.

For example, Jennifer Sawyer, A/R manager for Wolfe Electronics' Japan location, has her accounts restricted to include only her local bank account. This account appears by default when she accepts customer payments. This increases Sawyer's efficiency and reduces her chances of making data-entry errors.

To restrict access to accounts, you first set restrictions on account records. By default, NetSuite roles do not restrict users by class, department, or location. To restrict accounts, you must set up both account restrictions and role restrictions.

To set account restrictions:

1. Go to Lists > Accounting > Accounts.

2. Click **Edit** next to the account you want to restrict.
3. To restrict the account by department, select a department in the **Restrict to Department** dropdown list.
4. To restrict the account by class, select a class in the **Restrict to Class** dropdown list.
5. To restrict the account by location, select a location in the **Restrict to Location** dropdown list.
6. If you use NetSuite OneWorld, to restrict the account by subsidiary, select a subsidiary in the **Subsidiaries** dropdown list.
7. Click **Save**.

Next, you must set up restrictions for user roles.

To set role restrictions:

1. Go to Setup > Users/Roles > Manage Roles.
2. Do one of the following:
   - To customize a standard role, click **Customize** next to the role you want to change.
   - To edit a customized role, click **Edit** next to the role you want to change.
3. Click the **Restrictions** subtab.
4. In the **Segment** dropdown list, select **Class**, **Department**, or **Location**.
5. In the **Restrictions** dropdown list, select one of the following restrictions:
   - **none - default to own** – There is no restriction on what can be selected. Record access is not determined by this field. Fields of this type will select the user by default.
   - **own, subordinate, and unassigned** – Users are restricted when selecting any of the employee, sales rep, or supervisor fields. Users are granted access to records belonging to their supervisor hierarchy. Users may only select themselves or their subordinates. If the select field is optional, then the user may leave the value unassigned. Note that unassigned is technically a null value when used to filter.
   - **own and subordinates only** – Users are restricted when selecting any of the employee, sales rep, or supervisor fields. Users are granted access to records belonging to their supervisor hierarchy with the exception of unassigned records. Consequently, unassigned records are filtered and denied access. Users may only select themselves or their own subordinates.

   > **Important:** Any account in the Chart of Accounts list that does not have an assigned department is not subject to the **own, subordinate, and unassigned** or **own and subordinates only** restrictions.

6. To allow users logged in with this role to see, but not edit, data for departments to which the role does not have access, check the **Allow Viewing** box. You cannot use this setting to view employee payroll or commissions data. Also, users cannot view non-subordinate department records other than their own department records when the **Department Restrictions** field is set to **own and subordinates only**.
7. To apply the department restrictions defined here to item records (in addition to transaction, employee, and partner records), check the **Apply to Items** box.
8. If you have NetSuite OneWorld, you can use subsidiary restrictions to restrict what users with this role can access. Under **Subsidiary Restrictions**, select one of the following options:
   - **All** – Grants the role access to all subsidiaries, including inactive subsidiaries.
   - **Active** – Grants the role access to the active subsidiaries only.
   - **User Subsidiary** – Restricts the role's access to the user's subsidiary only. When users log in with this role, they can only access their own subsidiary. A user's subsidiary is set on the

employee record. For more information, see the help topic Assigning a Subsidiary to an Employee.

- **Selected** – You select the subsidiaries to which you want to restrict the role's access. When you choose Selected, you need to select the subsidiaries from an autogenerated list of all of the active and inactive subsidiaries. You must select at least one subsidiary. To select multiple subsidiaries, hold down the **Ctrl** key while selecting subsidiaries.

9. To allow users logged in with this role to see, but not edit, records for subsidiaries to which the role does not have access, check the **Allow Cross-Subsidiary Record Viewing** box. You cannot use this setting to view employee payroll or commissions data.

> **Note:** If the Book Record Restriction option is enabled for a user, this restriction overrides permissions granted by the Allow Cross-Subsidiary Viewing option.

10. Click **Save**.

Customizing the Customer Center Role

Customize the Customer Center role to adjust the level of access customers have in the center. You can remove links to transactions or records or limit access to only viewing instead of editing or creating.

The Customer Center role is also applied to the My Accounts section of your website. For information on setting forms to use in your website, see the help topic Shopping Preferences.

Customizing this role also enables you to ensure a customer uses a custom form when entering sales orders or making payments in the center.

> **Note:** After you create a custom Customer Center role, you will need to manually assign this role to each customer that you want to use it, on the Access subtab of each customer record.

To customize the Customer Center role:

1. Go to Setup > Users/Roles > Manage Roles.
2. Click **Customize** next to Customer Center.
3. In the **Name** field, enter a name for this new custom role.

   You select this name when you assign the role on customer records.
4. Click the **Permissions** subtab.
   1. On the **Transactions**, **Lists**, and **Setup** subtabs, click the name of the task to which you want to change access.
   2. In the **Level** column, adjust the permission level for the task.
   3. Click **Edit**.
   4. Repeat these steps for each task you want to edit the access level for.
5. Click the **Forms** subtab, and on the **Transaction** and **CRM** subtabs, check the box in the **Preferred** column next to the form you want customers to use in the Customer Center. This overrides the preferred form selected on the Transaction Forms page.
   - The Customer Center and My Account section of your website use the transaction and entry forms marked as (External) in the Custom Forms list. Note the following:
     - External forms, meaning forms with names appended with (External), can be marked Preferred for Customer Center roles, but not for other roles.
     - Forms that are not external cannot be marked as Preferred for Customer Center roles, so they are not listed on the Forms tab of Customer Center role records.

- When a non-online order form is marked Preferred for Customer Center, it is saved as the form for the order. However, an online form is not saved as the form for an order, even if it is preferred; instead the preferred non-online order form is used.

> **Note:** To create custom forms for transactions, go to Customization > Forms > Transaction Forms. Custom transaction forms must use Basic printing for Customer Center roles. To create custom forms for records, go to Customization > Forms > Entry Forms.

6. Click the **Searches** subtab.
    1. To publish a custom search form or custom search results in the Customer Center, select the type of record or transaction to search.

       You must already have a public saved search to publish a search form or results in the Customer Center. The fields you select on the **Filters** subtab of the saved search record are used by the customer to set criteria on search forms.
    2. To publish a search form, select the name of the saved search in the **Search Form** column.
    3. To allow customers to view search results as a list, select the name of the saved search in the **List View** column. Searches must be marked both Public and Available as List View to be selected here.

       For example, a public transaction saved search marked Available as List View allows customers to view transactions matching the criteria of the search in their transaction lists.
    4. To allow customers to view search results in a list on the Customer Center dashboard, select the name of the saved search in the **Dashboard View** column. Searches must be marked both Public and Available as Dashboard View to be selected here.
    5. To allow customers to view search results in subtab lists, select the name of the saved search in the **Sublist View** column. Search must be marked both Public and Available as Sublist View to be selected here.
    6. Check the box in the **Restricted** column to only allow customers to view the results of this search in the list view, dashboard view or sublist view, respectively.

       If you clear this box, customers can select this view in a View filter at the bottom of the list, and the list of all the customer's transactions or records for that page is shown by default.
7. Click the **Preferences** tab to set preferences for the custom center role. The preferences set here are applied to new users assigned to a role and to existing users in a role who have not previously set that preference. See the help topic Setting Personal Preferences.

You can now select this custom role on the **Access** subtab of customer records to assign the role.

> **Note:** To prevent errors in the website, you cannot inactivate the standard Customer Center role you enable the Web Site feature. If this role was inactivated before the Web Site feature was enabled, you must temporarily disable the Web Site feature, activate the standard Customer Center role again, and enable the Web Site feature again. You will not lose any website data. For more information see, Inactivating Roles.

Retail Clerk Roles

The Retail Clerk and Retail Clerk (Web Services Only) roles are specialized roles intended to provide limited access for users to implement point-of-sale workflows.

Users can be assigned the Retail Clerk role to complete point-of-sale tasks in the NetSuite user interface. The Retail Clerk (Web Services Only) is intended for use in web services transactions and is marked as a

Web Services Only role. For details about Web services roles, see the help topic Setting a Web Services Only Role for a User.

Because of their design for limited access, these roles differ from other NetSuite standard roles in the following respects:

- The permissions for these roles cannnot be customized. To review the permissions assigned to these roles, see the following roles in Standard Roles Permissions Table:
  - Retail Clerk
  - Retail Clerk (Web Services Only)
- These roles are provisioned differently than other standard roles. Users assigned these roles may be counted differently than users assigned other roles, as described below:
  - If a user is assigned the Retail Clerk role or Retail Clerk (Web Services Only) roll and any other full access role, the user counts as one Retail Clerk.
  - If a user is assigned the Retail Clerk role or Retail Clerk (Web Services Only) role and any other non-Employee Center role, the user counts only as a full access user, but not as a Retail Clerk.
  - If a user is assigned the Retail Clerk role or Retail Clerk (Web Services Only) role and an employee center role, the user counts as both a Retail Clerk and Employee Center.

Showing Role Permission Differences

Use the Show Role Differences feature to quickly review the differences in permissions between roles. You can view all of the roles' permissions or just the permissions that are different. You can also export the list of role permission differences as a .CSV or .XLS file. You should select less than 100 roles for comparison to avoid issues with processing your request.

To compare permissions for two or more roles:

1. Go to Setup > Users/Roles > Show Role Differences.
2. In the **Base Role** dropdown list, select the role that will be the basis for comparison to other roles.
3. In the **Compare To** dropdown list, select one or more roles to compare to the base role.
4. Do one of the following:
   - To view all of the permissions associated with the selected roles, clear the **Only Show Differences** box.
   - To view only the permissions that are different between the roles, select the **Only Show Differences** box.
5. Click **Show**.

   On the **Role Permission Differences** page, the permissions are arranged alphabetically and by category.
6. To export the list as a .CSV or .XLS file, click one of the export options at the top of the list.
7. To compare permissions for another set of roles, click **New**.

Use Searches to Audit Roles and Permissions

You can use searches to audit your NetSuite role permissions. NetSuite provides a simple role search you can use to find a particular role or set of roles, or to return a list of roles and their characteristics. For information about running simple searches, see the help topic Defining a Simple Search. You can also create advanced employee and role record saved searches to find information about role permissions. For example, you can verify permissions assigned to a role, or verify permissions assigned to an employee or an employee's role. For information about auditing permissions, see Use Searches to Audit Roles and Use Searches to Audit Permissions By Employee. In addition to user interface searches, you can use the SuiteScript Search APIs to create and automate searches. For more information see the help topic Search APIs.

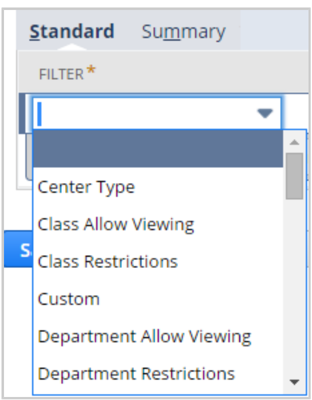
> **Note:** Role record searches do not support the nlapiLoadSearch(type, id) search API.

Use Searches to Audit Roles

You can run role and employee record saved searches to gather information about the roles in your NetSuite account.

You can do role record searches for general information about roles in your account, such as permissions assigned to a custom role. Role record body fields are available for role record searches.

Figure 3. Role Record Search Fields



Related record fields are also available; see the help topic Related Records Fields Available for Advanced Searches. Additionally, the following permissions fields are available:

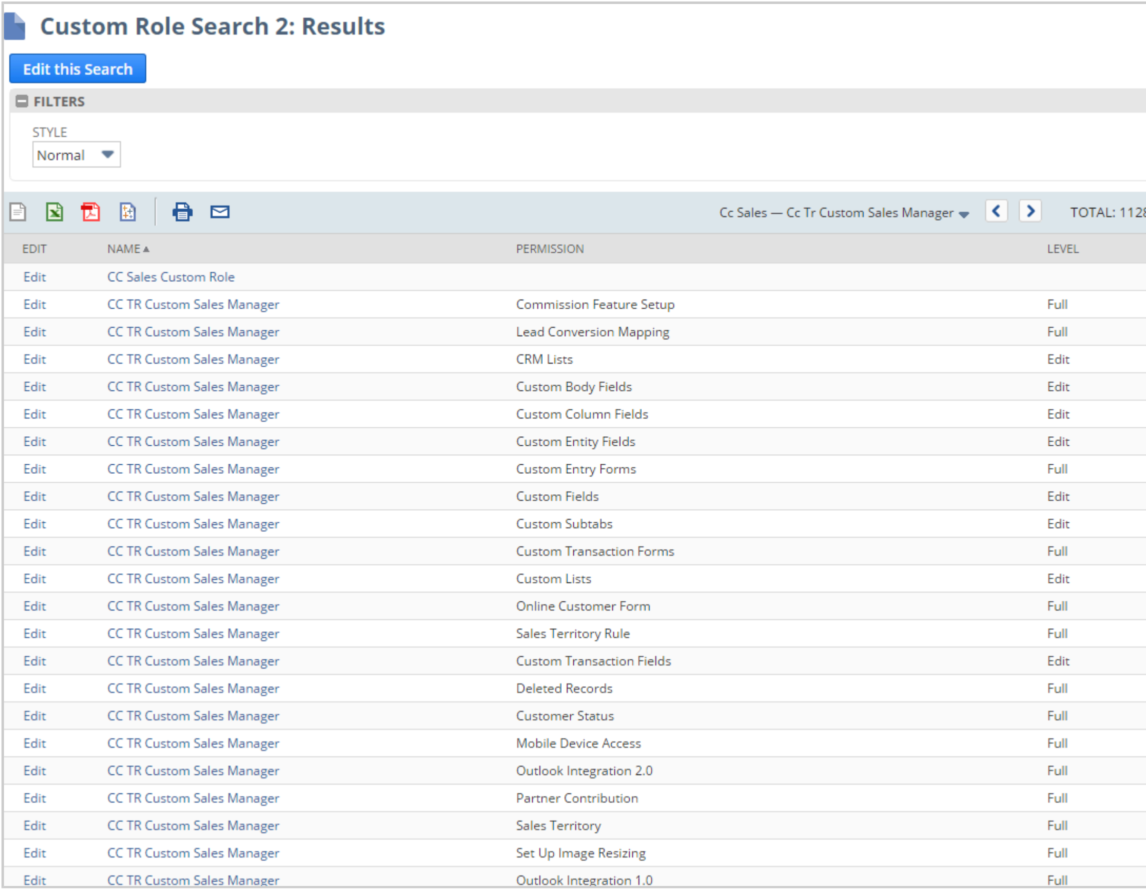
- Permission: Provides the name of each permission assigned to a role. If you include this field in a search with the permission change fields, results information for the permission change fields is displayed in every row that a permission name exists. To display search results efficiently, create separate searches to return values for for the permission name field and the permission change fields.
- Permission Change: Provides the name of a permission to which a change was made.
- Permission Change Date: Provides the date a change was made to a permission.
- Permission Change Level: Provides the level a permission was changed to.

Role Search Example

You need to audit permissions and levels assigned to sales roles.

To see this list, you would create a Role record advanced search. For the search criteria, you would add a **Is Sales Role** filter set to **Yes**. For the results, you would select **Name**, **Permission** and **Level**.

Figure 4. Role Record Search Results



EDIT	NAME ▲	PERMISSION	LEVEL
Edit	CC Sales Custom Role		
Edit	CC TR Custom Sales Manager	Commission Feature Setup	Full
Edit	CC TR Custom Sales Manager	Lead Conversion Mapping	Full
Edit	CC TR Custom Sales Manager	CRM Lists	Edit
Edit	CC TR Custom Sales Manager	Custom Body Fields	Edit
Edit	CC TR Custom Sales Manager	Custom Column Fields	Edit
Edit	CC TR Custom Sales Manager	Custom Entity Fields	Edit
Edit	CC TR Custom Sales Manager	Custom Entry Forms	Full
Edit	CC TR Custom Sales Manager	Custom Fields	Edit
Edit	CC TR Custom Sales Manager	Custom Subtabs	Edit
Edit	CC TR Custom Sales Manager	Custom Transaction Forms	Full
Edit	CC TR Custom Sales Manager	Custom Lists	Edit
Edit	CC TR Custom Sales Manager	Online Customer Form	Full
Edit	CC TR Custom Sales Manager	Sales Territory Rule	Full
Edit	CC TR Custom Sales Manager	Custom Transaction Fields	Edit
Edit	CC TR Custom Sales Manager	Deleted Records	Full
Edit	CC TR Custom Sales Manager	Customer Status	Full
Edit	CC TR Custom Sales Manager	Mobile Device Access	Full
Edit	CC TR Custom Sales Manager	Outlook Integration 2.0	Full
Edit	CC TR Custom Sales Manager	Partner Contribution	Full
Edit	CC TR Custom Sales Manager	Sales Territory	Full
Edit	CC TR Custom Sales Manager	Set Up Image Resizing	Full
Edit	CC TR Custom Sales Manager	Outlook Integration 1.0	Full

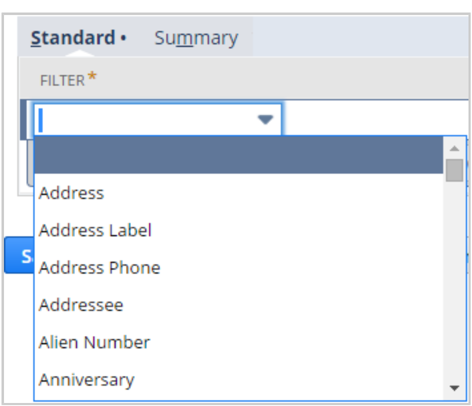
Use Searches to Audit Permissions By Employee

In addition to role record searches, you also can run employee record saved searches to gather information about the roles and permissions in your NetSuite account.

For example, you can do an employee record search to obtain a historical list of changes to an employee's roles.

All employee record fields are available for employee record searches.

Figure 5. Employee Record Filter Fields



Related record fields are also available, see the help topic Related Records Fields Available for Advanced Searches. Additionally, the following role fields are available:

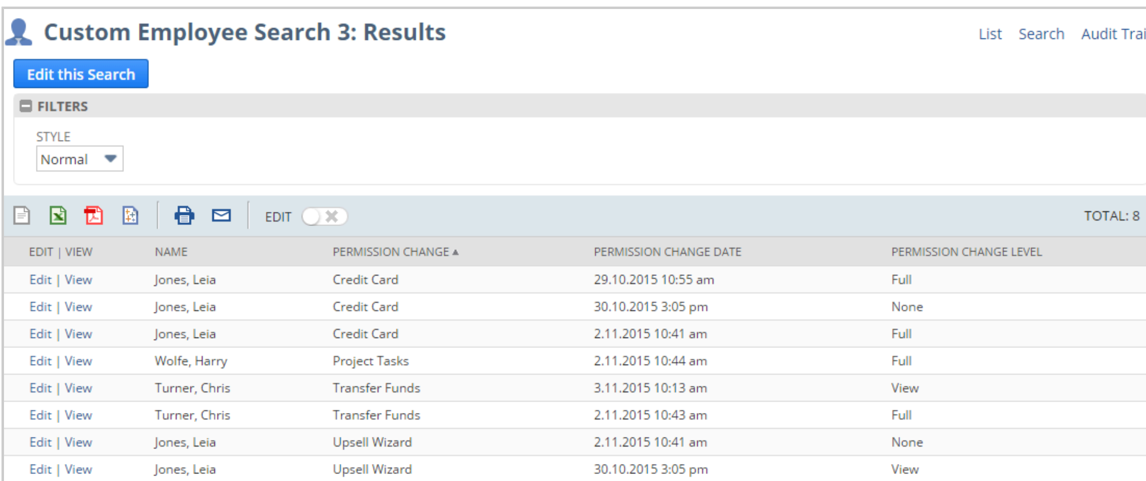
- Role: Provides a role's name.
- Role Change: Provides the name of a role to which a change was made.
- Role Change Action: Provides the action taken on a role.
- Role Change Date: Provides the date an action took place.

Employee Search Example

You need to see changes made to roles of employees at a specific location.

To gather this information, you would create an Employee record saved search. For the search criteria, you would add a **Location** filter equaling the office location. For the search results, you would select the **Name**, **Permission Change**, **Permission Change Date**, and **Permission Change Level** fields.

Figure 6. Employee Search Results



EDIT | VIEW	NAME	PERMISSION CHANGE ▲	PERMISSION CHANGE DATE	PERMISSION CHANGE LEVEL
Edit | View	Jones, Leia	Credit Card	29.10.2015 10:55 am	Full
Edit | View	Jones, Leia	Credit Card	30.10.2015 3:05 pm	None
Edit | View	Jones, Leia	Credit Card	2.11.2015 10:41 am	Full
Edit | View	Wolfe, Harry	Project Tasks	2.11.2015 10:44 am	Full
Edit | View	Turner, Chris	Transfer Funds	3.11.2015 10:13 am	View
Edit | View	Turner, Chris	Transfer Funds	2.11.2015 10:43 am	Full
Edit | View	Jones, Leia	Upsell Wizard	2.11.2015 10:41 am	None
Edit | View	Jones, Leia	Upsell Wizard	30.10.2015 3:05 pm	View

Mass Updating a Permission on Custom Roles

You can use a specialized mass update to add, remove, or change the level of a permission for multiple roles at the same time, instead of editing each role individually. This mass update is available to users with the Manage Roles permission.

Users cannot modify permissions for standard roles, so this mass update can only be applied to custom roles. Also, this mass update is not available to customized Customer Center, Employee Center, Partner Center, or Vendor Center roles.

For general information about mass updates, see the help topic Mass Changes or Updates.

To mass update a permission for multiple roles:

1. Go to List > Mass Update > Mass Updates, expand Roles & Permissions, and select Add/Edit Permission on Roles.

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2. In the **Title of Action** field, enter a name for this update.
3. In the **Permission** field, select the permission that you want to change for selected roles.
   - Click the icon at the right of this field to see a list.
   - Note that all permissions are listed in alphabetical order; they are not divided into Transactions, Reports, Lists, Setup, and Custom Records, as they are on role records.
4. In the **Level** field, choose the permission access level to be applied to selected roles.
   - Choose **None** to remove the permission from selected roles.
   - Note that the available access levels vary according to the permission selected. See Access Levels for Permissions.
5. For custom record permissions only, you can select a value in the **Restrict** field, to limit the selected roles' access to custom records of the type indicated by the permission.
   - Select **Viewing and Editing** to restrict users with selected roles to viewing or editing only the records of this type that they or their subordinates created.
   - Select **Editing Only** to restrict users with selected roles to editing only the records of this type that they or their subordinates created but allow them to view all records of this type.
   - Leave this column blank to allow users with selected roles to view and edit all records of this type.

   For information about custom record type permissions, see the help topic Setting Permissions for a Custom Record Type.
6. To limit the roles where the selected permission should be modified, define a filter or filters on the **Criteria** subtab.
   - If existing role fields do not provide needed filtering, you can create one or more custom field(s) of the Other Custom Field type, and add them to role records, to be used as filter criteria for this mass update. See Adding Custom Role Fields to be Mass Update Filter Criteria.
   - If you do not define any filter criteria, the permission change is applied to all custom roles in the account, other than customized Customer Center, Employee Center, Partner Center, and Vendor Center roles.
7. Define display options for mass update results on the **Results** subtab.
8. Define the users who can run the update on the **Audience** subtab, if available.
9. If you have the Administrator role and you want to run the mass update on a recurring basis, set up this recurrence on the **Schedule** subtab. See the help topic Scheduling a Mass Update.
10. View audited changes and actions respective to the update on the **Audit Trail** subtab.
11. Click **Preview** to see which records the mass update will change, and review the Mass Update Preview page.
    - To modify the mass update, click **Return to Criteria**, and repeat the previous steps as necessary.
    - If your list has less than 1000 entries, an **Apply** column is shown. If any record listed should not be updated, clear the box in the **Apply** column.
12. Choose one of the following options: **Perform Update**, or **Save**.

    you click **Perform Update**, you cannot stop or cancel the mass update, so proceed with caution!

Adding Custom Role Fields to be Mass Update Filter Criteria

To increase the effectiveness of the Add/Edit Permission on Roles mass update, you can add one or more custom fields to the role record. This kind of field can be used to categorize roles and provide filter criteria for the mass update. The type of custom field that can be added to role records is the Other Custom Field type.

The steps below provide steps for creating this type of field. For further details, see the help topics Creating a Custom Field and Creating Other Record Fields.

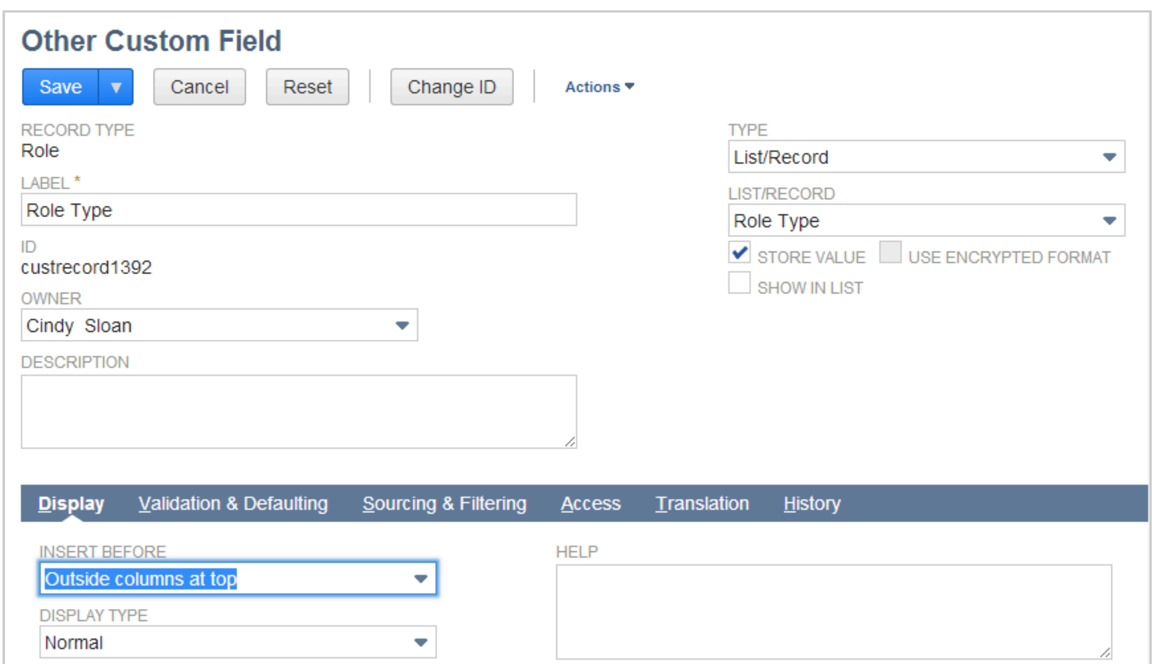
To create a custom field to be added to the role record:

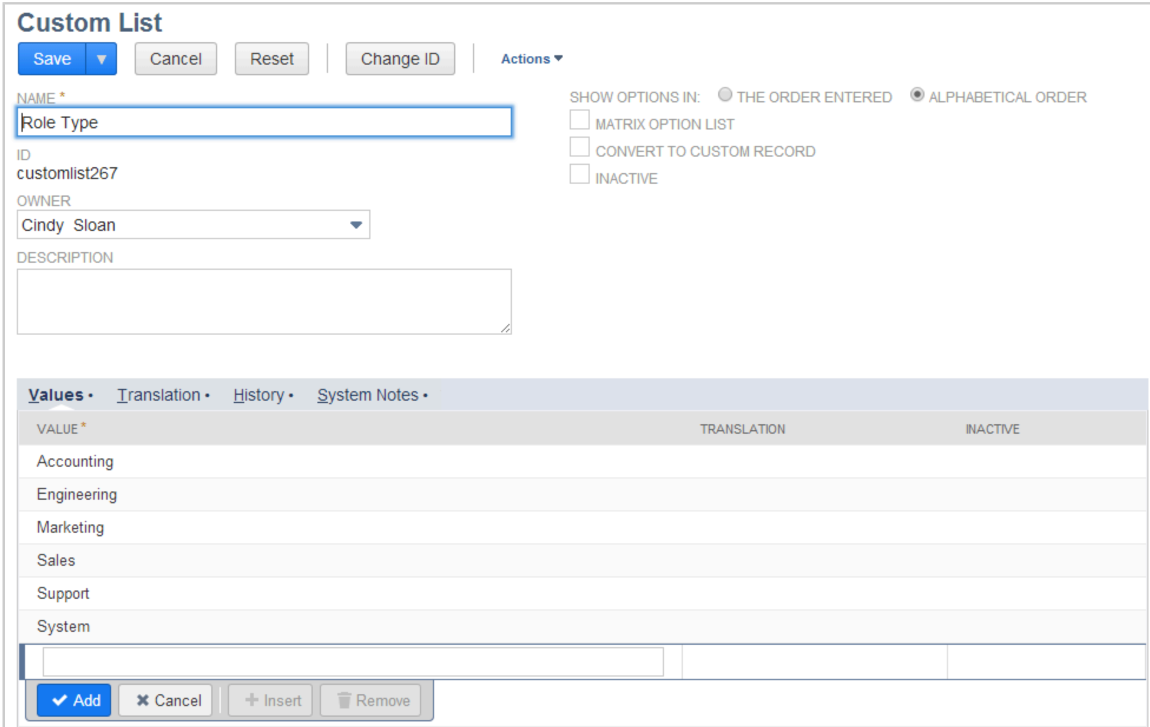
1. Go to Customization > Lists, Records, & Fields > Other Custom Fields > New.
2. From the **Record Type** dropdown list, select **Role**.
3. In the **Label** field, enter a name for the field.
4. From the **Type** dropdown list, select the type of field.

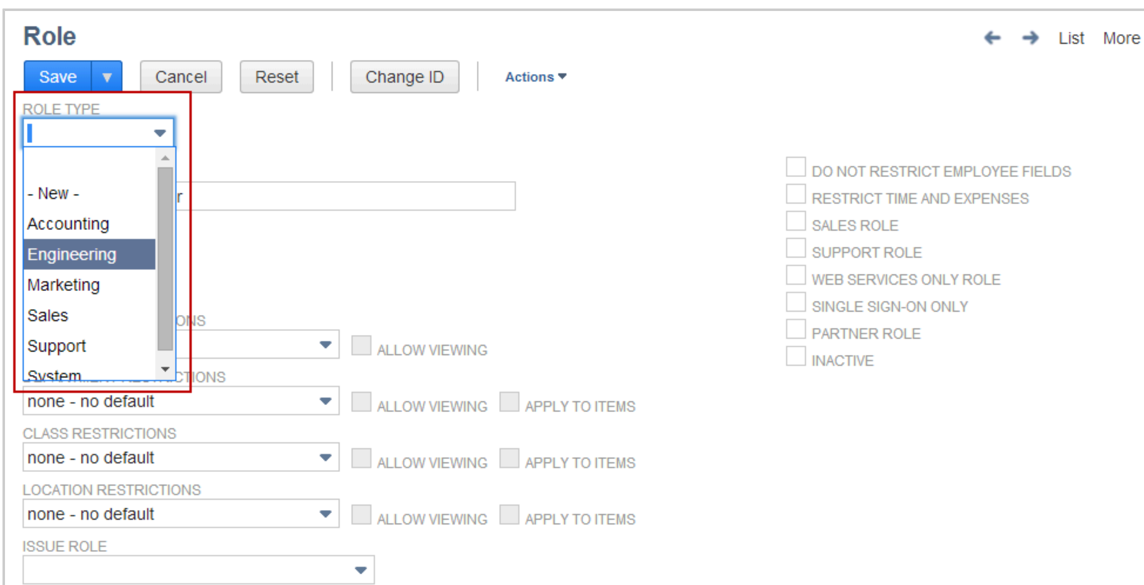
   For example, you can choose **List/Record** if you want the field to be a dropdown list with multiple options. For this choice, you need to select the list or record that supplies dropdown list options. You may need to first create a custom list of these options, then return to creating this custom field. See the help topic Custom Lists.
5. To add the field to the role page, select a value in the **Insert Before** field.
6. Complete other fields as necessary.
7. Click **Save**.

After you have created this custom field, you can set its values on role records as desired, then use it as a filter criteria for the Add/Edit Permission on Roles mass update.

The following screenshots show the record for a sample custom field, its associated custom list, and the field on the role record:







Mass Updating the Role Assigned to Customers

You can update the role assigned to your customers using a mass update. When you mass update customer roles, a change you indicate is made for many customer records at the same time, instead of changing the records one at a time.

For example, if you customize your Customer Center role and want to assign the new custom role to all of your customers, you can use the mass update to do so.

To mass update the customer role:

1. Go to List > Mass Update > Mass Updates, expand Customer Support and Service and select Change Customer Role.
2. In the **Title of Action** field, enter a name for this update.
3. In the **Change Role** field, select the role you previously assigned that you now want to change.
4. In the **to** field, select the role you want the update to assign in place of the role selected in the **Change Role** field.

   For example, in the **Change Role** field, you select Customer Center. In the **to** field, you select Customer Role Alpha, a custom role you created. When you run the mass update, selected customers are assigned the Customer Role Alpha role instead of the Customer Center role. These customers no longer have access to the Customer Center role.
5. Define a filter or filters on the **Criteria** subtab to limit the customers whose role should be modified.
6. Define display options for mass update results on the **Results** subtab.
7. Define the users who can run the update on the **Audience** subtab, if available.
8. If you have the Administrator role and you want to run the mass update on a recurring basis, set up this recurrence on the **Schedule** subtab. See the help topic Scheduling a Mass Update.
9. View audited changes and actions respective to the update on the **Audit Trail** subtab.
10. Click **Preview** to see which records the mass update will change, and review the Mass Update Preview page.
    - To modify the mass update, click **Return to Criteria**, and repeat the previous steps as necessary.
    - If your list has less than 1000 entries, an **Apply** column is shown. (If you want to show the **Apply** column, select search criteria that return results with less than 1000 entries.) If any record listed should not be updated, clear the box in the **Apply** column.
11. Choose one of the following options: **Return to Criteria**, **Perform Update**, or **Save**.

    you click **Perform Update**, you cannot stop or cancel the mass update, so proceed with caution!

For general information about mass updates, see the help topic Mass Changes or Updates.

NetSuite Users Overview

To set up users with access to your NetSuite account, you must have the Administrator role to set up records for them, either employee, vendor, partner, or customer records, depending upon the type of users. To add a user, you need to set up a record for that user and on that record, explicitly indicate that access to NetSuite should be provided

On each record, you need to provide an email address, which serves as the user ID. Each record has an Access subtab, where you can enable the Give Access option and assign roles. For users to have access to NetSuite, they must also have a password. Users with the Administrator role can send an access notification email that includes a link that lets users create their own passwords.

For links to instructions for adding NetSuite users, see the topics in Manage Different Types of Users**.**

If you assign an additional role to a user who is currently logged in to NetSuite, that user will need to log out and log back in to NetSuite to see the newly assigned role. The same is true if you add permissions to an existing role while a user is currently logged in to NetSuite. The user needs to log out and log back in to exercise the new permissions.

> **Note:** When the Advanced Employee Permissions feature is enabled, the Employee System Access permission must be assigned to a role to give access and assign roles to employees. For more information, see the help topic Employee Access Tab Permission Overview.

To review users' roles, go to Setup > Users/Roles > Manage Users. The Manage Users page lists all users by name, with their email addresses and roles.

The Manage Users Page

1. Click a user name to open his or her record. You can then click the **Edit** button in the record to make changes.
2. Click a user email address to send mail to him or her.

For more information, see Viewing Your NetSuite Users List.

The Login Audit Trail

The Login Audit Trail is a specialized search that returns a list of account login and logout activity, that can be filtered by date, user, role, or IP address. This search helps keep track of account users, when they have logged in or logged out, and from where. Search results indicate whether each login or logout attempt was successful. This search is available at Setup > Users/Roles > View Login Audit Trail.

> **Note:** In some cases, users' login to NetSuite is ended when they have not explicitly logged out of NetSuite. For example, this situation occurs when a user's NetSuite session times out. If the logout is not explicit, the system does not create a logout entry in the Login Audit Trail.

For more information, see Login Audit Trail Overview.

Manage Different Types of Users

See the following topics for information about setting up and maintaining access for different types of NetSuite users.

- Employee Users
- Vendor Users
- Partner Users
- Customer Users

> **Note:** Only active users with access count against the Full User Count purchased for your account. Inactive users that have access do not count. For details about making users inactive, see the help topic Employee Termination.

Employee Users

You can give NetSuite access to employees by checking the Give Access box on the Access subtab of the Employee record. You assign roles to an employee on the Roles subtab of the Access subtab. Most roles in the system are available to employees, and you can assign multiple roles to each employee.

- For instructions for setting up NetSuite access for employees, see the help topic Giving an Employee Access to NetSuite.
- For instructions for assigning roles, see the help topic Assigning Roles to an Employee.

- For instructions for limiting employees' ability to enter time records, see the help topic Restricting Employee Time Tracking Entries.
- For instructions for adding employees, see the help topic Adding an Employee.

After you have set up employees with access and one or more roles each, you can return to their records and make changes to their assigned roles as necessary. The Access subtab includes a History subtab that lists changes made to role assignments.

If the Global Permissions feature is enabled, you also can assign permissions directly to employees, on a Global Permissions subtab of the Access subtab. These permissions supersede permissions for the employee's assigned role, in the event of a conflict. Please note that usage of the Global Permissions feature is not recommended. For more information, see Using the Global Permissions Feature.

You can use employee searches to track employees' roles and changes to them. The following role fields are available to be used as filters for employee searches:

- Center Type
- Custom
- Inactive
- Internal ID
- Level
- Name
- Permission
- Permission Change
- Permission Change Date

The following role fields are available to be displayed as results for employee searches:

- Center Type
- Custom/Standard
- Inactive
- Internal ID
- Level
- Name
- Permission
- Permission Change
- Permission Change Date
- Permission Change Level

> **Important:** When an employee leaves your company, you should modify the person’s record to reflect the termination date and remove any previously granted user roles and access permissions. You can also inactivate the employee record if you want to prevent it from appearing in lists or as choices anywhere in your account. For more information, see the help topic Employee Termination.

Vendor Users

Vendor access is supported if you have enabled the Vendor Access option on the Web Presence subtab at Setup > Company > Setup Tasks > Enable Features. If this feature is disabled, Vendor records do not include an Access subtab.

You can give vendors access by checking the Give Access box on the Access subtab of the Vendor record. You assign roles to a vendor on the Roles subtab of the Access subtab. Most roles in the system are available to vendors, and you can assign multiple roles per vendor. There may be a Vendor Center role available.

After you have set up vendors with access, you can return to their records and make changes to their assigned roles as necessary. The Access subtab includes a History subtab that lists changes made to role assignments.

For more information about setting up vendors, see the help topics Creating a Vendor Record, Assigning a Role to a Vendor, and The Vendor Center Role.

Partner Users

Partner access to your account is supported if you have enabled the following features at Setup > Company > Setup Tasks > Enable Features:

- Partner Relationship Management on the CRM subtab
- Partner Access and/or Advanced Partner Access on the Web Presence subtab

You can give partners access by checking the Give Access box on the Access subtab on the Partner record. You can assign one role per partner. Available roles may include the Partner Center, the Advanced Partner Center, or your customized versions of these roles. You also can grant access to individual partner contacts based on their email addresses.

Customer Users

Customer access to your account is supported if you have enabled the Customer Access option on the Web Presence subtab at Setup > Company > Setup Tasks > Enable Features. If this feature is disabled, Customer records do not include an Access subtab. For more information, see Giving Customers Access.

You can give customers access by checking the Give Access box on the Access subtab of the Customer record. You can assign one role per customer, usually the Customer Center role, or your customized version of it. You also can grant access to individual customer contacts based on their email addresses.

Giving Customers Access

NetSuite provides a standard role for customers. The Customer Center role lets customers view their estimates, orders, invoices, and payments. You can customize this role to adjust the level of permission for certain tasks in the center. For example, if you do not want customers to make payments from the Customer Center, you can set the level for Customer Payments to None instead of Edit.

For more information about giving access to customers, see the following:

- Enable the Customer Access Feature
- Provide Access to Individual Customers
- Use CSV Import to Provide Access to Multiple Customers
- Set the Customer Center Sales Order Form

Enable the Customer Access Feature

To allow customer access to NetSuite, a user with the Administrator role must first enable the Customer Access feature.

To enable the Customer Center:

1. Go to Setup > Company > Setup Tasks > Enable Features.
2. On the Enable Features page, click the **Web Presence** subtab.
3. Check the **Customer Access** box.
4. Click **Save**.

When customer access has been enabled, roles can be assigned to customer users individually or by CVS import to give access to multiple customers.

Provide Access to Individual Customers

You can use customer records in NetSuite to give access to customers and assign roles.

You should use the **Send New Access Notification Email** feature that lets customers set up a NetSuite password for themselves. However, if you prefer to set their passwords yourself, use the procedure in Set a Customer's Password Manually instead.

To assign a customer a role and provide access to NetSuite:

1. Go to Lists > Relationships > Customers.
2. Click **Edit** next to the customer that you want to assign a role to.
3. In the **Email** field, enter the customer's email address.

   The customer uses this email address to log in to NetSuite.
4. Click the **Access** subtab.
5. Click the **Give Access** box.
6. If you run multiple websites, you can restrict a customer's login access to a specific website (for example, the website that the customer registered on). To assign a customer to a website, in the **Assigned Web Site** field, select a website. For more information, see the help topic Assign Customers to Websites.
7. To assign the standard Customer Center role, in the **Role** field, select **Customer Center**. If you customized the Customer Center role, select the name of the custom role. For more on customizing this role, see Customizing or Creating NetSuite Roles.
8. Check the **Send New Access Notification Email** box to notify your customer of this new access. As of 2018.2, the new access notification email includes the user's email address (used for logging in to NetSuite), the administrator's email address, and explains login procedures. It also contains a URL so that the customer can set up a NetSuite password. The email containing the link is sent as secure email, and comes from NetSuite `<nlmailer@netsuite.com>`.

   To customize the email message, go to Setup > Company > System Email Templates. Next to **Standard Customer Center Access Email**, click **Edit**.
9. To assign individual logins to the customer's contacts, on the **Access** subtab, check the **Access** box next to the contacts you want to grant access to.

   > **Note:** If this is a new customer, you might need to save the record before you can view contacts on the **Access** subtab.

   a. Make sure that an email address is listed for each of the contacts that you want to assign login access to.

b. Check the **Manually Assign Password** box and enter a password for each of the contacts.
c. Check the **Notify** box for the contacts that you want to notify by email.

For security reasons, the contact's password is not included in the email message.

10. Click **Save**.

> **Important:** To revoke access, you should clear the **Give Access** box. If you want to inactivate all roles of the customer, and the customer is also a vendor, partner, or employee, you must revoke access and inactivate those records, too.

Set a Customer's Password Manually

You should use the **Send New Access Notification Email** feature that lets customers set up a NetSuite password for themselves. However, if you prefer to set their passwords yourself, use the following procedure instead.

To set a customer's password manually:

1. Go to Lists > Relationships > Customers.
2. Click **Edit** next to the customer that you want to assign a role to.
3. In the **Email** field, enter the customer's email address.

   The customer uses this email address to log in to NetSuite.
4. Click the **Access** subtab.
5. Check the **Give Access** box.
6. If you run multiple websites, you can restrict a customer's login access to a specific website (for example, the website that the customer registered on). To assign a customer to a website, in the **Assigned Website** field, select a website. For more information, see the help topic Assign Customers to Websites.
7. To assign the standard Customer Center role, in the **Role** field, select **Customer Center**. If you customized the Customer Center role, select the name of the custom role. For more on customizing this role, see Customizing or Creating NetSuite Roles.
8. Do not check the **Send New Access Notification Email**
9. Check the **Manually Assign or Change Password** box.
10. Enter and confirm the customer's password.

    > **Note:** When customers register on your website, the passwords they enter are saved here.

    For details about password requirements, see the help topic NetSuite Password Requirements.
11. Click **Save**.
12. Next, tell your customer to go to your customer center login page. To find the URL, go to Setup > Company > Company Information in the Customer Center Login field. Your customer can log in with the email address and the password you entered on the customer's record. Do not send the customer the password by email.

The customer can now use the email address and password to log in to your NetSuite account with the Customer Center role. Customers can log in to see their own sales orders, invoices, estimates, and payments.

> **Note:** After you save the record, you can preview the account. To preview the account, go to the **Access** subtab, and click the **Log in as customer** link.
>
> You can use the preview to ensure the role given to the customer is set up correctly.

Use CSV Import to Provide Access to Multiple Customers

You can use the Import Assistant to provide access to your NetSuite account to a large set of customers at Setup > Import/Export > Import Tasks > Import CSV Records, without needing to individually update each customer record.

You must have the Import CSV File permission to complete this task. For general instructions for using the Import Assistant, see the help topic Importing CSV Files with the Import Assistant. For general information about setting up CSV files for import, see the help topic Guidelines for CSV Import Files. See also Boolean Values in CSV Files.

> **Important:** There are two procedures in this section. The recommended procedure uses CSV import to provide access to your NetSuite account to multiple customers without assigning passwords. The other procedure also uses CSV import to provide access to your NetSuite account, but requires that you assign a password for each customer.

Users with the Administrator role no longer need to create the initial passwords when giving access to users. You should use the following procedure to provide access, setting the value for the Send New Access Notification Email field to Yes. The standard access notification email includes a link that lets users create their own passwords for accessing NetSuite.

You should follow this procedure to provide access to your NetSuite account for multiple customers.

To provide access for existing customers:

1. Create a CSV file of customer data, with (at minimum) the following fields. You can include other fields in the CSV file, if necessary.
   - **Unique ID** – You should use the Internal ID for the customer record. For information about obtaining internal ID values, see the help topic Displaying Internal IDs. However, using the Customer ID is supported.
   - **Email address** – Required for NetSuite access. You can omit the value for customers whose email address is already populated in their NetSuite records.
   - **Give Access** – Set the value of this field to Yes for all customers included in your CSV file to which you want to provide access.
   - **Send New Access Notification Email** – Set this value to Yes. The notification email includes a link that lets customers create their own passwords for accessing NetSuite.
   - **Role** – For most customers, this value should be Customer Center.
2. Go to Setup > Import/Export > Import CSV Records.
3. In the Import Assistant, do the following:
   a. Select an **Import Type** of **Relationships**.
   b. Select a **Record Type** of **Customers Only**.
   c. Click the **Select** button and browse to the CSV file you created.
   d. Click **Next**.
4. Choose a **Data Handling** value of **Update** and click Next.
5. Map all of the fields listed in step 1 and any other required fields. Click **Next**.
   - For information about importing customer records, see the help topic Customers Only Import.

- For information about mapping import fields, see the help topic CSV Field Mapping Tasks.

6. Give the import map a name and click **Save & Run**.

If you prefer to assign passwords to customers, as well as give them access to your NetSuite account, follow this procedure.

To provide access and assign passwords for existing customers:

1. Create a CSV file of customer data, with (at minimum) the following fields. You can include other fields in the CSV file, if necessary.
   - **Unique ID** – You should use the Internal ID for the customer record. For information about obtaining internal ID values, see the help topic Displaying Internal IDs. However, using the Customer ID is supported.
   - **Email address** – Required for NetSuite access. You can omit the value for customers whose email address is already populated in their NetSuite records.
   - **Give Access** – Set the value of this field to Yes for all customers included in your CSV file to which you want to provide access.
   - **Manually Assign or Change Password** – Set the value of this field to Yes.
   - **Password** – The minimum password length for customers is eight characters.
   - **Confirm Password** – The value must match the value set for **Password**.
   - **Role** – For most customers, this value should be Customer Center.
2. Go to Setup > Import/Export > Import CSV Records.
3. In the Import Assistant, do the following:
   a. Select an **Import Type** of **Relationships**.
   b. Select a **Record Type** of **Customers Only**.
   c. Click the **Select** button and browse to the CSV file you created.
   d. Click **Next**.
4. Choose a **Data Handling** value of **Update** and click Next.
5. Map all of the fields listed in step 1 and any other required fields. Click **Next**.
   - For information about importing customer records, see the help topic Customers Only Import.
   - For information about mapping import fields, see the help topic CSV Field Mapping Tasks.
6. Give the import map a name and click **Save & Run**.

> **Note:** After the CSV import completes successfully, you must tell each customer the password you assigned. Do not send passwords by email.

Set the Customer Center Sales Order Form

When a customer views a sales order in the Customer Center, the form used to display the order depends on how the order was originally entered in NetSuite. You can determine the sales order form that is shown to Customer Center users.

- For a sales order created in the Customer Center or entered directly into NetSuite, the order is displayed using the preferred sales order form defined at Customization > Forms > Transaction Forms at the time the order was saved.
- For a sales order created through the Web Store, the order is displayed using the form that was defined at the time the order was saved in the Sales Order Type field on the Website record at Commerce > Websites > Website List on the Shopping subtab, Checkout Preferences.

> **Important:** If this form preference is changed, sales orders saved prior to the change are displayed using the originally saved form.

If your default external form is an invoice form instead of a cash sale, perform the following procedure to determine which fields show on the form.

To determine which fields show on the form:

1. Go to Customization > Forms > Transaction Forms.
2. Click **Customize** next to Standard Sales Order — Invoice.
3. Go to the **Printing Fields** subtab and check (or clear) the **Print/Email** box for fields you want to show (or not show.) The Printing Field subtab is displayed if you have the Basic printing type selected. For information about printing types, see the help topic Creating Custom Entry and Transaction Forms.

   The **Screen Fields** subtab controls the appearance of the form when it is viewed from an internal role, such as Administrator.
4. Click **Save**.

> **Note:** Be aware of the following about marking a transaction or CRM form Preferred for Customer Center roles: External forms, meaning forms with names appended with (External), can be marked Preferred for Customer Center roles, but not for other roles. Forms that are not external cannot be marked as Preferred for Customer Center roles.

Changing a User's NetSuite Password

Users can change their own NetSuite passwords, but there are occasions when an administrator must reset a user's password. For example, when users forget the answers to their security questions.

The procedures in this section are for users with the Administrator role.

- For instructions written for users to change their own passwords, see the help topic Change Password Link.
- For more information written for Administrators about passwords, see the help topic Password Reset Tips for Administrators. See also Password Requirements and Policies in NetSuite.

As of 2019.2, the User Access Reset Tool is the preferred method for changing a user's NetSuite password. You can also perform other actions to assist users: clear security questions, unlock NetSuite access, and reset (clear) the user's two-factor authentication (2FA) settings.

> **Important:** To initiate a password reset for a user who has access to multiple NetSuite accounts, you must be an Administrator in all of those accounts.

To change a user's NetSuite password with the User Access Reset Tool:

1. In your Administrator role, go to Setup > Users/Roles > User Management > User Access Reset Tool.
2. On the User Access Reset page, enter the email address of the user who requires your help.
3. Check the appropriate box or boxes. You can check multiple boxes if the user needs help with more than one thing.
   a. **Initiate Password Reset** - check this box to send an email to the user containing a link so that the user can reset the NetSuite password.

   b. **Clear User's Security Questions** - check this box to clear the user's security questions. The user will be prompted to set up new security questions and answers after the next login to NetSuite.
   c. **Unlock The User's Access** - check this box to unlock NetSuite access for a user who is locked out of NetSuite after submitting five consecutive incorrect passwords.
   d. **Reset 2FA Settings** - check this box to reset (or clear) the user's settings for 2FA. The user will be prompted to enter new 2FA settings after the next login to NetSuite with a 2FA required role.
4. Click **Save**.

To manually change a user's NetSuite password on the entity record:

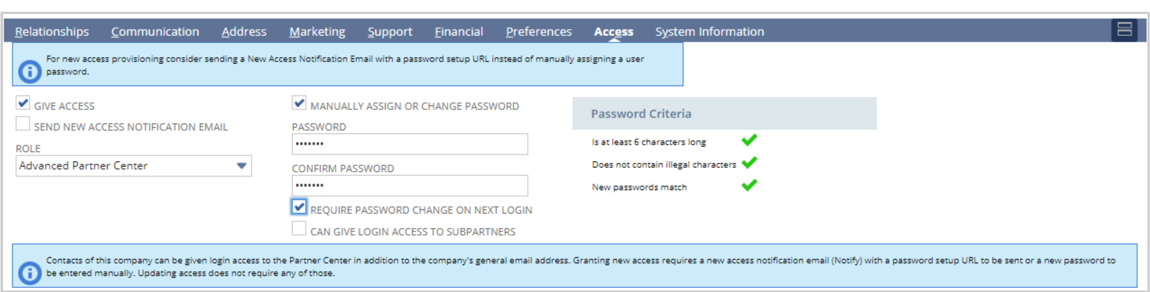
1. Do one of the following:
   - If the user is an employee, go to Lists > Employees > Employees.
   - If the user is not an employee, go to List > Relationships, and then click **Customers**, **Partners**, or **Vendors**.
2. Next to the user's name, click **Edit**.
3. Click the **Access** subtab.
4. Verify that the **Give Access** box is checked.
5. Check the **Manually Assign or Change Password** box.
6. Enter a password in the **Password** field. As you type, the characters are validated against password policy criteria and the results are displayed.
7. Enter the password in the **Confirm Password** field.
8. Do not check the **Send New Access Notification Email** box.
9. To require the user to create and save a new password, check the **Require Password Change on Next Login** box. For security reasons, you should select this option.

   > **Note:** The **Require Password Change on Next Login** box is not available on Customer records.

10. Click **Save**.

   > **Important:** If a message appears saying that only the user can change this password, click **OK** to close the message. Some users access multiple NetSuite accounts with the same email address and you might not have management over all of the accounts.

11. You must tell the user the password you created. For security reasons, do not send the password by email or in a chat application.



NetSuite permits each user a maximum of five failed login attempts. When a user exceeds this maximum (usually because of an incorrect password), an email message is sent to notify users with the Administrator role, and the user is locked out of NetSuite for 30 minutes.

Viewing Your NetSuite Users List

Your Users list gives you quick access to records for the customers, vendors, partners or employees who have access to your NetSuite account.

To view your Users list:

1. Go to Setup > Users/Roles > Manage Users.
2. Here are some procedures you can use with the Users list:
   - Click a column heading to sort the list by that column.
   - Click a user's name to go to that person's record.
   - Click a user's email address to send email to that user.
   - Select a role from the **Role** dropdown list at the bottom of the page to list only users for the selected role.
   - Click **Print** to print your list.
   - Click **Export** to export this list as a CSV file or Microsoft Excel file.
   - The **Total:** at the top of the list on the right indicates the total number of records.

> **Note:** Inactive users do not appear in the Users list, but they can appear in the different Entity Lists if the Show Inactives box is checked. For example, you can get a list of all Employee records at Lists > Employees > Employees and if you check the Show Inactives box, you can see the inactive Employee records too.

Login Audit Trail Overview

The Login Audit Trail is a specialized search that helps keep track of account users, when they have logged in, and from where. It is available at Setup > Users/Roles > View Login Audit Trail.

The Login Audit Trail captures and records the IP address at the beginning of the user's session. It does not capture changes in IP addresses that might occur during a session, such as when a user connects to a Virtual Private Network (VPN) while the session is active. If the user logs out of NetSuite, then logs back in while the VPN is still open, the IP address of the VPN will be captured for that session.

> **Note:** Oracle NetSuite does not support traffic that is routed through a split-tunnel Virtual Private Network (VPN) to control user access to NetSuite. For more information, see the help topic VPN Configuration for User Access to NetSuite.

This search returns a list of login activity, that can include each session listed by date and time of initial login, the user's name, and the IP address from which the user logged in. When you drill down on individual login entries, you view a list of the transactions completed during the user's session. If no data appears, then the user did not complete any transactions during the period you are viewing.

> **Note:** The Login Audit Trail search also is available from general search task links, like Reports > New Search, and Reports > Saved Searches > All Saved Searches > New.

Login Audit Trail Search Capabilities

The Login Audit Trail offers the same capabilities as other NetSuite searches, including:

- Simple search mode, where you can select from a limited set of filters, including IP address, user name, date range, and role.
- Advanced search mode, with more options, including filtering by formulas and join fields, display of formula and join fields as results, and sorting and grouping of results. Available join fields include Role, Employee, and in some cases, Customer, Partner, and Vendor fields.
- Saved searches that you can define and run repeatedly. Saved searches offer all advanced search options, and more, including defining audiences and sending emails of search results.

When you open the Login Audit Trail Search page it displays in the mode last used, initially simple search.

For instructions for using the Login Audit Trail, see the following:

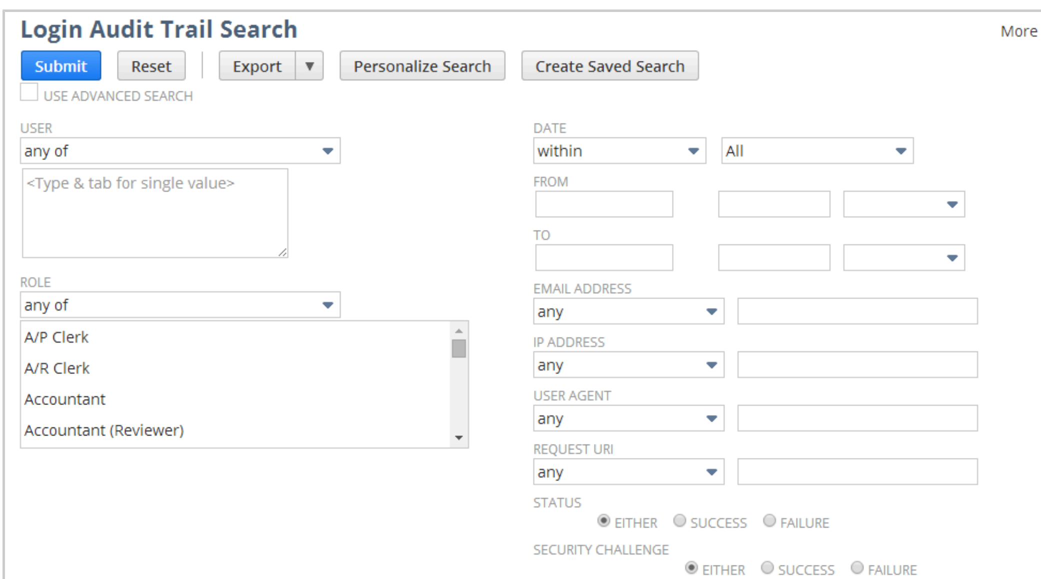
- Defining a Simple Login Audit Trail Search
- Defining an Advanced Login Audit Trail Search

Defining a Simple Login Audit Trail Search

> **Important:** By default, the Administrator role has permission to create, edit and view the Login Audit Trail Search. You can also add permission to any role that can make changes on the Manage Roles page.

To define a simple Login Audit Trail search:

1. Go to Setup > Users/Roles > View Login Audit Trail.



2. Define filters for searching login activity:
   - **User** – Select one or more users, holding down the **CTRL** key to select more than one. To search by exclusion, change the dropdown list to **none of**.
   - **Role** – Select one or more roles.
   - **Date Range** – Select a named time period (such as last fiscal year), or enter a start date and end date to define a custom date range.
   - **Email Address** – Enter an email address in the field.

- **IP Address** – Select search logic in the dropdown list, and enter an IP address or part of an IP address.
- **User Agent** – Select search logic, and enter a value like “Mozilla” to find the client browser used to access your account.
- **Request URI** – Select search logic, and then enter a URI (or any part of a URI) for a NetSuite page used for login.

  The list below includes examples you might use to find the services used to access your account:
  - /app/center/mobile/iphone.nl
  - /app/reporting/webquery.nl
  - /app/site/hosting/restlet.nl
  - /app/webservices/wslogin.nl
  - /internal/admin/acctrepl.nl
- **Status** – Select an option: Success, Failure, or Either.

  > **Note:** If a user enters an incorrect 2FA verification code, it is counted as a login Failure.
- **Security Challenge** – Select an option: Success, Failure, or Either.
- **Token-based Application Name** – Select a parameter to use, and then type the name.
- **Token-based Access Token Name** – Select a parameter to use, and then type the name.

NOTES ABOUT USER AND EMAIL ADDRESS FILTERS FOR CUSTOMER CENTER ROLES:

- Generally, a user is determined by a combination of email address and password. There is not necessarily a one-to-one mapping between email addresses and users, because two users might share the same email address but use different passwords.
- If an email address is used by only one user, then a login audit trail search filtered by that email address and a search filtered by the matching user produce the same results.
- If an email address can be matched to more than one user, then a login audit trail search filtered by that email address and a search filtered by one of the matching users would produce different results sets.

3. Choose one of the following actions:
   - Click **Submit** to run the search and open a NetSuite page with a list of results.
   - Click **Export** button to run the search and save results to a .csv file that you can save to disk or open on your desktop. For more information about exporting search results, see the help topic Exporting Search Results.
   - Click **Personalize Search** to open a saved search page with no filters defined, where you can define a personalized search form to be your default search form for audit trail.
   - Click **Create Saved Search** to open a saved search page that includes the filters you defined. For more information, see the help topic Saved Searches.

Defining an Advanced Login Audit Trail Search

To define an advanced Login Audit Trail search:

1. Go to Setup > Users/Roles > View Login Audit Trail.
2. Check the **Use Advanced Search** box.

3. Click the **Criteria** subtab to define filters.
   - Select a field from the **Filter** dropdown list, select a value in the field popup, and click **Add**, repeating to define additional filter fields.
   - Available filter fields include: Date, formulas, IP Address, Role, User, Employee fields, Role fields, and in some cases Customer, Partner, and/or Vendor fields.
   - For more information, see the help topic Advanced Search Criteria Filters.
4. Click the **Results** subtab to define columns to appear in search results.
   - Select a field from the **Field** dropdown list and click **Add**, repeating to define additional results fields.
   - Available results fields include: Date, Email Address, formulas, IP Address, Request URI, Role, Security Challenge, Status, User, User Agent, Employee fields, Role fields, token-based Authentication fields (Detail, Token-based Access Token Name, Token-based Application Name) and in some cases Customer, Partner, and/or Vendor fields.
   - You also can set up sorting and summarizing options for results. For more information, see the help topic Search Results Display Options.
5. After you have defined criteria and results display options for an advanced search, you can:
   - Click **Submit** to run the search and open a NetSuite page with a list of results.
   - Click **Export** to run the search and save results to a .csv file that you can save to disk or open on your desktop. For more information about exporting search results, see the help topic Exporting Search Results.
   - Click **Personalize Search** to open a saved search page with no criteria or results options defined, where you can define a personalized search form to be your default search form for the record type.
   - Click **Create Saved Search** to open a saved search page that includes the criteria and results options you defined. For more information, see the help topic Saved Searches.

Logout Entries in the Login Audit Trail

The Logout Entries for the Login Audit Trail feature tracks successful logouts of your users. Every time the users explicitly log out of NetSuite, the Login Audit Trail creates a new entry with one of the following values in the Detail column:

- **ExplicitLogout** - A value in the Detail column that indicates the user clicked the Log Out link in the NetSuite UI and the active session was terminated.
- **RoleSwitchLogout** - A value in the Detail column that indicates the user switched to a different role in the account, or to a role in a different account. Switching roles terminates the session and is considered a logout.
- **SAMLIdPInitiatedLogout** - A value in the Detail column that indicates the SAML Identity Provider initiated a logout and the NetSuite UI active session was terminated.

In some cases, a user's NetSuite session is ended even when the user has not explicitly logged out of NetSuite. For example, this situation occurs when a user's NetSuite session times out. If the logout is not explicit, the system does not create a logout entry in the Login Audit Trail.

> **Important:** If you use the data from the Login Audit Trail for the purpose of counting the number of successful logins, you should not include the successful logout entries. You can do this by filtering out the new values for successful logouts.

For more information about the Login Audit Trail, see Login Audit Trail Overview.

Inactivating Users

If an employee is terminated, or you revoke a customer's access, you might also want to inactivate the record. Inactive users do not appear in record lists.

Here are some cases in which you would want to inactivate a user record:

- You do not want to delete the record because it contains information that you might need in the future for record-keeping or auditing purposes. Also, the user could return (employee might be rehired or a vendor might sign a new contract) and you could make the record active again.
- You want to temporarily remove the user’s access to NetSuite and restore it later.

When you inactivate a user:

- The user’s login credentials and role assignments are saved. If the record is later made active again, the user can access NetSuite as they did before being inactivated.
- If the user set up schedules to run reports, the reports are not run. The schedule definition is still available, but the task stops running because one part of the schedule was deleted.
- If the user owns calendar events, those events remain in the calendar.
- If the user owns saved searches, they remain in the list of saved searches.

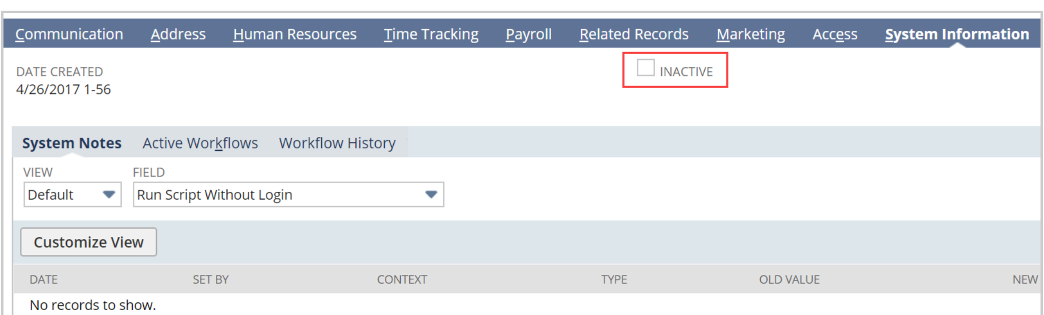
Inactive users do not appear in entity lists unless the Show Inactives box is checked.

Any jobs, for example, reports or scripts, that were scheduled by a user who is now inactive are not run. The jobs are still available, but the schedule is deleted.

Mass Updates process inactive records unless criteria is added to the update to exclude inactive records.

To inactivate a user:

1. Open the record list page.
   - Lists > Employees > Employees
   - Lists > Relationships > Vendors
   - Lists > Relationships > Partners
   - Lists > Relationships > Customers
2. Click **Edit** beside the user record you want to inactivate.
3. Click the **System Information** subtab.
4. Check the **Inactive** box.



5. Click **Save**.

To see inactivated users, go to the appropriate list of records and check the **Show Inactives** box at the top of the list.

To activate an inactivated user:

1. Open the record list page.
   - Lists > Employees > Employees
   - Lists > Relationships > Vendors
   - Lists > Relationships > Partners
   - Lists > Relationships > Customers
2. Check the **Show Inactives** box at the top of the list.
3. Click **Edit** beside the user record you want to activate.
4. Click the **System Information** subtab.
5. Clear the **Inactivate** box.
6. Click **Save**.

Restricting an Individual User View

Although users with the Administrator role can restrict a users' access to data by department, class, location or for NetSuite OneWorld, subsidiary, by customizing the roles they use to log in, there are situations when a user might want to artificially restrict the information seen for a particular login session.

For example, a bookkeeper might want to approve purchase orders for a single location. Restricting her view allows her to view only the purchase orders for that location. Additionally, reports and search results only show records and transactions associated with that location.

You can restrict your view for the current login session at Home > Set Preferences. The next time you log in, the normal restrictions set for your role are restored.

To restrict your view:

1. Go to Home > Set Preferences.
2. Click the **Restrict View** subtab.
3. In the **Subsidiary**, **Department**, **Location**, or **Class** fields, select the classification for which you want to restrict your view in this login session.

   > **Important:** If you restrict your subsidiary view, the departments, locations, and classes available to you are limited to those associated with the selected subsidiary.

4. Check the **Include Sub** box if you want to also see records and transactions associated with child subsidiaries, departments, locations, or classes of the selections.
5. Check the **Include Unassigned** box if you want to see those records and transactions that have not been associated with a department, location, or class.
6. Click **Save**.

NetSuite Permissions Overview

NetSuite provides a large number of permissions that govern the data and interface that users can access. Role permissions are used to define usage of record types, tasks, and pages. Permissions are associated with roles, and roles are assigned to users, who can be employees, vendors, partners, or customers.

Standard roles for specific business functions include predefined sets of permissions. Users with the Administrator role can create custom roles to vary from these standard sets. For information about setting up roles, see NetSuite Roles Overview. For information about assigning roles to users, see NetSuite Users Overview.

You can use the following sources to understand permissions:

- Each role definition page lists permissions already assigned to that role, and other permissions that can be assigned. Permissions are divided into different types: Transactions, Reports, Lists, Setup, and Custom Records. To see this page, go to Setup > Users/Roles > Manage Roles, and click **Customize** for a role. For more information, see Reviewing Permissions Assigned to Roles. For many permissions, different access levels are available. For information, see Access Levels for Permissions.
- NetSuite provides a page where you can compare the permissions assigned to two or more roles and identify differences. To access this page, go to Setup > Users/Roles > Show Role Differences.
- The Help Center provides a link to a spreadsheet listing how permissions are used, meaning the record types, pages, and/or tasks to which permissions provide access. To access this spreadsheet, click here: NetSuitePermissionsUsage.xls For more information, see Permissions Documentation.

Be aware of the following:

- If the Advanced Employee Permissions feature is enabled in your account, you can customize or create roles to use the Employee Self, Employee Public, Employee Confidential, Employee Compensation, Employee System Access, Employee Record Full, and Employee Administration permissions. For more information, see the help topic Advanced Employee Permissions Overview.
- If the Global Permissions feature is enabled in your account, you can assign permissions directly to employees. Employees retain these global permissions with all of their roles. If there is a conflict between role-based permissions and global permissions, global permissions take precedence. Please note that usage of the Global Permissions feature is not recommended. For more information, see Using the Global Permissions Feature.
- A special permission is required to see unmasked credit card numbers, the View Unencrypted Credit Card Numbers permission. To make this permission available to be assigned to roles in your account, you need to complete a signed agreement. For information, see the help topic Payment Card Number Security and Compliance.
- A special permission is available that masks employee information on financial reports. For more information, see Hiding Employee Information on Financial Reports.
- When you newly enable a feature in your account, you must consider permissions associated with the added feature. Customized roles that you have already assigned to users may need to be updated to reflect the proper permissions associated with the added feature. See Customizing or Creating NetSuite Roles.

Permissions and Restrictions

- A permission grants access to a specific record type. Some permissions grant access to tasks rather than record types, but for the purposes of understanding the difference between permissions and restrictions, only record type access is relevant.
- A restriction defines, after you have the necessary permissions, which instances of that record type can be accessed.

Note that users with create or full permissions to a restricted record type are able to create and submit new instances of that record type. However, these users are not able to view these newly created restricted records. In other words, users cannot view records to which they are restricted, regardless of their permissions and levels.

Permissions and Restrictions Example

As the manager of a team of employees your role might be granted the View access level for the Employees permission. This level would enable you to view, but not edit, all employee records.

In addition, a restriction might be applied to your role so you can only access employee records of members of your team.

Permissions are generally assigned to roles, and apply to users to which roles are assigned. If the global permissions feature is enabled, permissions can also be assigned to employees, independently of roles. For details about NetSuite permissions, see NetSuite Permissions Overview.

Restrictions are defined on roles, and apply to users to which roles are assigned. The following types of restrictions are available:

- **Employee Restrictions:** You can restrict a role's access to transaction, customer, and employee records, based on values in the employee, sales rep, and supervisor fields on these records. These restrictions may also limit the values that users logged in with this role can assign to these fields on records. These restrictions do not affect access to contact records. You can choose an option to allow viewing of records that are not available for editing due to these restrictions.
- **Department Restrictions:** You can restrict this role's access to transaction, employee, partner, and optionally item records, based on values in the department field on these records. These restrictions may also limit the values that users logged in with this role can assign to the department field on records. You can choose an option to allow viewing of records that are not available for editing due to these restrictions.
- **Class Restrictions**: You can restrict this role's access to transaction, employee, partner, and optionally item records, based on values in the class field on these records. These restrictions may also limit the values that users logged in with this role can assign to the class field on records. You can choose an option to allow viewing of records that are not available for editing due to these restrictions.
- **Location Restrictions:** You can restrict this role's access to transaction, employee, partner, and optionally item records, based on values in the location field on these records. These restrictions may also limit the values that users logged in with this role can assign to the location field on records. You can choose an option to allow viewing of records that are not available for editing due to these restrictions.
- **(OneWorld only) Subsidiary Restrictions:** You can limit the subsidiary values that users with this role can select for customer and vendor records, and to limit the transaction, customer, and vendor records that users with this role can edit, based on these records' selected subsidiaries. You can choose an option to allow viewing of records that are not available for editing due to these restrictions.

For instructions for setting restrictions on a role, see Customizing or Creating NetSuite Roles.

You can audit assigned permissions through searches of role and employee records. You can audit assigned restrictions through searches of role records.

Reviewing Permissions Assigned to Roles

You can review lists of permissions on any role definition page, including the permissions assigned to each role, and other available permissions. To review these lists:

1. Go to Setup > Users/Roles > Manage Roles.
2. On the Manage Roles page, click **Customize** for a role.

   The **Permissions** subtab on each role definition page has four subtabs that list different types of permissions already assigned to the role: **Transactions**, **Reports**, **Lists**, and **Setup**.
3. Scroll through the **Permissions** dropdown list on each of these subtabs to see other available permissions. Notice that each permission has a level of access selected.

For information about assigning permissions to roles, see Customizing or Creating NetSuite Roles.

Important: When you newly enable a feature in your account, you must consider permissions associated with the added feature. Customized roles that you have already assigned to users may need to be updated to reflect the proper permissions associated with the added feature. See the help topic Enabling Features.

Access Levels for Permissions

The following are general definitions of possible access levels for permissions.

- **NONE** - User doesn't have access to existing files. The user cannot create new, view existing, edit existing, or delete existing files. This access level makes the Restrict column in the Custom Record subtab invalid. For more information, see Setting Permissions.
- **VIEW** - User has access to view existing files only. The user cannot create new, edit existing, or delete existing files.
- **CREATE** - User can create new and view existing files. The user cannot edit or delete existing files.
- **EDIT** - User has access to create new, view existing, and edit existing files. The user cannot delete existing files.
- **FULL** - User has access to create new files and view, edit, and delete existing files.

Note that for some permissions, only the minimum view level is required for usage, and other levels do not provide any additional capabilities. In the model defined by the above access level definitions, each successive level (view, create, edit, full) of a permission provides increased usage of the related record type, task, or page, but the usage of some permissions does not fit exactly into this model. Generally, any user with at least VIEW access to a record type has the ability to print records of that type.

Core Administration Permissions

SuiteCloud: Core Administration Permissions

Access to various features, records, transactions, or reports in NetSuite is primarily controlled by permissions associated with roles that are assigned to end users. This way the end user logged in under a given role can be granted full access to one record, while having read-only access to another record, and no access to a third record. Unfortunately, not every kind of access in NetSuite can be granted to the user by giving the right permission. Most likely this is because such a permission is missing in the system, and access to this functionality is only available for a user with the Administrator role.

Core Administration Permissions is a feature that can be enabled for a role and gives the role access to a functionality that is currently only accessible to the standard Administrator role. You can use Core Administration Permissions to customize a role so that it behaves almost like the Administrator role, while also restricting access to other areas of NetSuite using role permissions and restrictions. For example, with Core Administration Permissions you can create a role specifically for an IT administrator who is responsible for the general administration of the system, but who should not have access to sensitive employee information.

By default, Core Administration Permissions is not assigned to any roles. The Core Administration Permissions feature is enabled by default. For more information, see Customizing or Creating a Role with Core Administration Permissions.

> **Important:** Use caution when assigning a role with Core Administration Permissions to a user, because the role will become similar to the standard Administrator role in terms of exclusive administrator privileges.

Differences Between Core Administration Permissions and Administrator Role

Although Core Administration Permissions is designed to behave like the standard Administrator role, the following table outlines some of the differences between these two roles.

	Core Administration Permissions	Administrator Role
Searches	■ Can only view saved searches through the user interface ■ Can only view private and saved searches by entering an URL	■ Can view, edit, make inactive, and delete ALL saved searches, including: □ Shared searches, with or without the Allow Audience to Edit option enabled, whether or not they include the administrator as the audience □ Public searches, with or without the Allow Audience to Edit option enabled □ Private searches owned by users other than the administrator
Account administration	■ Cannot edit employees that are assigned the Administrator role ■ Cannot approve Employee change request ■ Cannot assign the Administrator role ■ Cannot close a NetSuite account ■ Cannot provide access to a demo account ■ Cannot create payment instruments ■ Role with Core Administration Permissions assigned can be edited by users with non-administrator roles	■ Can edit employees that are assigned the Administrator role ■ Can approve Employee change request ■ Can assign the Administrator role ■ Can close a NetSuite account ■ Can provide access to a demo account ■ Can create payment instruments ■ Administrator role can only be edited by a user with an Administrator role
Contact Records	■ When the Advanced Employee Permissions feature is not enabled, any role using Core Administration Permissions must include the Lists > Employees permission when the **Show Employees as Contacts** box on the General Preferences page is checked ■ When the Advanced Employee Permissions feature is enabled, **Show Employees as Contacts** is not supported ■ For details, see the help topic Advanced Employee Permissions and Contact Records.	—

Customizing or Creating a Role with Core Administration Permissions

Consider the following when you are customizing or creating a role with Core Administration permissions:

- Use caution when assigning Core Administration Permissions to a role, because the role will become similar to the standard Administrator role in terms of exclusive administrative privileges.
- When you assign Core Administration Permissions to a role, you should consider making two-factor authentication required for the role. For more information, see the help topic Two-Factor Authentication (2FA).

The Core Administration Permissions feature is enabled on all accounts by default.

You can assign Core Administration Permissions to any role, and then configure the role to restrict access to areas of NetSuite.

> **Note:** To assign Core Administration Permissions to a role, you must be logged in using the Administrator role or a role with Core Administration Permissions and Manage Roles permissions assigned.

To assign Core Administration Permissions to a role:

1. Go to Setup > Users/Roles > Manage Roles.
2. On the **Manage Roles** list page, next to the role that you want to add Core Administration Permissions to, click **Customize**.
3. On the Role record, check the **Core Administration Permissions** box.
4. To make two-factor authentication required for the role, in the **Two-Factor Authentication Required** dropdown list, select **2FA authentication required**.
5. Click **Save**.

> **Important:** If you are logged in with a role where mandatory two-factor authentication (2FA) is required and you select **Not required** in the **Two-Factor Authentication Required** dropdown list, the mandatory 2FA policy supersedes the role setting. This means that two-factor authentication is required for the role even though it says two-factor authentication is not required on the Role record. For more information, see the help topics Mandatory Two-Factor Authentication (2FA) for NetSuite Access and Two-Factor Authentication (2FA).

Using the Global Permissions Feature

The Global Permissions feature allows users with the Administrator role to assign permissions that apply across all of assigned roles of employees. With global permissions, users with the Administrator role can make changes to each employee's permissions directly on the employee record. Please note that usage of the Global Permissions feature is not recommended.

> **Note:** Not all permissions that are supported for assignment to roles are available for assignment as global permissions.

To enable the Global Permissions feature:

1. Go to Setup > Company > Setup Tasks > Enable Features, and on the Employees tab, check the Global Permissions box.

When this feature is enabled, each employee record includes the Global Permissions subtab on the Access subtab.

To assign global permissions to an employee:

1. After the Global Permissions feature has been enabled, open an employee record.
2. Click the **Access** subtab, and the **Global Permissions** subtab.
3. Select a permission from the **Permission** dropdown list, select an access level for that permission (**View**, **Create**, **Edit**, **Full**, **None**) from the **Level** dropdown list, and click **Add**.

   > **Note:** For more information about the permission access levels, see Access Levels for Permissions.

4. Repeat step 3 until you have added all desired permissions.
5. Click **Save**.

You still need to assign one or more role to each employee on the Access subtab's Roles subtab. When an employee logs in, the applicable permission set is a combination of the employee's global permissions and the currently used role's permissions. Where conflicts between an employee's role-based permissions and global permissions occur, global permissions take precedence, even if global permissions are at a lower level.

The global permissions are not taken into account for the Administrator role. It is not possible to downgrade access for the Administrator role by using the global permissions.

Giving Access to the Transactions Subtab on Entity Records

If a user cannot see the Transactions subtab on customer or vendor records, an administrator can make this subtab visible by adding the Financial History permission to a role assigned to the user.

The Financial History permission gives a role access to the Transactions subtab. Additionally, the role must be given access to the specific types of transactions shown on the Transactions subtab.

For examples of where to find the Transactions subtab, see Transactions Subtab on Entity Records.

To create a custom role with access to the Transactions subtab:

1. Go to Setup > Users/Roles > Manage Roles.
2. Click **Customize** next to the name of the role you want to customize.
3. In the **Name** field, enter the name for this new role.

   This name is selected in employee records on the **Access** subtab.
4. On the **Permissions** tab, click the **Lists** subtab.
5. In the **Role** column, select **Financial History**.
6. In the **Level** column, select **View** (or higher).
7. Click **Add**.
8. Click the **Transactions** subtab.
9. Select the name of the type of transaction you would like this role to view.
10. In the **Level** field, select **View**.

    This level of access allows employees to view the transaction but not edit it.
11. Click **Add**.

12. Repeat these steps for each type of transaction you want this role to view.
13. Click **Save**.

Now, users assigned this customized role can view the **Transactions** subtab on entity records and click the links to view those transactions.

To assign employees this custom role:

1. Go to Lists > Employees > Employees.
2. Click **Edit** beside the employee you want to assign the role.
3. Click the **Access** subtab.
4. Select the new role in the **Role** field, and click **Add/Edit**.
5. Click **Save**.

When the employee logs in again, they will see the **Transactions** subtab on entity records.

Transactions Subtab on Entity Records

On Customer records, the Transactions subtab is located on the Sales subtab.

On Vendor records, the Transactions subtab is located on the Financial subtab.

Giving Access to Financial Statements

You can assign one permission, Financial Statements, to grant the ability to run all financial statement reports. The Financial Statements permission is a Reports type permission with only a View level possible.

Users also must have the Report Customization permission to be able to customize financial statements in the Financial Report Builder and to rename, delete, or reassign financial statement layouts. The View level of this permission is sufficient.

For information about assigning permissions, see NetSuite Permissions Overview.

For information about financial statement reports, see the help topic Financial Statements Overview.

Hiding Employee Information on Financial Reports

If a user requires access to financial reports, but should not be able to view personal employee information on these reports, an administrator can mask this information by adding the Hide Employee Information on Financial Reports permission to a role assigned to the user. This permission prevents a role from seeing employee information, such as the employee name on the following financial reports:

- Financial Statements Overview
- Expense Account Register
- Other Current Liability Account Register
- Income Statement Detail Report
- Balance Sheet Report
- General Ledger Report
- Trial Balance Report
- Viewing the Chart of Accounts

- Transaction Detail Report
- Account Detail Report

> **Important:** The Payroll feature must be enabled on your account to use the Hide Employee Information on Financial Reports permission.

To hide employee information on financial reports:

1. Go to Setup > Users/Roles > Manage Roles and select a role from the list.
2. On the **Permissions** tab, click the **Reports** subtab.
3. In the **Permission** column, select **Hide Employee Information on Financial Reports**, and click **Add**.
4. Click **Save**.

Now users with roles that have this permission will not be able to see personal employee information on financial reports.

Setting Permissions for Custom Records

Each custom record includes a Permissions subtab where you can restrict access by role to your custom records and the forms used to enter the records. Setting permissions within custom records themselves is the most flexible way to provide access to custom records.

1. Go to Customization > Lists, Records, & Fields > Record Types, and select a record type from the list.
2. On the **Permissions** subtab, choose a role and set the access level.
3. Repeat to provide access to additional roles, then **Save**.

You also can add the Custom Record Entries permission to a role, to provide users with that role access to all custom records.

1. Go to Setup > Users/Roles > Manage Roles, and select a role from the list.
2. Click the **Lists** subtab, select **Custom Record Entries** from the dropdown list, set the access level, and click **Save**.

If you make either of these changes, users may need to log out and log back in for the changes to take effect.

For more information about custom record permissions, see the help topic Setting Permissions for a Custom Record Type.

Permissions for Inbound Single Sign-on Methods

The correct permission to assign to a role for single sign-on (SSO) inbound access to NetSuite depends on the SSO feature enabled in your account.

OpenID Connect (OIDC) Single Sign-on Permission

OpenID Connect (OIDC) Single Sign-on is an inbound single sign-on (SSO) method to access NetSuite. OIDC is an identity layer on top of the OAuth 2.0 protocol. OIDC uses JavaScript Object Notation (JSON) as the data format, and uses JSON Web Tokens (JWT) to transfer claims between parties.

If the OIDC configuration is shared between different NetSuite accounts, users can switch between OpenID Connect (OIDC) Single Sign-on roles without requiring a separate login. User credentials and policies are managed by the OIDC provider (OP). NetSuite is the client, or relying party (RP).

When this feature is enabled, you can provide OIDC SSO access to your account users by assigning the OIDC Single Sign-on permission to their roles.

See the help topics Customize Roles for OpenID Connect and OpenID Connect Permissions for more information about the OpenID Connect (OIDC) Single Sign-on permission and granting OIDC access to center roles.

For more information about the OIDC feature in NetSuite, see the help topic OpenID Connect (OIDC) Single Sign-on.

SAML Single Sign-on Permission

The SAML Single Sign-on feature supports inbound single sign-on access to NetSuite using authentication from a third-party identity provider. This feature allows users who have logged in to an external application to go directly to NetSuite. Users do not need to log in separately to NetSuite, because authentication from the same identity provider is used for login to both the external application and NetSuite.

When this feature is enabled, you can provide SAML Single Sign-on access to your account users by assigning the SAML Single Sign-on permission to their roles.

See the help topic Add SAML Single Sign-on Permissions to Roles for more information about the SAML Single Sign-on permission, granting SAML access to center roles, and limitations and restrictions that apply to SAML permissions.

For more information about the SAML feature in NetSuite, see the help topic SAML Single Sign-on.