

## Settings that Affect Where Custom Segments are Applied

### WARNING

This feature is not currently enabled in your account. To enable this feature, please contact your administrator.

Be aware that certain configurations of a custom segment can affect where that segment is applied. These configurations include the following:

- [Dynamic Defaults](#)
- [Filtering by Another Custom Segment](#)
- [Filtering by Class, Department, Location, or Subsidiary](#)
- [GL Impact](#)
- [Type](#)

### Dynamic Defaults

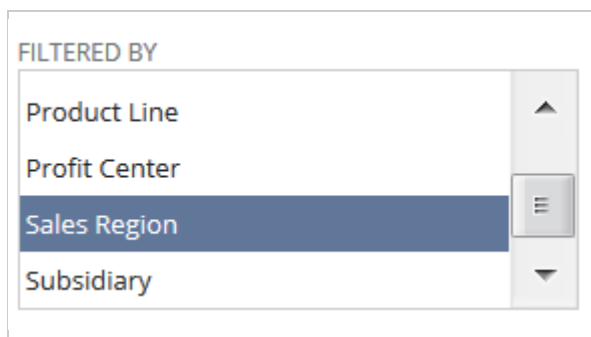
When you use dynamic defaults, you essentially create a relationship between multiple record types that use a segment. If you try to create this relationship before you have applied the segment to all of the applicable record types, the system displays a message regarding record application. This message states that the system will apply the segment to the record type referenced in the Source List choice that you have made. You can cancel the change, or you can let the system apply the segment to the additional record types.

For more information about sourcing, see [Dynamic Default Value Sourcing for Custom Segments](#).

### Filtering by Another Custom Segment

In some cases, you may configure a segment so that it is filtered by another segment. For example, you can have two segments, Sales Region and Sales Channel. You could configure the Sales Channel segment's values to be filtered based on the selection the user makes for Sales Region.

To achieve this type of configuration, edit the Sales Channel segment's Filtered by field. In this field, select Sales Region.



When you use this type of configuration, the segment in the Filtered by field must be applied to all of the same records as the segment that you are editing. Therefore, if you edit a segment to create a filtering relationship between it and a second segment, you may receive a message regarding record application. This message may state that the system will apply the second segment, the one named in the Filtered by list, to more record types.

Additionally, you may receive this message if you are editing a segment that is already filtered by another segment. If you apply the segment to additional record types, this change can affect the segment named in the Filtered by list. If that segment is not already applied to the new types you have selected, the system displays a message stating that it will be applied to them.

In both of these cases, you can cancel the change, or you can let the system apply the segment to the additional record types.

For more details about filtering, see [Filtering for a Custom Segment](#).

## Filtering by Class, Department, Location, or Subsidiary

In some cases, you may want to create a filtering relationship between a custom segment and the Class, Department, Location, or Subsidiary field. In this case, you edit the custom segment and select one of these classifications in the Filtered by field.

As described in [Filtering by Another Custom Segment](#), the classifications selected in the Filtered by field must be applied to all of the same record types as the segment that you are editing. However, in the standard NetSuite configuration, Class, Department, Location, and Subsidiary do not exist on certain record types. By using custom fields, you can customize the entry forms for these record types and make these classifications available. However, custom fields cannot be used for filtering custom segments, so these custom fields are not listed in the Filtered by field. Even if you name the fields Class, Department, Location, and Subsidiary, they are not represented by the options listed in the custom segment's Filtered by field.

For this reason, in some cases when you try to filter a segment by Class, Department, Location, or Subsidiary, the system displays a warning. You are prompted to let the system change either the Filtered by field or the record application of the segment you are editing. The following limitations exist:

- Class, Department, and Location cannot be used for filtering on the record types listed on the following subtabs: CRM, Other Record Types, Custom Record Types, and Custom Segments.
- Subsidiary cannot be used for filtering on the record types listed on the Custom Record Types or Custom Segments subtabs.

## GL Impact

The purpose of the GL Impact option is to add the segment to the GL Impact page for transactions where it is used. For this reason, you may receive a warning if you check the GL Impact box without applying the segment to a transaction. The GL Impact option has no function if the segment is not applied to a transaction type. However, you are not required to apply these segments to transaction types.

You set the GL Impact when you create a custom segment. After that, the option cannot be changed.

For more information about GL Impact, see [Configure a Segment to Appear on the GL Impact Page](#).

## Type

If a custom segment's Type field is set to Multiple Select, that segment cannot be applied to a transaction sublist.

For more information about custom segment types, see [Custom Segment Types](#).

### Related Topics