

NetSuite Point of Sale (NSPOS) Release Notes 2018.2.X



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# NetSuite POS 2018.2.0 Release Notes

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

This document lists the updates provided in NetSuite Point of Sale (NSPOS) version 2018.2.0. Updates are not available to NetSuite POS customers until they have upgraded to the release. NetSuite will modify these release notes when needed to provide our customers with additional information.

- [Required User Actions](#)
- [Prerequisites](#)
- [Product Enhancements 2018.2.0](#)
- [Fixes 2018.2.0](#)
- [Update your NSPOS Bundle to 2018.2.X](#)

## Required User Actions

To use the functionality included in this release, you must:

- [Update your NSPOS Bundle to 2018.2.X](#)
- If listed as a requirement, modify configurations for specific enhancements or fixes.

## Assistance and User Acceptance Testing (UAT)

- **Your assistance will be required to perform the upgrade.** Technical Support or another representative will contact you in advance to agree on the details.
- **Upgrade verification and UAT:** When your NetSuite POS upgrade is complete, we recommend testing at least one register in each store.  
You can find our **NSPOS Register Verification Checklist** in the NetSuite Help Center > User Guides > NetSuite Point of Sale section.  
You can use the checklist for verification after the upgrade and as a guide for performing initial User Acceptance Testing (UAT).

## Prerequisites

- Your server and all registers must be on NSPOS release **2018.1.0 or greater** prior to moving to 2018.2.0.



**Important:** Backward compatibility is only available for the previous major release. If you upgrade to 2018.2.0 and some registers are still on 2017.2.0, it might impact your integration with NetSuite ERP.

- You must have the appropriate third-party applications installed. See the help topic [Prerequisites for NSPOS](#) under “Set up a Register” in the NetSuite Point of Sale Administrator Guide.

## Product Enhancements 2018.2.0

This NetSuite Point of Sale (NSPOS) release includes enhancements to setting up gift certificates and cards, support for Microsoft SQL Server 2016, and features to maintain tenders in refunds from item returns.

- [Set up Gift Cards / Certificates without assistance](#)
- [Support for MS SQL Server 2016](#)
- [Limit downsync of Sales Orders from NetSuite ERP](#)
- [Returns – Require Refunds in Original Tender](#)
- [Returns – Credit Memo link to Invoice](#)
- [Returns – Maintain Tenders through ERP > NSPOS mapping](#)
- [End of Support for Shift4 Integrations with NSPOS Controlled Devices](#)

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

## Set up Gift Cards / Certificates without assistance

A benefit of NSPOS is the ability to set up gift certificate templates for use as gift cards or certificates on your registers. However, in the past, the setup steps concluded with contacting Professional Services so that they could assign a type and prefix.

Our 2018.2.0 release provides customers with the tools to be self-sufficient when creating gift certificate templates. The release includes two new custom records to set the type and prefix. The procedure is now:


1. Create the gift certificate template record.
2. Assign a gift certificate type (RA-GC Type).
3. Assign a gift certificate type prefix (RA-GC Type Prefix).
4. Ensure that the RA-Currency is set for Locations that will sell the gift card or certificate.


### 1. Create the Gift Certificate Template Record

See the help topic [Gift Cards and Gift Certificates in NSPOS](#) in the Administrator Guide for the complete steps to set up a gift certificate template.

### 2. & 3. Assign a Gift Certificate Type and Type Prefix

These procedures demonstrate how to assign a type and type prefix **after** creating a gift certificate master template record.

 **Note:** If your business only accepts NetSuite gift certificates as payment, and does not issue NetSuite-based gift cards from the register, setting up a Type Prefix is not required.

 **Tip:** For Gift Cards or Certificates created prior to the 2018.2.0 release, we will automatically create the corresponding RA-GC Type and RA-GC Type Prefix records. No action is required on your part.

#### To assign a gift certificate type (RA-GC Type)

1. Log in to NetSuite as an administrator.
2. Go to Customization > Lists, Records, & Fields > Record Types.
3. Locate **RA-GC Type** and click **List**.
4. Click **New RA-GC Type**.

**RA-GC Type**

Buttons: Save, Cancel, Reset

CUSTOM FORM \*  

☐ INACTIVE

GIFT CARD ITEM NAME \*

INTERNALID

DISPLAY/PRINT CARD NAME

DESCRIPTION

5. Leave **Custom Form** at the default **Custom RA-GC Type Form**.
6. For **Gift Card Item Name**, select the template you set up.  
The **Internal ID** populates from your selection.
7. Optionally enter a **Display/Print Card Name**. This information is for internal use only; it does not appear at the register.
8. The **Description** does not appear in the Journal. Enter text that is helpful for understanding how the gift certificate will be used. For example, **Use this certificate for customer loyalty rewards**.
9. Click **Save**.

**Note:** Use the **Inactive** box when you will no longer sell this gift certificate. For example, you can mark a seasonal certificate as Inactive when the season ends. See [What happens when a Type or Prefix is inactivated or deleted](#).

10. Before proceeding, note the **Internal ID** on the **RA-GC Type List** for the type you set up.

**Important:** You will select the type's **Internal ID** for the **RA-GC Type** in the next procedure.

### To assign a gift certificate type prefix (RA-GC Type Prefix)

In general, all gift cards issued by a single retailer will use the same prefix. However, you can set up additional prefixes if needed.

1. If not already done, log in to NetSuite as an administrator.
2. Go to Customization > Lists, Records, & Fields > Record Types.
3. Locate **RA-GC Type Prefix** and click **List**.
4. Click **New RA-GC Type Prefix**.

**RA-GC Type Prefix**

Buttons: Save, Cancel, Reset

NAME \*  

☐ INACTIVE

RA-CG TYPE \*

GC PREFIX \*

5. Enter a **Name** for the prefix using any combination of alpha or numeric characters.  
The name is for your internal use only; it does not appear on the register.
6. Select the **RA-GC Type** used when setting up the type.



7. Enter a **Prefix** of your choice using the following rules:
  - Numeric values 0 – 9 only. The prefix must not include alphabetic characters.
  - Enter 1 digit minimum, 3 or more digits recommended.



**Warning:** After saving the RA-GC Type Prefix record, you cannot change the **Prefix** number. Be certain to enter the number you desire.

8. Click **Save**.



**Note:** The **Inactive** box inactivates the prefix. See [What happens when a Type or Prefix is inactivated or deleted](#).

## 4. Ensure RA-Currency is set for Locations

Each retail location selling a NetSuite gift card or certificate must have the currency associated with the card assigned correctly.

For example, for cards configured in United States dollars, you must set the **Location** record > **RA-Currency** field to **US Dollar**. By default, the **Location** > **RA-Currency** field is blank.

See the help topic [Ensure currency set for your Locations](#) for the steps.

## What happens when a Type or Prefix is inactivated or deleted

If you decide to no longer use a type or prefix (type prefix) for your gift certificates and cards, you can edit the record and **Inactive** or **Delete** it. However, any items already issued to customers must remain redeemable.

The following rules apply if you inactivate or delete a RA-GC Type or RA-GC Type Prefix record:

- You should stop selling certificates or cards that use the type or prefix.
- You can continue checking the balance of certificates or cards that were previously sold.
- You can continue redeeming certificates or cards that were previously sold.
- If you reactivate a type, all prefixes that were not inactivated separately are made available for full use on NSPOS.
- If you reactivate a prefix associated with an active type in NetSuite ERP, the prefix is made available for full use on NSPOS.

## Support for MS SQL Server 2016

NSPOS 2018.2 and greater support Microsoft® SQL Server 2016 for use on your register workstations. Previously, we only supported Microsoft SQL Server 2008 R2 Express Edition, Service Pack 3.



**Important:** Microsoft (MS) will deprecate support for MS SQL Server 2008 on July 9, 2019. The deprecation means that regular security updates from Microsoft will end for MS SQL Server 2008 and MS SQL Server 2008 R2. Microsoft might offer extended security-update plans for these versions.

You can contact Microsoft for more information or visit the Microsoft site for [MS SQL Server 2008 R2](#).

It is important to plan for and begin work on a migration to MS SQL Server 2016 well before the July 2019 deprecation of MS SQL Server 2008 R2.

The hardware and software requirements for MS SQL Server 2016 are different from the requirements for MS SQL Server 2008 R2. Please take note of the following requirements.

### Requirements for using Microsoft SQL Server 2016

The following are the minimum and recommended requirements for your registers using MS SQL Server 2016. For more information, visit the Microsoft site for [MS SQL Server 2016](#).

- Processor
  - 64-bit processors only
  - Minimum speed of 1.4GHz (2.0GHz recommended)
- RAM
  - 512MB minimum for express editions (1GB recommended)
  - 1GB RAM minimum for all other versions (4GB recommended)
- Operating System
  - Windows Server 2012 R2
  - Windows Server 2012
  - Windows 10
  - Windows 8.1
  - Windows 8
- Disk space
  - Minimum of 6GB free for the server setup



**Important:** MS SQL Server 2016 will not function on Windows 7, Windows Embedded POSReady 7, Windows Vista, Windows Server 2008 R2 or other, earlier operating systems.

### Questions?

For questions about the NSPOS setup for MS SQL Server editions, please contact NSPOS Technical Support. For questions specific to the MS SQL Server application, please contact Microsoft Support.

## Limit downsync of Sales Orders from NetSuite ERP

With 2018.2, you can mark a NetSuite ERP sales order to prevent it from being downloaded to your registers. This option is useful for separating two sides of your business – one for products sold in stores and one for product sales managed online only.

Note that NetSuite ERP-created sales orders normally synchronize to your registers within 15 minutes of saving the form.

### Usage notes:


- To prevent a NetSuite ERP sales order from syncing any of its information to the register, check the **Do Not Download to POS** option **before** saving the order for the first time.
- If you save a sales order without checking the **Do Not Download to POS** option in NetSuite ERP, and you check the option later, the sales order will show a **Closed** status on your registers.

Having the NetSuite ERP sales order appear as closed prevents a cashier from making changes.

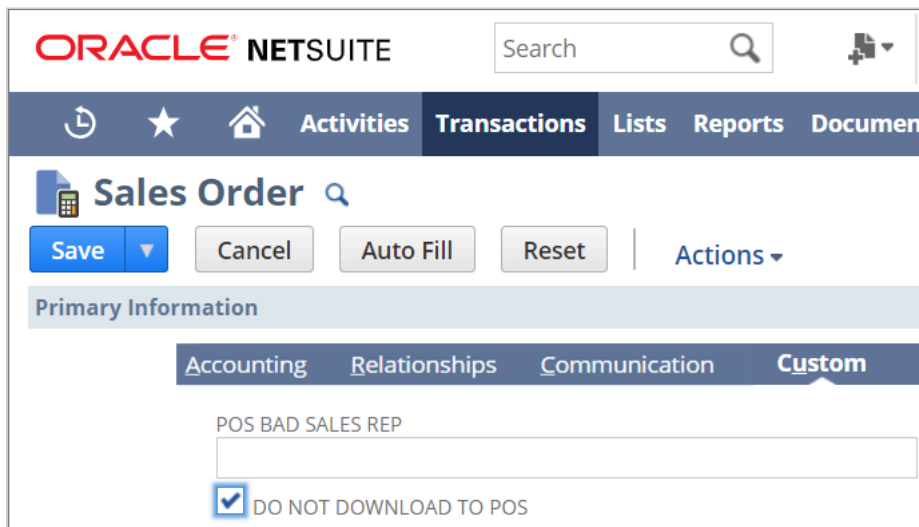
- If a sales order is created on the register, but the option is checked later in NetSuite ERP, the order changes to appear closed on the register.

### To prevent a new sales order from downsyncing to your registers:

You can select the **Do Not Download to POS** option while creating a sales order to prevent syncing any of the order's information to your registers.


 **Important:** To prevent a sales order from syncing any of its information to the register, check the option **before** saving the order for the first time.

1. Log in to NetSuite as an administrator.
2. Go to Transactions > Sales > Enter Sales Orders.
3. Complete the required fields.
4. Click the **Custom** subtab.
5. Check the **Do not download to POS** box.



The screenshot shows the NetSuite interface for creating a sales order. The top navigation bar includes 'ORACLE NETSUITE', a search bar, and tabs for 'Activities', 'Transactions', 'Lists', 'Reports', and 'Documents'. The 'Transactions' tab is active, and the 'Sales Order' form is displayed. The form has buttons for 'Save', 'Cancel', 'Auto Fill', 'Reset', and an 'Actions' dropdown. Below these is the 'Primary Information' section, which includes subtabs for 'Accounting', 'Relationships', 'Communication', and 'Custom'. The 'Custom' subtab is selected, showing a text field labeled 'POS BAD SALES REP' and a checked checkbox labeled 'DO NOT DOWNLOAD TO POS'.

6. Click **Save**.

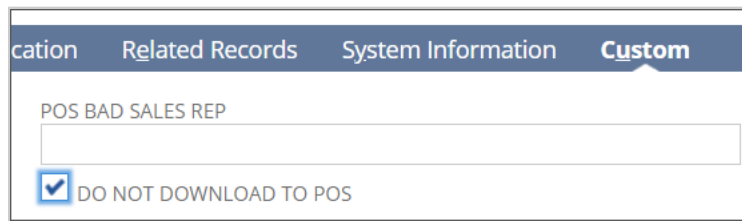
 **Note:** For information on the fields required to complete a sales order in NetSuite ERP, see the help topic [Creating Sales Orders](#).

### To prevent a cashier from updating an existing sales order on a register:

Follow these steps to prevent any changes to a sales order from the register. The sales order will show a **Closed** status on your registers. You can continue working the sales order in NetSuite ERP.

1. Log in to NetSuite as an administrator.
2. Go to Transactions > Sales > Enter Sales Orders > List.
3. Locate the desired sales order and click **Edit**.
4. Click the **Custom** subtab.

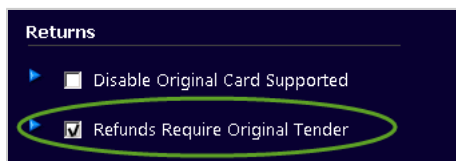
5. Check the **Do not download to POS** box.



6. Click **Save**.

## Returns – Require Refunds in Original Tender

In this release, we updated the NetSuite Point of Sale (NSPOS) feature that requires cashiers to tender refund payments in the tender type used for the original purchase. Labeled **Refunds Require Original Tender**, this register option provides flexibility in configuring refund processes to be in line with your business needs. It applies to validated returns only. Validated returns use the receipt or transaction history to verify the purchase, price and tax rate charged.



If you set the requirement, purchases tendered in cash must be refunded in cash. Refunds for credit or debit card purchases go directly to the original card used. If the original purchase was split-tender, such as 70% gift card and 30% cash, the refund must be provided 70% to a new gift card and 30% as cash.

The refund tender requirement applies to all stores within a single subsidiary. The default for this flag is no (cleared). For more information on configuring returns in NSPOS, see the help topic [Returns](#) in the Administrator Guide.

## Swipe-free Refunds

For most payment gateway integrations, the refund enhancement includes the ability to refund to the purchase credit card without the need to swipe the card in the PIN pad. Swipe-free is only available for registers within the same subsidiary. In the past, swipe-free refunds could only be processed from the register used to make the original purchase.

The flags that determine tender rules are included in your NSPOS Universal Settings. To be applicable to all locations, you only need to set your preferences from a single register.

### To set the Refunds Require Original Tender option:

1. Sign in to any NSPOS register as an administrator (9090 level operator).
2. Press **Ctrl+F10** to open the **Universal Settings** form.
3. In the search field, enter **Returns**.
4. Check the **Refunds Require Original Tender** option.
5. Tap **Done**.

Changes are applied immediately to the current register. Changes are applied to other registers the next time NSPOS is closed and restarted on those registers.

✓ **Tip:** NSPOS will not always provide a method for determining the original tender. The cashier might need to attempt the refund as cash tender first. If the tender is incorrect, NSPOS will prompt the cashier with the tender to use.

## Returns – Credit Memo link to Invoice

Basic return transactions generate a Credit Memo record and a Customer Refund record in NetSuite ERP.

To connect refunds from validated returns to the original purchase, Credit Memo records from NSPOS transactions now include a **Created From** link to the original Invoice. Click this link to display information about the purchase.

The link to the invoice record gives visibility into buying patterns when not all items from a purchase were returned, and can help with balancing cash in vs. cash out. It can also be helpful for preventing fraud at the cashier level. For example, you can view when a return was an attempt to get cash in exchange for a gift card purchase.

### To view Invoices from Credit Memo records:

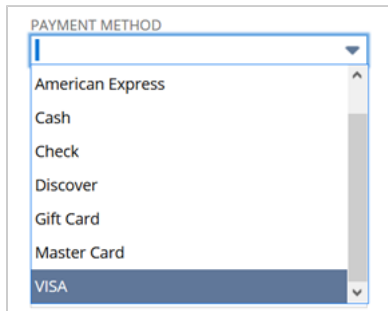
1. Log in to NetSuite ERP.
2. Go to Transaction > Sales > Create Invoices > List.
3. Expand the **Filters** and select a **Type** of **Credit Memo**.
4. Click **View** to review memo details.
5. Click the **Created From** link to view the invoice.

Sales Information		
SALES REP	SALES EFFECTIVE DATE 11/13/2018	CREATED FROM <a href="#">Invoice #60626</a>
Classification		

## Returns – Maintain Tenders through ERP > NSPOS mapping

Your NetSuite ERP setup might include tenders that are not mapped to your NSPOS setup. For example, ERP might include a tender exclusive to a specific credit card brand XYZ. If a transaction made through ERP used the XYZ credit card as tender, and XYZ did not exist as a separate tender in NSPOS, the refund made from NSPOS previously defaulted to cash.

A key requirement for many retailers is providing refunds in a tender that matches the original purchase.



The solution included in NSPOS 2018.2 is an internal “tender mapping” table. The table maps ERP tenders to common NSPOS tenders. An XYZ credit card tender is mapped to the basic NSPOS Credit Card tender. The mapping and refund process differentiates between EMV and non-EMV credit card tenders. EMV purchases must be refunded as EMV.

**Note:** NSPOS does not distinguish between debit and credit processing for returns. It treats debit cards as credit cards.

Because the mapping is internal, retailers cannot make changes. If a new tender is introduced in NetSuite ERP that is not available in NSPOS, if the need arises, the cashier can replace it with any tender. We can review additions to the mapping upon request.

**Important:** To be tracked as such, external gift cards must be set up as a separate tender.

## Matching for Sales Order Deposit Tenders

Lack of exact tender matches in NetSuite ERP and NSPOS could also cause issues with matching tenders for sales order deposit refunds.

In the past, the cashier could not determine the original tender to use for a sales order deposit refund. As part of this “mapping” enhancement, if the cashier attempts a deposit refund using a tender different from the original deposit, NSPOS prompts with the correct tender.

## End of Support for Shift4 Integrations with NSPOS Controlled Devices

In the past, NSPOS supported two methods for integrating with the Shift4 payment gateway:

- Shift4 UTG controlled devices via the PIN pad
- NSPOS controlled devices via the NSPOS application

As a security measure, we have changed our Shift4 integration for 2018.2.0 to support “Shift4 UTG controlled devices” only. On January 1, 2019 we will discontinue support of “NSPOS controlled device” setups for earlier releases.

## NSPOS / Shift4 Register Configuration Check

If you are using Shift4 and might have registers on the “NSPOS controlled devices” setup, follow these steps to verify each register’s payment gateway configuration. You will need to repeat these steps for each active RA-Workstation record.

### To verify your Shift4 configuration:

1. Log in to NetSuite as an administrator.

2. Go to Customization > Lists, Records, & Fields > Record Types.
3. Locate **RA-Workstation** and click **List**.
4. Click **View** for the workstation to verify.
5. Under **Payment provider info**, the **Shift4** section includes a check box called **Use New UTG**.
  - If this box is checked, the workstation is using a **Shift4 UTG controlled device via the PIN pad**. This setup will continue to be supported by NSPOS. No action is required for this register
  - If this box is NOT checked, the workstation is using **NSPOS controlled devices via the NSPOS application**.

Because support for this setup is not covered in NSPOS 2018.2.0, and because support for all releases will end soon, you should contact your Shift4 representative to discuss a migration plan. Shift4 is aware of the planned change and should be able to provide you with the necessary information.

**RA-Workstation**

Save Cancel Reset Copy prov

CUSTOM FORM \*  
RAPOS Workstation Form

NAME \*

☐ INACTIVE

**Payment provider info**

**Shift4**

URL  
xxx.xxx.xxx.x

☒ USE NEW UTG

Please contact NSPOS Technical Support or reach out to Shift4 if you have any questions.

## Fixes 2018.2.0

In addition to behind-the-scenes fixes, this NSPOS release includes corrections for the following areas:

- [Update Existing Prices from Price Levels corrected](#)
- [Flag for Non-Validated Returns corrected](#)


## Update Existing Prices from Price Levels corrected

Your NetSuite ERP accounting setup can include Price Levels. These levels let you set different pricing for single items on based on store locations. Price Levels are usually set as discounts against an item's base price.

When you assign a Price Level to an item, it creates a new item price at the level in NetSuite ERP. New prices synchronize with registers in the designated locations. This downsync data sets the item's price at the store.

When editing the adjustment amount set in a Price Level, you can choose to **Update Existing Prices**. This action updates current prices of all items that use the level.

Previously for NSPOS, a Price Level adjustment was not triggering the downsync to include those updated prices. Starting with NSPOS 2018.2.0, we now downsync updated prices from Price Level changes.

 **Tip:** Depending on the size of your inventory, it can take up to one hour to update all prices for all affected items. To maintain performance, you should avoid updating price levels that impact many items during business hours.

### Working with Price Levels

- To set up a new Price Level, see the help topic [Creating Price Levels](#).
- To adjust a Price Level, see the help topic [Editing Price Levels](#).

### Assigning Price Levels to Items and Stores

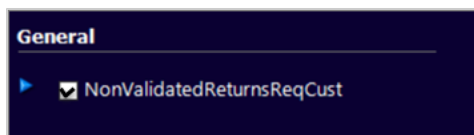
- To assign Price Levels to an Item, see the help topic [Add a Price or Price Levels to an Item](#).
- To assign a Price Level to a store Location, see the help topic [Work with Locations](#). The field is **POS-Price Level**.


## Flag for Non-Validated Returns corrected

If checked, the **NonValidatedReturnsReqCust** flag in NSPOS requires the cashier to enter the customer's name if the customer is making a non-validated (without receipt) return.

Previously, the setting was not working as designed. If checked, it prompted the cashier to select a customer for both non-validated and validated returns.

The flag now works correctly to only prompt the cashier during non-validated returns.



 **Note:** Because validated returns use the transaction information from a look up or from the receipt, entering a customer name to be associated with the original purchase was not required. The name to be used was already recorded in the database.

### To require entering the customer's name for non-validated returns:

1. Sign in to any NSPOS register as an administrator (9090 level operator).



2. Press **Ctrl+F10** to open the **Universal Settings** form.
3. In the search field, enter **NonValidated**.
4. Check the **NonValidatedReturnsReqCust** option.
5. Tap **Done**.


Changes are applied immediately to the current register. Changes are applied to other registers the next time NSPOS is closed and restarted on those registers.


## Update your NSPOS Bundle to 2018.2.X

Follow these steps to update your bundle to 2018.2.0 or later. Updating or installing a bundle requires an Administrator Role. If you need assistance performing this update and verifying settings, please contact NSPOS Customer Support.

### To update your NSPOS bundle:


1. Log in to NetSuite as an administrator.
2. Go to Customization > SuiteBundler > Search & Install Bundles > List.
3. On the Installed Bundles page, locate **NetSuite Point of Sale Bundle** with Bundle ID **27525**.



**Note:** Under the version number, a blue  icon indicates a new version is available. Place your mouse over the blue icon to display more information. If you do not see this icon, your installed bundle is already up to date and no further action is required.

VERSION	MANAGED
2017.2.1.2 	No
2018.2.0	

Update Available



Version 2018.2.0 has been released

4. Place your mouse over the green  icon and click **Update**. Allow time for the page to load.

ACTION	NAME ▲
 <b>Update</b>	NetSuite Point of Sale
 <b>Uninstall</b>	NetSuite Point of Sale

5. Review the updates to be installed.

NetSuite alerts you on-screen of any conflicts or other issues that may occur with the installation. If needed, use the screen shot below to choose options for **Sales Order** setup. For other issues, please stop and contact NetSuite Technical Support.

RA-RE-Fulfill Sales Order	<a href="#">RA-RE-Fulfill Sales Order</a>	customscript_ra_re_fulfill_sales_order		Replace Existing Object	Update Deployments
RA-RE-Refund Sales Order	<a href="#">RA-RE-Refund Sales Order</a>	customscript_ra_re_refundsalesorder		Replace Existing Object	Update Deployments



**Tip:** If you are viewing this image in a PDF, zoom in. If you are viewing it in the Help Center, click the image to enlarge it.



**Note:** Use **Replace existing object** and **Update deployments** to resolve a conflict. If **Replace data** is required for a custom list, contact Technical Support for assistance.

6. Click **Update Bundle**.
7. Click **OK** at the prompt.

The Updated Bundles page displays the install progress. When complete, if the bundle updated correctly, a green check mark displays in the **Status** column.

# NetSuite POS 2018.2.10 to .13 Release Notes

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

This document lists the updates provided in NetSuite Point of Sale (NSPOS) versions 2018.2.10 to 2018.2.13. Updates are not available to NSPOS customers until they have upgraded to the release. NetSuite will modify these release notes when needed to provide our customers with additional information.

## For upgrade steps

These release notes list the customer-facing changes included in NSPOS 2018.2.10 to 2018.2.13. For the required user actions, prerequisites, and steps to perform the upgrade, please see [NetSuite POS 2018.2.0 Release Notes](#).

## Product Enhancements 2018.2.10 to .13

These NSPOS releases do not include enhancements that are visible to our users.

## Fixes 2018.2.10 to .13

- [Incomplete Tax-exempt Fields in NetSuite ERP](#)
- [Register Creation Blocked by Validation](#)
- [Gift Card Prefix Upload Issue during Upgrade](#)
- [Replication Performance Issue for Large Jobs](#)

### Incomplete Tax-exempt Fields in NetSuite ERP

Tax-exempt transactions were not correctly synchronizing with NetSuite ERP. The issue was corrected.

### Register Creation Blocked by Validation

New validation rules introduced in NetSuite 2019.2 were blocking the creation of RA-Workstation records for new registers. The custom range previously used by NSPOS to set a default lane number did not match NetSuite's new range validation. We adjusted the custom range as required to correct the error.

### Gift Card Prefix Upload Issue during Upgrade

If a business had more than 100 gift card prefixes, those prefixes were not being uploaded to NetSuite ERP during an initial load or upgrade. The issue was corrected.

## Replication Performance Issue for Large Jobs

An issue was slowing performance of the replication server when handling heavy loads. Replication performance under those conditions is now improved.

# NetSuite POS Release Guidelines 2018.2.X

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

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

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



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

- [NetSuite POS 2018.2.1 Release Notes](#)
- [NetSuite POS 2018.2.0 Release Notes](#)
- [NetSuite POS Documentation Resources 2018.2.X](#)

## Areas to Verify prior to Upgrading

We recommend verifying these areas before upgrading your NetSuite POS environment.

- [Day of your upgrade](#)
- [One week before your upgrade](#)
  - [Verify your registers are ready to install the new release](#)
  - [Verify MS SQL 2008 R2 Express Edition SP3 loaded on Workstations](#)
  - [Verify that the Token-based Authentication feature is enabled in NetSuite ERP](#)
  - [Verify Gift Card and Gift Certificate setup](#)
  - [Verify RA-Location Type is set for all Location records](#)

## Day of your upgrade

Before the upgrade begins, ensure that:

- Your NetSuite administrator is available to update the bundle.
- Your administrator can allow remote access to a register if needed.
- NSPOS is closed (not running) on all registers. Exit out of NSPOS.
- Your register computers are turned on and power saving is disabled. Registers must not go into "sleep" mode when inactive.
- Your administrator can restage a register in the event an upgrade fails.

## One week before your upgrade

Perform these checks in advance of your scheduled upgrade to ensure your registers and NetSuite ERP setup are ready to move forward to the next release.

## Verify your registers are ready to install the new release

See the help topic [Workstation Monitoring](#) in the NSPOS Administrator Guide for the steps to view statistics about registers in your network.

- No disconnected registers (stale partners)
- No registers nearing 10GB size limit
- Hard drive (C:\) free space where NSPOS is installed is 25 GB or greater
- Replication push agent is running on each register
- Auto Updater Service is running on each register

## Verify MS SQL 2008 R2 Express Edition SP3 loaded on Workstations

You must have Microsoft® SQL Server ® 2008 R2 Express Edition Service Pack 3 installed on each workstation. You can use either of the following methods to verify the pack installed. Note that the methods may vary across different versions of Windows.

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

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

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

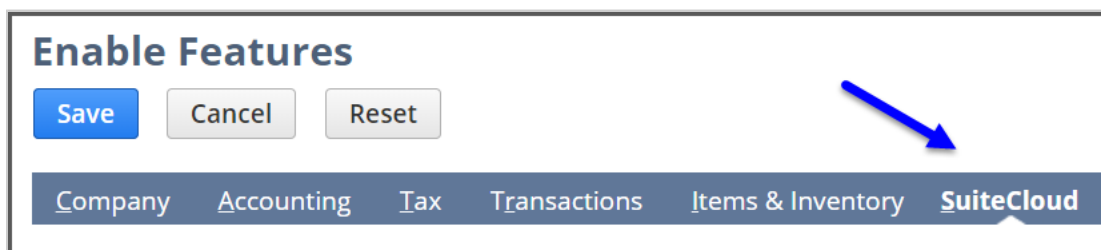
For the steps to download and configure the SQL Server, see the help topic [Install MS SQL Server 2008 R2 Express Edition](#) in the NSPOS Administrator Guide. Please contact NetSuite Technical Support if you require assistance.

**Note:** NSPOS 2018.2.0 and greater includes support for MS SQL Server 2016 in lieu of MS SQL 2008 R2 Express Edition SP3.

## Verify that the Token-based Authentication feature is enabled in NetSuite ERP

**Important:** If the **Token-based Authentication** feature is not enabled, your upgrade to 2018.1.30 or greater will fail.

NSPOS supports Token-based Authentication (TBA) for your integration user account. Use these steps to verify that you are ready for the TBA feature. If you have more than one integration account, you only need to set the check box on one of those accounts.



☒ TOKEN-BASED AUTHENTICATION

ENABLE TOKEN-BASED AUTHENTICATION AS AN ADDITIONAL AUTHENTICATION MECHANISM FOR YOUR USERS. BY ENABLING THIS FEATURE, YOU AGREE TO [SUITECLOUD TERMS OF SERVICE](#).



**Note:** If **Token-based Authentication** is already enabled, you do not need to change the setting.

### To verify that Token-based Authentication is enabled in NetSuite ERP:

1. Log in to NetSuite as an administrator.
2. Go to Setup > Company > Enable Features (under Setup Tasks).
3. Click the **SuiteCloud** subtab.
4. Scroll to the **Manage Authentication** section and review the **Token-based Authentication** box.
  - If it is checked, click **Cancel**. You are ready for this feature.
  - If it is not checked:
    1. Check the **Token-based Authentication** box.
    2. Click **I Agree** on the SuiteCloud Terms of Service page.
    3. Click **Save**.

## Verify Gift Card and Gift Certificate setup

Release 2016.20 and greater requires that the **Location** record > **RA-Currency** field be set to the correct currency for **every** retail location selling a gift card or certificate. Otherwise, sales of gift cards or certificates may fail after upgrading to 2016.20 or greater.

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

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

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

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

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

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

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

1. Log in to NetSuite as an administrator.

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

The screenshot shows a form with several fields. At the top, there is a 'Search' button and an 'Actions' dropdown. Below these are four main sections, each with a checkbox on the left and a label: 'RA - PRICES INCLUDE TAX' (checkbox is unchecked), 'RA - LOCATION TYPE' (checkbox is checked, and a red arrow points to the dropdown menu which is open and shows 'Retail Store'), 'RA - DEFAULT CUSTOMER' (checkbox is checked, and the dropdown shows 'Customer Name 135 anonymous locator'), and 'RA - CURRENCY' (checkbox is checked, and the dropdown shows 'US Dollar').

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

## Resources and Recommendations

Use the guidelines in this section to help ensure your NetSuite Point of Sale (NSPOS) upgrade and daily operations are a success.

- [Payment Application Data Security Standards \(PA-DSS\)](#)
- [Third Party Software and Licenses](#)
- [Verify your Registers after the upgrade](#)
- [Recommendations about mass Item and Customer updates](#)
- [Planning efficient rollouts for new Stores and Registers](#)
- [Backward Compatibility for NSPOS upgrades](#)
- [Windows Updates and Performance](#)
- [File Cabinet Changes](#)
- [Syncing Register Time with Server Network Time](#)

## Payment Application Data Security Standards (PA-DSS)

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



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



**Important:** See the **Payment Application Data Security Standard (PA-DSS) guide** appropriate to your NetSuite POS version in the NetSuite Help Center > User Guides.

## Third Party Software and Licenses

A NetSuite POS implementation can include software governed by licenses from third parties ("Third Party Software" and "Third Party License"). All third party software licensed for use with NetSuite POS is subject to the terms and conditions of the corresponding Third Party License, notwithstanding anything to the contrary in the agreement governing the POS Software. NetSuite|Oracle makes no representation or warranty concerning Third Party Software and shall have no obligation or liability with respect to Third Party Software.

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

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

## Verify your Registers after the upgrade

When your NSPOS upgrade is complete, we recommend testing at least one register in each store. You can find our **NSPOS Register Verification Checklist** in the NetSuite Help Center > User Guides > NetSuite Point of Sale (NSPOS) section.

## Recommendations about mass Item and Customer updates

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

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



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

## Planning efficient rollouts for new Stores and Registers

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

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

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



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

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

1. Stage registers **24-48 hours before first use**. If no major changes to NetSuite ERP data will occur before using the register, the time between staging and first use can be longer without a significant impact on performance.
2. If a store rollout requires new item and customer information, if possible, be sure to add or import the information to NetSuite ERP **before** staging new registers. Then the new information will be included during the staging process.
3. To reduce the impact to existing registers, large item and customer changes in NetSuite ERP should be performed in small increments. A good guideline is **limiting changes to 60,000 records or less per day**, performed outside of business hours.

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

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

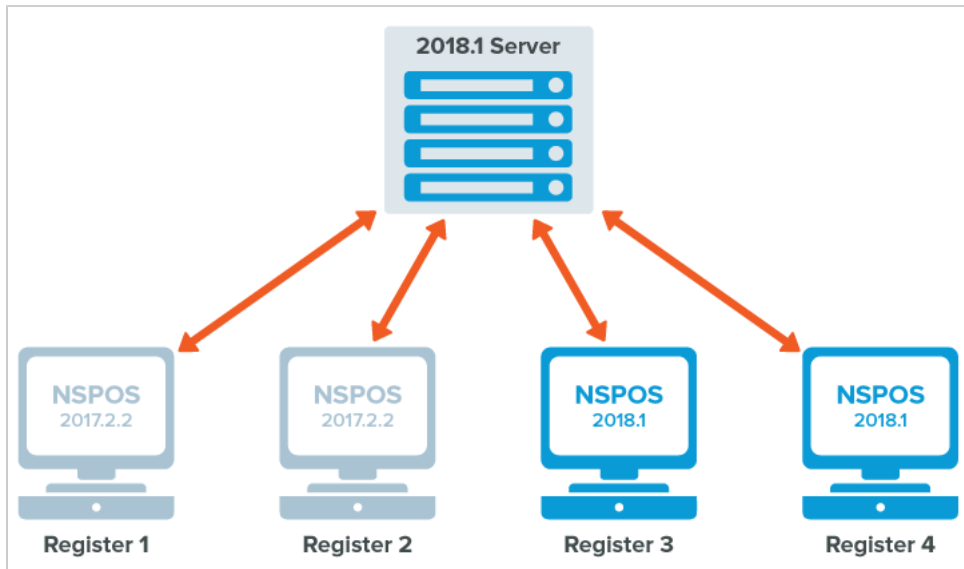


**Important:** Before restaging a register workstation that was set to **Inactive** in NetSuite ERP, clear the **Inactive** box on the NetSuite RA-Workstation record, **Save** and then wait **15 minutes** for the active status to sync between the server and the workstation.

## Backward Compatibility for NSPOS upgrades

NSPOS includes an upgrade feature called Backward Compatibility. With this feature, we can upgrade a server to the latest release and then let you upgrade each register when it is convenient to your business. Registers still running the previous release will continue communicating with the upgraded server until time is available to make the change.

Backward Compatibility can help avoid downtimes that might occur if all registers in a store are upgraded at the same time. Note that compatibility can be extended to the current and previous major releases only, such as 2019.2 to 2019.1.



### To start with Backward Compatibility

You must be at release 2017.2.2 or greater to use backward compatibility. Then, work with your Account Manager or Technical Support to have your server upgraded to the latest targeted release. After that, upgrade your registers to the new release on your time line.

Doing a self upgrade requires that you restage your registers. We recommend starting the process with only a few registers. See the help topic [Stage a Register](#) in the NSPOS Administrator Guide.

**Note:** To ensure all of your registers receive an upgrade, we will alert you through prompts in NSPOS (Closed mode) and NetSuite ERP (RA-Workstation record) that a new release is available for the register. In the event that another release is coming soon, the prompts to upgrade to the current version will include a do-by date.

### Features are specific to registers on a release

Features made available through a new release will not appear on registers running the previous release. For example, if a register is upgraded to 20XX.2, and the release includes a new “promotions” feature, that feature will not be available on backward compatible registers running 20XX.1.

In addition, NSPOS settings configured for a feature on the current release will not work on registers running the previous release.

## Windows Updates and Performance

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

## File Cabinet Changes

NetSuite POS uses the NetSuite ERP File Cabinet > File System folder to manage many system-wide configurations. An example of File Cabinet configuration is the template that determines the look of your printed receipts. Customers with **advanced knowledge** about the application can make some File Cabinet customizations themselves by signing into NetSuite and going to Documents > Files > File Cabinet > NSPOS.

Due to the complexities and risks associated with making File Cabinet modifications, we do not describe specific customization steps in the release notes guidelines. However, please note the following warning and important information:

**Warning:** Moving or modifying files in the File Cabinet can seriously affect NetSuite POS performance or cause it to cease functioning completely. If you are not certain about making a change, please contact NSPOS Customer Support.

**Important:** Do not make modifications to the File Cabinet shortly before or during an **upgrade** to a new release. Any modifications you make during that time might be lost.

## Syncing Register Time with Server Network Time

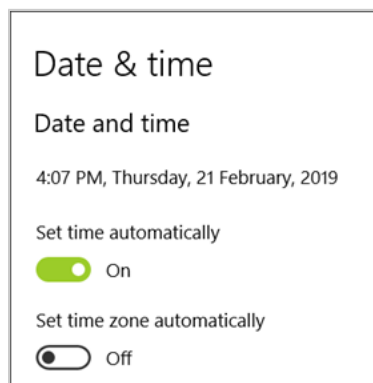
If a register is set to use its internal clock, the register time can get out of sync with the network time used by your NSPOS replication server. The server network time comes from time-keeping sources on the internet.

Register variations of minus or plus five minutes ( $-5\text{min} > x < +5\text{min}$ ) can cause data replication functions to fail. Gift card functionality and other POS services are also dependent on keeping the time synchronized.

Your administrator or NetSuite Customer Support can use the NSPOS **Push Agent** log to determine if replication errors were caused by times being out of sync.

### To resynchronize a register's clock using Windows 10:

1. Go to Settings > Time & Language > Date & Time.
2. Switch **Set time automatically** to **On**.
3. Close the window.



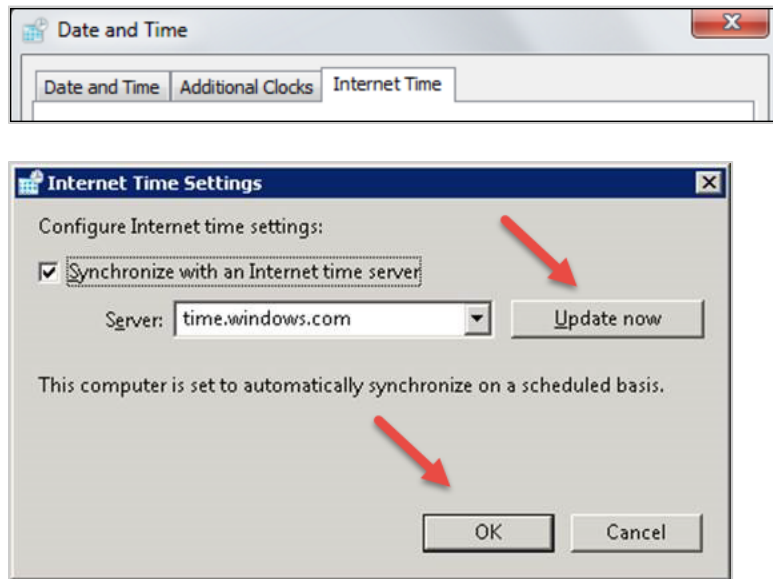
### To resynchronize a register's clock using Windows 7:

1. Tap the Windows **Start** button and search for **change time zone**.  
Or go to Control Panel > Date and Time.
2. Open the **Internet Time** tab.

**Note:** Some businesses restrict access to the **Internet Time** tab.

3. Tap **Change Settings**.

4. Tap **Update now** and then **OK**.



# NetSuite POS Documentation Resources

## 2018.2.X

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

This topic provides descriptions and links to NetSuite Point of Sale (NSPOS) documentation resources. Use these resources to learn about using NSPOS, configuring NSPOS to meet the needs of your retail business, and troubleshooting NSPOS to solve common problems.

[Watch a Related Video](#)


## Documentation Updates in this release

The following updates were made to the Administrator Guide:


- Updated the [Prices](#) chapter with a new section on [Using Price Levels to adjust Prices across Locations](#).
- Updated [Set up NSPOS Gift Cards/Certificates in NetSuite ERP](#) to include new **Type** and **Type Prefix** steps.
- Updated [NSPOS System Requirements](#) to include new hardware and operating system specifications for **Microsoft SQL Server 2016**. Also noted that Microsoft will deprecate support for Microsoft SQL Server 2008, including Release 2 Express Edition Service Pack 3, on July 9, 2019.
- Updated the [Sales Orders in NetSuite ERP](#) topic to include the new **Do Not Download to POS** option and what it means for online and in-store business.
- Updated the [Money Management](#) chapter to show that the [Credit Memo record](#) record now includes a **Created From** link to the original Invoice record.
- Updated the [Returns](#) chapter for enhancements around requiring cashiers to make [Set Requirement for Refunds in Original Tender](#).
- Updated the [Returns](#) chapter with a setting to [Require Cashier to enter Customer Name for Non-Validated Returns](#).
- Removed the **Returns: Use Original Tender** setting from the [Returns](#) chapter and the [Flags and Settings](#) chapter.

## Documents & Videos

Use the links in this topic to access a PDF guide or Help Center topic. If PDF, you can review materials online or download a copy to your computer or register.

 **Tip:** Log into [NetSuite ERP](#) before clicking a documentation link. Videos do not require logging in.

Documentation Resource	What it provides
NetSuite POS Release Notes <ul style="list-style-type: none"> <li>■ <a href="#">Release 2018.2</a></li> <li>■ <a href="#">Release 2018.1</a></li> </ul>	NSPOS release notes list the customer-facing updates included in each release. We modify these release notes on occasion to provide our customers with additional information.
<a href="#">NetSuite POS Administrator Guide</a>	This document is a guide to configuring and maintaining NSPOS. It includes:

	<ul style="list-style-type: none"> <li>■ Overviews and steps for basic tasks, such as setting up employees and running reports.</li> <li>■ Steps for modifying the buttons and related security settings for your registers.</li> <li>■ Steps to work with promotions.</li> <li>■ How to stage and re-stage registers, either individually or as a scheduled mass update.</li> <li>■ Setting up credit card payment providers.</li> <li>■ Configuring process options for promotions, sales orders, and other features vital to your business.</li> </ul>
<a href="#">PA-DSS 3.2 Implementation Guide - NSPOS 2018.2</a> <a href="#">PA-DSS 3.2 Implementation Guide - NSPOS 2018.1</a>	<p>NetSuite POS is a PA-DSS validated application. The Payment Application Data Security Standard (PADSS) guide describes the Payment Card Industry (PCI) initiative and lists recommendations for using NetSuite POS in a PCI DSS compliant environment.</p> <p>The guide includes:</p> <ul style="list-style-type: none"> <li>■ Details about installing and configuring a compliant system.</li> <li>■ Best practices for maintaining compliance.</li> <li>■ A list of operating systems (OS) validated for use on your NetSuite POS registers/terminals.</li> </ul>
<a href="#">NSPOS Register Verification Checklist</a>	<p>This document lists steps for verifying the basic functionality of NSPOS registers in stores or other locations.</p> <ul style="list-style-type: none"> <li>■ Customers or other representatives should perform verifications as part of the user acceptance testing (UAT) process and after deployment of an upgrade.</li> <li>■ Each section will help to identify issues prior to a store recommencing customer transactions.</li> </ul> <div style="border: 1px solid black; background-color: #fff9c4; padding: 5px; margin-top: 10px;">  <b>Important:</b> We recommend testing at least one terminal (register) in every store.     </div>
<a href="#">NSPOS Security Guide</a>	<p>This guide provides security guidelines and information for installing and using NSPOS. It contains both direct information and links to other NSPOS-related documentation</p>
<a href="#">NetSuite POS Help Center Videos</a> <ul style="list-style-type: none"> <li>■ <a href="#">NetSuite SuiteCommerce NSPOS Overview</a></li> <li>■ <a href="#">NetSuite SuiteCommerce: NSPOS Basic Transactions</a></li> <li>■ <a href="#">NetSuite SuiteCommerce: Customizing the NSPOS User Interface</a></li> <li>■ <a href="#">NetSuite SuiteCommerce: NSPOS Documentation Resources</a></li> <li>■ <a href="#">NetSuite SuiteCommerce: NSPOS Cancel and Void</a></li> </ul>	<p>Our videos deliver a convenient method for understanding and using NSPOS. Housed on the Oracle Learning Library, each video is brief and concise. Watch our videos to get the information you require in a relaxed learning environment.</p>
<p>Also available from the NetSuite ERP application:</p> <ul style="list-style-type: none"> <li>■ <a href="#">Help Center</a></li> <li>■ <a href="#">SuiteAnswers</a></li> </ul>	<p>Some NPSOS-related tasks are common across different NetSuite   Oracle applications. Use the Help Center and SuiteAnswers links to research NetSuite ERP topics that cover:</p> <ul style="list-style-type: none"> <li>■ Your general ledger.</li> </ul>

- |  |  |
|--|--|
|  | <ul style="list-style-type: none"><li>■ Item and price updates.</li><li>■ Other areas not specific to working with your registers.</li></ul> |
|--|--|

## Contacting Technical Support

Individual support is available to NSPOS customers via telephone or by issuing a case. Before reaching out, Technical Support asks that customers enter their concerns in the SuiteAnswers search field first to see if an answer is already available.

### To contact Technical Support:

1. Log into NetSuite.
2. From the **Support** tab, click **Go to SuiteAnswers**.
3. Select from the options in the right pane to contact Support.