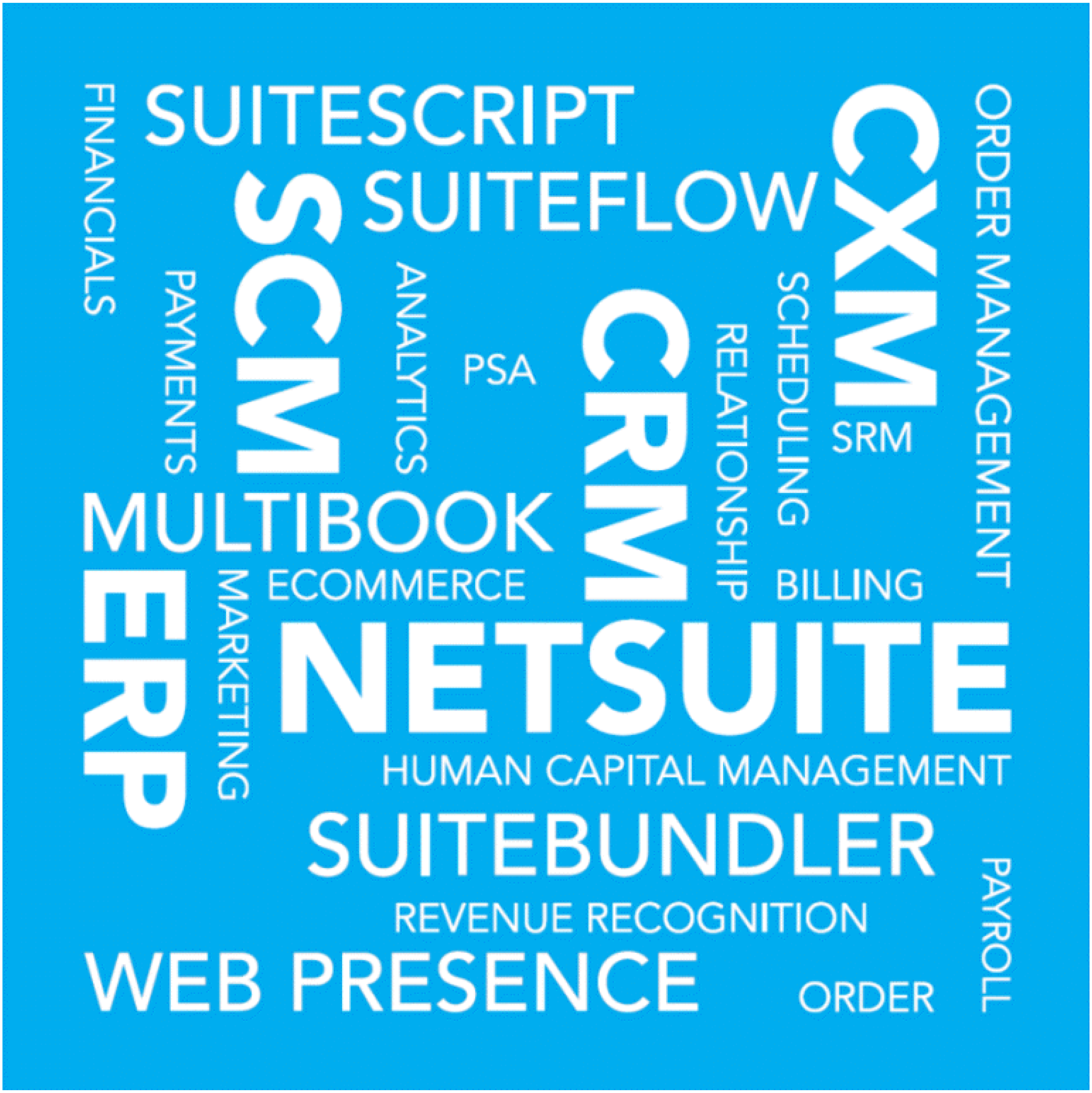
SuiteCommerce InStore Administrator’s Guide



April 11, 2018 SCIS 2017.2.8

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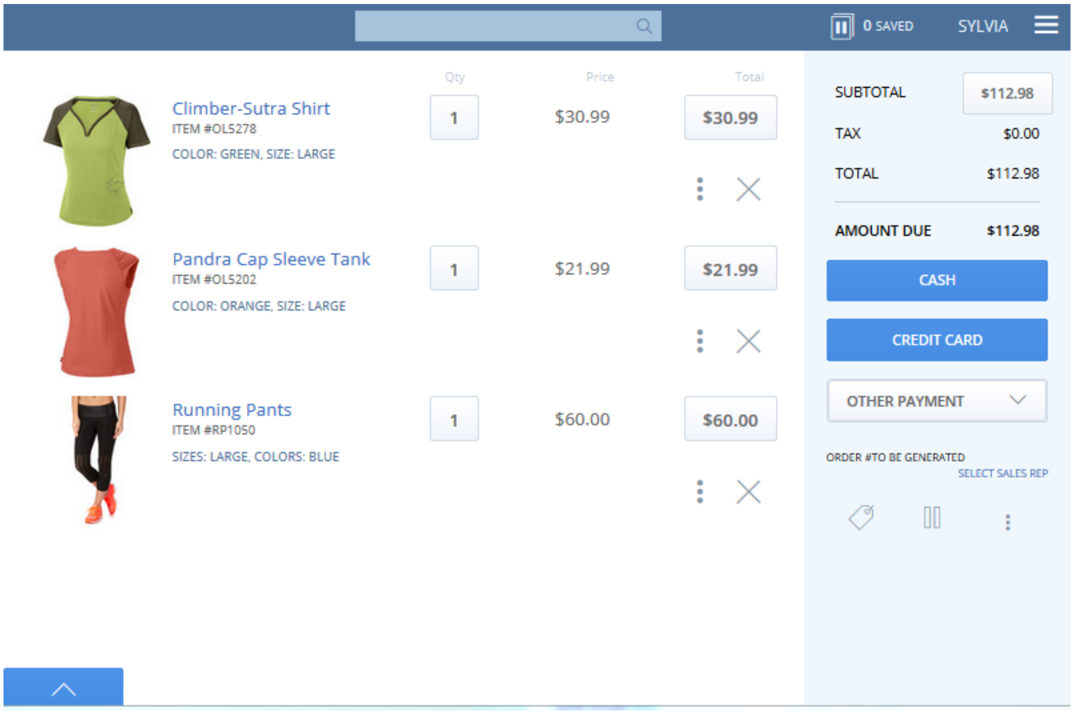
SuiteCommerce InStore Administrator's Overview

SuiteCommerce InStore (SCIS) is a web-based point-of-sale application. Because it was built on the same platform as SuiteCommerce Advanced, SCIS has leveraged responsive web design to provide an intuitive user interface designed for touch tablet screens.



SCIS is delivered as a managed SuiteApp, so that any updates are pushed directly to your NetSuite account. As part of installation, you create a website where employees can access SCIS using the secure SCIS Point-of-Sale application. You must also assign a role to each employee so they can log in. The following topics provide administrators the information they need to install SuiteCommerce InStore (SCIS):

- SCIS Installation
- Installing SCIS Mobile Apps

For user guide information, see the help topic SCIS User Guide Overview.

Locations and Subsidiaries

Location records play an important part in configuration. For example, employee access to SCIS relies on the location associated with the employee record. If you use OneWorld, the subsidiary must be specified on each employee, customer, and item record. For more information, see Subsidiaries and Locations for SCIS.

Standard Records and Custom Records

SCIS uses NetSuite records to store data. Some of these are standard NetSuite records and some are custom records that are installed along with the SuiteCommerce InStore SuiteApp. Standard records include item records, customer records and employee records. Some custom fields, that you can modify, are added to standard NetSuite records. For more information, read Configuring Records for SCIS.

When creating employee records, it is important to consider the role that each employee will play in your organization. For example, employees require permissions beyond general transaction entry to complete an item return. For more information, see SCIS Roles and Permissions.

Configuration is optional for many custom fields and records. To see a list of custom fields associated with SCIS, see SCIS Custom Fields, Lists, Records, and Searches.

Sales and Other Transactions

After a transaction is submitted through SCIS, a NetSuite administrator can view or modify the transaction in NetSuite. However, sales associates will use InStore to view customer profiles and transaction histories, and to perform returns and exchanges. For more information, see SCIS Cash and Transactions.

SCIS Installation

SuiteCommerce InStore (SCIS) is a SuiteApp that you install in your NetSuite account. After installation, then complete configuration of SCIS for your business needs. After configuration steps are completed, sales associates can log in to SCIS and start entering transactions. For more information about configuration, read SCIS Configuration.

Prior to installing the SuiteApp, ensure that the proper features are enabled in your account. if certain features required by the SuiteApp are not enabled the SuiteApp installation will fail.

After the SuiteApp is installed you must create the SCIS website, and then install the SCIS for iOS application or the SCIS for Windows application, so you can use SCIS on a tablet.

Prerequisites

Complete the following before starting SuiteCommerce InStore installation:

1. Contact your NetSuite sales rep or account manager regarding access to SuiteCommerce Advanced features such as, a SuiteCommerce Advanced website, and access to the SuiteCommerce InStore SuiteApp.
2. Enable required features. For more information, see Enabling Features for SuiteCommerce InStore.

Phased Release Process for SCIS

Starting with SCIS 2017.2.0, SCIS will implement a phased release process. SCIS has two major releases each year during which customers will be upgraded in phases over a period of two months. Before the upgrade, each customer can access the new version of SCIS on their Sandbox accounts. This provides the opportunity to do some advance testing of the new features using your own data and business processes. It can help you identify any potential issues before your production account is upgraded. During the time that SCIS 2017.2.0 is available in your Sandbox account, you should do the following:

- Continue to use your production account to run your daily business processes.
- Use your Sandbox account to learn about new features and to test the upcoming release.

After the new version has been available in Sandbox for approximately two weeks, the customer account upgrades begin in phases. All customers will receive an email notification with information about when your account is scheduled for upgrade. Each phase consists of a different group of customers being upgraded every two weeks. Contact your NetSuite representative for more information.

SuiteCommerce InStore Installation

To install SuiteCommerce InStore, complete the following tasks:

	Tasks	Before you begin	Goal
1	Enabling Features for SuiteCommerce InStore	Contact your NetSuite sales rep or account manager.	Make sure you have enabled all the features required for successful SCIS installation.

Tasks	Before you begin	Goal
	Ensure you have access to the SuiteCommerce Instore Suite app and required features, including a SuiteCommerce Advanced website.	
2 Setting Accounting and Tax Preferences		Complete accounting and tax setup.
3 Installing SuiteApps	Make sure you have access to the SuiteCommerce InStore SuiteApp.	Install the SuiteCommerce InStore SuiteApp and product review SuiteApps. Note that SCIS custom records will be installed by the SuiteApp.
4 SCIS Website Creation	Make sure that you can create a SuiteCommerce Advanced website.	Create a website for SCIS.
5 SCIS for iOS and SCIS for Windows Applications	Make sure you are using tablets and operating systems compatible with SCIS. For more information, read Main Devices for POS.	Configure a secure connection to the tablets used with SCIS. Read also, Device ID Authentication.
6 Install other peripherals ▪ Receipt Printers ▪ Setting Up Barcode Scanners for SCIS ▪ Cash Drawers	Make sure you have installed the latest version of the SCIS for iOS Application.	Configure peripherals for daily operations., such as barcode scanners, printers, and cash drawers.

See, Troubleshooting SCIS Installation and Configuration to learn how to resolve error messages displayed in SCIS as you complete installation tasks.

Enabling Features for SuiteCommerce InStore

The following NetSuite features are required to use SuiteCommerce InStore (SCIS). To enable features in NetSuite:

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

Subtab on Enable Features Page	Feature Name
Company	Locations Multi-Language **Note:** The Multi-Language feature is optional for NetSuite US, but **required** for other editions of NetSuite, such as NetSuite Canada and NetSuite Australia.
Accounting	Accounting Periods
Tax	Advanced Taxes
Transactions	Advanced Billing Multiple Shipping Routes

Subtab on Enable Features Page	Feature Name
	Promotion Codes
Items & Inventory	Gift Certificates Bar Coding and Item Labels Inventory Multi-Location Inventory
CRM	Upsell Manager
Web Presence	Web Site Web Store Advanced Site Customization Descriptive URLs SuiteCommerce Advanced Host HTML Files Online Ordering
SuiteCloud	Custom Records Advanced PDF/HTML Templates Client SuiteScript Server SuiteScript SuiteScript Server Pages Custom Transactions

To view a list of SCIS installation tasks, see SuiteCommerce InStore Installation.

Setting Accounting and Tax Preferences

SuiteCommerce InStore (SCIS) requires specific accounting preferences and tax settings in your NetSuite account.

To set accounting preferences for SCIS:

1. Go to Setup > Accounting > Accounting Preferences.
2. Set the following accounting preferences:
   - On the **General** subtab, clear the box next to **Void Transaction Using Reversing Journals**.
   - On the **Items/Transactions** subtab, select a **Default Income Account** from the list.
   - On the **Order Management** subtab, check the box next to **Invoice in Advance of Fulfillment**.
3. Click **Save**.

To automatically charge for shipping:

1. Go to Setup > Accounting > Shipping.
2. Check the **Charge for Shipping** box.
3. Click **Save**.

For more information, see the help topic Setting Up Shipping.

To configure tax settings:

1. Go to Setup > Accounting > Nexuses. You must have at least one tax nexus set up.

2. Go to Setup > Accounting > Set Up Taxes.
    a. Check the box next to **Enable Tax Lookup on Sales Transactions**.
    b. Check the box next to **Customers Default to Taxable**.
    c. Check the box next to **Charge Out of District Sales Taxes**.
    d. Check the box next to **Per-Line Taxes on Transactions**.

    > **Note:** In some cases, the Per-Line Taxes on Transactions preference conflicts with the feature, Multiple Shipping Routes. If you find that the preference is not available, go to Setup > Company > Enable Features. On the Transactions subtab, clear the box next to Multiple Shipping Routes. Click Save. Then, you can check the Per-Line Taxes on Transacations box, and enable the Multiple Shipping Routes feature again.

    e. Under **Charge Sales Tax on Store Orders**, select **Always**.
    f. Select a **Default Tax Code**.

    > **Note:** If there is no tax code or tax item on the customer record, then the tax is calculated based on the SCIS location address.

    g. Under **Tax Code Lists Include**, select **Tax Groups and Tax Codes**.
    h. Set up a tax code for each location where you will be using SCIS.
    i. Click **Save**.
3. Go to Setup > Accounting > Tax Schedule. Verify that the nexus corresponding to each location is taxable.

After you have configured accounting preferences and tax settings, you can install the SuiteCommerce InStore SuiteApp.

For more information about tax settings, see Calculating Taxes on Transactions.

To view a list of SCIS installation tasks, see SuiteCommerce InStore Installation.

Installing SuiteApps

SuiteApps install all the components required to run SuiteCommerce InStore (SCIS), including custom records and fields, JavaScript files, and other assets. After enabling the required NetSuite features and configuring account preferences, you must install SuiteApps. The SuiteApp installation process checks for required features. If required features are not enabled the SuiteApp installation will fail. For the list of required features, see Enabling Features for SuiteCommerce InStore. Product review capabilities are delivered by installing the Reference Product SuiteApps.

To use SuiteCommerce InStore with product review capabilities, install the following SuiteApps:

- SuiteCommerce InStore (Bundle ID 110261)
- Reference Product List Records (Bundle ID 53051)
- Reference Product Review Records (Bundle ID 53053)

To install SuiteApps for SCIS:

1. Go to Customization > SiteBundler > Search & Install Bundles.

2. In the **Keyword** field, enter the Bundle ID for each SuiteApp.
3. Click **Search**.
4. Verify that the correct SuiteApp is returned in the search and select it.
5. Review the SuiteApp details and then click **Install**.

After completing SuiteApp installation, create a website for access to SCIS. For more information, see SCIS Website Creation.

Important: SuiteCommerce InStore is a managed SuiteApp, which means that updates and enhancements to the SuiteApp are pushed automatically to your account. You must reset the touch point after a bundle update. Go to Setup > SuiteCommerce Advanced > Set Up Web Site. Edit your SCIS website. On the **Touch Points** subtab, set the **View Homepage** touch point to **SuiteCommerce InStore**.

To view a list of SCIS installation tasks, see SuiteCommerce InStore Installation.

SCIS Website Creation

You must configure at least one website for SuiteCommerce InStore (SCIS). Employees use the website to access SCIS and enter transactions. Configuring the SCIS website includes setting up a website in NetSuite, running a setup script that configures search fields and field sets, and configuring facets.

Complete the following tasks in order:

1. Setting Up the SCIS Website
2. Configuring Search Fields and Field Sets
3. Configuring Facets for SCIS
4. Configuring Sort Options for SCIS

Important: SuiteCommerce InStore is a managed SuiteApp, which means that updates and enhancements to the SuiteApp are pushed automatically to your account. You must reset the touch point after a bundle update. Go to Setup > SuiteCommerce Advanced > Set Up Web Site. Edit your SCIS website. On the **Touch Points** subtab, set the **View Homepage** touch point to **SuiteCommerce InStore**.

To view a list of SCIS installation tasks, see SuiteCommerce InStore Installation.

Setting Up the SCIS Website

Many of the same tasks involved in setting up a website for SCA are also involved in setting up a website for SuiteCommerce InStore (SCIS).

Note that entering a domain name is a required step in SCIS website setup. However, you can enter a domain name that is not registered. When you navigate to your SCIS website, the domain you use redirects to the system-generated URL for your website.

To set up the SCIS website:

1. Go to Setup > SuiteCommerce Advanced > Set Up Web Site > New.

2. Click **Setup Site**.
3. On the **Setup** subtab, configure the fields as described below:
   - **Display Name** – Enter a unique name for this site. The display name shows as the page title in the browser.
   - **Internal Name** – Automatically populates with the Display Name, but you can enter another name. The internal name shows in NetSuite lists.
   - **Default Hosting Root** – Set to **Live Hosting Files**.
   - **Scripting Template (Credit Card)** – Set to **Standard Sales Order — Cash Sale**.
   - **Scripting Template (Invoice)** – Set to **Standard Sales Order — Invoice**.
   - If you use OneWorld, select a **Subsidiary** at the bottom of the page. For more information about subsidiary settings, see Subsidiaries and SuiteCommerce InStore.
4. Click the **Shopping** subtab. Configure the following preferences:
   - Check the following boxes:
     - **Include Out of Stock Items in Web Store**
     - **Drop Ship/Special Order Items Are Always in Stock**
     - **Pass URL Promotion Code to Checkout**
     - **Gift Certificate Affects Minimum Order Amount**
     - **Allow Non-Credit Card Payment Methods During Checkout**
   - Make the following selections:
     - In the **Sales Order Type** field, select **Standard Sales Order — Cash Sale**.
     - In the **Customer Registration Is** field, select **optional**.
5. Click the **Touch Points** subtab.
   - Under **Name**, select **View Homepage**.
   - Under **SSP Application**, select **SuiteCommerce InStore**.

   > **Important:** You must reset the touch point after a bundle update. Go to Setup > SuiteCommerce Advanced > Set Up Web Site. Edit your SCIS website. On the **Touch Points** subtab, set the **View Homepage** touch point to **SuiteCommerce InStore**.

6. Click the **Domains** subtab.
   - Enter a domain name in the **Domain Name** field. You can use a domain name that you have registered for your SCIS website, or you can enter a domain name that is not registered, as a placeholder.

     > **Note:** Omit the HTTP when you enter the domain. For example, enter www.mywebsite.com in the domain field, not http://www.mywebsite.com.

   - Set the **HTML Hosting Root** to **Live Hosting Files**.
7. Click **Save**.

To view a list of SCIS installation tasks, see SuiteCommerce InStore Installation.

Using a Registered Domain with SCIS

When you use a registered domain name with SCIS, you must configure DNS with your domain provider to set up a CNAME redirect.

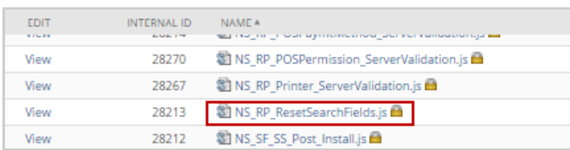
When you click Save after entering the domain in NetSuite, a CNAME (Alias) is configured for the new domain. You must use the CNAME (Alias) to configure DNS with your domain provider to point your domain name at NetSuite hosting servers. It can take up to two hours for the CNAME (Alias) to be completely configured. For more information, see the help topic Point Domain Names at NetSuite.

Configuring Search Fields and Field Sets

SuiteCommerce InStore (SCIS) uses search fields and field sets to retrieve and display item information. To set the search fields and field sets criteria for your SCIS site, use the NetSuite debugger to run the setup script. A link to the setup script is provided in the following steps.

To configure search fields and field sets for SuiteCommerce InStore:

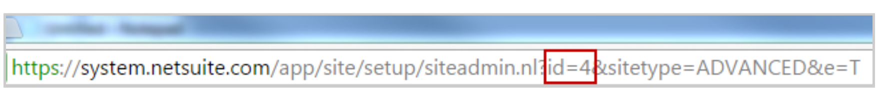
1. Copy the script displayed in the **NS_RP_ResetSearchFields.js** file in the NetSuite file cabinet at Web Site Hosting Files > Live Hosting Files > SSP Applications > NetSuite Inc. - POS > SuiteCommerce InStore > scripts.



2. Edit the **siteID** and the **debug** setting in the setup script.
   a. Set the value for **debug** to **true**.

```
debug:
true
, debugParameters:
{
        siteID:
0
}
```

   b. Use the ID for your SCIS website. You can see the site ID in the address bar of your browser when the Web Site Setup page is in Edit mode.



> **Important:** Change `debug: false` to `debug: true` so the script will run in the debugger. You must change the value for siteID in the setup script to the internal ID for **your** SCIS website.

3. Go to Customization > Scripting > Script Debugger.
4. Enter the SuiteScript Debugger domain (by clicking the link as indicated) and then re-enter your login credentials if prompted.
5. Set the **API Version** to 1.0.
6. Paste the script code into the debugger. Ensure the siteID is the one for your SCIS website.
7. Click **Debug Script** and then click **Continue**.

To view a list of SCIS installation tasks, see SuiteCommerce InStore Installation.

Configuring Facets for SCIS

Select the facets that sales associates can use to find products in SuiteCommerce InStore (SCIS). Various product attributes can be used as facets, such as brand, or color. For example, you set up a custom field on item records called, Color. You want sales associates to be able to search for products by the color. Select the field name, Color in the list of Facets. Sales associates can then search on colors such as, red or blue to find products.

To configure facets for SCIS:

1. Go to Setup > SuiteCommerce Advanced > Set Up Web Site.
2. Click **Edit** next to your SCIS website.
3. Click **Search Index**, and then **Facet Fields**.
   - **Facet Field Name** – (Required) Select the fields that can be used to filter product searches and browse products in SCIS.
   - **Field ID** – (View only field) Displays the field's internal ID.
4. Click **Save**.

To finish configuring facets for SCIS, you must modify the CustomConfiguration.js file to include facets that correspond to custom fields or categories specific to your NetSuite account.

To add facets to CustomConfiguration.js:

1. Go to Setup > SuiteCommerce Advanced > Web Site Hosting Files > Live Hosting Files > SSP Applications > NetSuite Inc. - POS > SuiteCommerce InStore.
2. Click edit the CustomConfiguration.js file.

   Note: For information about how to edit the CustomConfiguration.js, see Editing the CustomConfiguration.js File

3. Add custom facet information for your account. Replace the value for `id` with the custom field ID used in your NetSuite account. Replace the value for `name` with the value you want displayed in SCIS. Note the `behavior` and `macro` setting for each type of facet field in the following code samples:

```
//To set a facet of type “List” replace the value for id and name according to custom fields in
 your account.
{

id: ’custitem1’
,
name: ’Team’
, behavior: ’multi’ // or ’single’
, macro: ’facetsPosList’
, priority: 0
, titleToken: ’$(0)’
, titleSeparator: ’/’
, uncollapsible: true
}

//To set a facet of type “Integer” replace the value for id and name according to custom fields
 in your account.
{
```

```
 id: 'custitem2'
,
name: 'Integer Range'
, behavior: 'range'
, macro: 'facetsPosRange'
, priority: 0
, titleToken: '$(0) - $(1)'
, parser: function (value) { return parseFloat(value).toFixed(0); }
, uncollapsible: true
}

//To set a facet of type "Decimal" replace the value for id and name according to custom fields
 in your account.
{

 id: 'custitem3'
,
name: 'Decimal Range'
, behavior: 'range'
, macro: 'facetsPosRange'
, priority: 0
, titleToken: '$(0) - $(1)'
, parser: function (value) { return parseFloat(value);}
, uncollapsible: true
}

//To set a facet of type "Currency" replace the value for id and name according to custom field
s in your account.
{

id: 'custitem4'
,
name: 'Currency Range'
, behavior: 'range'
, macro: 'facetsPosRange'
, priority: 0
, titleToken: '$(0)'
, parser: function (value) { return _.formatCurrency(value); }
, uncollapsible: true
}
```

4. Click **Save** when you are finished editing the file.

To view a list of SCIS installation tasks, see SuiteCommerce InStore Installation.

Configuring Sort Options for SCIS

Sorting enables you to determine the order in which search results display in SuiteCommerce InStore (SCIS). Configuring sort options includes setting sort fields in NetSuite, and then modifying the CustomConfiguration.js file. In this way, you can apply default sort settings that make sense to sales associates in your organization.

To configure search index settings for sorting:

1. Go to Setup > SuiteCommerce Advanced > Set Up Web Site.

2. Click **Edit** next to your SCIS website.
3. Click **Search Index**, and then click **Sort Fields**.
4. Configure sorting. The following screenshot shows settings for sorting by price that correspond with the default sort options in CustomConfiguration.js. The base price setting is required. You can add more sorting fields if needed.

   a. In the **Field Name** column, select **Base Price**. The **Field ID** column shows **pricelevel1**. In the **Sort Order** column, select **Ascending**.
   b. Click **Add**.
   c. In the **Field Name** column, select **Relevance**. The **Field ID** column shows **relevance**. In the **Sort Order** column, select **Ascending**.
   d. Click **Add**.
5. Click **Save**.
6. Modify the **CustomConfiguration.js** file to define sort options. To edit the JavaScript file, find it in the file cabinet. Go to Web Site Hosting Files > Live Hosting Files > SSP Applications > NetSuite Inc. - POS > SuiteCommerce InStore.

```
// available sorting options for the Sort By dropdown
   sortOptions: [
      //  id: Has the format <field>:<sort direction> (e.g. relevance:asc)
      //  name: The name to display in the dropdown
      //
      //  The field should be sortable using the search API, so putting invalid values here may

      //  break the search
      //
      //   Example
      //
      //   {id: 'relevance:asc', name: 'Relevance', isDefault: true},
      //   {id: 'pricelevel1:asc', name: 'Price (Low to High)'},
      //   {id: 'pricelevel1:desc', name: 'Price, High to Low '},
   ],
```

For general instructions on how to modify the custom configuration file, see Editing the CustomConfiguration.js File.

To view a list of SCIS installation tasks, see SuiteCommerce InStore Installation.

SCIS for iOS and SCIS for Windows Applications

In addition to delivering the same experience as the web application, SCIS mobile applications include robust security and remote configuration options for administrators. SCIS for iOS and SCIS for Windows use custom records in NetSuite to update the configuration settings on your mobile device. Remote configuration enables administrators to make subsequent configuration changes, after the first-run setup has been completed on the device.

Important: SuiteCommerce InStore is only supported on mobile devices running SCIS for iOS, or SCIS for Windows. Installation of either SCIS for iOS, or SCIS for Windows is **required**.

Recommended Settings for iPads Running SCIS

1. **iOS 11.0, iOS 11.1, or iOS 11.2** – These versions have been verified to be compatible with SCIS for iOS version 4.0.
2. **SCIS for iOS 4.0.0** – To update the mobile app, go to the App Store app > Updates tab > Tap Update button on NetSuite SuiteCommerce InStore app .
3. Turn **off** automatic updates – Go to Settings > iTunes & App Store > Automatic Downloads. Toggle off Apps and Updates.

After applying recommended settings, you must wait for a notification from NetSuite, before you update the iOS version on your iPad again, or update the SCIS for iOS mobile application. NetSuite sends a notification after new iOS updates from Apple have been tested on SCIS, and when an updated version of the mobile app is available.

The best practice for applying settings to iPads is to update one single device, run acceptance tests on that device, and then apply the recommended settings to other devices. The list of acceptance tests is available in SuiteAnswers. For more information, read Updating the Operating System and SCIS Mobile App.

Recommended Settings for Windows Tablets Running SCIS

SCIS for Windows version 4.0, includes specific system requirements. Tablets running SCIS must be updated to run the following:

- Windows 10 operating system (Version 1607 or newer)
- .NET Framework version 4.7.1

Supported Windows Operating System

The following table shows Windows OS versions that support SCIS for Windows version 4.0.

SCIS Mobile App Version	Minimum .NET Framework Required	Windows OS Support for SCIS for Windows				
		Windows 10 64-bit (Version 1507)	Windows 10 64-bit November Update (Version 1511)	Windows 10 64-bit Anniversary Update (Version 1607)	Windows 10 64-bit Creators Update (Version 1703)	Windows 10 64-bit Fall Creators Update (Version 1709)
4.0	.NET 4.7.1	No	No	Yes	Yes	Yes

Detailed instructions associated with installation and configuration of SCIS mobile apps are included in the following topics:

- Installing SCIS Mobile Apps
- Setting Up Mobile Certificates and a Domain Whitelist for SCIS.
- Creating a Shortcut for the SCIS Mobile Device List
- Setting Up SCIS Touch ID for iOS

- Updating the Operating System and SCIS Mobile App

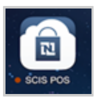
Installing SCIS Mobile Apps

> **Important:** Installation of the SCIS for iOS or SCIS for Windows mobile app is **required**.

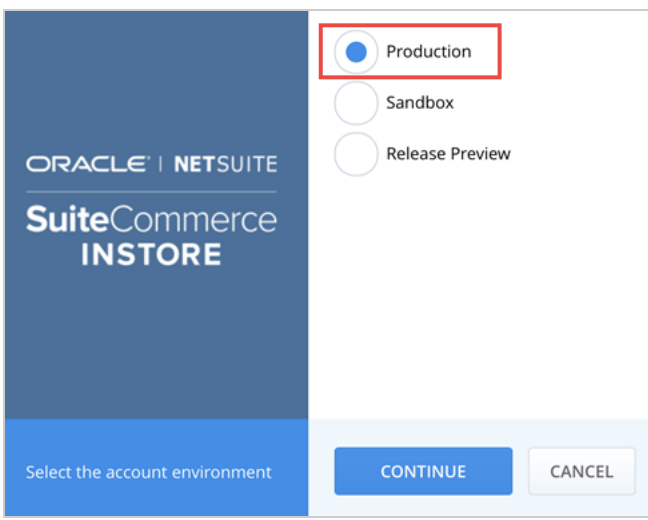
This section includes instructions for installing SCIS for iOS and SCIS for Windows. After you have installed the mobile app, you can set up Guided Access or Full Screen Mode. This is optional for iOS devices, but recommended for Windows devices. For more information, read Setting Up Guided Access.

To configure SCIS mobile apps on iPads and Windows tablets:

1. Ensure you have the latest version of **SCIS for iOS**, or **SCIS for Windows** app on your tablet.
   - For iOS devices, open the App Store on your iPad and download the **SCIS for iOS** app.

   - For Windows devices, contact your NetSuite account representative for access to the SCIS for Windows executable file, and then install the app.
2. After you have installed the mobile app on the tablet, launch SCIS on your tablet. If you use an iPad, tap **Configure Account**, after the Welcome screen.
3. Choose **Production**.

4. Log in to SCIS. Enter your login credentials.
5. If you have access to more than one NetSuite account with SCIS installed, you can access any of those accounts. Choose an account.
6. Choose a role that is capable of configuring devices, such as the Administrator role.
7. On the next screen, the device ID is automatically configured. Enter the website ID for your **SCIS Website**.

   Choose the following configuration settings based on the operating system on your tablet:

   - **iOS devices:**
     - Guided Access – Optional.

  - Printing Technology – Choose Airprint.
- **Windows devices:**
  - Guided Access – Recommended. Guided Access enables SCIS to display in full screen on your device.

    > **Note:** Ensure that peripherals used by the Windows device are installed by an administrator **after** the SCIS for Windows application is configured on the device, but **before** the device is placed in Guided Access mode. You may not be able to access certain websites for driver installation when the device is in Guided Access mode.

  - **Printing Technology** – Select **Star** or **Epson**, depending on the printer you will use with this device. Note that AirPrint is not supported on Windows devices using SCIS.

    > **Important:** You must download the appropriate drivers for your printer on the mobile device to use Star native printing. To learn which printers are supported, read List of Supported Peripherals.

8. Click **Done**.

When you click Done, an SCIS Mobile Device record is created in NetSuite, configured for Production.

Device configuration is now complete and you are redirected to the SCIS login screen. Log in using your existing credentials to access SCIS. Next, set up printing preferences. For more information, read Setting Up Receipt Printers for SCIS.

Setting Up Guided Access

> **Note:** Setting up Guided Access on an iOS tablet is optional.

You can enable **Guided Access** on the iPad. Guided Access is a type of “kiosk” view, which keeps the device in a single application and prevents unauthorized use of additional applications on the device. Guided access is not required for using SCIS, but recommended when using SCIS on Windows.

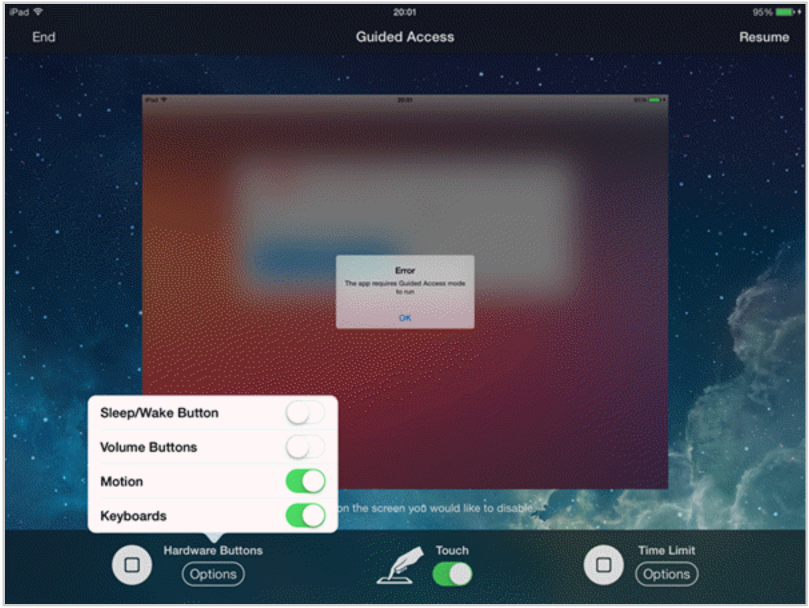
Before placing the device in Guided Access mode, and handing the device over to a sales associate, install any required peripherals. Please consult the manufacturer’s handbook for specific setup requirements for peripherals. For more information, read List of Supported Peripherals.

To set up Guided Access on an iOS device:

1. Tap **Settings** > **General** > **Accessibility**.
2. Scroll to **Learning** > **Guided Access**.
3. Toggle **Guided Access** to on.
4. Tap **Passcode Settings** and enter a four-digit pin code.

    > **Note:** Do not use obvious pin codes such as “0000”, “1234” or any known dates or the main device Pin code.

5. Press the home button.
6. Launch the SCIS for iOS app.
7. Triple-click the home button.
8. Tap **Options** on the Guided Access set up screen.



9. Set the required options. Do not enable **Time Limit**.
10. Tap **Done** to save the Guided Access preferences.
11. Tap **Start** to begin Guided Access and lock the device to the SCIS for iOS app.
12. Triple-click the home button to end or reset options for the guided access session, you will be prompted to enter your Guided Access pin.

After these procedures have been set up the device is ready for use by the sales associate. Upon launching the app, the user is prompted to enter their usual SCIS login and passcode.

Setting Up Mobile Certificates and a Domain Whitelist for SCIS

The SCIS Domain Whitelist, and SCIS Mobile Certificates custom records are installed by the SuiteCommerce InStore SuiteApp. Administrators can add or remove values to the default settings on these records as needed. For example, you may need to add a domain to the whitelist, so that sales associates can visit an approved website. Also, as certificates lapse, administrators will need to periodically manage updates to the domain and certificates records.

SCIS Domain Whitelist

This custom record contains a list of domains that can be accessed using the device running SCIS. These white-listed domains are global to your account, regardless of location or subsidiary. The following domains are required for SCIS to function properly.

Most of the following domains are added to the SCIS Domain Whitelist record automatically. If there are domains in this list that do not appear in your account, you must add them.

Required Whitelist Domains:

- forms.netsuite.com
- maps.google.com
- media.netsuite.com
- shopping.netsuite.com
- system.eu1.netsuite.com
- system.eu2.netsuite.com
- system.na1.netsuite.com
- system.na2.netsuite.com
- system.na3.netsuite.com
- system.netsuite.com
- www.google.com
- system.sandbox.netsuite.com

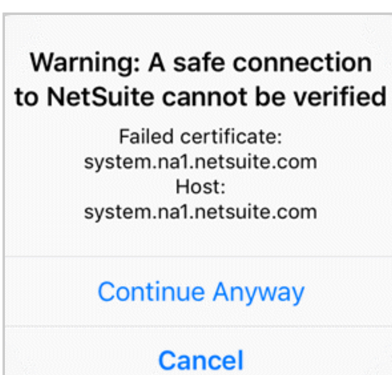
> **Note:** After applying any configuration changes, including changes to the Domain Whitelist, Certificates and Printer Settings, the user must log out and log in again to refresh the updated settings to the device. For changes to printer settings, the user must also select the printer again from the main menu in the SCIS for iOS app.

To create a new entry:

1. Go to Customization > Lists, Records & Fields > Record Types
2. Scroll to **SCIS Domain Whitelist** and click **New Record**.
3. Enter the domain in the **Name** field.
4. Click **Save**.

SCIS Mobile Certificates

This custom record stores authorizing certificates. A standard set of certificates is created when the SCIS bundle is installed. As certificates expire, an administrator will need to update the domain with a new certificate. The app will display the following warning dialog if a domain has an expired or missing certificate:



Whenever a certificate is updated or added, the user must log out and log into SCIS iOS, to refresh the configuration settings. For instructions on how to obtain the latest security certificate, read Using Firefox to Obtain a Domain's SHA-256 Fingerprint.

> **Note:** If you are using system.na1.netsuite.com, system.na2.netsuite.com, system.eu2.netsuite.com, and system.eu1.netsuite.com ensure that you set the record for system.netsuite.com with the certificates for the system domain associated with your account.

To create a new entry:

1. Go to Customization > Lists, Records & Fields > Record Types
2. Scroll to **SCIS Mobile Certificates** and click **New Record**.
3. Enter the domain in the **Name** field.
4. Copy and paste the fingerprint hash in the **Certificate Fingerprint** field.
5. Click **Save**.

Obtaining a Domain's SHA-256 Fingerprint

You will need this fingerprint to paste into the Certificate Fingerprint field on the individual SCIS Mobile Certificate record. If you have OpenSSL installed, you can run the following command to return the domain fingerprint:

```
openssl x509 -noout -fingerprint -sha256 -inform pem -in [certificate-file.crt]
```

Using Firefox to Obtain a Domain's SHA-256 Fingerprint

Firefox (versions 31 and higher) provides one of the most straightforward methods of obtaining a domain's SHA-256 fingerprint. You must paste this fingerprint into the Certificate Fingerprint field on the individual Mobile Certificate Record.

To obtain a domain's SHA-256 fingerprint using Firefox:

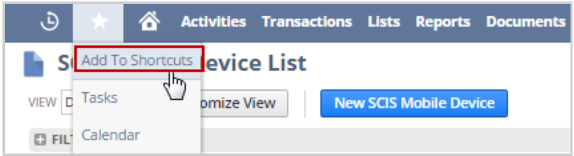
1. Open Firefox and navigate to the required URL, for example system.netsuite.com.
2. Double-click the padlock icon in the address bar.
3. Click **More Information**.
4. Click **View Certificate**.
5. Under **Fingerprints**, copy the SHA-256 Fingerprint hash.

Creating a Shortcut for the SCIS Mobile Device List

If you have multiple devices using SuiteCommerce InStore (SCIS), consider creating a shortcut for easy access to the SCIS Mobile Device list in your NetSuite account.

To create a shortcut to the SCIS Mobile Device list:

1. Log in to NetSuite and go to Customization > Lists, Records & Fields > Record Types
2. Scroll to **SCIS Mobile Device** and click **List**.
3. Click the Add To Shortcuts link in the Shortcut menu.



The Shortcut portlet on your dashboard shows a link to the list of mobile devices associated with your account.

Setting Up SCIS Touch ID for iOS

To set up Touch ID for SuiteCommerce InStore (SCIS), you must ensure that Touch ID is already configured on the mobile device you are using for point-of-sale. The first time a sales associate logs in to SCIS, they must enter their email address and password. The login credentials are stored in the device, and then Touch ID capabilities can be used in the future for logging in.

To set up SCIS for Touch ID login:

1. To set up Touch ID for SCIS, ensure that Touch ID is configured on the device.
2. Check the **Touch ID Login** box on the SCIS Login window.
3. The **Touch ID for SCIS** window appears. All fingerprints registered with Touch ID on this device will have full access to SCIS. If Touch ID is not configured on the device a popup alert appears indicating that setup is required.
4. If you have multiple roles with access to SCIS, then you must choose a role.

After choosing a role, you can start using SCIS. Touch ID is configured and available on next login.

To log in with touch ID:

1. Start the **SCIS** mobile application.
2. Tap your fingerprint on the **Touch ID for SCIS** prompt.
3. If you have multiple roles, you can choose the role with which you want to log in. If you only have one role, you are automatically logged in to SCIS.

To turn off touch ID:

1. Start the **SCIS** mobile application.
2. Tap your fingerprint on the **Touch ID for SCIS** prompt.
3. Log in to SCIS.
4. In the **User Menu**, select **Remove Touch ID**.
5. Log out of SCIS.

After log out, Touch ID login to SCIS is no longer configured for that user.

To update Touch ID when password changes:

1. Start the **SCIS** mobile application.
2. When the Touch ID for SCIS prompt appears, touch Cancel. If you use your fingerprint to access SCIS, then you will be required to enter the login email address and correct password to view the SCIS cart.
3. In the SCIS login window, enter the login email address and new password.

4. The Password Update prompt appears. Touch your fingerprint to confirm password update. You are logged in to SCIS.

If the fingerprint is valid, then the old password is overwritten, and login to SCIS is permitted. If the fingerprint is not valid or is canceled, then the password is not updated, and login is not allowed.

Updating the Operating System and SCIS Mobile App

This section describes the best practice for applying updates to the operating system on your iPad and the SCIS for iOS mobile app. Update one single device, and then run acceptance tests. After you have verified that the mobile app is working properly on one device, then update the iOS or the mobile app on other devices running SCIS.

If you encounter errors in the process of running any of the acceptance tests, then contact Customer Support.

> **Important:** You must wait for a notification from NetSuite, before you update the iOS version on your iPad, or update the SCIS for iOS mobile application. NetSuite sends a notification after new iOS updates from Apple have been tested on SCIS, and when an updated version of the mobile app is available.

Updating the SCIS for iOS Mobile App

Use the following instructions to update the SCIS for iOS mobile app. For more information on performing a first time installation, read SCIS for iOS and SCIS for Windows Applications.

To update the SCIS for iOS mobile app:

1. Go to the **App Store** app.
2. Tap the **Updates** tab.
3. Tap **Update** next to the NetSuite SuiteCommerce InStore app.

After you update the operating system or the SCIS for iOS mobile app on your device, you must run the following acceptance tests. If you encounter errors in the process of running any of the acceptance tests, then contact Customer Support.

Acceptance tests for iOS and mobile app updates:

Run the following tests as appropriate for your SCIS implementation. Ensure that you test the peripheral devices that you use with SCIS, such as printers and barcode scanners, .

1. Test the updated version of the mobile app to ensure that additional settings are not required.
    a. Go to the AppStore, and touch the SCIS for iOS app icon to update the app.
    b. Open the app. If the device has already been configured, then the first screen is the login screen.
    c. Verify that you can log in to the app.

    > **Note:** If the device has not yet been configured, then the configuration screen is displayed.

2. Test device configuration.
    a. Download the SCIS for iOS app on a device that has not yet been configured.

b. Follow the instructions on the configuration screen.
c. Verify that you can successfully configure the device.

> **Note:** If the SCIS for iOS app has been downloaded and installed on all devices, then uninstall the mobile app on one device. Verify that you can successfully configure the device.

3. Test the printer configuration. Run the following tests using the printer you configured for SCIS.
   a. When you log in to the SCIS for iOS mobile app, select a printer from the menu. The following printer types are supported: Star, Epson, Airprint. If you use OPrint or Printopia, also test with these.
   b. Enter a test transaction. Add an item to the cart, and then process a payment.
   c. Print the receipt.
   d. Verify the receipt is printed as expected.
4. Test a barcode scanner:
   a. Connect a barcode scanner to the device running SCIS.
   b. Log in to SCIS.
   c. Scan a barcode.
   d. Verify that the corresponding item is added automatically.
   e. Process a test payment.
   f. Print the receipt.
   g. Verify the receipt is printed as expected.
5. Test cash drawer operations:
   a. Connect a cash drawer to a printer.
   b. Log in to SCIS.
   c. Perform a cash sale, or perform another drawer operation, such as an Initial Loan or End of Day transaction.
   d. Verify that the cash drawer opens automatically.
6. Test fingerprint or Touch ID:
   a. On the iPad, go to System Settings. Add a fingerprint in Touch ID & Passcode.
   b. Open SCIS and check the Touch ID box on the login screen.
   c. Log in to SCIS.
   d. Log out of SCIS.
   e. Log in to SCIS a second time.
   f. Verify that the Touch ID option populates the email and password automatically.

> **Note:** For more information on configuring Touch ID for SCIS, read Setting Up SCIS Touch ID for iOS.

Working with SCIS on Sandbox

You can use SuiteCommerce InStore (SCIS) on your sandbox account for testing changes to your SCIS implementation. Before completing the following procedures, you must already have access to a sandbox account.

To configure a mobile device to access your sandbox account, you must complete some configuration steps in NetSuite and on the mobile device. You must define the file permissions for **config-setup-step2.ssp** within the SuiteCommerce InStore SSP Application. Then change the device ID status to Trusted.

> **Note:** For information on acquiring one or more sandbox accounts, contact your NetSuite account representative.
>
> The following instructions assume you are using **SCIS 2017.2.7** or later.

To set the permissions for the config-setup-step2.ssp file:

1. Log into your sandbox account on a computer, with the **Administrator** role.
2. Navigate to Setup > SuiteCommerce Advanced > SSP Applications.
3. Find **SuiteCommerce InStore** and click the Application Folder.
4. Click **Edit** next to **config-setup-step2.ssp**. Under the **Permission** subtab set the following:
   - Check the **Enabled** box.
   - Set **Execute as Role** to **SCIS Support**.
   - Check the **Run Script Without Login** box.
   - For **Roles**, select **Administrator** and **SCIS Clerk**.
   - Check the box next to **All Employees**.
5. Click **Save**.

To set the mobile device as trusted on your sandbox account:

1. On the **mobile device**, use the **Administrator** role to configure the device for your sandbox account.
   a. After redirection to the SCIS Login page, try to login.
   b. An error message is displayed, "Invalid role or account device restrictions." The error indicates that the device ID is recognized, but the Status of the device is not Trusted.
2. On a computer, log in to your sandbox account as an administrator to change the Status for the device.
   a. Go to Setup > Integration > Device ID. Find the device ID that is not trusted.
   b. Change the **Status** to **Trusted**.
3. On the mobile device, log in to SCIS again, using your **SCIS Clerk** role. (This step will set the configuration in mobile app.)
4. You are directed to login again. After login, you will be on SCIS Sandbox.

> **Note:** Each time you refresh your sandbox account, you must repeat this procedure to access SCIS for Sandbox on mobile devices. No change is required in your production NetSuite account.

List of Supported Peripherals

The following topics describe the devices and peripherals that SuiteCommerce InStore (SCIS) supports. To install peripherals for your point-of-sale station, follow the installation procedures provided by your vendor.

- Main Devices for POS
- Receipt Printers
- Bar Code Scanners
- Cash Drawers

Main Devices for POS

The following table lists the main devices that SuiteCommerce InStore (SCIS) supports for entering point-of-sale transactions:

Supported Device	Supported Browser Applications
iPad Air	SCIS for iOS Application
iPad2	
iPad Mini	
Windows Surface Tablet	SCIS for Windows

The SCIS for iOS or SCIS for Windows application is required for all supported devices. This is the only supported browser application for SCIS. For more information, read SCIS for iOS and SCIS for Windows Applications.

Important: Ensure that unauthorized individuals do not have access to the device running SCIS. Note that the definition of all client-side security measures are stored in a local configuration file on the device.

Receipt Printers

Remote configuration is supported in both Star and Epson printers. Support for Epson bluetooth and TCP/IP connection is supported as of the 3.0.0 version of the SCIS for iOS and SCIS for Windows mobile applications. Bluetoooth connection to Star printers is also supported.

Note that specific printer models have been verified to be compatible with SCIS. However, the SCIS mobile apps for iOS and Windows include an API that supports remote configuration for the printer models listed below.

Star Printers

- The following Star printer models are supported for use with SCIS: TSP100LAN, TSP650, TSP650II, FVP10, TSP700II, TSP800II, TUP500, SM-220i, SM230i, SM-T300i, SM-T400i, SM-L200.
- The following Star printers have been verified to be compatible with SCIS: TSP650II, TSP700II.

Epson Printers

- The following Epson printer models are supported for use with SCIS: TM-T20, TM-T20II, TM-T20II-m, TM-T60, TM-T70, TM-T70II, TM-T81II, TM-T82, TM-T82II, TM-T88V, TM-T88VI, TM-T90II, TM-P20, TM-

P60, TM-P60II, TM-P80, TM-U220, TM-U330, TM-m10, TM-m30, TM-T20II-i, TM-T70-i, TM-T82II-i, TM-T83II-i, TM-T88V-i, TM-U220-i, TM-T70II-DT, TM-T88V-DT, TM-H6000IV-DT.

- The Epson printer model EPSON TM-T88V-i has been verified to be compatible with SCIS.

For more information, read Setting Up Receipt Printers for SCIS.

Bar Code Scanners

SCIS supports the following bar code scanners: Bluetooth Socket Mobile scanners – CHS 7Xi (8550-00059 Revisions A, B and C), CHS 7XiRx (8550-00060 Revisions A, B and C), CHS 7Ci, CHS 7Pi, CHS 7Mi, CHS 7Qi, CHS 8Ci, CHS 8Qi

To complete installation, follow instructions provided by the vendor of each device. For additional setup steps, read Setting Up Barcode Scanners for SCIS.

Cash Drawers

SCIS Supports the following cash drawer models. Note the cable part supported with each model. SCIS supports any of the series in the following list:

- APG (Vasario Series) with Cable Part# CD-101A.
- MMF (Advantage Series) with Cable Part# 226-199EPST10-00

Starting with SCIS 2016.2.0, the SuiteCommerce InStore for iOS application provides native support for cash drawers connected to Star printers. The cash drawer is identified based on your printer technology setting on the SCIS Mobile Device record.

Your setting on each SCIS Payment Method record defines whether or not the cash drawer opens automatically. The cash drawer opens based on the SCIS Payment Method used to pay for the order. Sales associates can also open the cash drawer by selecting the No Sale option in the User Menu.

> **Note:** The credit card reader device, Magtek BulleT PN 21073098 (Bluetooth), supplied by Merchant e–Solutions is supported. However, SuitePayments provides more capabilities and is supported across all editions of NetSuite. For more information, read Setting Up Payment Services for SCIS.

Setting Up Receipt Printers for SCIS

The SCIS for iOS application or SCIS for Windows application must be installed before completing receipt printer setup. To view a list of supported printers, read Receipt Printers. For more information on installing the SCIS for iOS or SCIS for Windows application, read SCIS for iOS and SCIS for Windows Applications.

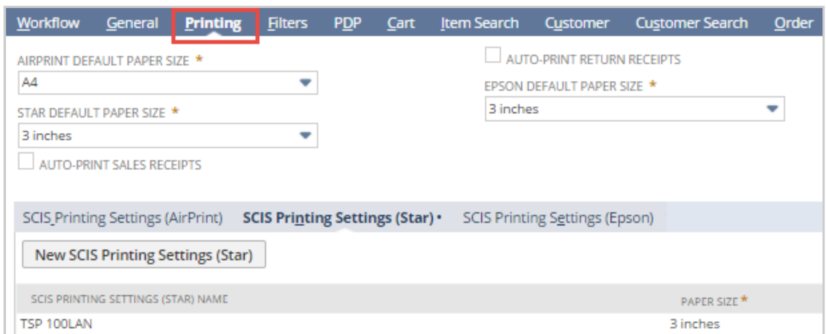
SCIS renders printed receipts using the Advanced HTML/PDF Template feature in NetSuite. SCIS interacts directly with the printer. If you use AirPrint, your iOS device automatically recognizes accessible printers. If you use StarPrint, the SCIS for iOS application and SCIS for Windows application allows discovery of accessible printers.

To complete printer setup for SCIS, you must configure printer settings on the **SCIS Settings** custom record. Here you can choose to use automatic printing, so that receipt printing is automatically initiated when an order is submitted. You can also set the paper size for specific printers or use default paper size settings.

To set up printing for SCIS:

1. Ensure that **Printing Technology** is properly set on the **SCIS Mobile Device** record, at Customization > Lists, Records & Fields > Record Types > SCIS Mobile Device.
2. Go to Customization > Lists, Records & Fields > Record Types > SCIS Settings.
3. Click **Edit** next to the **SCIS Settings** record you want to modify. Location-specific printing settings are applied to SCIS, based on locations, websites, and subsidiaries defined on the **Filters** subtab.

   > **Note:** SCIS sets default paper sizes that you can change as needed



4. Click the **Printing** subtab. Here, you can enable the automatic printing capability, as well as define printer name and paper size for each printer.
5. Set the following fields as needed:
   - **Airprint Default Paper Size** – (Required) Select the paper size. Accept the default setting if you do not use Airprint.
   - **Star Default Paper Size** – (Required) Select the paper size. Accept the default setting if you do not use a Star printer.
   - **Epson Default Paper Size** – (Required) Select the paper size. Accept the default setting if you do not use an Epson printer.
   - **Auto-Print Sales Receipts** – Check this box to print sales receipts automatically, when the sales associates submits an order.
   - **Auto-Print Return Receipts** – Check this box to print return receipts automatically.
6. Click a sublist to set preferences for your printer.
   - **SCIS Printing Settings (AirPrint)**

     > **Important:** AirPrint is not supported on Windows devices.

   - **SCIS Printing Settings (Star)**
   - **SCIS Printing Settings (Epson)**
7. Click **New Printing Settings** to enter the printer name and select the paper size.
   - **Name** – The Name of the printer should be exactly the same name that the printer already has set in the network.

     Note this example of a description based on supported printers: **Star TSP650**
   - **Paper Size** – Select the paper size. SCIS only supports the following:
     - For AirPrint: **A4** or **Letter**.

- For Star and Epson printers: **2 inches** or **3 inches**

> **Important:** Do not enter new paper sizes.

8. Click **Save** on the SCIS Settings record.

Setting Up Barcode Scanners for SCIS

The SCIS for iOS application or SCIS for Windows application must be installed before completing barcode scanner setup. To view a list of supported barcode scanners, read Bar Code Scanners. For more information on installing the SCIS for iOS or SCIS for Windows application, read SCIS for iOS and SCIS for Windows Applications.

The following procedure outlines the basic requirements for pairing your bluetooth scanner for use with SCIS for iOS. Please consult your manufacturer's handbook for specific setup requirements of your device. Starting with SCIS 2016.2.0, SuiteCommerce InStore for iOS includes native support for bar code scanner pairing.

To setup a bluetooth scanner for use with SCIS for iOS:

1. Check to see if the scanner has already been paired to the device in the iOS settings menu.
2. Click Settings > Bluetooth.
3. Unpair the connection by tapping **forget this connection** on the iPad.
4. Restore the scanner to its factory default setting by scanning the following barcode. After scanning, the barcode scanner will turn off. Refer to manufacturer's instructions if you need more information.

   7Ci/7Di

   #FNB00F0#

5. Power the scanner on.
6. Place the scanner in iOS mode by scanning the following barcode. Refer to manufacturer's instructions if you need more information.

   7Ci/7Di

   #FNB00F40002#

> **Important:** SuiteCommerce InStore for iOS supports the scanner in **iOS Mode** only. HID mode is not supported.

7. In the iOS settings menu, establish a new pairing with the scanner.

8. After the scanner has been paired, log in to the SCIS app.
9. After logging in to the home dashboard of the app, you will receive an audible alert from the scanner to confirm connection.

SCIS Configuration

After you have installed the SuiteCommerce InStore SuiteApp you must configure the application for your business needs. Complete the following tasks to configure SCIS:

	Tasks	Before you begin	Goal
1	Subsidiaries and Locations for SCIS	If you use OneWorld, ensure that Subsidiaries are set up in NetSuite.	Set up at least one location record for use with SCIS.
2	SCIS Settings	Upload logo image and application background.	Complete required tasks including the following: - Define discounts and saved searches available for SCIS. - Define printer settings - Define the void item and rounding item. - Define transaction forms and entry forms for SCIS. - Apply branding to your SCIS implementation by selecting your logo image, and background image for the main SCIS screen.
3	Localizing SCIS	Ensure that you have configured country-specific features in NetSuite. For ore information, read the help topic Overview of Country-Specific Features.	Complete required settings for your locale. Including setting up multiple currencies and currency rounding.
4	Advanced Receipt Templates for SCIS	Make sure the latest SuiteCommerce InStore SuiteApp is installed. Also, make sure that the Advanced HTML/PDF Templates feature is enabled.	Set up receipts for printing and email.
5	- Configuring SCIS Gateway Records - Configuring SCIS Payment Methods - Modifying Cash Payment Denominations	Create Payment Methods and payment profiles in NetSuite.	Create payment profiles for SCIS, so you can start accepting payments. Configure payment methods you plan to support in SCIS, and cash denominations.
6	Configuring Employee Records for SCIS	Enter or import employee records as needed.	Make sure Employee records are set up with the required permissions and roles.
7	Customer Records and SCIS	Enter or import customer records as needed.	Configure customer groups and set up the form used for entering new customers in SCIS.
8	Configuring Item Records for SCIS	Enter or import item records as needed.	Prepare for selling products with SCIS.
9	Configuring Item Images for SCIS	In the process of creating a website, you can choose an item identifier. You can also decide on the format you want to use for image file names.	Upload product image files to the file cabinet.

	Tasks	Before you begin	Goal
10	Configuring QuickAdd Keys		Configure item records and QuickAdd Keys. Upload product images.

Subsidiaries and Locations for SCIS

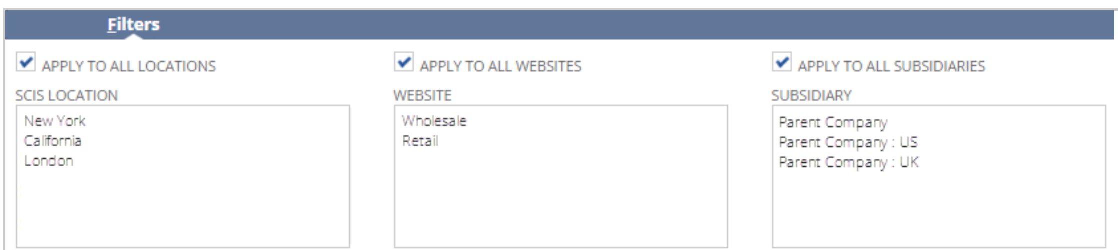
This section includes general information about configuring SuiteCommerce InStore (SCIS) for OneWorld accounts and setting up locations. The following links include more detailed information.

If you use OneWorld, you must select a subsidiary on each employee, item, customer, and website record. For more information, read Subsidiaries and SuiteCommerce InStore.

A location must be specified on each employee record granted access to SCIS. For more information, read the following topics:

- Configuring Locations for SCIS
- SCIS Location Distance
- SCIS Location Searches

The Filters subtab, found on many SCIS custom records, enables an administrator to define location and subsidiary settings.



An important step in configuring your implementation of SCIS is to ensure that the proper locations and subsidiaries are selected on SCIS custom records. SCIS Location and Subsidiary settings on custom records ensure capabilities such as QuickAdd Keys, discounts, shipping methods, printing settings, and transaction forms are available for sales associates at point-of-sale. If you do not want to setup specific location and subsidiary settings, then check the Apply to All boxes.

Subsidiaries and SuiteCommerce InStore

If you use OneWorld, the SuiteCommerce InStore (SCIS) website, item records, customer records, and employee records must all be assigned to the same subsidiary. When you are configuring NetSuite records, it is important to set the Subsidiary field on each record. You must also have nexuses set up for each subsidiary you use with SCIS.

For example, you have subsidiaries in New York and California and you plan to use SCIS with the subsidiary in California. You must select the California subsidiary on each record you plan to use with SCIS. Item records, customer records, employee records, and the SCIS website must all be associated with the California subsidiary.

Important: To calculate tax correctly, a nexus must be set up for each subsidiary location.

Go to Setup > Company > Subsidiaries. Click the Nexuses subtab. Verify that you have set up a nexus for each location. See the help topic Setting Up Subsidiaries for more information.

Configuring Locations for SCIS

You must set a location on every employee record and item record you plan to use with SuiteCommerce InStore (SCIS). The SCIS user interface shows whether or not a product is in stock at an employee's location.

For example, you may be using SCIS in two locations: Los Angeles and San Francisco. The sales associate assigned to the San Francisco location can see that an item is out of stock at her location, but available at the Los Angeles location. This visibility enables the sales associate to make arrangements to have the product shipped.

SuiteCommerce InStore uses location data for the following:

- To define store locations
- To determine which items are available at a specific location
- To assign a sales associate to a store location
- To determine the distance between store locations

> **Note:** SCIS uses the standard NetSuite location record. You must configure at least one location in NetSuite.

To define locations for SCIS:

1. Go to Setup > Company > Classifications > Locations > New.
2. The following settings are **required** for SuiteCommerce InStore:
   - **Name** – Defines the name of the location. The name appears in NetSuite lists.
   - **Subsidiary** – Required if you use OneWorld.
   - **SCIS Store Safe Account** – Defines the account used for opening drawer and closing drawer transactions. Select an account from your Chart of Accounts. For example, you can choose Petty Cash.
   - **SCIS Cash Drawer Difference** – Defines the account used if there is a difference between the amount in the cash drawer and the expected amount of cash based on the sum of all transactions entered by the sales associate in the Closing Drawer or End of Day transaction.

     > **Important:** If there is no value for SCIS Store Safe Account or SCIS Cash Drawer Difference, then an error occurs when the sales associate tries to complete an opening drawer or closing drawer transaction.

   - Check the following boxes:
     - **Make Inventory Available** – (Required) Makes all on-hand inventory at the location available for orders.
     - **Make Inventory Available In Web Store** – (Required) Makes all on-hand inventory at the location available for web store orders.
3. Click **Save**.
4. Go to Lists > Relationships > Employees.

   Set the location for each employee record. For more information, see Configuring Employee Records for SCIS.
5. Go to Lists > Accounting > Items.

   (Optional) Set the location on item records you create. For more information on creating items, see Configuring Item Records for SCIS.

> **Note:** To determine if a product is available for purchase, there must be stock available in a location.

In addition to configuring a standard location record for each location where you plan to use SCIS, you must also configure custom records to define additional location settings. Additional settings include discounts and shipping methods available at certain locations, information for nearby store locations, and employees who work at more than one location.

SCIS Location Distance

SCIS Location Distance is a custom record associated with SuiteCommerce InStore (SCIS). This custom record defines the distance between store locations. Information from this custom record shows on the **Nearby Stores** tab on the product display page in SCIS.

To configure Location Distance:

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find **Location Distance** in the list of custom records, and then click **List** in that row.
3. Select store locations in the **From** and **To** fields on the custom record.
4. Enter the **Distance**.
5. Click **Save**.

SCIS Location Searches

In SuiteCommerce InStore (SCIS), the SCIS Location and SCIS Inventory Location searches affect location data displayed on the Product Detail Page in the Nearby Stores tab and the All Locations tab. You can modify the location data by creating new location searches with criteria that you select. After you have created your own modified saved search, use the new saved search ID in the CustomConfiguration.js file to change the default location searches used in SCIS.

To create a location search for the Product Detail Page:

1. Select your own criteria for the location search. Follow the instructions in Modifying Saved Searches for SCIS.
2. Go to Reports > All Saved Searches. Remember the ID for your modified SCIS location search.

EDIT | RESULTS	NAME	FROM BUNDLE	ID
Edit | Results	My SCIS Daily Sales		customsearch_ns_pos_daily_sales_2
Edit | Results	My SCIS Individual Company Form Fields		customsearch_ns_pos_company_customer_2
Edit | Results	My SCIS Locations		customsearch_ns_pos_locations_2

3. Go to Web Site Hosting Files > Live Hosting Files > SSP Applications > NetSuite Inc. - POS > SuiteCommerce InStore.
4. Click **Edit** next to **CustomConfiguration.js**.
5. Replace the default value for `locationSearch` with the ID for your own custom saved search.

```
location: {
```

```
// Id of the search for displaying locations in Nearby stores and in Pick up locations
locationSearch: '
customsearch_ns_pos_locations_2',
```

You can also replace the value for `inventoryLocationSearch` with a modified version of the SCIS Inventory Location search.

For more information, see Customize Location Display.

SCIS Settings

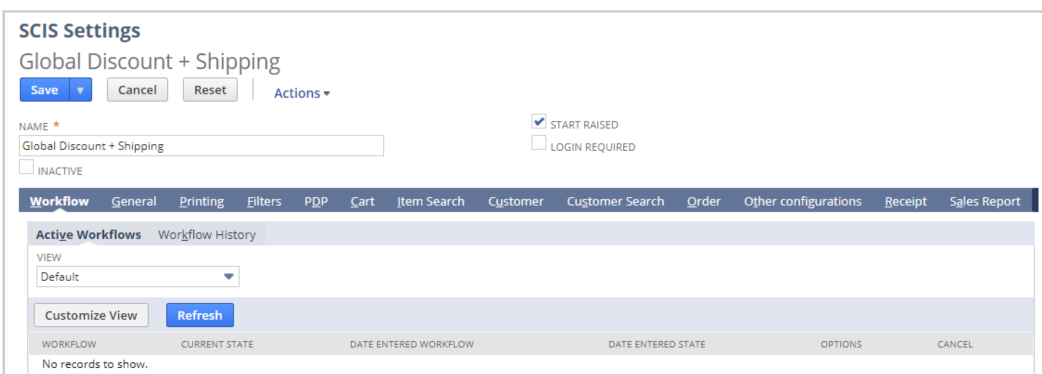
Define SCIS settings after you have installed the SuiteCommerce InStore SuiteApp. The SCIS Settings custom record is installed by the SuiteApp and you can modify it at any time after you have completed initial setup. This custom record enables you to define various settings, such as logo image and printing preferences. Also, use the SCIS settings record to define discounts available at a certain location, create custom attributes, select sales reports for SCIS sales associates, and more.

> **Important:** Creating the first SCIS Settings record and defining settings are required steps in configuring your implementation of SCIS.

The settings on the SCIS record apply to the location, subsidiary, and website you select on the **Filters** subtab. For example, you must use the SCIS Settings record to make certain discounts, shipping methods, and logos available at specific retail locations running SuiteCommerce InStore.

To configure an SCIS Settings record:

1. Go to Customization > Lists, Records, & Fields.
2. Scroll to **SCIS Settings**, and then click **List** in that row.
3. Click **New SCIS Settings** to create a new record, or click **Edit** next to an existing record to make changes.



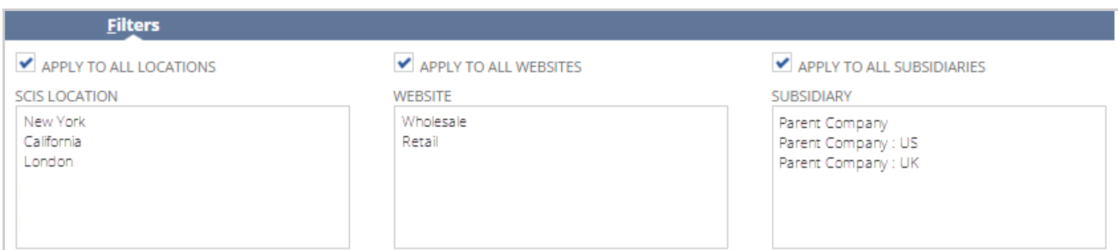
4. In the **Name** field, enter a name for the settings on this record. This name appears in the list of SCIS Settings.
5. Check the **Start Raised** box to start SCIS with the QuickAdd Bar expanded.
6. Check the **Login Required** box to require login to SCIS.
7. Click the subtabs to configure the following settings:
   - SCIS Settings for Filters

- General SCIS Settings
- SCIS Settings for Printing
- SCIS Customer Settings
- Customer Search
- SCIS Custom Attributes
- SCIS Settings for Orders
- Other Configurations: QuickAdd Bar and Forms Settings for SCIS
- Receipts for SCIS
- Selecting Sales Reports for SCIS

SCIS Settings for Filters

Click the **Filters** subtab, and then select the location, website, and subsidiary where you want these settings to apply. You can select more than one value in each box. If you use multiple SCIS websites, note that one SCIS settings record is applied depending on the combination of location, subsidiary, and website defined on the filters subtab. Also note that those settings affect the settings available to employees when they log in.

> **Important:** Consider that the combination of location and subsidiary defined on the employee record must match those settings on the appropriate SCIS Settings record. By default, the filters are set to apply to all locations, websites, and subsidiaries.



For more information about setting up SCIS for different locations and subsidiaries, read Setting Up SCIS for Multiple Locales. For more information about setting up employee records for SCIS, read Configuring Employee Records for SCIS.

General SCIS Settings

On the general subtab, you can define the discounts, shipping methods, logos, and SCIS Saved Searches available to SCIS users. Note that these saved searches are available for employees based on the combination of subsidiary, website and location defined on the filters subtab.

- Discounts and Shipping
- SCIS Logo Settings
- Saved Search
- Shipping Label Fields
- Automatic Logout

- Advanced Cash Management

Discounts and Shipping

Define the following settings for discounts and shipping:

- In the **SCIS Location Discounts** list, select the discounts that you want to make available at this location.
- In the **SCIS Shipping Methods** list, select the shipping methods you want to make available for this location.
- Check the **Use Default Discount** box to make custom discounts available.
- Select a value in the **Default Discount** list.

  Select the discount item to use with custom discounts. The value you select here is the actual discount item used for custom discounts. If you do not make a selection here, the default value is "Partner Discount."

  For example, you can check the Use Default Discount box, and then select a value from the list of discounts. When a sales associate enters a custom discount, the resulting sales transaction form shows the discount you choose as the custom discount name. The sales associate can enter any value as the amount of discount.
- (Optional) Select one or more searches in the **SCIS Saved Searches** list. The saved searches you select here are available to the SCIS Sales Clerk when he or she is logged in.

For more information, see Configuring Discounts. See also, Publishing Saved Searches to SCIS Users.

SCIS Logo Settings

Consider using a transparent background for your logo image. Note the supported file formats: PNG files are recommended. JPEG files are also supported. SVG files are **not** supported.

> **Important:** Ensure that the **Available Without Login** box is checked on the image file you use for the logo or background. To ensure the Available Without Login box is checked, click the image while the SCIS Settings record is in View mode to be directed to the image file record. You can edit the image file record to check the box.

Select or add your logo images using the following fields on the General subtab:

- **Logo** – Select the image to display in SCIS as your company logo. This shows in the upper left corner after logging in to SCIS.
- **Login Logo** – Select the logo image that displays on the SCIS Login page. Because this image is displayed when employees first visit the page, prior to logging in, only the website filter is applied here. Location and subsidiary filters are not applied to the Login Logo.
- **Printable Logo** – Select the logo image intended for printing on receipts.
- **Wallpaper** – Select the background image on the main SCIS application screen.

Logo Image Dimensions

The size of the images that you select on the SCIS Settings record should have the same dimensions as the images used in SCIS by default. Note the dimensions for each type of logo. The following table shows the default image files installed with SCIS and the corresponding Logo fields on the SCIS Settings record.

Logo Field	Default Image File	Dimensions
Logo	logo.png	215 x 46px
Login Logo	logo-login.png	243 x 66px
Printable Logo	logo-black.png	600 x 100px
Wallpaper	wallpaper.jpg	1273 x 955px

Saved Search

(Optional) Select one or more searches in the **SCIS Saved Searches** list. The saved searches you select here are available to the SCIS Sales Clerk when he or she is logged in. For more information on creating these saved searches, see Publishing Saved Searches to SCIS Users.

Shipping Label Fields

The following fields are used for shipping fulfillment requests. When orders are shipped from the store, the shipping label is sent by email before it is printed. You can change the default text in the following fields:

- **Shipping Label Email Body** – This text appears in the email message.
- **Shipping Label Email Subject** – This is the text that appears as the subject of the email message.
- **Shipping Label Email Prefix** – This text appears before the @ symbol in the email address.

Automatic Logout

An administrator can set the period of inactivity before a sales associate should be automatically logged out of the SCIS device. When the sales associate is logged out after the period of time you specified, he or she must log in to continue using the device. Enter the time interval in minutes. For example, if you want to allow 10 minutes of inactivity before the sales associate is logged out, enter **10** in the **Automatic Logout** field.

Note: Automatic Logout is applied based on the Location, Website, and Subisidary settings on the **Filters** subtab.

Advanced Cash Management

Check the Advanced Cash Management box to start using the feature which includes a receipt template for recording the closing drawer transaction for each sales associate. Advanced Cash Management also enables additional custom records and permissions. For more information, read Advanced Cash Management Setup.

SCIS Settings for Printing

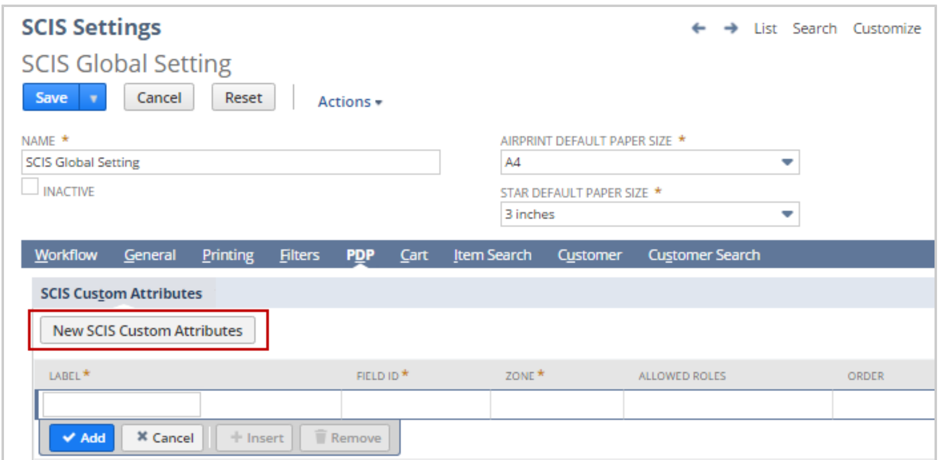
To complete printer setup for SuiteCommerce InStore (SCIS), you must configure printer settings on the **SCIS Settings** custom record. Enter printer names and set paper sizes for the printers you are using with SCIS. You can also set up automatic printing, so that receipt printing is automatically initiated when an order is submitted.

For step-by-step instructions, read Setting Up Receipt Printers for SCIS.

Important: Printing configuration for each location is required.

SCIS Custom Attributes

Administrators can customize the SuiteCommerce (SCIS) user interface by displaying additional field attributes on certain pages. Placeholders, or **zones** define areas in SCIS that can be customized. Administrators define the fields, or **attributes** that should appear in each zone.



Click **New SCIS Custom Attributes** to define additional information for display. The following areas of SCIS contain zones that support customization:

- Product Detail Page
- Cart
- Item Search
- Customer Profile
- Customer Search

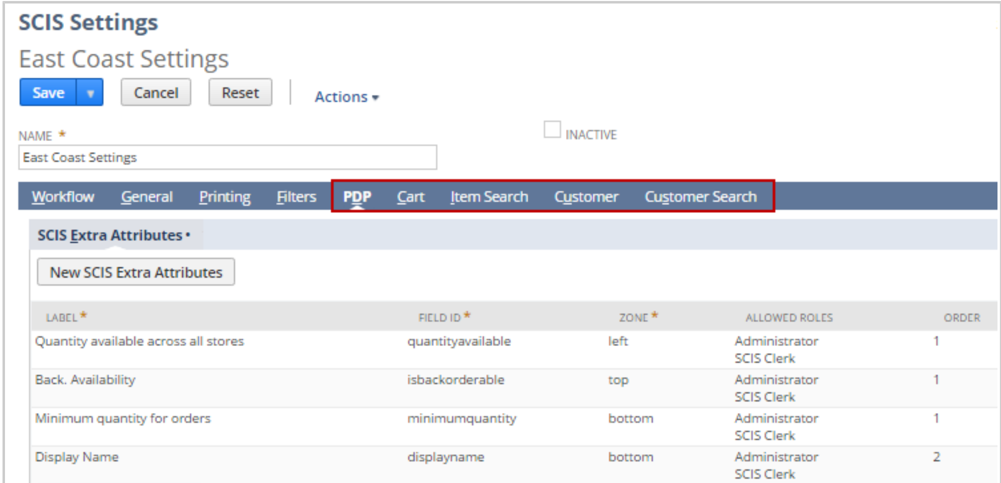
Creating SCIS Custom Attributes

This section provides information on how to define custom attributes for SuiteCommerce Instore (SCIS). Use the SCIS Settings record to define attributes for display in certain zones on SCIS pages that support customization. From the **SCIS Settings record**, you can create an **SCIS Custom Attribute record** to define various properties, including the fields you want to show, and the zones where they should display.

You can add multiple attributes to one zone. There is no limit to the number of attributes allowed in a particular zone, and no character limits in the attributes you define.

To create custom attributes for SCIS:

1. Go to the **SCIS Settings** record.
2. Click a subtab named for the area you want to customize.



3. Click **New SCIS Custom Attributes**.
   a. **Label** – Enter a label for the field. The text you enter in this field displays in SCIS.
   b. **Field ID** – Enter a field ID for an item attribute, or a field ID associated with the customer record.

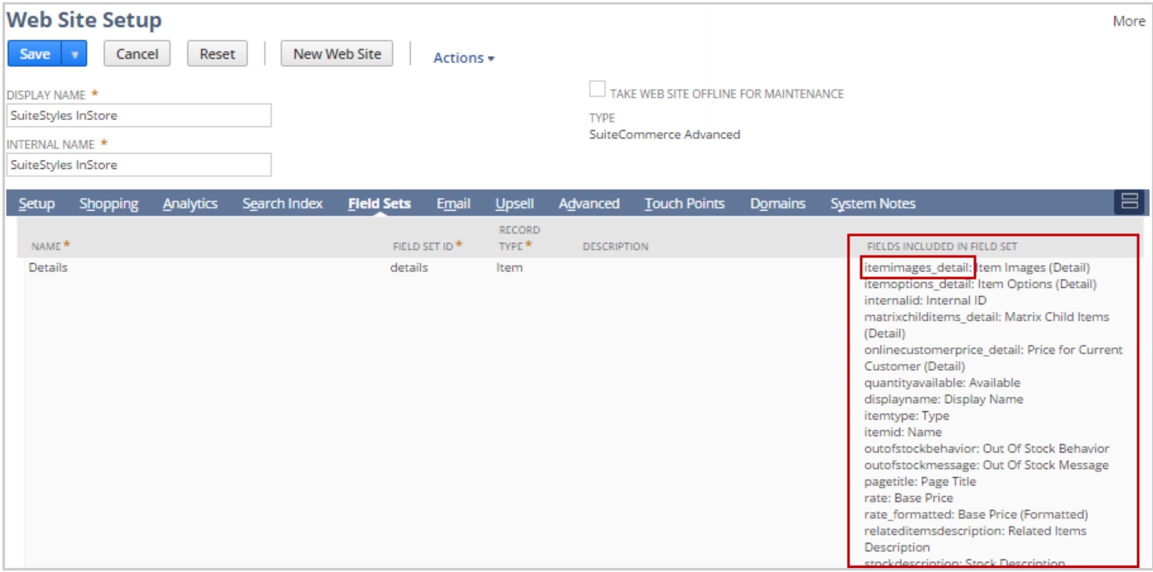
      The way you define properties for custom attributes is different depending on the the area you want to customize. Read the following for more information:

      - To define custom attributes for the **PDP**, **item search** results page, and **cart**, you must use field IDs defined in the Details field set. For more information, read Product Detail Page, Item Search, and Cart.
      - To define custom attributes for display on the **Customer Profile** and in **Customer Search** results, use field IDs from the list displayed at, Customer Profile and Customer Search Results.
   c. **Zone** – Enter **right**, **left**, **top**, or **bottom**. This defines the zone on the page where you want custom attributes to display. The following list shows the zones that apply to each SCIS area:
      - Product Detail Page – Top, Bottom, Left
      - Item Search – Top
      - Cart – Right, Left
      - Customer Profile – Right, Left
      - Customer Search – Top, Bottom
   d. **Allowed Roles** – Define the roles that can view the custom attributes you define.
   e. **Order** – If you have more than one attribute in a zone, enter the order in which you want each one to display. You can enter numbers or letters in this field.
   f. **Parent select lists** – Select the SCIS Settings record you want the custom attributes associated with.

Product Detail Page, Item Search, and Cart

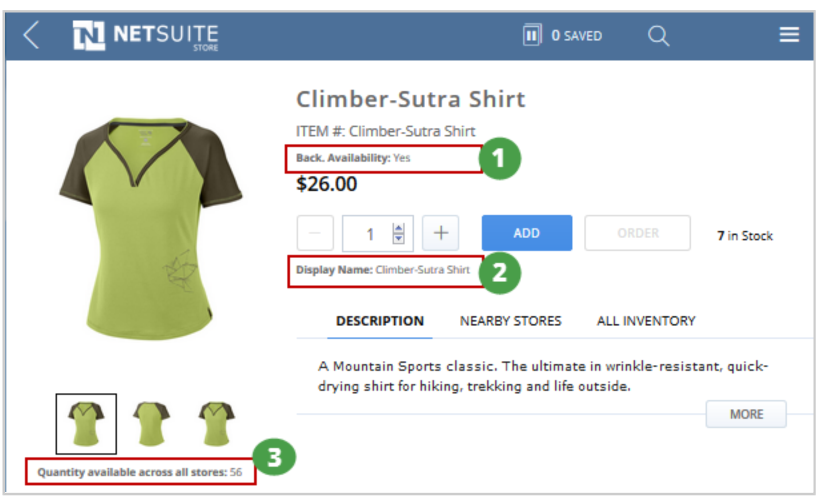
To define custom attributes for the PDP, item search results page, and cart, you must use field IDs defined in the details field set. You can use any field ID defined in field sets associated with your SCIS website. If a field ID does not exist in the list of field sets, then it cannot appear as an attribute.

Go to Setup > SuiteCommerce Advanced > Set Up Web Site. Click the **Field Sets** subtab. Any field ID listed in the **Details** field set can be a valid attribute. The following screenshot shows one example of a field ID you can use to define a custom attribute. You can use any field ID that appears in the **Fields Included in Field Set** column.



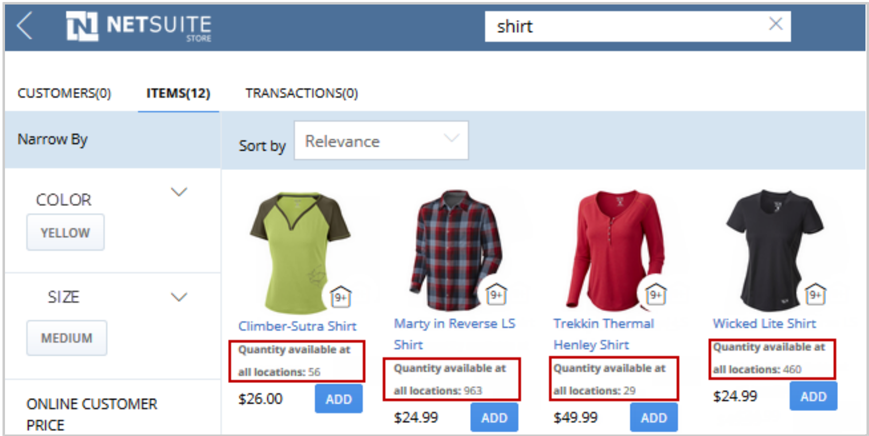
Product Detail Page

The screenshot below shows the zones you can select when creating custom attributes for display on product detail pages. You can use zones: (1) **Top**, (2) **Bottom**, or (3) **Left** to customize the PDP.



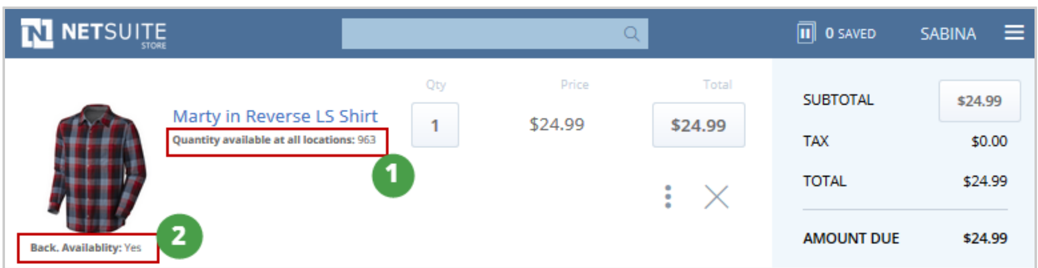
Item Search

The following screenshot shows the top zone, available for customization in the item search grid view. Note that the list view does not support custom attribute fields.



Cart

The screenshot below shows the zones in the cart, where you can display custom attributes. You can use zones: (1) **Right**, or (2) **Left** to customize the Cart.

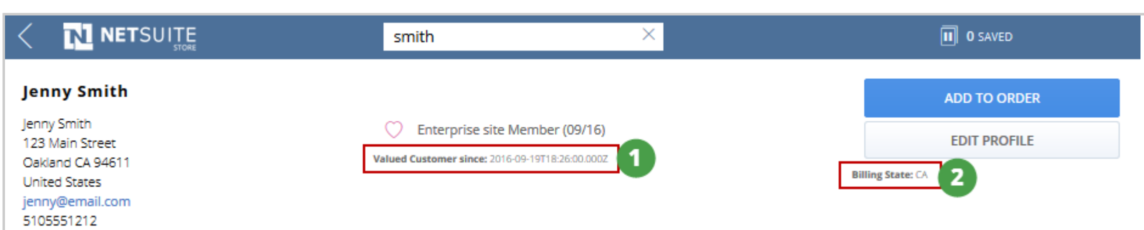


Customer Profile and Customer Search Results

You can define custom attributes for display on the Customer Profile and in customer search results. The fields available are pulled from the columns configured for customer saved searches. This includes fields that are displayed in the following searches, **SCIS Individual Customer Form Fields** and **SCIS Individual Company Form Fields**.

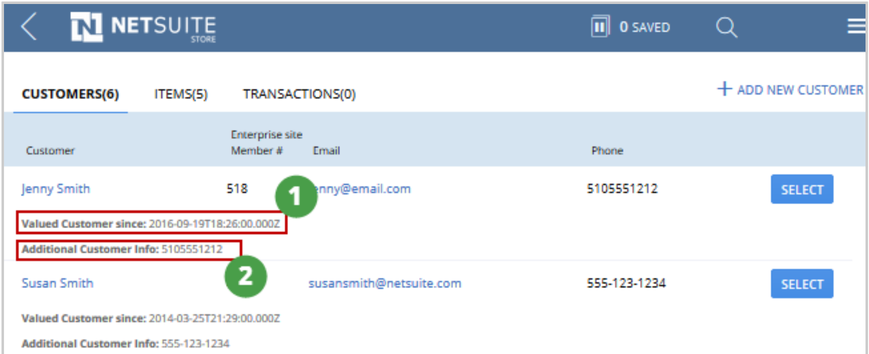
Customer Profile

The following screenshot shows the zones on the customer profile where you can display custom attributes. You can use zones: (1) **Left**, or (2) **Right**.



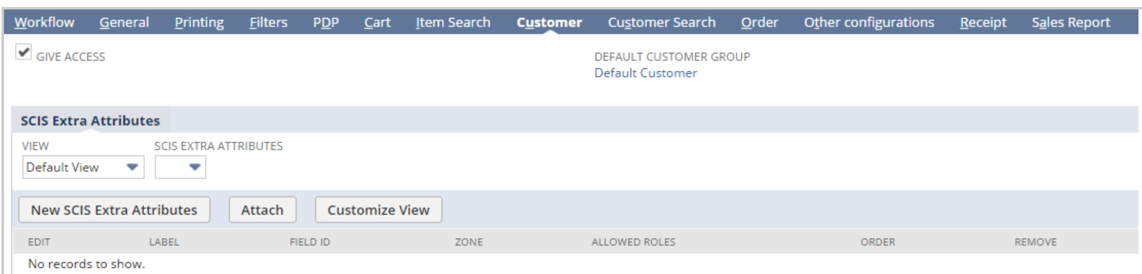
Customer Search

The following screenshot shows the zones on the customer profile where you can display custom attributes. You can use zones: (1) **Top**, or (2) **Bottom**.



SCIS Customer Settings

Use the SCIS Settings record to grant customer center access, set the default customer group, and add SCIS Custom Attributes to the Customer profile page. These settings affect new customer records created using SuiteCommerce InStore (SCIS).



- Check the **Give Access** box to grant customer center access to each customer who places an order. An email message is sent to the customer as notification that customer access has been granted.
- (Required) In the **Default Customer Group** list, select the Customer Group assigned to new customers by default. For more information about customer groups, see Configuring SCIS Customer Group.

> **Note:** If a default customer group is not selected, then sales associates are not able to use search capabilities in SCIS to find customers.

- Click **New SCIS Custom Attributes** to create additional content for display on the Customer Profiles page. For more information, read Customer Profile.

SCIS Settings for Orders

The SCIS Settings record includes settings for orders submitted using SuiteCommerce InStore (SCIS). Click the Order subtab to define the following:

- **Submit on Update** – Check this box to submit a transaction on each update. When the box is checked, AvaTax capabilities are triggered with each transaction. When the box is cleared, SCIS saves transactions in memory as orders are being created, and then commits each transaction into the system only when you click Submit.
    - If you do not use AvaTax, leave this box cleared.
    - If you are using the latest version of AvaTax, and you plan to use the Execute Client Scripts setting, leave this box cleared.

> **Note:** Checking this box can slow the performance of SCIS.

- **Charge Payments** – Check this box to ensure that credit card payments are charged. You can clear the box while you are testing your SCIS implementation on Sandbox, or while troubleshooting.
- **Signature Folder** – Enter the name of the folder in which you want to store signature images. If you have not created a folder for credit card signatures, then the folder is automatically created with the first credit card transaction that requires a signature.
- **Signature File Type** – Enter the file type you use for signature images. In most cases, enter **.png**.
- **Voided Item** – Select the item record you use to represent voided line data. This item must be a non-taxable, non-inventory item with a price of zero (0).
- **Rounding Item** – (Required if you use multiple currencies) Select the item record used to represent the rounding amount for Payment Methods that use rounding. SCIS already provides this item by default. For more information, read Setting up Currency Rounding for SCIS.
- **Search Transaction by Serial Number** – Check this box to enable the search of transactions by serial number or lot number. If this box is checked, you can find a transaction using the serial number or the lot number of an item on the transaction.

> **Note:** Using this setting may impact performance. For more information, read SCIS Settings for Improved Performance

- **Execute Client Scripts** – Enables the system to execute AvaTax integration code as Client Scripts. This setting can help improve performance in SCIS, but it can affect transactions. Leave this box cleared if you do not use AvaTax, or you use AvaTax and your account does not experience any slowness when entering or working with orders.

> **Warning:** If you check the box, it is recommended that you test on a Sandbox account and work with Professional Services to ensure your SCIS implementation continues to behave as expected. For more information, read SCIS Settings for Improved Performance

QuickAdd Bar and Forms Settings for SCIS

Use the **Other Configuration** subtab on the SCIS Settings record to define QuickAdd bar behavior and forms settings for SuiteCommerce InStore (SCIS).

QuickAdd Bar

- **Show Related Items** – Check the box to show an additional tab that displays Related Items associated with the last item on an order. You can define one or more Related Items by selecting them on item records.
- **Show Correlated Items** – Check the box to show an additional tab that displays Correlated Items associated with the last item on an order. Correlated items are items that are frequently bought together. This list is automatically generated by the system and cannot be configured.
- **Start Raised** – Check the box to show the SCIS main application screen with the QuickAdd bar expanded. When this box is cleared, the QuickAdd bar is collapsed on the main application page, and users can click the arrow to expand it.

Transaction Forms and Other Entry Forms

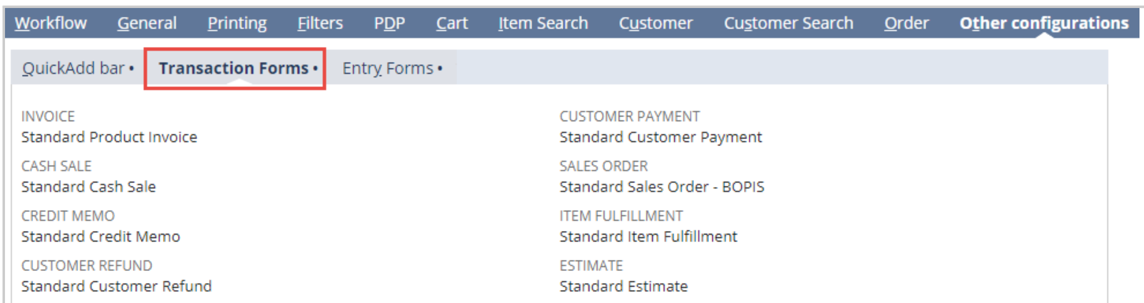
The forms you use with SCIS can impact the performance of the system. Forms that include many fields, custom fields or standard fields, may cause the system to slow down. Too many fields on a transaction form can increase the time between clicking the submit button and the data being written into the system.

> **Note:** SCIS includes forms that have been optimized for better performance. You can select one of the forms labeled **Minimal**, or customize one of the Minimal forms if needed. However, it is recommended that you test the form before you start using it in your SCIS implementation.

Transaction Forms

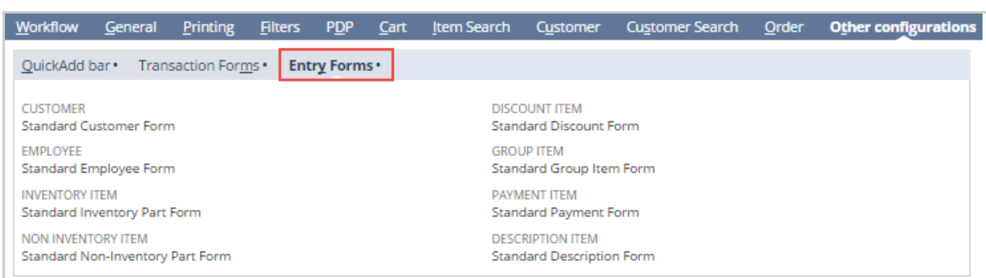
On the **Transaction Forms** subtab, select the forms you want to use for transactions submitted through SCIS. Select a form to use for each transaction.

> **Important:** The **Standard Sales Order – BOPIS** form is required for Sales Orders.



Entry Forms

On the **Entry Forms** subtab select forms you want to use for customers created with SCIS and employees logging into SCIS. Entry forms also include item record forms for products you sell with SCIS. Select a form to use for each of the entities and item types that you use with SCIS.



Receipts for SCIS

Use the SCIS Settings record to define the subject line on email receipts used for SuiteCommerce InStore (SCIS). For more information about configuring the receipts, read Advanced Receipt Templates for SCIS.

Email

Define settings in each of the following fields:

- **Order Subject** – Enter the subject line for receipts sent by email from an SCIS order.
- **Return Subject** – Enter the subject line for receipts sent by email from a return submitted through SCIS.
- **Email body** – Enter text sent in the body of an email attached to a receipt for an order or return transaction.
- **Email From** – Enter an address or an employee ID. This setting controls the from address when sending an email receipt. If you leave this field blank, then the sales associate ID is used. The email address comes from the employee record.

Preview

SCIS periodically checks the print job status. In the **Message Timeout** field, define the interval time in milliseconds when the system checks the print queue. The default setting is 5,000, or 5 seconds.

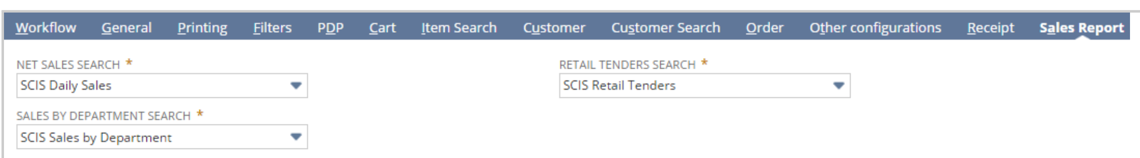
Selecting Sales Reports for SCIS

Administrators can select the sales reports they want to display in SuiteCommerce InStore (SCIS). You can use the saved searches installed by the SuiteApp, or you can use a custom saved search that you created.

> **Note:** To customize a saved search for use with SCIS, you must work from a copy of a saved search installed by the SuiteApp. For more information, read SCIS Saved Search and Reporting.

On the **Sales Report** subtab. Select an SCIS sales report search for each of the following:

- **Net Sales Search** – Select a search for displaying daily sales graph data.
- **Sales by Department Search** – Select the search you want to use for displaying total sales by department graph data.
- **Retail Tenders Search** – Select the search you want to use for displaying total sales for each payment method (except Gift Cards).



Localizing SCIS

SCIS provides localization support for Canada, Australia, New Zealand, UK, France, Germany, Italy, Japan, and Spain. This section includes setup information for localizing SCIS.

The following general capabilities are supported in SCIS:

- Currency
- Decimal precision
- Item pricing
- Taxes
- Receipts

- Cash rounding
- Address formats
- Phone formats
- Date formats

> **Note:** Set the date format at Setup > Company > General Preferences. . For OneWorld accounts, the date format is specified on the default website subsidiary record. To modify this setting, edit the subsidiary record at Setup > Company > Subsidiary, and change the date format on the Preferences subtab.

Custom Address Form Templates

In addition, SCIS supports custom address form templates. Account administrators and other users with the Custom Address Form permission can create customized versions of the address form, and assign each custom address form to one or more countries. In SCIS, the custom address forms that you create display in the customer profile, order items page, and product detail pages.

Creating custom address forms is a task associated with NetSuite customization, and not specifically with SCIS. For more information about custom address forms, see the help topic Customizing Address Forms.

Taxes and Localization

Typically, applicable taxes are displayed in the cart, checkout pages, and order confirmation. Alternately, you can set the website preference, **Prices Include Tax** to include tax in item prices displayed in SCIS.

To include tax in item prices:

1. Go to Setup > SuiteCommerce Advanced > Set Up Web Site.
2. Click Edit next to your SCIS website.
3. Click the **Shopping** subtab.
4. Check the box next to **Prices Include Tax**.
5. Click **Save**.

When this preference is set, tax is included in the price of each item. If shipping and handling also include tax, then tax is included in the cost of shipping and handling. However, a separate line for tax still displays in the SCIS transaction summary.

Read the following topics to learn how to complete localization setup:

- Setting Up SCIS for Multiple Locales
- Setting up Currency Rounding for SCIS
- Managing Multiple Languages for SCIS

Setting Up SCIS for Multiple Locales

To configure SuiteCommerce InStore (SCIS) for any locale, you must complete some general setup in NetSuite, such as entering supported currencies, and entering prices for each currency on item records. You must also configure custom SCIS records appropriately.

> **Note:** If you use Multiple Currencies in your account, an Administrator must ensure that the Currency permission exists on the SCIS Clerk role. Go to Setup > Users/Roles > Manage Roles. Click **Edit** next to **SCIS Clerk**. Click the **List** subtab, select **Currency**, and then set the permission **Level** to **View**. Click **Save**.

To assign multiple currencies to item records:

1. Setup currencies in NetSuite. Follow general NetSuite setup instructions. For more information see, Setting Up Multiple Currencies.
2. Enter currency prices on item records.

   > **Note:** If you use multiple currencies, you must enter prices in your base currency in addition to other currencies you support.

   a. Go to Lists > Accounting > Items.
   b. Click **Edit** next to the item record you want to update.
   c. Click the **Sales/Pricing** subtab.
   d. Enter prices for additional currencies.
   e. Click **Save**.

To create new SCIS custom records for certain locales:

Follow these steps to create a new SCIS custom record as needed for each locale.

1. To create a new custom record, go to Customization > Lists, Records, & Fields > Record Types.
2. Find the record type in the list.
3. Click **New Record**.
4. (Required) On the **Filters** subtab, select the appropriate Location, Website, and Subsidiary for each record.
5. Make sure employee records have the same subsidiary and location as the SCIS website that supports a particular locale. Go to Lists > Employees to view employee records and verify Subsidiary and Location settings. For more information, see Configuring Employee Records for SCIS.

Configuring SCIS Custom Records for Multiple Locales

It is important to ensure that the proper locations and subsidiaries are selected for each SCIS custom record. In some cases, you must create a new record to define settings for a particular locale. Ensure that the proper locations and subsidiaries are selected for each of the following SCIS custom records:

- **SCIS Settings** – Required for the following settings per locale:
  - Discounts
  - Shipping
  - Saved searches
  - Logo and background images
  - Settings for printing
  - Custom attributes
  - Customer settings
  - Settings for orders

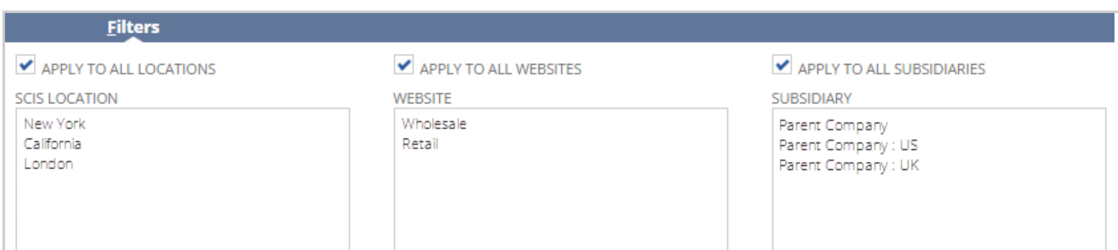
    - QuickAdd bar
    - Transaction forms
    - Entry forms
    - Settings for email receipts
    - Sales reports

    > **Note:** You may need to create a new SCIS Settings record for certain settings that apply to a particular website, location, and subsidiary.

- **SCIS Quick Cash Denominations** – Required to support various currency denominations. There should be an SCIS Quick Cash Denomination record to reflect denominations for each currency in which you transact.
- **SCIS Permission** – Required for SCIS Clerk to access items. Ensure that you select the appropriate locations and subsidiaries on the Filters subtab.
- **SCIS Payment Method** – Required for payment methods that are only valid for a particular locale. There should be an SCIS Payment Method record to reflect payment methods that apply to each currency in which you transact.
- **SCIS QuickAdd Group** – Required for grouping items by locale. Ensure that you select the appropriate locations and subsidiaries on the Filters subtab.
- **SCIS QuickAdd Key** – Required for items to display correct currency symbol and price. Ensure that you select the appropriate locations and subsidiaries on the Filters subtab.
- **SCIS Discount Reasons** – Required to create a custom discount for subsidiary, website, and location. Ensure that you select the appropriate locations and subsidiaries on the Filters subtab.
- **SCIS Return Reason** – Required so that return reasons can be filtered by subsidiary, website, and location. Ensure that you select the appropriate locations and subsidiaries on the Filters subtab.

Setting Filters on Custom Records

Click the **Filters** subtab on each custom record to select your settings.



Select a value for each filter that corresponds with the locale you want to support in SCIS. For example, if the SCIS Retail website, under the UK subsidiary in London supports the British Pound, then you would select **London** for **SCIS Location**, **Retail** for **Website**, and **Parent Company : UK** for **Subsidiary**. If you do not want to setup specific localizations, then check the **Apply to All** boxes.

> **Note:** By default, the Filters are set to apply to all locations, websites, and subsidiaries.

Setting up Currency Rounding for SCIS

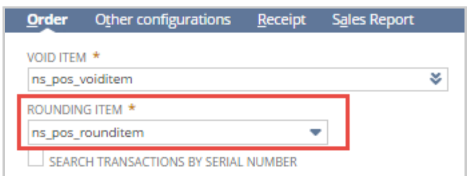
SCIS can round the total order amount (up or down) to the nearest currency value for a particular locale. In this way, SCIS manages decimal precision effectively.

First, you must select the rounding item on the SCIS Settings record. Then, select a rounding setting on the **SCIS Payment Method** records you use for cash and for custom payment methods.

> **Note:** Rounding only applies to cash transactions and custom payments. After you complete the setup tasks, currency rounding is applied to the total amount of every cash payment or custom payment method, and refund involving a cash payment or custom payment method.

To set up currency rounding:

1. Go to Customization > Lists, Records, & Fields.
2. Scroll to **SCIS Settings**, and then click **List** in that row.
3. Click **Edit** to modify an existing record.
4. Click the **Order** subtab.
5. Select the Rounding Item installed by the SuiteCommerce InStore SuiteApp. It is named, **ns_pos_rounditem**

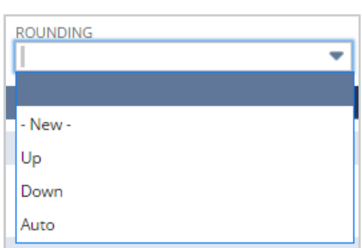


6. Click **Save**.
7. Edit the **CustomConfiguration.js** file.

   Add IDs for the tax groups you want to use for calculating tax on transactions where rounding was applied. Set the applicable zero percent tax groups for rounding. (Replace 0 with the ID for the applicable tax groups in your account.)

```
,   nonTaxableTaxCodes: {
      US: 0
    ,   CA: 0
    ,   AU: 0
    ,   NZ: 0
    ,   GB: 0
,   SP: 0
,   DE: 0
,   FR: 0
```

8. Set the **Rounding** field on **SCIS Payment Method** records.
   a. Go to Customization > Lists, Records, & Fields.
   b. Scroll to **SCIS Settings**, and then click **List** in that row.
   c. Set rounding on cash payment methods and custom payment methods.



Cash amounts are rounded up or down according to the smallest SCIS quick cash denomination, according to the currency in your locale and your settings. Select from the following options:

- **Round up** – Select this option to always round up to the nearest Quick Cash Denomination.
- **Round down** – Select this option to always round down to the nearest Quick Cash Denomination.
- **Auto** – Select this option to round up or down to the nearest Quick Cash Denomination based on the number. For example, if the smallest Quick Cash Denomination is 0.5, then:
  - An order subtotal of 10.1 rounds to 10.0
  - An order subtotal of 10.4 rounds to 10.5
- Select the blank option, if you do not want to enable rounding for that payment method.

9. On the **Filters** subtab, select filters for Location, Website, and Subsidiary.

   > **Note:** By default, the filters are set to apply to all locations, websites, and subsidiaries.

10. Click **Save**.

To view a list of SCIS installation tasks, see SuiteCommerce InStore Installation.

Managing Multiple Languages for SCIS

Administrators can setup SCIS to support multiple languages. This is useful if you use SCIS in multiple retail locations where sales associates speak different languages. Sales associates can select the language of their choice in the User Menu. First enable the Multi-Language feature in your NetSuite account, select languages in NetSuite, and then select them on your SCIS website.

To setup SCIS to support multiple languages:

1. Ensure that the **Multi-Language** feature is enabled at Setup > Company > Enable Features.
2. Enable the languages that you want to show in SCIS. Do this in your NetSuite account first. Go to Setup > Company > General Preferences. On the languages subtab, select the languages you want to show in SCIS.
3. Select the languages on the SCIS website. Go to Setup > SuiteCommerce Advanced > Set Up Web Site.
   a. Click **Edit** next to your SCIS website.
   b. Click the **Shopping** subtab.

      At the bottom of the page, click **Languages**. Mark the languages you want available online. Sales associates will be able to choose these languages in the SCIS User menu.
4. Click **Save**.

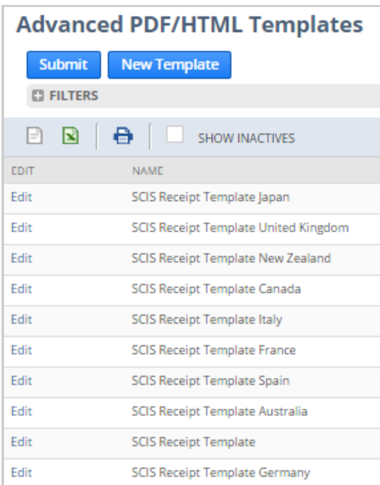
SuiteCommerce InStore installs a language folder in the file cabinet which includes translations for UI strings. The folder contains a set of JavaScript files—one for each language supported in SCIS.

You can make changes to any of these JavaScript files to change the translation for a particular term. Note, however that the languages folder is updated and each file is overwritten periodically, with each e-fix and major release to the managed SuiteApp. If you make changes to one of the language files, save a copy of the modified file on your computer. After a scheduled release, you can upload your modified file to reapply your customization.

> **Important:** If you make changes to one of the JavaScript files in the Languages folder, download and save the modified file on your computer. After a managed SuiteApp update, all files in the languages folder are overwritten. After an update, you must upload your modified file to reapply your customization.

Advanced Receipt Templates for SCIS

SCIS supports the Advanced PDF/HTML Templates feature in NetSuite for customizing receipts. You can use SCIS Receipt Templates to create your own receipts for print and email. The SuiteCommerce InStore SuiteApp installs a set of receipt templates.



Creating Custom Receipt Templates

To create a custom receipt template, you must make a copy of the template you want to use, and then make changes to the copy. It is recommended not to use the default receipt templates in everyday business. Because, SCIS is a managed SuiteApp, any changes to the default templates will be overwritten by future updates to the SuiteApp. For more information read, Customizing a Receipt Template for SCIS.

> **Important:** Do not modify any of the receipt templates that are installed by default. Because SuiteCommerce InStore is a managed SuiteApp, your changes to the templates will be overwritten by automatic updates to the SuiteApp.

Creating SCIS Receipt Template Custom Records

You must create an **SCIS Receipt Template** custom record for each receipt template you use with SCIS. For example, if you want to create different receipts for different locations, you must create a custom record to define the location where each receipt template is available. For more information, see Creating SCIS Receipt Template Records

Customizing a Receipt Template for SCIS

To customize one of receipt templates installed by the SuiteCommerce InStore SuiteApp, make a copy. After you make a copy of the receipt template, you can modify your copy to fit your particular business needs.

To make a copy of the SCIS Receipt Template:

1. Ensure that you have enabled the advanced templates feature in your NetSuite account.
   a. Go to Setup > Company > Setup Tasks > Enable Features.
   b. Click the **SuiteCloud** tab.
   c. Under SuiteBuilder, check the **Advanced PDF/HTML Templates** box.
   d. Click **Save**.
2. Go to Customization > Forms > Advanced PDF/HTML Templates.
3. Find the **SCIS Receipt Template** you want to modify.
4. Make a copy of the SCIS Receipt Template.
   a. Click **Edit**.
   b. Click **Template Setup**, and then enter a name for the copy.
   c. Click **Save** in Template Setup.
   d. Click **Save As** in the Advanced Template window.

After you have created your own receipt template, you can make changes as needed. For example, you may want to include custom fields on the print or email receipt. For more information about adding custom fields, read Adding Fields to Custom SCIS Receipt Templates. See also, JSON Object Data for SCIS Receipt Templates

Next, you must create an SCIS Receipt Template custom record to make your copy available in SCIS. For more information, read Creating SCIS Receipt Template Records.

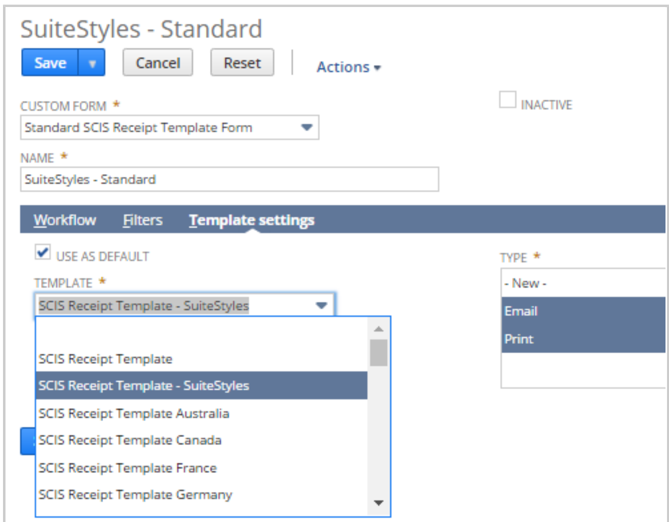
Creating SCIS Receipt Template Records

After you have customized receipt templates for use in SuiteCommerce InStore, create an SCIS Receipt Template custom record for each receipt template. The custom records enable sales associates to select your custom receipt templates in SCIS.

To make your receipt template available in SCIS:

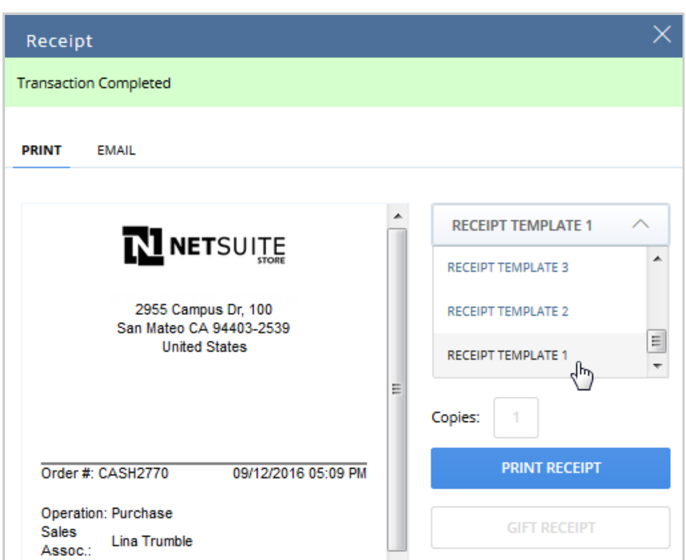
1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find **SCIS Receipt Template** in the list, and then click **List** in that same row.
3. Click **New SCIS Receipt Template**.
4. In the **Custom Form** list, select Standard or Custom SCIS Receipt Template.
5. Enter a **Name** for the receipt template. This is the name that is displayed in SCIS.
6. On the **Filters** subtab, select the location, website, and subsidiary where this template will be applied. If you do not want to make specific selections, check the **Apply to All** boxes.
7. On the **Template Settings** subtab, set the following:
   - **Use as Default** – (Optional) Check this box to set the template you select for printed receipts to show in the following scenarios:
     - When a transaction is submitted (also applies when auto-print is enabled).

    - When a transaction is about to be suspended.
    - When a transaction is searched and the receipt is shown.
    - When a quote is generated.
- **Type** – (Required) Select a type of template. You can choose to apply a template to receipts sent by email, apply it to printed receipts, or to both print and email. If you apply the same template to both print and email, then the sales associate can choose a receipt type when completing the transaction.
- **Select a Template** – (Required) Select the copy of the SCIS receipt template that you created.



8. Click **Save**.

When you create multiple SCIS Receipt Template custom records, sales associates can select the appropriate receipt template on completing the transaction. The screenshot below shows a list of available receipt templates in the right pane. To select a receipt template for the order, the sales associate clicks an option in the list. The text and layout of the selected receipt displays in the left pane. Because the selected receipt template is available for both print and email, the sales associate can also choose the type of receipt at the top.



> **Note:** The Print Receipt button is only displayed on tablets running SCIS for iOS or SCIS for Windows.

Adding Fields to Custom SCIS Receipt Templates

You can add transaction fields to the receipt templates you use in SuiteCommerce InStore (SCIS). To add a field that does not already appear on a receipt, you must first modify the CustomConfiguration.js file. Next, modify your custom receipt template, adding the field to the receipt template code.

To add a field to a receipt template:

1. Modify the CustomConfiguration.js file. Add the following code snippet, including the field you want to add inside the corresponding array. You can add more than one field to your custom receipt template. Note the following example, which includes various fields added for display on the receipt template:

   ```
   // Add custom fields to show in receipt
   customMappingFields: {
   //Define extra fields in the order
   order: ['ismultishipto'],
   //Define extra fields in the creditmemo
   creditMemo: ['billcountry'],
   //Define extra fields in the lines of the order
   line: ['itemtype'],
   //Define extra fields in the lines of the creditmemo
   creditMemoline: ['printitems']
   },
   ```

   > **Note:** All field types are supported except fields of type Select.

   View the **SuiteScript Records Browser** to see a complete list of the fields you can add to each array. Note the following:

   - For `order`, the supported fields are listed in the SuiteScript records browser, under Cash Sale. Only objects listed under Fields are supported.
   - For `creditMemo`, the supported fields are listed in the SuiteScript records browser, under Credit Memo. Only objects listed under Fields are supported.
   - For `line`, the supported fields are listed in the SuiteScript records browser, under Cash Sale. Only objects listed under item-Items are supported.
   - For `creditMemoLine`, the supported fields are listed in the SuiteScript records browser, under Credit Memo. Only objects listed under item-Items are supported. Also note that only and/or operations are supported.
   - A custom field can be placed in any of the following arrays: `order`, `creditMemo`, `line`, or `creditMemoLine`.
2. Save your changes to the CustomConfiguration.js file.
3. Modify your custom SCIS Receipt Template.
   a. Go to Customization > Forms > Advanced PDF/HTML Templates.
   b. Click **Edit** next to the custom SCIS Receipt Template you want to modify.

> **Important:** Do not modify the default SCIS Receipt Templates, because these templates may be overwritten during periodic SuiteApp updates.

c. Add lines to the receipt template code to display additional fields. Refer to the following examples:

```
//Show an additional field on the order
Multiship: ${JSON.customExtraFields.ismultishipto}

//Show an additional field on the creditmemo
Country: ${JSON.creditmemo.customExtraFields.billcountry}

//Show an additional field on the line
<#list JSON.lines as line>
              Type: ${line.customExtraFields.itemtype}
</#list>
```

For more information, read JSON Object Field Mapping.

4. Go to Customization > Lists, Records, & Fields > Record Types.
5. Find **SCIS Receipt Templates** in the list, and click **New Record**.
6. Create a new SCIS Receipt Template with the new custom template selected.
7. Click **Save**.

JSON Object Field Mapping

To generate the receipt template, SCIS includes logic that gets data from a global JSON object. The following bulleted list provides a high-level description of the structure. Use the following information as a guide to get the fields you require:

- creditmemo (object)
  - lines (array)
    - customExtraFields (array)

      If you want to get a field that you defined in the `creditMemoline` array, you can get that field from the `creditmemo` object (in the `lines` array, in `customExtraFields` .)
  - customExtraFields (array)

    If you want to get a field that you defined in the `creditMemo` array, you can get that field from the `customExtraFields` array, in the `creditmemo` object.
- customExtraFields (array)

  If you want to get a field that you defined in the `order` array, you need to get that field from the **customExtraFields** array.
- lines (array)
  - customExtraFields (array)

    If you want to get a field that you defined on the `line` array, you need to get that field from the `customExtraFields` array in the `lines` array.

JSON Object Data for SCIS Receipt Templates

The following tables describe the global JSON object included in receipt templates, as well as other objects included in the global object. For your convenience, some fields are exposed here that you can also access through the existing SuiteScript API.

Object Name	Object Type	Description
createddate	String	Date that was created the order. Format MM/DD/YYYY HH:mm
creditmemo	JSON object	Order summary information, such as total amount, discounts, and tax amount and lines of a credit memo
customer	JSON object	Customer assigned to the order.
customExtraFields	JSON object	Additional fields on the custom receipt template form. For more information, read JSON Object Field Mapping.
includeTaxInPrices	Boolean	Flag to indicate when the prices have tax included.
internalid	String	Internal ID for the transaction record.
labels	JSON object	Translated text that appears in the default template.
lines	Array of objects	Lines added to the order, each line contain an item.
line	JSON object	Contains information about each line item on an order.
location	JSON object	Current location from the employee. Location information from the employee record.
operation	String	Type of order. Possible values ["Suspend" | "Exchange" | "Return" | "Purchase"]
payments	Array of objects	Payments made to the order.
payment	JSON object	Contains information about the payment associated with the order.
posStatus	String	Status of the order, mapped from the POS Status field. A numeric ID is displayed for each status value: ■ 1 - Open ■ 2 - Tendering ■ 3 - Closed ■ 4 - Suspended ■ 5 - Canceled ■ 6 - partially returned ■ 7 - returned ■ 8 - tendering and suspended
receiptType	String	Possible value ["purchase"].
recordtype	String	Contains the transaction record type. Possible values are, ["cashsale" | "invoice" | "creditmemo"].
returnType	String	Contains the type of return transaction. Possible values are ["unvalidated" | "validated"].

Object Name	Object Type	Description
salesassoc	JSON object	Sales associate assigned to the order.
status	String	Contains the status of the order transaction. Possible values ["open" | "paidInFull"].
subsidiary	JSON object	Subsidiary assigned to the employee record.
summary	JSON object	Order summary information, such as total amount, discounts, and tax amount.
taxes	Array of objects	Contains an array of tax Objects grouped by rate, it is added to the order summary and `creditmemo` summary.
tax	JSON object	Contains information about the tax charged on an order.
templateId	String	Internal ID of the receipt template record.
urlLogo	String	URL for company logo.

creditmemo

This object only exists if the recordtype is invoice.

Object Name	Object Type	Description
customer	JSON object	Customer assigned to the credit memo.
customExtraFields	JSON object	Additional fields on the custom receipt template form. For more information, read JSON Object Field Mapping.
discountitem	JSON object	Global discount applied of the creditmemo
entity	String	Customer Name as it appears in NetSuite, for example, 3832 John Smith.
internalid	String	ID for the transaction.
lines	Array of objects	Lines returned in a credit memo, each line contain an item.
posStatus	String	Status of the order, mapped from the POS Status field. A numeric ID is displayed for each status value. For more information, see JSON Object Data for SCIS Receipt Templates.
refunds	Array of objects	Refund from credit memo.
salesassoc	JSON object	Sales associate assigned to the credit memo.
salesrep	JSON object	Sales rep assigned to the credit memo.
summary	JSON object	Order summary information, such as total amount, discounts, and tax amount on the credit memo.

customer

This JSON object includes information about customer records including the default customer record used at point of sale.

Object Name	Object Type	Description
email	String	Customer email address.
entityid	String	Default customer record. This includes the following: ID, name of customer, name of employee and subsidiary in parentheses. For example, 11 Default Customer (Jane Smith, Parent Company).
internalid	Number	Customer record internal ID.
isdefault	Boolean	Returns true if this is a default customer record.
isinactive	Boolean	Returns true if this customer record is marked inactive.
isperson	Boolean	Returns true if this customer record is an individual as opposed to a company.
name	String	Name, if the customer is an individual. If the customer is a company, this is the company name.

labels

This JSON object contains labels from the default template.

Object Name	Object Type	English Translated Text
change	String	"Change"
customer	String	"Customer"
discount	String	"Discount"
giftcards	JSON object	
▪ giftcard	String	"Giftcard"
▪ giftcertnumber	String	"Gift Certificate Number"
handlingCost	String	"Handling Cost"
operation	String	"Operation"
payments	JSON object	
▪ authcode	String	"Autorization Code"
▪ ccexpiredate	String	"CC Expiration"
▪ ccname	String	"Name"
▪ ccnumber	String	"CC Number"
refunds	JSON object	
▪ checknum	String	"Checknum"
▪ refund	String	"Refund"
returnDiscount	String	"Returned Items Discount"
returnSubtotal	String	"Returned Items Subtotal"
returnTax1	String	"Returned Tax" or "Returned GST/HST"
returnTax2	String	"Returned PST"

Object Name	Object Type	English Translated Text
returnTotal	String	"Returned Item TOTAL"
salesAssoc	String	"Sales Assoc."
salesRep	String	"Sales Rep."
shippingCost	String	"Shipping Cost"
subtotal	String	"Subtotal"
tax1	String	"GST/HST"
tax2	String	"PST"
thanks	String	"Thanks for coming!"
total	String	"TOTAL"

lines

This is an array of line objects added to the order. JSON format is the same as `creditmemo.lines`.

line

This JSON object contains information about each line item on an order.

Object Name	Object Type	Description
amount	String	Amount on the line item.
customExtraFields	String	Additional fields on the custom receipt template form. For more information, read JSON Object Field Mapping.
item	JSON object	Describes the line item.
■ displayname	String	Item display name.
■ internalid	String	Item ID of the item record.
■ isVoid	Boolean	Defines the void item.
■ itemType	String	Defines the type of item.
■ thumbnail	String	Defines the thumbnail image.
■ voidqty	Number	Stores the original quantity of the line, if the line is voided from the order.
■ price	Number	Defines the item price.
line	Number	Defines the line item.
order	String	True if the line was marked as an order, or False if the line is a cash sale.
quantity	String	Quantity on the item line.
tax_code	String	Contains the internal ID of the tax code associated with this line, for example if the item is Not Taxable it shows -7 or -8.

location

This object contains information about the location associated with the transaction.

Object Name	Object Type	Description
address	String	SCIS location where the transaction occurred.
city	String	City where the transaction occurred.
country	String	Country where the transaction occurred.
custrecord_ns_pos_location_diffaccount	String	Difference account associated with the sales associate on the order.
custrecord_ns_pos_location_safeaccount	String	Safe account (or initial loan) associated with the sales associate on the order.
custrecord_ns_pos_servicehours	String	Service hours for the SCIS location.
internalid	String	ID for the location record associated with the transaction.
name	String	Name of the location associated with the transaction.
state	String	State from the location record associated with the transaction.
zip	String	Postal code from the location record associated with the transaction.

payments

This is an array of Payment objects.

payment

This object contains information about the payment associated with the order.

Object Name	Object Type	Description
changeDue	String	Change due after cash payment on the order.
internalid	String	Internal ID of the payment method.
paymentmethod	String	Contains the ID of the payment method record from the Accounting List. (Setup > Accounting > Accounting Lists.)
paymentmethodname	String	Name of the payment method associated with the transaction.
total	String	Contains the total of each payment made on the order.
totalTendered	String	Total amount paid.

salesassoc

This object contains information about the sales associate on the order.

Object Name	Object Type	Description
id	String	Internal ID from the employee record of the sales associate.
name	String	Name of the employee.

subsidiary

This object contains information about the subsidiary associated with a transaction. This is applicable for accounts using OneWorld.

Object Name	Object Type	Description
legalname	String	Subsidiary legal name.
tin	Boolean	Taxpayer Identification Number.

summary

This object contains information from the order summary section of an order.

Object Name	Object Type	Description
amountdue	Number	Amount due on the order.
changedue	String	Change due after cash payment on the order.
createddate	String	Date the order was created.
discounttotal	String	Total discount applied to the order.
giftcertapplied	String	Gift certificate applied to the order.
handlingcost	String	Handling cost applied to the order, if applicable.
shippingcostoverriden	String	Contains a value related to the Shipping cost activation/deactivation in SCIS (sidebar). If you changed the shipping cost to zero, the value is T. If shipping cost was not modified it shows F.
subtotal	String	Subtotal of the order.
taxes	Array of objects	Contains a list of taxes grouped by rate
taxtotal	String	Total tax charged on the order.
tax2total	String	If multiple taxes were applied, then this shows the other tax amount. For example if both GST and PST tax is incurred.
total	String	Total amount of the order.
tranid	String	Transaction ID of the order.

taxes

This object contains an array of tax objects grouped by rate, it is added to the order summary and creditmemo summary.

tax

This object contains information about the tax charged on an order.

Object Name	Object Type	Description
amount	Number	Amount of tax on the order.
amountCharged	Number	When the tax applied to the order is a Tax Group, the amount charged is the total amount of the order (taxes not included).
fromTax	String	Describes the number of the tax which belongs to a tax groups. It can be tax1 or tax2. This value is used internally.
rate	Number	Describes the tax that was applied in the line. Examples tax1 or tax2.

Configuring SCIS Payment Methods

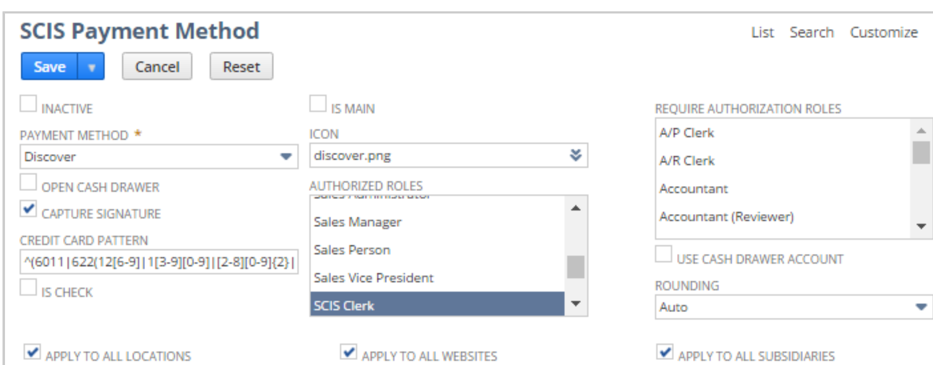
SuiteCommerce InStore (SCIS) uses payment methods configured in your NetSuite account. The SCIS Payment Methods custom record makes payment methods that you have already configured in NetSuite available for SCIS. Before you configure the custom record for SCIS, you must create a payment method in NetSuite. For step-by-step instructions, read the help topic Creating a Payment Method.

SCIS Payment Method Records

Each SCIS Payment Method requires at least one authorized role. Administrators can configure payment methods and set authorized roles. You must configure an SCIS Payment Method record for each payment method you want to use with SCIS. At minimum, create one SCIS payment record for each type of credit card you plan to use, and an SCIS payment record for cash.

To configure SCIS Payment Method records:

1. Create a payment method in NetSuite. The SCIS Payment Method is associated with the payment method in NetSuite. For more information read, Creating a Payment Method.
2. Go to Customization > Lists, Records, & Fields > Record Types > SCIS Payment Methods > List.
3. Click **New SCIS Payment Method**.



4. Configure the required fields described below. All other fields are optional based on the intended behavior of the payment method.
   - **Payment Method** – (Required) Select the payment method you want to use with SCIS.
   - **Open Cash Drawer** – Specifies that the cash drawer should be opened when using this payment type.
   - **Capture Signature** – Indicates that a customer signature is required when using this payment method.

- **Credit Card Pattern** – Defines the appropriate credit card pattern, if this payment method represents a credit card type. For more information, read Credit Card Patterns for SCIS.
- **Is Check** – Prompts for a check number when using this payment method.
- **Is Main** – Check this box to show the payment method in the list on the transaction summary pane of the SCIS main screen.
- **Icon** – Defines the appropriate credit card icon, if this payment method represents a credit card type. For more information, read Credit Card Icons.
- **Authorized Roles** – (Required) Defines the roles authorized to submit transactions with this payment method. You must select at least one Authorized Role for the payment method to show in SCIS. See also, Role-Based Payment Methods

  > **Note:** Employees with authorized roles must have a SCIS Access Code on their employee records. For more information, see Configuring Employee Records for SCIS.

- **Require Authorization Roles** – Defines roles that require additional authorization to submit a transaction with this payment method.
- **Use Cash Drawer Account** – Check this box to use the cash drawer account associated with the SCIS Clerk.
- **Rounding** – This setting is used for currency rounding in NetSuite accounts that use multiple currencies. Set rounding on cash payment methods and custom payment methods. Cash amounts are rounded up or down according to the smallest SCIS quick cash denomination, according to the currency in your locale and your settings. Select from the following options:
  - Select the blank option, if you do not want to enable rounding for that payment method.
  - **Round up** – Select this option to always round up to the nearest Quick Cash Denomination.
  - **Round down** – Select this option to always round down to the nearest Quick Cash Denomination.
  - **Auto** – Select this option to round up or down to the nearest Quick Cash Denomination based on the number. For example, if the smallest Quick Cash Denomination is 0.5, then: An order subtotal of 10.1 rounds to 10.0, An order subtotal of 10.4 rounds to 10.5.

5. Select the **Location**, **Website**, and **Subsidiary** where you want the payment method to be available. You can select more than one value in each box. Check the **Apply to All** boxes if you want to enable the payment method to all locations, SCIS websites, or subsidiaries. See also, Location-Based Payment Methods.

   > **Note:** By default, the filters are set to apply to all locations, websites, and subsidiaries.

6. Click **Save**.

Role-Based Payment Methods

Setting an authorized role enables employees with the authorized role to accept payment with the SCIS Payment Method. For example, you may not want checks accepted as payment for purchases made through SCIS. In this case, you would select Administrator as the only Authorized Role for that payment method. With this configuration, Check is not available to sales associates using SCIS.

Location-Based Payment Methods

Selecting a location on a payment method enables you to configure different locations for payment methods. For example, if you want to make a certain credit card available as a payment method for sales associates to use at a retail location in California, you can select California as the location on the payment method. You must also select the sales associate's role as the Authorized Role on the payment method.

Typically, multiple payment methods are available to most sales associates. The following order of precedence determines the payment methods available:

1. **Location Specific** – used when the location is defined.
2. **General** – used when neither a Requires Authorization role nor location are defined.

You can view a list of all transactions submitted with SCIS. The list includes the person with the authorized role. For more information, see SCIS Audit Log.

Credit Card Patterns for SCIS

Credit card patterns are regular expressions that are used to match a credit card number with its provider. SuiteCommerce InStore (SCIS) uses these regular expression in the following contexts:

- To associate a credit card number or provider with a specific payment type.
- To verify a credit card number when a sales associate manually enters credit card information.

To configure the credit card pattern:

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find **SCIS Payment Methods** in the list, and then click **List** in the same row.
3. Click **Edit** next to the SCIS Payment Method custom record that corresponds with a credit card.
4. In the **Credit Card Pattern** field, copy and paste the pattern that corresponds with the credit card provider. Use the table below to find the appropriate pattern.
5. Click **Save**.

To configure the credit card pattern, edit the corresponding SCIS Payment Method. For more information, see Configuring SCIS Payment Methods. The following table lists the credit card patterns for each provider.

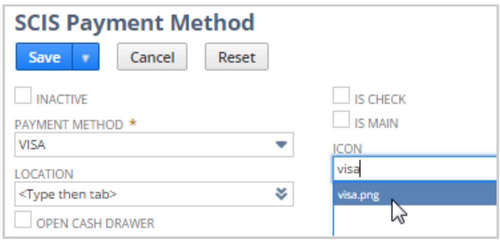
Provider	Pattern
VISA	^4[0-9]{12}(?:[0-9]{3})?$
MasterCard	^(?:5[1-5][0-9]{2}|222[1-9]|22[3-9][0-9]|2[3-6][0-9]{2}|27[01][0-9]|2720)[0-9]{12}$
American Express	^3[47][0-9]{13}$
Diners	^3(?:0[0-5]|[68][0-9])[0-9]{11}$
Discover	^6(?:011|5[0-9]{2})[0-9]{12}$
JCB	^(?:2131|1800|35\d{3})\d{11}$

Credit Card Icons

For each credit card type, you can assign an icon to each credit card provider. SuiteCommerce InStore (SCIS) installs a set of credit card icons in the file cabinet. To assign an icon to a credit card payment method, edit the corresponding SCIS Payment Method custom record. For more information, see Configuring SCIS Payment Methods.

To assign an icon to a credit card payment method:

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find **SCIS Payment Methods** in the list, and then click **List** in the same row.
3. Click **Edit** next to the SCIS Payment Method custom record that corresponds with a credit card.
4. In the **Icon** field, start typing the file name of the icon you want to use, and then select the appropriate credit card icon.



5. Click **Save**.

The following table lists the name of the icon associated with each provider.

Provider	Filename
Visa	visa.png
Master Card	master.png
American Express	american.png
Diners	diners.png
Discover	discover.png
JCB	jcb.png

Setting Up Payment Services for SCIS

SuiteCommerce InStore (SCIS) supports a variety of in-person payment types including Apple Pay, EMV, Android Pay, Samsung Pay, and PIN Debit. Support for specific payment types and hardware devices depends on the Payment Service Provider that you choose to work with.

To configure payment services for SCIS, you must establish a merchant account with a PSP that provides a SuiteApp for installation in your NetSuite account. You must also create a payment processing profile and payment method in NetSuite, and then configure related SCIS custom records.

Note: The procedures in the following topics must be performed during the initial installation and configuration of SuiteCommerce InStore (SCIS).

Read the following topics for more information:

- Configuring SCIS Gateway Records
- Configuring EMV Payment Services for SCIS
- Configuring SCIS Payment Methods

Note: Before you start to configure any payment service for SCIS, you must establish a merchant account with a Payment Service Provider outside of NetSuite.

Configuring SCIS Gateway Records

Before creating an SCIS Gateway record, you must have already created a payment processing profile in NetSuite for a particular payment services provider. For more information on creating payment processing profiles, see the help topic Setting Up Credit Card Processing Profiles in NetSuite.

The SuiteCommerce InStore SuiteApp installs the SCIS Gateway custom record type. This custom record enables you to use payment processing profiles in SCIS. By configuring SCIS Gateway records, you define location information for each payment processing profile.

To configure the SCIS Gateway custom record:

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find **SCIS Gateway**, and then click **List** in that row.
3. Click **New SCIS Gateway**.
4. In the **Name** field, enter a name for the SCIS Gateway. You may consider a name that includes the payment processing profile name.
5. Select a **Location** from the list. The SCIS Gateway will be available for the location you choose.
6. Select a payment processing profile from the **Gateway** list.
7. Click **Save**.

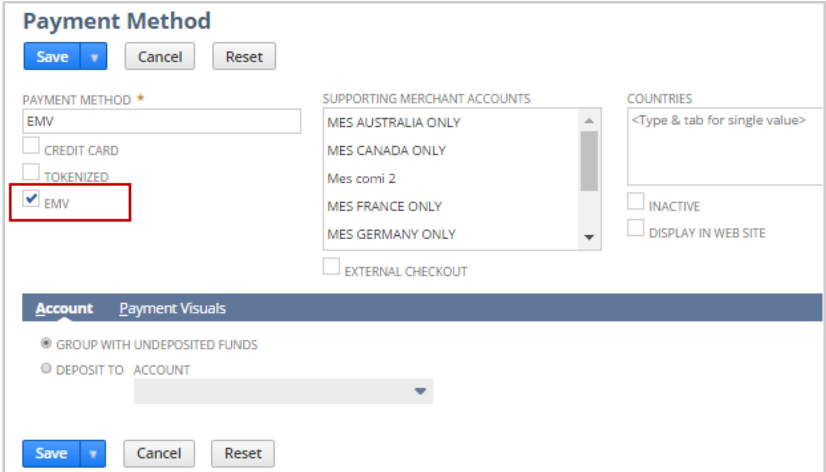
It is important to define the location where certain payment services are available, especially if you use international payment services for some locations. After you have configured SCIS Gateway records, then you can define SCIS Payment Method records.

Configuring EMV Payment Services for SCIS

EMV is the standard for chip card technology. SuiteCommerce InStore (SCIS) supports in-store technology used for processing payments made with smart-chip cards. To configure support for EMV, you must first install a SuiteApp distributed by a Payment Service Provider (PSP) that supports integration with NetSuite. Next, create a payment processing profile and payment method in NetSuite, and then configure related SCIS custom records.

To configure EMV payment services for SCIS:

1. Go to Setup > Accounting > Accounting Preferences.
2. Click the **Items/Transactions** subtab. Check the following boxes under **Payment Processing**:
   - **Use Strict Rules for the Selection of Payment Processing Profiles**.
   - **Preserve Transactions When Payment is On Hold**.
3. Install the Moneris EMV Payment Processing SuiteApp, bundle ID 122131.
4. Create a Payment Method in NetSuite flagged as EMV.
   a. Go to Setup > Accounting > Accounting Lists.
   b. Create a new **Payment Method**. Name it for the payment processing solution you plan to use.



   c. Check the **EMV** box.
   d. Click **Save**.
5. Set up a payment processing profile in NetSuite for your Payment Service Provider. Go to Setup > Accounting > Payment Processing Profiles.
   a. In the **Primary** section, complete the information as appropriate.
   b. In the **Authentication Credentials** section, enter the account information provided by the payment service provider.
   c. Under **Payment Information**, select the payment methods you want to process with this profile.
   d. In the **Gateway Request Types** section, select the requests this profile supports.
6. Create an SCIS Payment Method custom record.
   a. Go to Customization > Record Types > SCIS Payment Method > List.
   b. Click **New SCIS Payment Method**.
   c. In the **Payment Method** field, select the EMV payment method you created in Step 3.
   d. Check the **Is Main** box.
   e. Complete other fields on this page as needed. For more information on creating SCIS payment methods, see SCIS Payment Method Records.
   f. Click **Save**.
7. Define SCIS Payment Devices. This custom record identifies the device you plan to use to process the EMV payment type.

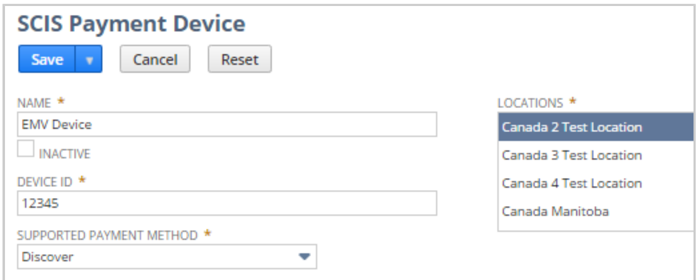
After an administrator has configured all the components above to support EMV transactions, a new button appears in the Transaction Summary area on the main SCIS screen. The sales associate clicks this button to process orders paid with a smart-chip card. If you have configured multiple EMV devices, they can be selected from a list that displays after the EMV button is clicked. If the customer’s signature is required, it is applied to the receipt and saved on the transaction record in NetSuite.

SCIS Payment Device Custom Records

After you have completed setting up EMV payment services, you must configure payment devices in SCIS for use with EMV. Define each device by configuring an **SCIS Payment Device** record. You must configure an SCIS Payment Device record to support each EMV device at each location.

To configure an SCIS Payment Device:

1. Go to Customization > Record Types > SCIS Payment Device > List.
2. Click **New SCIS Payment Device**.

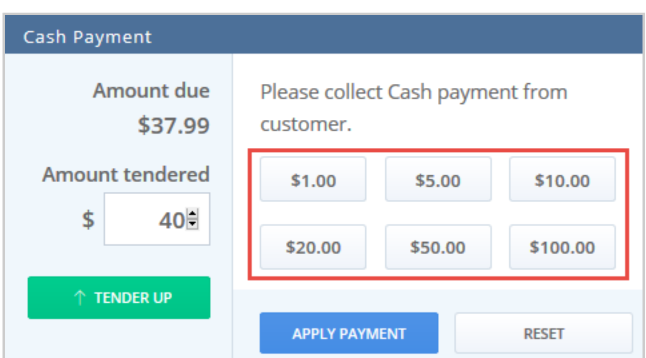


3. In the **Name** field, enter a name for the device. Enter a name that you can use to identify the device, for example, Device–1234.
4. Enter the **Device ID.** This value is commonly an IP or an unique value the payment processor uses to communicate with the device.
5. In the **Supported Payment Method** list, select the EMV payment method supported on the device.
6. Select the **Locations** that can use this payment device. You can select one or more options in the list.
7. Click **Save**.

After you have configured the SCIS payment device record, test the device. When the sales associate chooses a particular payment method in SCIS, a popup list shows the payment devices that have been configured. The sales associate then selects a payment device to continue.

Modifying Cash Payment Denominations

Administrators create cash payment denominations using SCIS custom records so that sales associates can enter the cash amount provided by the customer at point of sale. Create SCIS Quick Cash Denomination records to reflect cash denominations commonly used in the currency being used in SCIS.



At the point of sale, the sales associate clicks the cash denomination to reflect the cash added to the cash drawer.

> **Note:** The following procedures must be performed during the initial installation and configuration of SuiteCommerce InStore (SCIS).

To view or modify cash payment denominations:

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find **SCIS Quick Cash Denominations** , then click **List** in that row.
3. Add or modify entries in the list:
   - Click **New SCIS Quick Cash Denominations** to add a cash denomination to the list.
   - Click **Edit** next to an existing denomination to change the name, filter settings, or delete.
4. Click the **Filters** subtab, and then select the Location, Website, and Subsidiary where you want the cash denomination to be available. You can select more than one value in each box.

   > **Note:** By default, the filters are set to apply to all locations, websites, and subsidiaries.

5. Click **Save**.

Troubleshooting SCIS Installation and Configuration

This section includes information about resolving common errors in SuiteCommerce InStore (SCIS) setup and configuration. This section also includes guidance on settings and preferences you can select to enable the best performance of your SCIS implementation.

- Troubleshooting SCIS Error Codes
- Troubleshooting SCIS Performance Issues

> **Note:** If you choose to uninstall the SuiteCommerce InStore SuiteApp, some records that were added to your NetSuite account on the first installation will remain in the system. If you choose to uninstall or remove the SuiteApp, and then install it again, you must select the option to replace the records during the latest installation process.

To view the table of installation tasks, see SuiteCommerce InStore Installation.

Troubleshooting SCIS Error Codes

Error Message	Problem/Cause	Solution
Script Execution Usage Limit Exceeded	Searches for transaction record document numbers can exceed script execution usage limits.	Go to Setup > Company > Auto-Generated Numbers. Click **Document Numbers**. You can enter a prefix for Cash Sale, Estimate, Sales Order and Invoice. In SCIS a search can occur for any of these transactions. For example, enter the prefix, “CASHSALE” for cash sale transactions.
Internal error: Must identify a region associated with this site.	The subsidiary associated with the logged–in employee is not marked as online.	Go to Setup > SuiteCommerce Advanced > Set Up Web Site. Click the Setup subtab. At the bottom of the page, mark the appropriate subsidiary online.
There's been an internal error	Items are not displayed in SCIS. GET request returns a 500 Internal Server Error.	Rebuild the Search Index. Go to Setup > SuiteCommerce Advanced > Setup Web Site. Click the Actions menu, and then select Rebuild Search Index.
	Sales associate is not able to log in. After a managed SuiteApp update, the SCIS Clerk role may be removed from the employee record.	Go to Lists > Relationships > Employees. Click Edit next to the employee record. Click the Access subtab. Reset the role on the employee record.
An nlobjSearchColumns contains an invalid column join ID, or is not in proper syntax: custrecord_ns__pl_plip_value	The Product List SuiteApp is not updated on the account.	Go to Customization > SuiteBundler > Search & Install Bundles > List. Click the Action icon to update your version of the Product List SuiteApp.
The record type [CUSTOMRECORD_NS_POS_GATEWAY] is invalid. The Credit Card Payment couldn't be processed. Please check your credit card details provided and try again	The custom record referenced in the error has been deprecated.	Go to Customization > SuiteBundler > Search & Install Bundles > List. Click the Action icon to update your version of SCIS.

<table>
<tr><th>Error Message</th><th>Problem/Cause</th><th>Solution</th></tr>
<tr><td>Invalid shippingtaxcode reference key -7 for shipaddress...</td><td>Each time an item is added to the cart, the error is shown. This is because the –Not Taxable– tax code is inactive.</td><td>To resolve the error, review the following settings:

■ Ensure the shipping items are assigned to the SCIS site.
Go to Customization > Lists, records, & Forms > Record Types. Find SCIS Settings, and then click List in that row. Edit the SCIS Location record for that location. Select SCIS Shipping Methods.

■ Set the –Not Taxable– tax code as active.
Go to Setup > Accounting > Tax Codes. Mark the Show Inactives box. Clear the inactive box next to –Not Taxable–.

■ Ensure that accounting periods have been set for the current fiscal year.
Go to Setup > Accounting > Manage Accounting Periods. Set accounting periods for the current fiscal year.</td></tr>
<tr><td>Invalid account reference key 123 for subsidiary 1..</td><td>The SCIS Store Safe Account used in the sales associate's location does not have the subsidiary set correctly.</td><td>To resolve the error:

1. Check the location on the employee record for the sales associate.
2. Verify that the location on the employee record matches the location for the subsidiary named in the error (check the ID for the subsidiary, for example, id=1).
3. Verify that the subsidiary on the account you use for the SCIS Store Safe Account is also the same.

Note: SCIS Store Safe Account is set on the Location record.

a. Go to Setup > Company > Locations. Make a note of the SCIS Store Safe account assigned to the location.
b. Go to Setup > Accounts > Chart Of Accounts.
c. Find the account you selected as the SCIS Store Safe Account. For example, this could be the Petty Cash account.
d. Edit the account record and select the subsidiary.</td></tr>
</table>

Error Message	Problem/Cause	Solution
Cannot read attributes of undefined	The **roundItemId** is missing from CustomConfiguration.js	If you installed SCIS prior to the 2016.1.0 release, you must also update the CustomConfiguration.js file to support currency rounding capabilities introduced in SCIS 2016.1.0. Search for **ns_pos_rounditem** in NetSuite, and then add `roundItemId: 0,` to the CustomConfiguration.js file, under the `voidItem` definition. Replace 0 with the ID for the item in your account. For more information, read Setting up Currency Rounding for SCIS.
Error: Please enter value(s) for: Account	This error can be displayed during an initial loan or end of day transaction entered in SCIS. The problem could be any of the following: - Cash Drawer account is not set correctly in SCIS User Settings. - **SCIS Store Safe Account** and **SCIS Cash Drawer Difference Account** are not set on the location record. - The subsidiary setting on the SCIS Store Safe Account does not match the location.	Review the following settings: - Go to Customization > Record Types > SCIS User Settings. Set the correct cash drawer account for the employee. - Check the location record for the store. Verify that there is a value for **SCIS Store Safe Account** and **SCIS Cash Drawer Difference**. - Check the Chart of Accounts to verify that the subsidiary on the account selected as the SCIS Store Safe Account and the SCIS Cash Drawer Difference hav the same subsidiary as the location.
Please enter a value for amount.	This error occurs because the price of the item was not entered for the currency used in the order.	To resolve this error, go to Lists > Accounting > Items. Click Edit next to the item, and then enter prices for each currency on the **Sales/Pricing** subtab.
Invalid taxcode reference key 115 for subsidiary 6	This error occurs because the tax code for sales on the tax schedule was set incorrectly for the country where SCIS is being used.	To resolve the error: 1. Setup > Accounting > Tax Codes. 2. Click **Edit** next to the tax code associated with the region where the order is being entered in SCIS. 3. In the **Available On** list, ensure that **Sales Transactions** or **Both** is selected. 4. Click **Save**.
Insert transaction failure: No valid, open, tax period for date – 4/22/2016. Please visit setup > manage tax periods to set up a new tax period.	If this error occurs, it will be displayed instead of the receipt popup window after a payment is made on an order. The problem is that	To resolve the error, go to Setup > Accounting > Manage Tax Reporting periods. Set up tax reporting periods as needed.

<table>
<thead>
<tr><th>Error Message</th><th>Problem/Cause</th><th>Solution</th></tr>
</thead>
<tbody>
<tr><td>Your payment couldn’t be processed. Please review the amount entered and the order details, and try again.</td><td>the tax reporting period does not exist.</td><td></td></tr>
<tr><td>An nlobjSearch Filter contains an invalid operator or is not in proper syntax: upccode.</td><td>After the sales associate adds a line level discount, this error can appear in the Enter Access Code popup window.</td><td>Verify that the discount item has the location and subsidiary set properly. Both location and subsidiary must match the settings on the sales associate's employee record and the SCIS settings record.</td></tr>
<tr><td>An unexpected error occurred. Please go back and try again.
invalid property id (CustomConfiguration.js#414)</td><td>This error can appear while performing any action in SCIS. It happens because of an error in the CustomConfiguration.js file.</td><td>To resolve the error, verify any changes made to the CustomConfiguration.js file following installation of the SCIS SuiteApp. Double-check any customizations.</td></tr>
<tr><td>Enter only numeric characters</td><td>This error appears in the Cash Payment popup window after adding an item to the order and clicking on a Cash Denomination.
It typically happens in accounts that use multiple currencies.
The problem may be related to the configuration of the currency record in NetSuite.</td><td>To resolve the error:
Go to Lists > Accounting > Currencies.
Click Edit next to the currency that displayed the error.
Check the Override Format check box.</td></tr>
<tr><td>Invalid Number undefined</td><td>This error occurs when attempting to initiate a customer return from the customer profile page.
The problem is that the saved search, SCIS Transactions Details was modified, removing the ID and some required fields.</td><td>Do not modify the SCIS Transactions Details saved search.</td></tr>
<tr><td>Invalid taxcode reference key undefined for subsidiary 13.</td><td>This error typically occurs in accounts that use multiple currencies with SCIS.
The CustomConfiguration.js file must contain an ID for the non taxable tax group record associated with each currency in which you transact. Note that you must create a zero percent (0.0%) tax group for each region.
For more information, read Setting up Currency Rounding for SCIS.</td><td rowspan="2">To resolve the problem:
Go to Web Site Hosting Files > Live Hosting Files > SSP Applications > NetSuite Inc. - POS > SuiteCommerce InStore.
Click Edit next to CustomConfiguration.js.
Add IDs for the tax groups you want to use for calculating tax on transactions where rounding was applied. (Replace 0 with the ID for the applicable tax groups in your account.)
<pre>
,   nonTaxableTaxCodes: {
     US: 0
,   CA: 0
,   AU: 0
,   NZ: 0
,   GB: 0
,   SP: 0
</pre></td></tr>
<tr><td>Couldn’t add items.
The following items couldn’t be added.
Item #: unknown error.</td><td>This error occurs because the nonTaxableTaxCode is set incorrectly in the CustomConfiguration.js file. There must be a zero percent (0.0%) tax group for the country associated with the order.</td></tr>
</tbody>
</table>

Error Message	Problem/Cause	Solution
Invalid taxcode reference key undefined for subsidiary 6. Your payment couldn't be processed. Please review the amount entered and the order details and try again.	This error may appear instead of the receipt popup window, after a payment is entered. There must be a zero percent (0.0%) tax group for the country associated with the order.	`, DE: 0` `, FR: 0`
Configuration Error: Subsidiary on Employee and SCIS must match. Must identify a region associated with this site.	The Subsidiary selected on the Employee must match the Subsidiary on the website record.	To resolve this error: 1. Go to Lists > Employees. 2. Click Edit next to the employee in question. 3. Note which Subsidiary is selected on the Employee record. 4. Go to Setup > SuiteCommerce Advanced > Web Site Setup. 5. Click Edit next to the SCIS website. 6. Click the Setup subtab, and then scroll to the bottom of the page. Ensure that the same subsidiary is selected on the website and on the Employee record. If there are multiple subsidiaries, at least one must match.

Troubleshooting SCIS Performance Issues

This section includes recommendations for optimizing your implementation of SuiteCommerce InStore (SCIS). The following topics include recommended settings for best performance outcomes:

- Form Optimization – Faster Forms with Fewer Fields
- SCIS Settings for Improved Performance
- Features that Can Affect SCIS Performance
- Performance Modifications in CustomConfiguration.js

Form Optimization – Faster Forms with Fewer Fields

You can increase the speed of SCIS by using forms that include only the essential fields required to capture information from the following records:

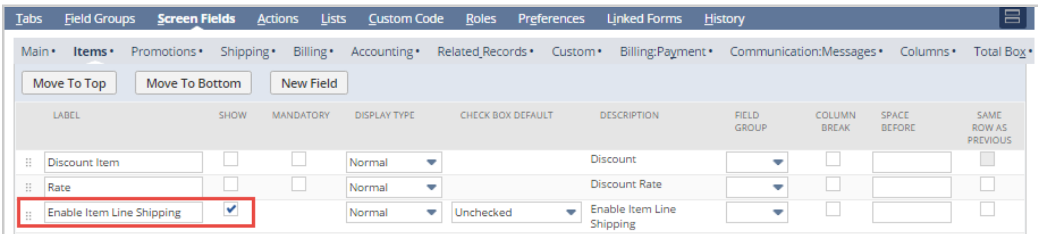
- Transactions
- Customers
- Items

The SuiteCommerce InStore SuiteApp installs a set of **Minimal forms**. These are forms which have been optimized for best performance. Using these forms is not required. However, if you notice some latency in your implementation of SCIS, then you have the option of using the optimized forms.

To use Minimal transaction and entry forms, go to the SCIS Settings record to select the forms you want to use. It is recommended that you test the form on your Sandbox environment to ensure it works as you expect. For more information, read Transaction Forms and Other Entry Forms.

You can customize one of the minimal forms, but note the following recommendations:

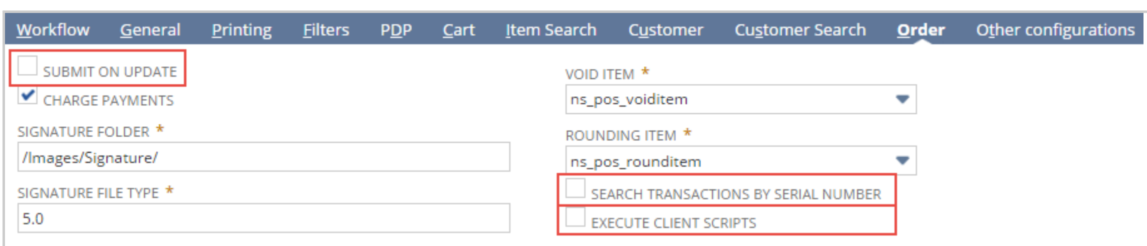
- **Make a copy of the minimal form**, and then customize your copy. You must work from a copy because forms that are installed by the SuiteApp may be updated or changed during periodic managed SuiteApp updates. Your custom forms are not affected.
- Ensure that the **Enable Item Line Shipping** field is marked to show on transaction forms. This field is required on forms used for SCIS transactions.



- **Do not change or remove default tax settings on minimal transaction forms**. If you modify default tax settings on these forms, tax may not be calculated properly, or you may not be able to submit transactions through SCIS.

SCIS Settings for Improved Performance

There are settings on the Order subtab of the SCIS Settings record that you can use to help optimize the performance of your SCIS implementation.



- **Submit on Update** - By default, SCIS transactions are saved in memory before they are submitted. When this box is checked, each transaction is automatically committed in NetSuite. Checking the box, makes the system work slower.
- **Search for Serialized Item** – This setting enables search capabilities for transactions by serial number or lot number. When this box is checked, you can find a transaction using the serial number or the lot number of an item on the transaction. Clear the box for this setting to optimize performance.
- **Execute Client Scripts** – Check this box if you use AvaTax. It enables the system to execute Avalara integration code as client scripts. It also enables administrators and web developers to implement logic around client scripts. This setting is intended to resolve slowness when adding, voiding or returning items, updating item quantity, and adding discounts.

> **Warning:** If you check the box, you must test on a Sandbox account and work with Professional Services to ensure your SCIS implementation continues to behave as expected. This setting is experimental. Tasks for Professional Services include modifying any Client Scripts that are incompatible with the `enablefieldtriggers` property in SuiteScript.

Recommendations for Using the Execute Client Scripts Setting

The following recommendations apply to accounts that use Avalara and are experiencing performance issues:

1. Obtain a Sandbox account for testing SCIS with the Execute Client Scripts setting enabled.
2. Clear the **Submit on Update** box.
3. Check the **Execute Client Scripts** box.
4. Work with Professional Services to modify any Client Scripts that are incompatible with the `enablefieldtriggers` property in SuiteScript.
5. After testing on Sandbox, and verifying that entering and working with orders in SCIS is successful, apply the changes to your production account.

Features that Can Affect SCIS Performance

Fewer features enable faster performance for SCIS. To turn off features, go to Setup > Company > Enable Features. Turn off the following features if they are not required for your business processes:

- **Bill Costs to Customers** - This feature includes additional sublists on cash sale transactions. The additional sublists can cause a degradation of performance in SCIS.
- **User events and workflows** - These impact performance because they are triggered each time a transaction is submitted or edited in SCIS.

Performance Modifications in CustomConfiguration.js

You can modify settings in the CustomConfiguration.js file to optimize performance of your SCIS implementation.

Customer Search Settings

You can customize the default filters for searching customers in SCIS. For better performance, remove search filters that are not needed. For example, use only email and company name.

Modify the following section of code in CustomConfiguration.js. Configuration settings that are commented are the default settings. To change the default settings modify the settings, and then remove the comments around the code snippet.

```
    //   searchFilters: [
    //       'fullname'
    // ,   'firstname'
    // ,   'lastname'
    // ,   'phone'
    // ,   'email'
 // ,   'companyname'
```

```
    // ],
```

The Warming Up Service

The warming up service keeps the server active. SCIS enables better performance by maintaining continuous activity during sessions. You can configure this setting by modifying the CustomConfiguration.js file. The default setting of 10 minutes is recommended. However, when troubleshooting latency issues with SCIS, you can modify the default setting to address your needs. Note that changing the setting to 20 - 30 minutes makes the warm up service less effective. Changing the setting to be less time, such as 1 minute, for example causes additional work for the system diminishing the purpose of the warm up service.

```
warmUp: {
            //   warmUp : true,
            //warmUpTime : 10 //in minutes    },
```

Configuring Records for SCIS

SuiteCommerce InStore (SCIS) uses standard NetSuite records to display items, manage employee login access, and store information displayed in the Customer Profile. SCIS also uses custom records for various configuration settings. This section includes information about setting up standard NetSuite records and custom SCIS records.

A location must be specified on each employee record granted access to SCIS. For more information, read Configuring Locations for SCIS. If you use OneWorld, you must select a subsidiary on each record. For more information, read Subsidiaries and SuiteCommerce InStore.

> **Important:** All of the procedures described in the topics listed below must be performed during the initial configuration of SuiteCommerce InStore.

After you have installed and configured SCIS, you can use these topics as a reference, particularly if you need to change configuration settings. Read the following topics for more information:

- Customer Records and SCIS
- Configuring Item Records for SCIS
- Configuring QuickAdd Keys
- Configuring Employee Records for SCIS

Customer Records and SCIS

Customer records entered in NetSuite are automatically available in SuiteCommerce InStore (SCIS). Customer records can be created, modified, and viewed in either NetSuite or SCIS. The status field on customer records created in SCIS is automatically set to CUSTOMER-Closed Won.

When configuring customer records, consider the following settings:

- **Taxable settings** – Administrators can check the Taxable box and set the Tax Item on the Financial tab of the customer record. These settings are applied automatically when the customer record is submitted, based on the customer's address.
- **Currency settings** – Currencies in which the customer has transacted are tracked on the Financial subtab of the customer record.
- **Sales Rep** – If your store pays commissions to sales reps, an administrator can assign a sales reps to a customer record.
- **OneWorld or Subsidiary settings** – The subsidiary selected on the customer record affects the ability for a sales associate to access the customer record and to view the customer profile.

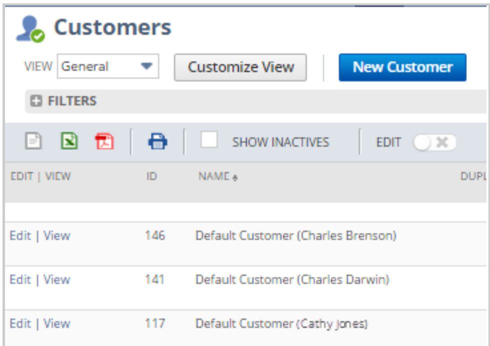
OneWorld and SCIS Customer Records

To access a customer record, a sales associate must be assigned to the same subsidiary as the customer. The customer record must be flagged as taxable, and the customer address must be in a country with tax nexuses set up in NetSuite. For more information, see Subsidiaries and SuiteCommerce InStore.

Default Customer

NetSuite requires a customer record for each transaction. Typically, a sales associate creates a new customer in the process of entering a sales transaction. However, for customers who do not want to share their contact information, the default customer record stores transaction data in NetSuite.

SCIS automatically creates a Default Customer record for each sales associate. Administrators can access the Default Customer record in NetSuite at Lists > Relationships > Customers. Note that the Default Customer customer record must have the same subsidiary as the sales associate submitting transactions in SCIS.



You can also change or remove the name, Default Customer. To do this you must modify the CustomConfiguration.js file. Find the following line in the CustomConfiguration.js file, remove the comment, and then substitute your own text for 'Default Customer':

```
//  defaultCustomerNameOverride: 'Default Customer'
```

The Default Customer record can be used on most sales transactions. However, some transactions cannot be processed without a unique customer record. To process the following transactions, a sales associate must use an existing customer record, or create a new customer:

- Delivery
- Store Pickup

Configuring SCIS Customer Group

The SCIS Customer Group defines tiered customer categories for SuiteCommerce InStore (SCIS) based on purchase levels. By default the SCIS Customer Group includes a list of values: Bronze, Silver, and Gold. Sales associates can set this field on the customer profile in SCIS.

In NetSuite, Administrators can update the setting for individual customers on the **Sales** subtab of the Standard Customer Form. Administrators can also change or add new values to the list.

To configure SCIS Customer Group records:

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find **SCIS Customer Group (List)**, and then click **List** in that row.
3. Modify the list of default values:
   - Click **Edit** next to a value in the list and change it.
   - Click **New SCIS Customer Group (List)** to add new values to the list.
4. Click **Save**.

To set the default customer group for new customers entered in SCIS:

1. Go to Customization > Lists, Records, & Fields.

2. Scroll to **SCIS Settings**, and then click **List** in that row.
3. Click **Edit** next to an existing record.
4. In the **Default Customer Group** list, select the SCIS Customer Group that you want to assign to new customers by default.
5. Click **Save**.

To set the customer group on individual customer records:

1. Go to Lists > Relationships > Customers.
2. Click **Edit** next to a customer on the list.
3. Set the **Custom Form** list to **Standard Customer Form**.
4. Click the **Sales** subtab.
5. Select a setting for **SCIS Customer Group**.
6. Click **Save**.

Configuring the Customer Entry Form

When sales associates create new customers in SuiteCommerce InStore (SCIS), they use a customer entry form that you can configure based on fields in a saved search. You can also configure the fields that are required and optional. Follow the steps described in this section to configure a customer entry form for SCIS, and designate required and optional fields.

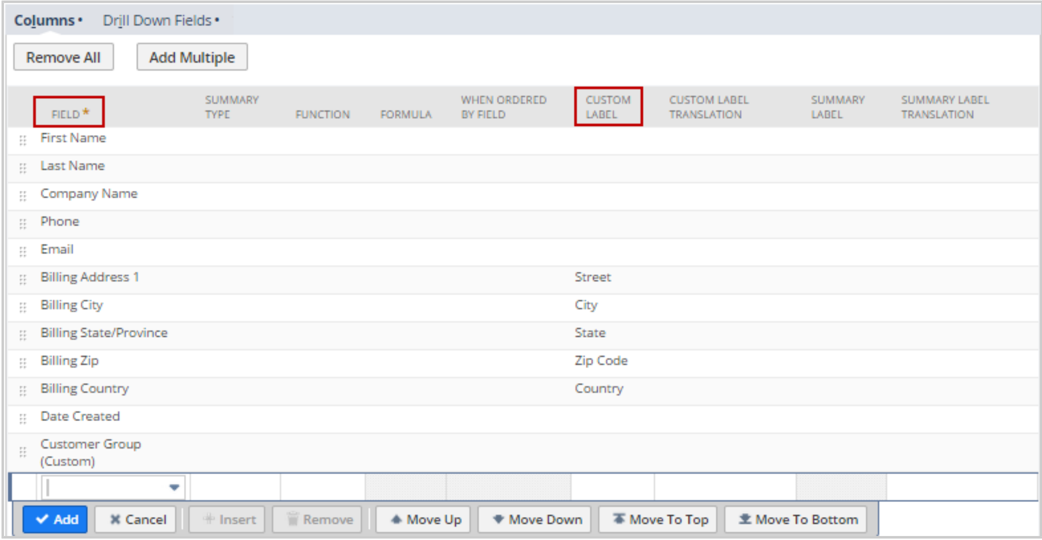
Sales associates use the Customer Profile to view information about existing customers displayed in time lines and charts. To configure the data displayed in the Customer Profile, you must modify the related saved searches in NetSuite.

Customer Profile Entry Form for SCIS

To use a customer entry form other than the default forms installed by the SuiteCommerce InStore SuiteApp, you must create a customer saved search based on the default SCIS Individual Company or SCIS Individual Customer form. Next, define your custom search form in the CustomConfiguration.js file. Optionally, you can add custom fields to the customer entry form and make fields mandatory.

To create a customer search form based on the SCIS default:

1. Go to Lists > Search > Saved Searches.
2. Click **Edit** next to the custom searches installed in your account by the SuiteCommerce InStore SuiteApp:
   - **SCIS Individual Company Form** – For customers that are companies.
   - **SCIS Individual Customer Form** – For individual customers.
3. Click the **Results** subtab. Here you can specify the fields that are displayed in the customer entry form. You can also enter a custom label for any field.



a. To add a field, make a selection in the blank row at the bottom of the **Field** column.

b. Optionally, enter a label in the **Custom Label** column.

c. Click **Add**.

d. To remove a field, select an existing row in the list, and then click **Remove**.

4. Enter a new name for the search.

5. Click **Save As**.

The fields you select on the saved search are displayed when sales associates create new customers or edit existing customers. After creating your saved search, you must define this search in the CustomConfiguration.js file. Use the following steps to add the ID for your custom saved search.

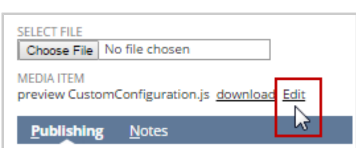
To display your customer entry form in SCIS:

1. Go to Setup > SuiteCommerce Advanced > Web Site Hosting Files.

2. Find the **SuiteCommerce InStore folder** in the File Cabinet. Go to Web Site Hosting Files > Live Hosting Files > SSP Applications > NetSuite Inc. - POS > SuiteCommerce InStore

3. Click **Edit** next to **CustomConfiguration.js**.

4. In the file record, click **Edit** in the Media Item section, next to the file name.



5. Add the ID for the customer search you configured in the **Customer Options** section of the Configuration file. Note the example below. The definition for the search form must be included in the identifiers section.

```
customer:  {
    defaults: {

    },
```

```
    identifiers: {
       //Add the code and the saved search id here

customerIndividualCustomerFormSearch: 'customsearch_ns_pos_individual_custome_2',
  }
},
```

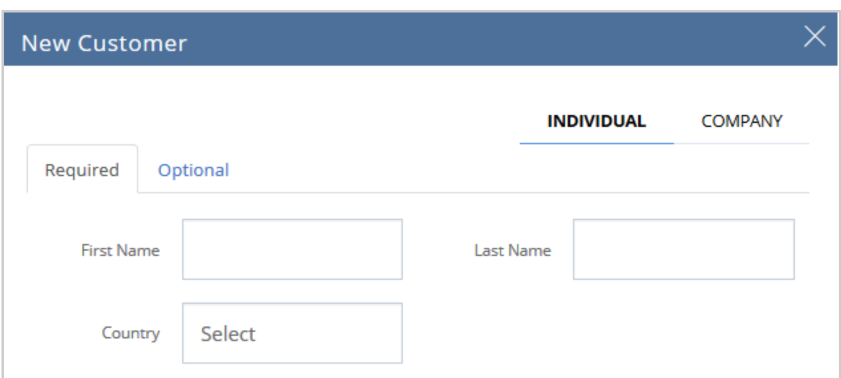
> **Note:** The following steps are optional. Fields are not required to be mandatory to appear on the customer entry form.

To specify required fields on the customer entry form:

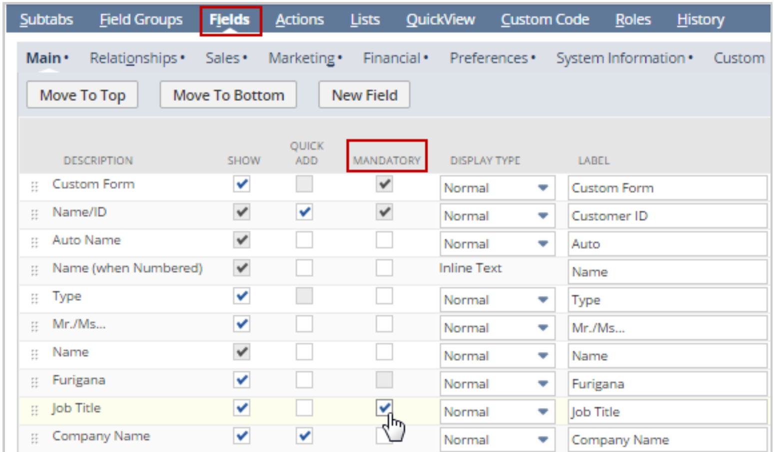
1. Go to Customization > Forms > Entry Forms.
2. Click **Customize** next to the **Customer Form** marked as **Preferred**. The subtype of the customer entry form is Customer/Lead/Prospect. In an account that has not been customized, use the **Standard Customer Form**.
3. Click the **Fields** subtab.
    a. Check the box in the **Show** column for fields you want to display on the form.
    b. Check the box in the **Mandatory** column next to the fields you want to be required on the Customer Profile entry form.
4. Click **Save**.

Required Fields on the Customer Entry Form

Fields displayed on the Required or Optional tabs in SCIS are based on the customer entry form. To specify certain fields as required in SCIS, they must be mandatory on the customer entry form.



For example, to make sure that the customer's job title is captured when an employee creates a new customer in SCIS, set the Job Title field mandatory on the customer entry form. Any field that you set as mandatory on the customer entry form appears on the Required tab of the customer entry form in SCIS.



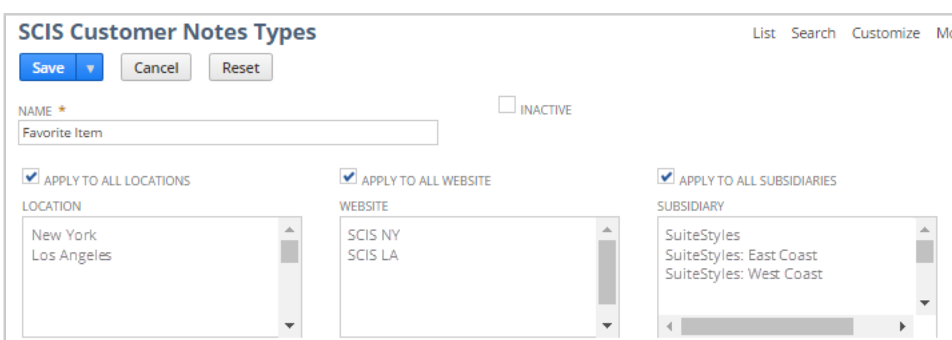
Defining SCIS Customer Notes

Administrators can use the SCIS Customer Note Types custom record to define notes for different types of information associated with a customer. This custom record is installed with SuiteCommerce InStore (SCIS).

After an administrator has defined customer notes, sales associates can add them to the customer profile in SCIS. For example, you may want to track the customer's item preferences or frequent purchases.

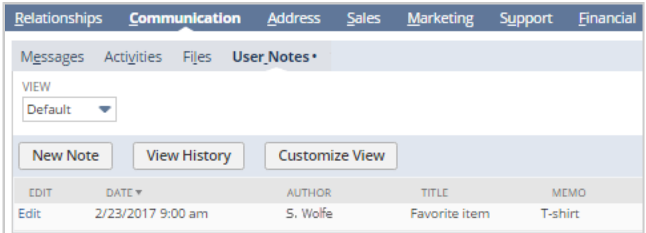
To define SCIS Customer Note Types:

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find **SCIS Customer Notes Types**, and then click **List**. By default, there is a custom note in the list. Sales Associates can enter any text into the note in SCIS.
3. To create a new note type, click **New SCIS Customer Note Types**.
4. Enter a **Name** for the customer note type. The name is displayed in SCIS. The sales associate can select this note type, and then enter additional information.
5. You can choose particular **Locations**, **Websites**, and **Subsidiaries**, or make the note available to all of them.



6. Click **Save**.

In SCIS, sales associates can add notes to customer profiles and view existing notes. The notes are also saved in the system on the customer record on the **Communication** subtab, under **User Notes**.



Configuring Item Records for SCIS

Setting Up Products for Sale on SCIS

Product information is stored on item records in NetSuite, and displayed in SuiteCommerce InStore (SCIS). Sales associates can access product information by using the search bar, or the QuickAdd bar in SCIS. The following item record types are compatible with SCIS:

- Inventory items
- Matrix items
- Non-inventory items
- Gift card items
- Discount for sale items
- Service items
- Kit items
- Assembly items

> **Important:** SCIS does not support the Bin Management feature and Advanced Bin/Numbered Inventory Management feature.

To use SCIS, you must ensure that item records are configured correctly. Consider the following when configuring item records:

- If you use OneWorld, the item must be included in the same subsidiary as the SCIS implementation.
- You must select a Tax Schedule on each item record, and set a corresponding nexus (if a nexus is applicable).

Follow the steps below to configure item records. Note that to complete setup, you must create a QuickAdd Key for each item. Sales associates cannot add an item to a transaction if a QuickAdd Key does not exist for the item in SCIS. For more information, see Configuring QuickAdd Keys.

To configure items for SCIS:

1. Go to Lists > Accounting > Items > New. Complete the item record settings listed below.

2. Enter a value in the **Item Name/Number** field. The value you enter here displays in NetSuite on lists. It will display in SuiteCommerce InStore as the product name if the **Display Name/Code** field is blank.
3. Enter a value in the **UPC Code** field. It lets you scan a bar code for this item. Note that the UPC Code must be unique for each item.

   If you have additional codes, use the **Additional UPCs** field on the Custom subtab to enter multiple UPC codes separated by commas.
4. Enter a value in the **Display Name/Code** field. The value you enter here displays in SuiteCommerce InStore and on the website as the product name. If this field is blank, then the value in the **Item Name/Number** field is displayed.
5. (Optional) Add the item to a location. In the **Location** list, select the SCIS location where the item will be available for purchase. If you do not select a location here, the item is available in all locations.
6. Click the **Accounting** subtab. Select a **Tax Schedule**.
7. Click the **Sales / Pricing** subtab. In the **Price Levels** section, enter a **Base Price** for the item. Enter the same price level for each currency that can be used to purchase the item. If you use multiple quantities, enter a price for each sales unit.

   > **Note:** SuiteCommerce InStore uses the Base Price (not Online Price) as the product price. If the Base price is not entered, an error occurs when the item is added to an order. Zero is a valid entry.

8. Click the **Web Store** subtab to configure the following settings:
   a. Check the **Display in Web Store** box.
   b. (Optional) Enter a short description of the item in the **Detailed Description** field. This setting is recommended, but not required. The description you enter here displays in the SuiteCommerce InStore.
   c. (Optional) In the **Out of Stock Behavior** list, select the way you want the item to display in SCIS when it is out of stock. The selection you make here only applies to the item record. You can set the global preference for all items on the Web Site Setup page.

      > **Note:** SCIS does not support the **Remove Item when out of stock** option. SCIS follows the same rules as SCA for Out of Stock Behavior options. For more information, read the help topics Out of Stock Behavior, and Include Out of Stock Items in Web Store.

   d. Click **Web Site Categories**. In the **Site** column, select the **SuiteCommerce InStore** website. In the **Category** column, select **Home**.
9. Click **Save**.

The item is not available to use in SCIS until a search index update has been completed. Clicking Save on the Item record, triggers an update to the search index. To see the status of the search index, go to Setup > SuiteCommerce Advanced > Set Up Website and click View in the Search Index Status column.

For information about printing item labels, see the help topic Printing Labels from Item Records.

Configuring Serialized Items and Lot Numbered Items in SCIS

You can sell serial numbered and lot numbered items using SuiteCommerce InStore (SCIS), but first you must create them in NetSuite. This section includes links to setup and configuration information.

1. To use serialized inventory, you must first enable the feature and then set up item records. Read instructions in the following topics:
    a. Enabling Serial Numbered Inventory
    b. Entering Serialized Inventory Records
2. To use lot numbered items, you must first enable the feature, and then create item records including the lot numbers:
    a. To enable the feature, go to Setup > Company > Setup Tasks > Enable Features. On the Items & Inventory subtab, check the Lot Tracking box, and then click Save.

    > **Important:** SCIS does not support the Bin Management feature and Advanced Bin/Numbered Inventory Management feature.

    b. To create lot numbered item records, follow instructions described in the topic, Creating Lot Numbered Items.
3. The SCIS Settings record includes a preference for searching transactions using serial and lot numbers. Administrators can set this preference, at Customization > Record types > SCIS Settings. On the Orders subtab, check the box next to Search transactions by Serial Number.

    > **Note:** This setting can make searches for transactions take longer. Only use this setting if you use serial or lot numbered items.

For more information about how sales associates can add serial numbered items and lot numbered items to orders in SCIS, read the help topic Adding a Serialized or Lot Numbered Item to an SCIS Order.

Configuring Item Images for SCIS

Configuring item images is an important task in setting up SuiteCommerce InStore (SCIS). As with SuiteCommerce Advanced, image files are automatically matched with item records in NetSuite based on criteria that you include in the image file name. The criteria that you include in the image file name is the item identifier. You can match images to items based on the value in a field that appears on item records in NetSuite. Choose one of the following fields:

- Display Name/Code
- UPC Code
- URL Component
- Additional UPCs

After you decide on the item identifier and the format you want to use for image file names, you can rename the files and upload them to the file cabinet.

To learn how to configure item images for SCIS, read Example of Item Image Configuration. For more detailed information about configuring item images, read the help topic Product Images.

Configuring Matrix Item Images for SCIS

When you sell matrix items, you may want to show a different product image for each item option. You can add the `multiImageOption` variable to the CustomConfiguration.js file to support multiple images on the product detail page. Note the following example where `custcol_color` is the transaction item option ID.

```
multiImageOption: 'custcol_color'
```

In this case, when you name the product images you want to associate with the matrix item record, use the following naming convention:

```
[Display Name/Code]_{Item Option}
```

For example, you may want to show the same pair of shoes in different colors. You could name the product images as follows:

- Shoe_Black.jpg
- Shoe_Red.jpg
- Shoe_White.jpg

To show multiple images of the same item option, append a number to the file name, `[Display Name/Code]_{Item Option}-[n].jpg`.

Using a Keyword to Support Multiple Images

In other cases a keyword must be set as a place-holder category to map the images correctly to the items. You can create your own keyword. The only requirement is that all images must contain the **same** keyword. For example, you can use the following structure to name your image files, but all image file names must use the same structure.

```
[Display Name/Code]_media-[number].[file extension]
```

Example of Item Image Configuration

For example, you have two .jpg images to add for the item, "Plastic Spatula." You can choose Item Display Name/Code as the item identifier. Next, rename the image files you plan to use for items. The following naming convention is used for image files based on the image file above:

```
[Display Name/Code]_media-[number].[file extention]
```

If your NetSuite account has another SuiteCommerce Advanced site, you can copy the image mapping criteria and use it for your SCIS site. If your only SuiteCommerce Advanced website is used for SCIS, then follow the steps below to set up image mapping criteria. In this case, you must rebuild the search index to update of all the items with the image files uploaded.

Sample steps to configure item images:

The following steps are provided based on the item described in the example above. You can replace image file names and folder names with file and folder names that correspond with your account.

1. On your computer, rename the image files based on the naming convention described in the example above.
   a. Rename the primary image to **PlasticSpatula_media-0.jpg**
   b. Rename the second image to **PlasticSpatula_media-1.jpg**
   c. Create a ZIP file for all your image files.

> **Note:** Using numbers in the image file naming convention enables you to use more than one image for each item. Using sequential numbers helps to organize your images.

2. Go to Setup > SuiteCommerce Advanced > Setup Web Site.
   a. Click **Edit** next to your SCIS website, and then click the **Advanced** subtab.
   b. In the **Item Identifier** field, select **Display Name/Code**.

   > **Warning:** All images you upload must use the same item identifier. If you change the item identifier, then some product images will not display on your SCIS website.

   c. In the **Image Domain** field, select the domain you use for SCIS.
   d. In the **Image Folder** field, select Web Site Hosting Files > Live Hosting Files > Images.

   > **Note:** This is the folder you create in the Live Hosting Files folder to store item images.

   e. Click **Save**.
3. Upload your image files (from Step 1) to Web Site Hosting Files > Live Hosting Files > Images.
   a. Go to the folder at Setup > SuiteCommerce Advanced > Web Site Hosting Files > Live Hosting Files > Images.
   b. Click **Advanced Add**.
   c. In the **ZIP Archive to Add** field, choose the ZIP file on your computer.
   d. Verify the **Destination Folder** is where you intend to upload files.
   e. Check the **Unzip Files** box.
   f. Check the **Make all Files Available Without Login** box.
   g. Check the **Overwrite Files with Same Name** box to avoid uploading duplicate files in this folder. Files of the same name are automatically updated with the latest version you upload.
   h. Click **Add**.
4. Rebuild the search index. This step is required if you are adding item images, you have only one SuiteCommerce Advanced website, and that site is used for SCIS.
   a. Go back to Setup > SuiteCommerce Advanced > Setup Web Site.
   b. Click the **Actions** menu.
   c. Select **Rebuild Search Index**.

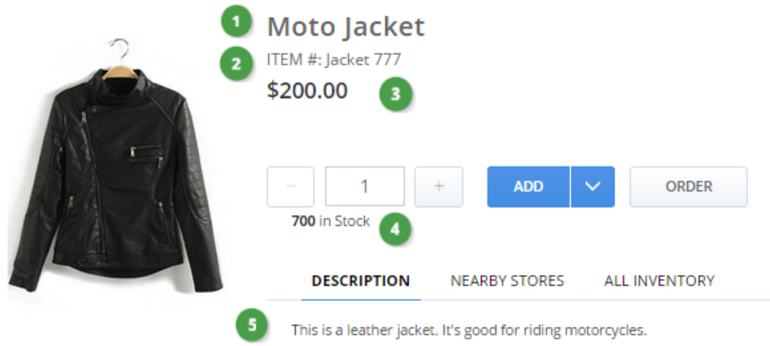
      The time it takes to rebuild the search index depends on the number of items in the account, and network connections. To check the status of the search index, go to Setup > SuiteCommerce Advanced > Web Site Set Up. Click **View** under **Search Status Index**.

When the search index status is completed, you can verify that images are correctly associated with item records. Go to the item record at Lists > Accounting > Items. Click Edit next to an item record. Confirm that images are listed on the **Web Store** subtab, under **Associated Images**.

For more detailed instructions on configuring images, see the help topic Product Images.

Fields Displayed on the Product Detail Page

After you configure item records in NetSuite, product information you entered in NetSuite is displayed on the Product Detail Page in SuiteCommerce InStore (SCIS). SCIS uses templates to display product information, but you cannot modify these templates. Use the following information to understand which fields from item records are displayed on the Product Detail Page.



	Item Field	Notes
1	Display Name/Code	Item Name/Number shows as the product name if you do not enter a value for Display Name/Code.
2	Item Name/Number	
3	Base Price	
4	Quantity On Hand, stock status	The stock status message is generated by NetSuite. You can set preferences on the item record or on the Web Site Set Up page.
5	Detailed Description from the Web Site subtab of the item record.	

Product Detail Page Specific Options

You can modify some field labels displayed on the Product Detail Page by editing the JavaScript configuration file. For instructions on making edits to this file, see Editing the CustomConfiguration.js File.

You can change the string that appears in front of the Item Name/Number by changing the value for `labelForItemId`. Note the following code sample:

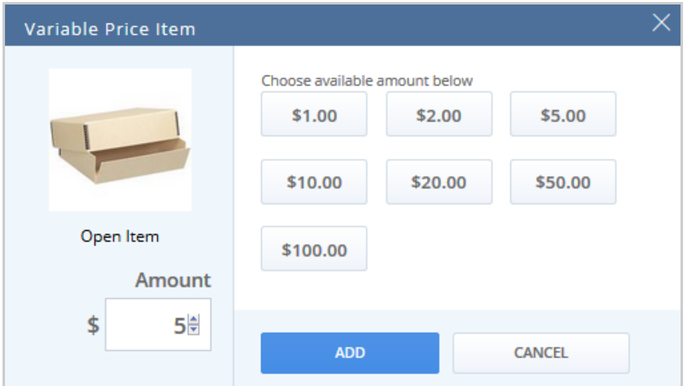
```
//   Product Detail Page specific options
     pdp: {
        //   If true it will show the Item ID label on the page
        //   showItemIdInPDP: true,

        //   Label used for describing the product ID
           labelForItemId : 'Item #: '
     },
```

You can also modify the item name display in the cart. For more information, see Item Display in Cart.

Creating an Open Item in SCIS to Prompt for Price

The open item is a generic item record configured as a variable price item. The item is created by the administrator, and then used by sales associates. Sales associates can set the price of the item when it is added into the cart. The sales associate can use the open item to sell items that may not have a price, or items that are not configured in NetSuite. For example, if the customer wants to buy a floor model, the sales clerk can add it to the order and set the price in the cart.



You can create more than one open item record. You might use an open item to add shipping cost, or a charge for gift wrap.

To create an open item:

1. Go to Lists > Accounting > Items > New. Complete the item record settings listed below.
2. Enter a value in the **Item Name/Number** field. The value you enter here displays in NetSuite on lists. It will display in SuiteCommerce InStore as the product name if the **Display Name/Code** field is blank.
3. (Optional) Add the item to a location. In the **Location** list, select the SCIS location where the item will be available for purchase. If you do not select a location here, the item is available in all locations.
4. Click the **Accounting** subtab. Select a **Tax Schedule**.
5. Click the **Sales / Pricing** subtab. In the **Price Levels** section, enter 0.00 for the **Base Price**. Enter the same price level for each currency that can be used to purchase the item. If you use multiple quantities, enter a price for each sales unit.

   > **Note:** SuiteCommerce InStore uses the Base Price (not Online Price) as the product price. If the Base price is not entered, an error occurs when the item is added to an order. Zero is a valid entry.

6. Click the **Web Store** subtab to configure the following settings:
   a. Check the **Display in Web Store** box.
   b. (Optional) Enter a short description of the item in the **Detailed Description** field. Consider entering a description that provides some guidance to sales associates for how to use the open item appropriately.
   c. Check the **Variable Amount** box. This setting enables the sales associate to enter a price.

      > **Note:** The **Don't Show Price** box and the **No Price Message** field do not affect the display in SCIS.

   d. Click **Web Site Categories**. In the **Site** column, select the **SuiteCommerce InStore** website. In the **Category** column, select **Home**.

After you have created the open item in NetSuite, you must also create an SCISQuickAdd Key so that sales associates can add the open item to orders. For more information, read Configuring QuickAdd Keys.

Configuring QuickAdd Keys

In SuiteCommerce InStore (SCIS), sales associates can use QuickAdd Keys to add items to an order. You can configure QuickAdd Keys to display products at any SCIS location. To display an item QuickAdd Key at a certain location, the location specified on the QuickAdd Key must match the SCIS location and the location specified on the sales associates' employee records.

QuickAdd Groups

The first step in configuring QuickAdd Keys is to configure QuickAdd Groups. QuickAdd Groups are the tabs you use on the QuickAdd bar to organize the display of items in the SCIS user interface. Note that because of responsive design, the appearance of QuickAdd Groups changes when you resize the browser. If the browser window is narrow, QuickAdd Groups may be stacked in multiple rows.

To configure QuickAdd Groups:

1. Go to Customization > Lists, Records, & Fields > Record Type.
2. Find **SCIS QuickAdd Group**, and then click **List** in that row.
3. Add or modify entries in the SCIS QuickAdd Group List.
    a. Click **New SCIS QuickAdd Group** to create a new grouping.
    b. Click **Edit** next to an existing group to make changes.
4. Click the **Filters** subtab, and then select the Location, Website, and Subsidiary where you want these settings to apply. You can select more than one value in each box.

> **Note:** By default, the filters are set to apply to all locations, websites, and subsidiaries.

5. Click **Save**.

QuickAdd Keys

After you have configured QuickAdd Groups, you can create a QuickAdd Key for each product you want to show in SCIS. Hotkey is a custom record type that is created when you install InStore. Configure QuickAdd Keys in NetSuite for display in SCIS.

To create a new QuickAdd Key:

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find the **SCIS QuickAdd Key** row. Click **List** in that row.
3. Click **New SCIS QuickAdd Key**.
4. Select a QuickAdd Group from the **Key Group** list.
5. Select an item from the **Item** list.

6. The following settings are optional. You can set all of them, or some of them as they apply to your business:
    a. Select the SCIS **Location** where you want to show the item. If you do not select a location, the item QuickAdd Key shows at all locations.
    b. Specify a **Role**. This setting is useful if you want to make certain QuickAdd Keys visible to sales associates with a certain role.
    c. Specify a **User**. This is the list of employees granted access to SCIS. The QuickAdd Key displays for the user you specify.
    d. Select a **Customer Group**. This list is sourced from the SCIS Customer Group list. If you select a customer group here, the QuickAdd Key is only available when the sales associate adds a customer from this group to a sales transaction. If you do not make a selection, the QuickAdd Key is available for all customers.
    e. Select a **Customer**. The QuickAdd Key is only available when the customer is selected on a transaction. If you do not make a selection, the QuickAdd Key is available for all customers.
7. Click the **Filters** subtab, and then select filters for Location, Website, and Subsidiary.

    Filter settings are required. If filters are not selected, the SCIS custom record is ignored entirely. If you **do not** want to setup specific localizations, then you must check the **Apply to All** boxes on the Filters subtab.
8. Click **Save**.

To edit a QuickAdd Key:

1. Go to Customization > Lists, Records, & Fields > Record Types
2. Find the **SCIS QuickAdd Key** row. Click **List** in that row.
3. Click **Edit** next to the QuickAdd Key.
    a. To change the QuickAdd Group, make a selection in the **Key Group** field.
    b. To change criteria for availability, such as location, role or customer group, click the **Search Criteria** tab.
4. Click **Save**.

QuickAdd Keys CSV Export and Import

After you finish setting up all of the item QuickAdd Keys, you can backup your QuickAdd Key data by exporting it to a CSV file. In the unlikely event that you need to reinstall SuiteCommerce InStore, you can use CSV import capabilities in NetSuite to restore your item QuickAdd Key configuration.

To export QuickAdd Key data as a CSV file:

1. Go to the Hotkey List page.

    Go to Customization > Lists, Records, & Fields > Record Types. In the **SCIS QuickAdd Key** row, click **List**.
2. Click the **Export - CSV** icon at the top of the list. The CSV file is saved in the Downloads folder on your computer.
3. Open the file to verify data was saved correctly. You can store this file on your computer or in the NetSuite file cabinet for safe keeping.

Before you import item QuickAdd Key data, verify that the Key Group is correct in the CSV file. For example, if you have customized the data in NetSuite, verify that your customizations are up-to-date in the CSV file. If SuiteCommerce InStore is reinstalled, then custom Key Groups are removed.

To import QuickAdd Key data:

1. Go to Setup > Import/Export > Import CSV Records.
2. On the Scan & Upload CSV File screen, select the following:
   a. For **Import Type**, select **Custom Records**.
   b. For **Record Type**, select **SCIS QuickAdd Key**.
   c. Select the appropriate **Character Encoding**.
   d. Choose **One File to Upload**.
3. On the **Import Options** screen, under **Data Handling**, choose **Add**. Accept defaults in the other fields on that screen.
4. On the **Field Mapping** screen, accept default settings.
5. On the **Save Mapping & Start Import** screen, entering information in the fields is not required. Follow instructions provided on the screen.
6. Click **Save & Run** to start the import.

Configuring Employee Records for SCIS

Create an employee record for each person who will be using SuiteCommerce InStore (SCIS) to enter transactions. To add a sales associate, you must create and configure a new employee record in NetSuite.

The following must be configured:

- **Location** – Set the location on the employee record to ensure the sales associate has access to items and customers in the same location.
- **Access** – Select one or more roles for each SuiteCommerce InStore user on the employee record. You must select the SCIS Clerk role installed by the SuiteCommerce InStore SuiteApp, or a role configured using the SCIS Clerk role as a template.
- **OneWorld or Subsidiary settings** – Select a Subsidiary on the employee record. The sales associate must belong to the same subsidiary as the SuiteCommerce InStore website and his or her corresponding Default Customer record.
- **SCIS Access Code** – (Optional) Custom field setting only required for employees with manager override permission.
- **SCIS Location** – If you have employees who log in to SCIS at more than one location, then you must select SCIS Locations for those employees. Additional permissions may also be required. For more information, read Working with Employees in Multiple SCIS Locations.
- **SCIS User Settings** – Custom record that links the employee record to other records, such as default customer, default sales rep, and cash drawer account. For more information, read SCIS User Settings.

To add a new SCIS sales associate:

1. Go to Lists > Relationships > Employees > New. Create a new employee record.

   > **Important:** Create employee records using the Standard Employee Form. The SCIS Access Code field is added to the Standard Employee form when SCIS is installed.

2. Enter name, email, and address information.
3. (Required if you use OneWorld) Make a selection from the **Subsidiary** list.

4. Select an employee location from the **Location** drop down.

 > **Note:** You must configure the location before an employee can use SuiteCommerce InStore. If this field is not set, the employee will not be able to log in.

5. (Required if you have employees log in to SCIS at more than one location) Click the Custom Subtab and select **SCIS Locations** . For more information, read Working with Employees in Multiple SCIS Locations.
6. (Required if you use Departments) Make a selection from the **Department** drop down.
7. (Optional) Click the **Human Resources** subtab, and then check the **Sales Rep** box.
8. (Required for employees with Authorized Roles) Click the **Custom** subtab. Enter a value in the **SCIS Access Code** field. For more information, see Manager Override.
9. Click the **Access** subtab.
    a. Check the **Give Access** box.
    b. (Optional) Check the **Send Notification Email** box. If checked, the employee receives an email notification that access has been granted to you NetSuite account.
    c. In the **Password** field, enter a password for the employee to use to log in. You must tell the employee the password you created because passwords are not provided in email notifications.
    d. In the **Confirm Password** field, re-enter the password.
    e. (Optional) Check the **Require Password Change on Next Login** box to require this employee to change their password on their next login to NetSuite.
    f. In the **Roles** column, select one or more roles for the employee.

    > **Important:** For employees expected to enter transactions using SuiteCommerce InStore, you must use the SCIS Clerk role installed by the SuiteApp, or use a role that you create using the SCIS Clerk role as a template.

10. Click **Save**.

Working with Employees in Multiple SCIS Locations

Many retailers have more than one store in the same city, so employees may work at multiple locations. To set up SuiteCommerce In Store (SCIS) for employees in multiple locations, an administrator or store manager must use NetSuite to configure point–of–sale devices and employee records.

> **Note:** You can assign the SCIS Support Role to allow employees to configure mobile devices for use in multiple locations. For more information, read SCIS Support.

SCIS installs the **Device Location** field on the SCIS Mobile Device record, and the **SCIS Locations** list on the employee record. Selecting SCIS locations is a one-time setting when configuring a new Employee.

To set up SCIS for employees in multiple locations:

1. Assign locations to mobile devices:
    a. Go to Customization > Lists, Records, & Fields > Record Types.
    b. Find **SCIS Mobile Devices**, and click **List** in that row.
    c. Click **Edit** next to the mobile device you want to configure for a particular location.

d. In the **Device Location** list, select a location for the device. The options in the list are sourced from the list of locations that you configured in NetSuite. You can choose one location per device.

e. Click **Save**.

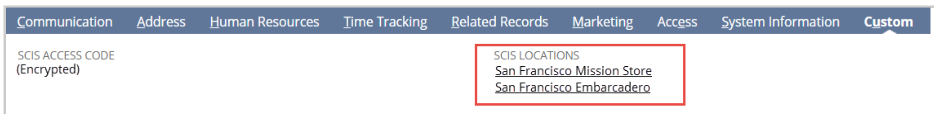
2. Assign locations to Employee records:

   a. Go to Lists > Relationships > Employees.

   b. Click **Edit** next to the employee record you want to modify.

   c. Click the **Custom** subtab.

   d. In the **SCIS Locations** list, select the locations where this employee logs in to SCIS.



   e. Click **Save**.

If the list on the employee record includes the same location configured on the mobile device, then the employee is automatically logged in to SCIS.

SCIS User Settings

An SCIS User Settings custom record is automatically created for each employee, after the employee logs in to SCIS for the first time. The SCIS User Settings record links the employee record to other records critical to SCIS transactions, such as the default customer record and the employee's cash drawer account.

To view the SCIS User Settings custom record:

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find **SCIS User Settings**, and then click **List** in that row.
3. Click **View** next to a name in the list of employees, to confirm the settings. If you want to change or update settings, click **Edit**.
4. Note the following user settings:
   - **Employee** – Shows the employee name. This field is automatically populated, and is linked to the employee record.
   - **Default Customer** – Shows the default customer record associated with the employee. For more information, see Default Customer.
   - **Default Sales Rep** – Defines the default sales rep for the employee.
   - **Account** – Defines the cash drawer account assigned to the employee.
   - **EULA Version Presented** – Shows the ID of the latest version of the End-User License Agreement (EULA) presented to the user. This field is automatically updated each time a new version of the EULA is displayed in SCIS.
   - **EULA Review Date** – Shows the date and time when the user accepted the terms of the EULA.
   - **EULA Acceptance** – This check box is marked if the SCIS user has accepted the terms of the EULA. If the box is cleared, then the SCIS user has not accepted the EULA.
5. Click **Save**.

Customizing the Configuration File

SuiteCommerce InStore (SCIS) includes the CustomConfiguration.js file where you can modify various optional settings. You can use the validator.js file to modify events that occur in the shopping cart. This section includes instructions on how to modify these files and information about making customizations to meet your business needs.

For step-by-step instructions on making changes to the SuiteCommerce InStore configuration file, see Editing the CustomConfiguration.js File.

For more information about optional settings, see Optional Settings in CustomConfiguration.js.

Managed SuiteApp Updates not Applied to CustomConfiguration.js

SuiteCommerce InStore is a managed SuiteApp, which means that updates and enhancements to the SuiteApp are pushed automatically to your account. However, the JavaScript configuration file for SuiteCommerce InStore is an exception. The CustomConfiguration.js file is not updated automatically.

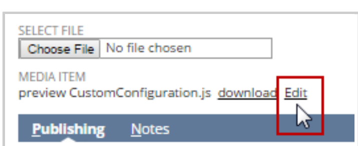
When you add or modify a section of code in CustomConfiguration.js, those changes remain in place through subsequent automatic upgrades.

Editing the CustomConfiguration.js File

To make any changes to the CustomConfiguration.js file in SuiteCommerce InStore (SCIS), you must perform the same general steps.

To edit the CustomConfiguration.js file:

1. Go to Setup > SuiteCommerce Advanced > Web Site Hosting Files.
2. Find the **SuiteCommerce InStore folder** in the File Cabinet. Go to Web Site Hosting Files > Live Hosting Files > SSP Applications > NetSuite Inc. - POS > SuiteCommerce InStore
3. Click **Edit** next to **CustomConfiguration.js**.
4. In the file record, click **Edit** in the Media Item section, next to the file name.



5. When you are finished making changes, click **Save** on the file record.

Optional Settings in CustomConfiguration.js

There are several custom configurations that are optional for SuiteCommerce InStore (SCIS). Each optional configuration is documented in the JavaScript configuration file. To learn about the options you can configure, view the CustomConfiguration.js file.

The following topics includes more information about the optional configurations for SCIS:

- Filters for Customer Search

- Switch the Sales Rep After Each Transaction
- Item Display in Cart
- Customize Location Display
- SCIS Event Validators

Filters for Customer Search

You can customize the default filters used for searching customers in SCIS. To apply settings that make sense to sales associates in your organization, modify the following section of code in CustomConfiguration.js.

Configuration settings that are commented are the default settings. To change the default settings modify the settings, and then remove the comments around the code snippet.

```
//   Customer options
   customer: {
      //   Internal ids for the fields used to search customers in the Search Modal.
      //   For example customer can be searched by: Internal Id (internalid), Last Name (lastna
me), Phome (phone), email (email), and
      //   Company Name (company name). These filters can be configured by adding or removing v
alues. Take note that search won't work
      //   if an invalid internalid is issued here. If fullname is added to this list, the sear
ch will also be performed on the concatenation
      //   of firstname and lastname.
      //
      //
searchFilters: [
      //       'fullname'
      // ,   'firstname'
      // ,   'lastname'
      // ,   'phone'
      // ,   'email'
      // ,   'companyname'
      // ],
```

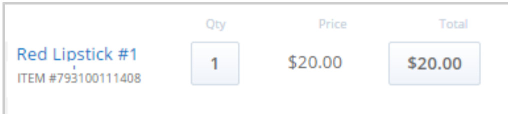
Switch the Sales Rep After Each Transaction

If you use commissions to compensate sales representatives, you may want to customize the workflow for selecting the sales rep on an order. By default, the sales associate can select a sales rep after logging in to SuiteCommerce InStore. The sales rep selected remains in place on all subsequent orders until the sales associate changes the sales rep setting.

```
//   Switch sales rep. after each transaction.
   //
   switchSalesRep: false,
```

Item Display in Cart

By default, each item added into the cart shows the item number as the subtitle under the item name in the cart. You can configure the subtitle shown below the name of the item by adding a line to the CustomConfiguration.js file.



For example, the sample code below will display the text, ITEM #, followed by the UPC code from the item record:

```
itemList: { subtitleLabel: 'ITEM #' , subtitleField: 'upccode' }
```

> **Note:** The value for `subtitleField` must be added to the list of Search Fields on the Web Site Setup page. For example, if you use SKU as the subtitle you will have to add it to the list of Search Felds before putting that value in CustomConfiguration.js.

Customize Location Display

SuiteCommerce InStore includes information about physical store locations where product are in stock and available for pickup. This information is sourced from location settings on item records in NetSuite. You can customize the way in which location information is displayed in SCIS. First create a saved search to display the location information you want to share, and then edit the CustomConfiguration.js file to define the saved search you want to use.

For more information on creating the saved search, see Modifying Saved Searches for SCIS.

- Create a new Location Search with criteria that filters the locations displayed in SCIS. You can also specify sorting. Replace the default values for `locationSearch` and `inventoryLocationSearch` with the ID for your own custom saved search.

```
location: {
        //    Id of the search for displaying locations in Nearby stores and in Pick up locatio
ns
        locationSearch: 'customsearch_ns_pos_locations',

        //    Id of the search for searching the inventory of an item by location
        inventoryLocationSearch: 'customsearch_ns_pos_inventory_locations',
```

- In the nearby stores tab, exclude stores that do not have stock available. Set `nearbyStoresRemoveNoStock: true`.

```
//    Remove locations without stock on that item
        nearbyStoresRemoveNoStock: false,
```

- Sort Nearby Stores and Store Pickup locations by distance to the current SCIS user's location. If you choose not to sort by location distance, then search results sort order is used. You can set the sort parameters for Nearby Stores and Store Pickup, and set a limit to the number of stores in the list.

```
        // Extra order to put in the order screen. Possible values are
        //     'none'             use saved search order
        //     'nearby:desc'    sort by nearby stores, near last
        //     'nearby:asc'    sort by nearby stores, near first
        nearbyStoresExtraSort: 'none',

        // How many locations displayed in all locations
        // 0 means no limit.
```

```
        nearbyStoresLimit: 0,

        // Extra order to put in store pickup tab. Possible values are
        //     'none'            use saved search order
        //     'nearby:desc'    sort by nearby stores, near last
        //     'nearby:asc'    sort by nearby stores, near first
        storePickupExtraSort: 'none',

        // How many locations displayed in the store pickup tab
        // 0 means no limit.
        storePickupLimit: 0,
    }
```

SCIS Event Validators

SuiteCommerce InStore (SCIS) enables administrators to extend the application to meet specific business and design needs. The **validator.js** file contains code snippets that can run before or after a specific event occuring in the shopping cart. The pre-validation code defines what is returned. For example, either the event is not run (and an error message is passed to the SCIS UI instead), or there is success ("1” is returned) and the event runs as expected.

This section includes reference information about how to modify the validator.js file and available methods, supported events, and a list of objects and their properties. Read the following topics for more information:

- How to Modify the validator.js File
- Methods
- Events
- Arguments

How to Modify the validator.js File

The validators.js file is installed by the SuiteApp. By default, the JavaScript is commented, but administrators or web developers can remove the comments in the code to use the default values or make changes to the file.

To modify the validator.js file:

1. Go to Web Site Hosting Files > Live Hosting Files > SSP Applications > NetSuite Inc. - POS > SuiteCommerce InStore.
2. Click **Edit** next to **validators.js**.
3. Remove the comment around the code snippet to use the default values included in the file. You can also edit the code to customize your implementation of SCIS.
4. Click **Save**.

Setting a Variable in Session

You can use a validator to implement a particular workflow that is important to your business. For example, you can add a popup message when some value is missing from an order. To accomplish this with one of the supported event validators, you must set a variable in the user session.

Note the following example:

```
var context = nlapiGetContext();
context.setSessionObject('mykey', 'my value');

// then

var theValue = context.getSessionObject('mykey');
```

Methods

The following methods are available:

- addLine(data)
- updateLine(data)
- getLines()
- getSummary()

addLine(data)

This has a callback function with an argument of type line. Note the following example:

```
//EVENTS
var data = {"line": {"isNew": true,"quantity":1, "line": 1, "item":{"internalid":108}}};
SCISCartComponent.addLine(data).then(function(line) {
    console.log('The line added was: ' + JSON.stringify(line));
});
```

updateLine(data)

updateLine(data)

```
var data = {"item":{"internalid":108},"quantity":2, "line": 1};
SCISCartComponent.updateLine(data).then(function(line) {
    console.log('The line updated was: ' + JSON.stringify(line));
});
```

getLines()

This has a callback function with an array argument, this contains objects of type line. Note the following example:

```
SCISCartComponent.getLines()
.then(function(lines)
{
    var countLines = lines.length;
    if (countLines >= 10)
    {
        throw new Error('You have added ' +  countLines + ' items. You should add only until te
```

```
n items');
    }
});
```

getSummary()

This has a callback function and returns an object of type summary, note the following example:

```
SCISCartComponent.getSummary()
.then(function(summary)
{
    if (summary.total > 10000) {
        throw new Error('You can not make sales with a total greater than 10000');
    }
});
```

Events

You can customize certain events that occur in the shopping cart.

`object.on('event', callback, [context])`

- `event <String> name of the event`
- `callback<Function>`

The following events in SCIS support customization:

- beforeAddLine
- afterAddLine
- beforeVoidLine
- afterVoidLine
- beforeUpdateLine
- afterUpdateLine
- beforeSetCustomer
- afterSetCustomer
- beforeReturnLine
- afterReturnLine
- beforeAddDiscount
- afterAddDiscount
- beforeAddGiftItem
- afterAddGiftItem
- beforeAddGlobalDiscount
- afterAddGlobalDiscount
- beforeCancelTransaction
- afterCancelTransaction
- beforePay

- afterPay

beforeAddLine

The callback gets one argument (Line), for example:

```
//EVENTS
SCISCartComponent.on('beforeAddLine', function(line) {
    console.log('EVENTO BeforeAddLine ', JSON.stringify(line));
});
```

afterAddLine

The callback gets one argument (Line), for example:

```
//EVENTS
SCISCartComponent.on('afterAddLine', function(line) {
    console.log('EVENT AfterAddLine ', JSON.stringify(line));
});
```

beforeVoidLine

The callback gets one argument (Line), for example:

```
//EVENTS
SCISCartComponent.on('beforeVoidLine', function(line) {
    console.log('EVENT BEFORE VOID LINE', ' line is void: ' + line.voidLine);
});
```

afterVoidLine

The callback gets one argument (Line), for example:

```
//EVENTS
SCISCartComponent.on('afterVoidLine', function(line) {
    console.log('EVENT AfterVoidLine', ' line is void: ' + line.voidLine);
});
```

beforeUpdateLine

The callback gets one argument (Line), for example:

```
//EVENTS
SCISCartComponent.on('beforeUpdateLine', function(line) {
    'use strict';
    console.log('EVENT BeforeUpdateLine', JSON.stringify(line));
    var quantity = line.quantity;
    if (quantity > 10) {
```

```
        throw new Error('You can not update lines with quantity greater than 10.');
    }
});
```

afterUpdateLine

The callback gets one argument (Line), for example:

```
//EVENTS
SCISCartComponent.on('afterUpdateLine', function(line) {
    console.log('EVENT AfterUpdateLine', ' line updated: ' + JSON.stringify(line));
});
```

beforeSetCustomer

The callback gets one argument (Customer). Customer is an ID for example:

```
//EVENTS
SCISCartComponent.on('beforeSetCustomer', function(customer) {
    'use strict';
    console.log('EVENT BeforeSetCustomer' + JSON.stringify(customer));
    var customerId = 0;
    if (customer == customerId) {
        throw new Error('The customer with the id ' + customerId + ' can not be used.');
    }
});
```

afterSetCustomer

The callback gets one argument (Customer). Customer is an ID for example:

```
//EVENTS
SCISCartComponent.on('afterSetCustomer', function(customer) {
    console.log('EVENT AfterSetCustomer' + JSON.stringify(customer));
});
```

beforeReturnLine

The callback gets one argument (Line), for example:

```
//EVENTS
SCISCartComponent.on('beforeReturnLine', function(line) {
    'use strict';
    console.log('EVENT BeforeReturnLine', JSON.stringify(line));
    var quantity = line.quantity;
    if (quantity > 2) {
        throw new Error('You can not return lines with quantity greater than 2.');
    }
});
```

afterReturnLine

Note the following example:

```
//EVENTS
SCISCartComponent.on('afterReturnLine', function(line) {
    console.log('EVENT AfterReturnLin', JSON.stringify(line));
});
```

beforeAddDiscount

The callback gets one argument (Discount), for example:

```
//EVENTS
SCISCartComponent.on('beforeAddDiscount', function(discount) {
    'use strict';
    console.log('EVENT BeforeAddDiscount', JSON.stringify(discount));

    var discountValue = discount.baseprice
    ,   isPercentage = discountValue.indexOf('%') > 0
    ,   discountRate = discountValue.replace('%', '').replace('-', '');

    if (discountValue && isPercentage && discountRate > 50) {
        throw new Error('You can not apply discounts greater than 50%.');
    }
});
```

afterAddDiscount

The callback gets one argument (Discount), for example:

```
//EVENTS
SCISCartComponent.on('afterAddDiscount', function(discount) {
    'use strict';
    console.log('EVENT AfterAddDiscount', JSON.stringify(discount));
});
```

beforeAddGiftItem

The callback gets one argument (gift), for example:

```
//EVENTS
SCISCartComponent.on('beforeAddGiftItem', function(gift) {
    'use strict';
    console.log('EVENT BeforeAddGiftItem', JSON.stringify(gift));

    var giftValue = gift.baseprice
    ,   maxValue = 400;

    if (giftValue > maxValue) {
```

```
        throw new Error('You can not add a gift card with amount greater than ' + maxValue + '
.');
    }
});;
```

afterAddGiftItem

The callback gets one argument (gift), for example:

```
//EVENTS
SCISCartComponent.on('afterAddGiftItem', function(gift) {
    'use strict';
    console.log('EVENT AfterAddGiftItem', JSON.stringify(gift));
});;
```

beforeAddGlobalDiscount

The callback gets one argument (Discount), for example:

```
//EVENTS
SCISCartComponent.on('beforeAddGlobalDiscount', function(discount) {
    'use strict';
    console.log('EVENT BeforeAddGlobalDiscount', JSON.stringify(discount));

    var discountValue = discount.rate
    ,   isPercentage = discountValue.indexOf('%') > 0
    ,   discountRate = discountValue.replace('%', '').replace('-', '');

    if (isPercentage && discountRate > 20) {
        throw new Error('You can not apply discounts greater than 20%.');
    }
});
```

afterAddGlobalDiscount

The callback gets one argument (Discount), for example:

```
//EVENTS
SCISCartComponent.on('afterAddGlobalDiscount', function(discount) {
    'use strict';
    console.log('EVENT AfterAddGlobalDiscount ', JSON.stringify(discount));
});
```

beforeCancelTransaction

The callback gets one argument (Transaction), for example:

```
//EVENTS
```

```
SCISCartComponent.on('beforeCancelTransaction', function(transaction) {
    'use strict';
    console.log('EVENT BeforeCancelTransaction ', JSON.stringify(transaction));
});
```

afterCancelTransaction

The callback gets one argument (Transaction), for example:

```
//EVENTS

SCISCartComponent.on('afterCancelTransaction', function(transaction) {
    'use strict';
    console.log('EVENT AfterCancelTransaction ', JSON.stringify(transaction));
});
```

beforePay

The callback gets one argument (params). The argument (params) is an object with two attributes. The attribute '0' contains the order and the attribute '1' contains an array of payment objects. Note the following example:

```
//EVENTS

SCISCartComponent.on('beforePay', function(params) {
    'use strict';
    console.log('EVENT BeforePay ', JSON.stringify(params));
    var order = params[0]
    ,   payments = params[1];
    if (order && payments)
    {
       var countPayments = payments.length
       ,   lastPayment = countPayments > 0 ? payments[countPayments - 1] : undefined
       ,   maxPaymentAllowed = 1000;

       if (lastPayment && lastPayment.paymentmethodname !== 'Cash' && order.total > maxPaymentA
llowed)
       {
            throw new Error('You can not apply a payment with a total greater than ' + maxPayme
ntAllowed + '. It is only allowed to cash payments.');
       }
    }
});
```

afterPay

The callback gets one argument (params). The argument (params) is an object with two attributes. The attribute '0' contains the order and the attribute '1' contains an array of payment objects. Note the following example:

```
//EVENTS
```

```
SCISCartComponent.on('afterPay', function(params) {
    'use strict';
    console.log('EVENT AfterPay ', JSON.stringify(params));
});
```

Arguments

The following arguments are accessible:

- Line
- Payment
- Discount
- Customer
- Transaction

Line

This argument contains the following properties in SCIS:

- line
- item
- quantity
- displayname
- upccode
- isinactive
- type
- baseprice
- matrix_parent
- minimumquantity
- additional_upcs
- isdonationitem

Note the following example:

```
{
      "line":1,
      "item": {"internalid": 108},
      "isdonationitem":false,
      "quantity":"1.0",
      "voidLine":true,
      "order":"F",
      "description":"",
      "giftcertfrom":"Mrs. Wolfe",
      "giftcertmessage":"You received a gift from MySCISWebsite",
      "giftcertnumber":"1234560",
```

```
        "giftcertrecipientemail":"mrwolfe@email.com",
        "giftcertrecipientname":"Mr. Wolfe",
        "tax_code":"116",
        "note":"",
        "excludefromraterequest":"F",
        "custcol_ns_pos_voidqty":""
}
```

Payment

This argument contains the following properties in SCIS:

- paymentmethod
- paymentmethodname
- payment
- total
- rounding

Note the following example:

```
{
        "paymentmethod": "1",
        "paymentmethodname": "Cash",
        "payment": 1300,
        "total": 1300,
        "rounding": true
}
```

Discount

This argument contains `rate` as the only property in SCIS. Note the following example:

```
{

"rate": "-20%"
}
```

Customer

This argument contains `id` as the only property in SCIS. Note the following example:

```
114
```

Transaction

This argument contains `id` as the only property in SCIS. Note the following example:

```
2123
```

Summary

This argument contains the following properties in SCIS:

- amountdue
- changedue
- couponcode
- createddate
- createdfrom
- discounttotal
- giftcertapplied
- handlingcost
- shippingcost
- shippingcostoverridden
- shippingtax1rate
- subtotal
- tax2total
- taxtotal
- total
- tranid

Note the following example:

```
{
    "amountdue": -7.38,
    "changedue": 7.38,
    "couponcode": "",
    "createddate": "2017-08-03T16:08:00.000Z",
    "createdfrom": ""
    "discounttotal": "0.00",
    "giftcertapplied": "0.00"
    "handlingcost": "0.00",
    "shippingcost": "",
    "shippingcostoverridden": "F",
    "shippingtax1rate": "",
    "subtotal": "1042.62",
    "tax2total": null,
    "taxtotal": "0.00",
    "total": "1042.62",
    "tranid": "CS1659",
}
```

SCIS Roles and Permissions

Different employees interact with SuiteCommerce InStore (SCIS) and with NetSuite based on their roles. The following list describes typical roles and responsibilities for workers in a retail store:

- **Sales Associate** – responsible for logging in to SuiteCommerce InStore, working with customer information, and performing sales transactions.
- **Sales Representative** – responsible for assisting customers. The Sales Rep designation is primarily used to calculate commissions.
- **Store Manager** – responsible for performing daily sales reports and other administrative tasks. Authorization from a store manager may be required to submit certain transactions, such as voids and returns.
- **Store Administrator** – responsible for installing and configuring SuiteCommerce InStore and peripherals.
- **NetSuite Administrator** – responsible for installing and configuring SuiteCommerce InStore. The NetSuite administrator can also manage day-to-day operations.

The **SCIS Clerk** role is added to your NetSuite account when you install SCIS. This role includes permissions required to access SCIS on an approved device, search for customers and enter transactions. For more information, read SuiteCommerce InStore Roles.

Permissions

The SuiteApp installs a basic set of permissions for operations that are typical in retail transactions, such as void lines, or apply discount. The employee using SCIS is required to have the necessary NetSuite permissions to perform these operations. The SCIS Permission custom record is used to manage restricted operations that require authorization. For more information, read SuiteCommerce InStore Permissions.

Manager Override

To complete restricted operations, a manager (or other employee) with an authorized role must enter an SCIS Access Code to allow the transaction to proceed. A NetSuite Administrator must define authorized roles on SCIS Permission custom records. Also, employees with authorized roles must be granted an SCIS Access Code to authorize restricted operations. To see a list of the operations that are restricted by default, see Operations that Require Authorization.

SCIS Access Code is a field on the Custom subtab on the Employee record. When this field is populated, employees can use the SCIS Access Code to authorize restricted transactions.

SCIS Audit Log

The SCIS Audit Log shows every operation that requires permission. You can use this log to track approvals of restricted operations. For more information, read SCIS Audit Log.

SuiteCommerce InStore Roles

Employees who use SuiteCommerce InStore (SCIS) to enter transactions, need permissions that are configured on the SCIS Clerk role installed by the SuiteApp. Administrators can create additional roles based on the SCIS Clerk role. For the purpose of secure authentication, roles for employees who will be using SCIS on tablets must also be restricted by Device ID. For more information about Device ID setup, see the help topic Device ID and the SCIS SuiteApp.

SCIS Clerk

Employees entering transactions in SCIS, must use the SCIS Clerk role, or a role configured using the SCIS Clerk role as a template. Removing any permissions that are already configured on an SCIS role can prevent employees from performing basic tasks.

> **Note:** If you use Multiple Currencies in your account, an Administrator must ensure that the Currency permission exists on the SCIS Clerk role. Go to Setup > Users/Roles > Manage Roles. Click **Edit** next to **SCIS Clerk**. Click the **List** subtab, select **Currency**, and then set the permission **Level** to **View**. Click **Save**.

SCIS Support

Assign this role to employees who are tasked with configuring devices for SCIS. This role does not include any permission to enter transactions. By default, this role is not restricted by device ID, and is intended to allow employees to log in to NetSuite on a tablet and configure the SCIS Mobile Device record.

To configure a device for a location, go to Customization > Lists, Records, & Fields > Record Types > SCIS Mobile Device. Click Edit next to a mobile device record, and then set the Device Location field. For more information, read Working with Employees in Multiple SCIS Locations.

Custom Roles

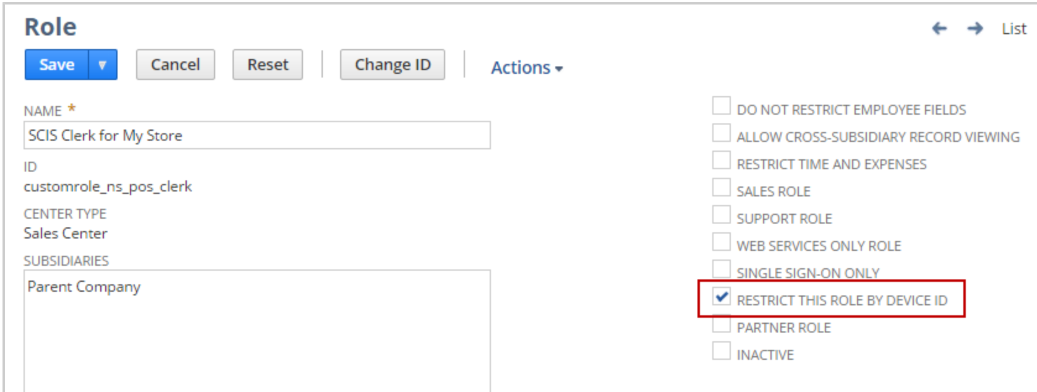
To create custom roles for your employees, use the SCIS Clerk role as a template. For example, after you install SCIS, the SCIS Clerk role appears in the list of roles in NetSuite at Setup > Users/Roles > Manage Roles. Perhaps **Sales Associate** is used as a job title in your organization. You can duplicate the SCIS Clerk role to create a role called **Sales Associate**. By duplicating the role installed by SCIS, you can preserve the custom role you create, as well as the original role and associated permissions installed by the SuiteApp.

To customize a role installed by SCIS:

1. Go to Setup > Users/Roles > Manage Roles.
2. Click **Edit** next to **SCIS Clerk**.
3. In the **Name** field, enter a name for the role you are creating. The name you create displays in NetSuite on the list of roles.
4. Add permissions as needed.

   > **Important:** Do not remove any permissions for Transactions, Lists, Setup, or Custom Records. Removing permissions can prevent workers from completing standard transactions in SCIS.

5. Check the **Restrict this Role by Device ID** box.



6. Click **Save As** to add your custom role to the list. This preserves all the permissions on the original role installed by SCIS.

After you create roles for employees who will be using SCIS, grant permissions for each role. For more information, see SuiteCommerce InStore Permissions.

SuiteCommerce InStore Permissions

The SuiteCommerce InStore (SCIS) SuiteApp installs a basic set of permissions for operations that are typical of point-of-sale transactions. If an employee is not allowed to complete a restricted operation, then the button that allows the operation is hidden, or an alert message is displayed when he or she tries to perform the operation. You can set up manager override capabilities for authorized roles.

For example, you can require that a manager authorize the transaction anytime an item is voided from an order. Edit the VOID_LINE permission, and then select the manager's role in the **Authorized Roles** list. Next, select the sales associate's role in the **Requires Authorization** list. The sales associate will need authorization from the manager to complete an order each time an item is voided. To configure VOID_LINE so that the sales associate can void an item without further authorization, select the sales associate's role as the Authorized Role, and then leave the Requires Authorization list blank.

Defining Permissions

The following steps describe how to define the SCIS Permission record to make sure each employee using SCIS has the correct permissions to complete his or her daily tasks.

To define SCIS Permission records:

1. Go to Customization > Lists, Records & Fields > Records Types.
2. Find **SCIS Permission** in the list of Record Types, and then click **List** in that row.
3. Click **Edit** next to the permission record you want to modify.
    a. **Name** – Do not edit this field. This is the name of the operation. It is used as a key to identify the permission.
    b. **Description** – (Optional) Enter a description for the operation.
    c. **Authorized Roles** – (Required) Select one or more roles that are allowed to perform the operation. The roles selected here have manager override capability.
    d. **Require Authorization Role** – (Optional) Select the role that needs authorization to perform the operation. You can select more than one role.

4. Click the Filters subtab. Set the **Locations**, **Websites**, and **Subsidiaries** where you want the permission to apply.
5. Click **Save**.
6. Go to Lists > Relationships > Employees.
7. Enter an **SCIS Access Code** for each employee granted manager override on SuiteCommerce InStore transactions.
   a. Click **Edit** next to employee records with authorized roles.
   b. Click the **Custom** subtab, and then enter a value in the **SCIS Access Code** field.
8. Click the **Filters** subtab, and then select filters for Location, Website, and Subsidiary.

> **Important:** Filter settings are required. If filters are not selected, the SCIS custom record is ignored entirely. If you **do not** want to setup specific localizations, then you must check the **Apply to All** boxes on the Filters subtab.

9. Click **Save**.

Operations that Require Authorization

The following table provides a list of operations associated with the SCIS Permission custom record. Any role derived from the default **SCIS Clerk** role requires authorization to complete the operations listed below.

Operation	SCIS Permission
Pay with a Credit Memo	APPLY_CREDITMEMO
Pay with a Gift Card	APPLY_GIFTCARD
Apply customer terms of payment to an order	APPLY_TERMS
Enable an employee to configure a device	CONFIGURE_DEVICE
Required for Administrators logged in to NetSuite on a desktop computer to set the SCIS Mobile Device Location.	EDIT_DEVICE_LOCATION
Apply Custom Discounts	CUSTOM_DISCOUNT
End of day operation	END_OF_DAY
Apply Order level discount	GLOBAL_DISCOUNT
Initial Loan operation	INITIAL_LOAN
Apply line level discount	LINE_DISCOUNT
Open the cash drawer between transactions with No Sale operation	OPEN_CASH_DRAWER
Convert quotes to sales	QUOTES_CONVERT
Create quotes	QUOTES_CREATE
Edit or change quotes	QUOTES_UPDATE
Remove or delete transaction	REMOVE_TRANSACTION
Resume order	RESUME_ORDER
Suspend Orders	SUSPEND_ORDER
Unvalidated Return	UNVALIDATED_RETURN

Operation	SCIS Permission
Validated Return	VALIDATED_RETURN
Void Line	VOID_LINE

SCIS Cash and Transactions

Sales Transactions

All transactions generated from SuiteCommerce InStore (SCIS) are recorded in NetSuite. Each sales transaction originates as a cash sale. The cash sale transforms to an invoice for cash-and-carry sales with split payments. Sales orders are generated for orders for delivery. As orders for delivery are processed and shipped, item fulfillments are created from the sales order.

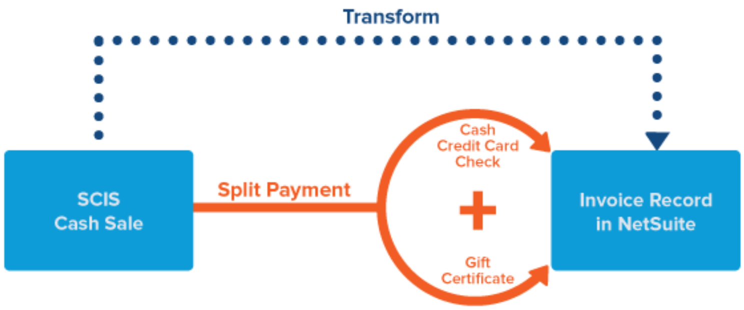
SCIS installs saved transaction searches that can be used for sales reporting. For more information, see SCIS Saved Search and Reporting.

Cash Sales

A basic sales transaction entered in SCIS, paid using one payment method is recorded on a cash sale transaction form. Administrators can view or edit cash sale transactions in NetSuite. Go to Transactions > Sales > Enter Cash Sales > List.

Invoices

A basic sale, paid with multiple payment methods is recorded on an invoice form. For example, an invoice form is used when a customer pays part of the amount due in cash, and the remaining amount with a credit card. The Standard Product Invoice form is used by default. To view or edit an invoice in NetSuite, go to Transactions > Sales > Create Invoices > List.



POS Status Definitions

The POS Status field appears on all transactions entered with SCIS. This field displays values that are not part of the standard transaction record. The values displayed in this field provide information about transactions that are closed or in progress. This is a read-only field that is set automatically as transactions are created and processed in SCIS.

The following list includes values that can appear in the POS Status field and descriptions for the values:

- **Closed** – A transaction that is paid in full, or a transaction with a Credit Memo fully applied.
- **Open** – The status set at the creation of a transaction. Also, if a saved transaction is resumed without being completed, then the POS Status is Open.
- **Tendering** – A partially paid transaction.
- **Suspended** – A saved or suspended transaction.

> **Note:** Suspended orders are designated an Unapproved Payment Status. To put a transaction in “Unapproved” status a credit card payment method must be selected. The specific payment method is not relevant and has no impact. Unapproved is the only status that allows a non-posting cash sale to be created without affecting reports and inventory.

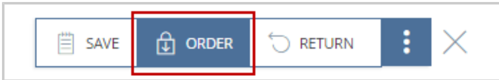
- **Partially Returned** – The status set when one or more (but not all) items on a cash sale transaction are returned.
- **Returned** – The status set when all items on a cash sale transaction are returned.

Orders for Delivery

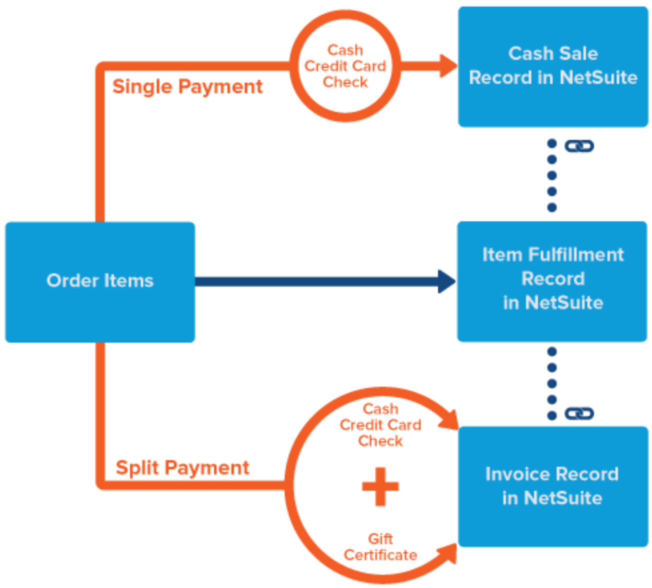
The sales associate can have products shipped to the customer. Each line of the order can be shipped to a different residential address or marked to be picked up in another store. Shipping capabilities in SCIS leverage the Multiple Shipping Routes feature in NetSuite. The following conditions must be met to create orders for delivery:

- **A non-default customer must be selected on the order.** Orders for delivery require a customer record with a shipping address. Before creating the order, the sales associate must establish whether the customer is already registered with the store. If the customer does not already exist in the system, then a customer record must be created.

- **Items must exist in the cart.** The sales associate uses the Item Action menu to set up the delivery. The Item Action menu appears under each line-item in the cart.



When an SCIS order is set up for delivery, the resulting transaction is a Cash Sale or an Invoice (depending on the payment methods, or return status). The workflow is the same for a delivery order as with a standard order. The difference is that the cash sale or invoice is created from a sales order. If the order contains items that are not to be shipped, an item fulfillment transaction is created in NetSuite for those items as well.



SuiteCommerce InStore supports ship from store and pickup in-store. For more information, read SCIS Ship from Store, Pickup In-Store Overview in the SCIS Administrator's Guide. See also Fulfilling Orders for Shipping and Pickup with SCIS, in the SCIS User Guide.

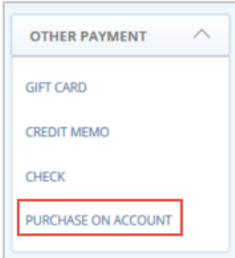
Accepting Payment

With SuiteCommerce InStore (SCIS), sales associates can accept various forms of payment from customers. All of the procedures described in the topics listed below must be performed during the initial installation and configuration of SCIS.

- Modifying Cash Payment Denominations
- Setting Up Payment Services for SCIS

SCIS Purchase on Account

SuiteCommerce InStore (SCIS) supports the Purchase on Account payment option that allows customers to purchase items using payment terms. After selecting a customer on the order, the sales associate can select the Purchase on Account option from the list of Other Payment options.



When an order is placed using Purchase on Account, an invoice is created in NetSuite. If the customer already has terms defined on the customer record, those terms are already selected in SCIS. If the sales associate is entering a new customer at point of sale, then the sales associate can select from the list of customer payment terms already defined in NetSuite.

Note: After the initial order is submitted in SCIS using Purchase on Account, any further payments on the order can be made only in NetSuite.

Permission for Purchase on Account

The Purchase on Account payment option depends on the SCIS Permission record, APPLY_TERMS. You must ensure that the permission record is configured with authorized roles and filters for location, website, and subsidiary.

To configure permission for purchase on account:

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find **SCIS Permission**, and then click **List**.
3. Click **Edit** next to **APPLY_Terms**.
4. Ensure the roles that should be allowed to use Purchase on Account are selected in the **Authorized Roles** list.
5. Click the **Filters** subtab. Ensure the location, website, and subsidiary are selected where you want Purchase on Account to be available.
6. Click **Save**.

Cash Management in SCIS

SuiteCommerce InStore (SCIS) supports traditional, cash based point–of–sale capabilities. This section provides information for Administrators about cash management in SCIS.

Administrators must complete some general setup steps to use cash management. To use Advanced Cash Management administrators must complete additional setup steps. For tracking sales, the administrator can view the opening drawer and closing drawer transactions submitted by employees. For more information about custom translations associated with cash management and workflows for sales associates, read SCIS Cash Management Workflows and Tracking.

Cash Management

Setup steps for using cash management include defining accounts in the chart of accounts for tracking the movement of cash. The administrator can choose from existing accounts in the chart of accounts, or create new ones for this purpose. Next, set these accounts on location records as the **SCIS Store Safe Account** and **SCIS Cash Drawer Difference** account.

A **Cash Drawer** account is automatically created in the chart of accounts for each sales associate when the sales associate first logs in to SCIS. For example, if you have five sales associates entering transactions in SCIS, you will have five cash drawer accounts in NetSuite. The account name is appended with the sales associate's name. The location assigned to the account is the same as the location assigned to the employee.

Advanced Cash Management

Advanced Cash Management requires some additional setup steps beyond defining the Store Safe and Cash Drawer Difference accounts. Also, Advanced Cash Management does not use cash drawer accounts associated with the sales associate. Instead, an **SCIS Shift** custom record is created when sales associates open a shift in SCIS. The administrator must configure an **SCIS Register** custom record for each cash drawer and printer combination used at each retail store. Because the sales associate must choose from a list of registers configured for the location where they are working, Advanced Cash Management provides flexibility for organizations with sales associates working in multiple locations.

For more information about setting up cash management, read SCIS Cash Management Setup.

SCIS Cash Management Setup

Administrators must first complete general cash management setup steps whether or not they plan to use Advanced Cash Management in SuiteCommerce InStore (SCIS). This section includes general setup steps, and steps for setting up Advanced Cash Management. See also, Advanced Cash Management Setup.

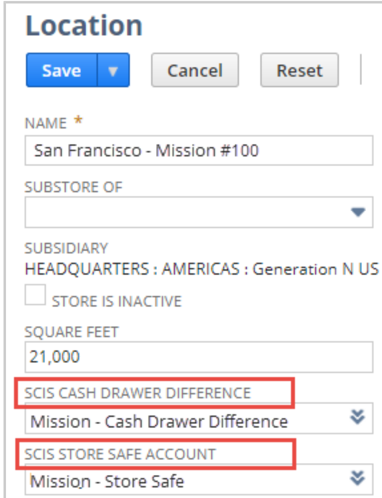
For more information about the custom fields and records that are used in cash management, read the section on Cash Management custom fields and records.

To set up cash management in SCIS:

1. Consider which accounts to use as the **SCIS Store Safe Account** and **SCIS Cash Drawer Difference** accounts.
    a. Go to Lists > Accounts > New.
    b. Select or create accounts as needed to represent the **SCIS Store Safe Account** and **SCIS Cash Drawer Difference** account. If you use multiple locations and currencies, you must define the location and currency on each account. Note the following recommendations for account types:

SCIS Account	Account Type or GAAP Category
SCIS Store Safe Account	Other Current Asset
SCIS Cash Drawer Difference	Expense

2. Define the **SCIS Store Safe Account** and **SCIS Cash Drawer Difference** accounts on Location records in NetSuite.
    a. Go to Setup > Company > Locations.
    b. Click **Edit** next to each location using SCIS.
    c. Select an account for **SCIS Store Safe Account** and **SCIS Cash Drawer Difference**.



d. Click **Save**.

3. Go to Customization > Lists, Records, & Fields > Records.
4. Find the **SCIS Payment Method** record, and click **List** in that row.
5. View the SCIS Payment record used for cash, and for any payment method for which you want the cash drawer to open. Ensure the **Use Cash Drawer Account** box is checked.

Advanced Cash Management Setup

This section provides information for administrators using SCIS with Advanced Cash Management capabilities.

To set up Advanced Cash Management

1. Enable the Advanced Cash Management feature on the SCIS Settings record.
   a. Go to Customization > Lists, Records, & Fields > SCIS Settings.
   b. Check the **Advanced Cash Management** box.
   c. Select a **Close Shift Receipt Template**.

   > **Note:** Because SuiteCommerce InStore is a managed SuiteApp, any changes to default receipt templates will be overwritten by periodic automatic updates. If needed, create a custom Close Shift Receipt Template, and then select your custom receipt template. For more information, read Customizing a Receipt Template for SCIS.

   d. Click **Save**.
2. Create one or more register accounts. You must use this register account when you create an SCIS Register record in a later step.
   a. Go to Lists > Accounts > New.
   b. Create one or more accounts with the location (and subsidiary, if applicable) defined on the account record.
3. Create an **SCIS Register** record for each cash drawer and printer combination.
   a. Go to Customization > Lists, Records, & Fields > SCIS Register.
      - **Name** - Enter a name for the cash register or cash drawer.

- **Register Location** - Select a location for the cash drawer. The options on the list are sourced from the list of locations set up in your NetSuite account.
- **Printer/Register**– Enter the name of the printer associated with the cash drawer.
- **Register Account** – Select the account for the cash drawer. The Register Account field is filtered by location.

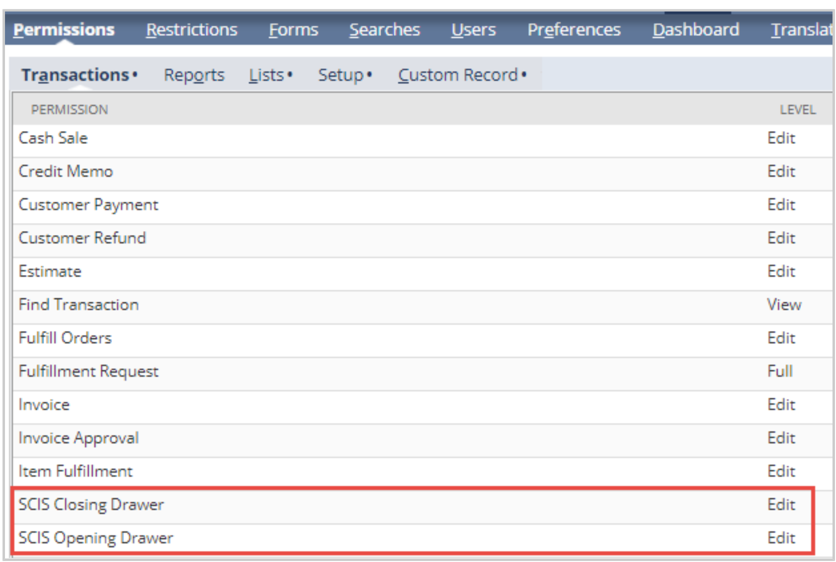
b. Click **Save**.

4. View the **SCIS Payment Method** record used for cash and any SCIS Payment Method for which you want the cash drawer to open. Ensure the **Use Cash Drawer Account** box is checked.

To use the advanced cash management feature, an administrator must also change the following permissions in the SCIS clerk role. Modify the SCIS Clerk role that is assigned to employees entering transactions in SCIS.

To set up permissions for the SCIS Clerk using Advanced Cash Management:

1. Go to Setup > Users/Roles > Manage Roles.
2. Click **Edit** next to the **SCIS Clerk** role.
3. On the **Permissions** subtab, in the **Transactions** sublist, change the level of permission for **SCIS Closing Drawer** and **SCIS Opening Drawer** to **Edit**.



PERMISSION	LEVEL
Cash Sale	Edit
Credit Memo	Edit
Customer Payment	Edit
Customer Refund	Edit
Estimate	Edit
Find Transaction	View
Fulfill Orders	Edit
Fulfillment Request	Full
Invoice	Edit
Invoice Approval	Edit
Item Fulfillment	Edit
SCIS Closing Drawer	Edit
SCIS Opening Drawer	Edit

4. Click **Save**.

With Advanced Cash management, the sales associate opens a shift by entering the initial loan and selecting a register. This action triggers an **SCIS Shift** record to be created automatically. The shift record shows opening and closing shift time, the register used, and includes links to the opening drawer and closing drawer transactions. For more information about cash management tracking, read SCIS Cash Management Workflows and Tracking.

SCIS Shift

The SCIS Shift record is only used when Advanced Cash Management is enabled. After the sales associate opens a shift, an **SCIS Shift** custom record is automatically created. The SCIS Shift record tracks the most important information about a shift including start and end times, as well as the beginning amount and ending amount in the cash drawer.

SCIS Cash Management Workflows and Tracking

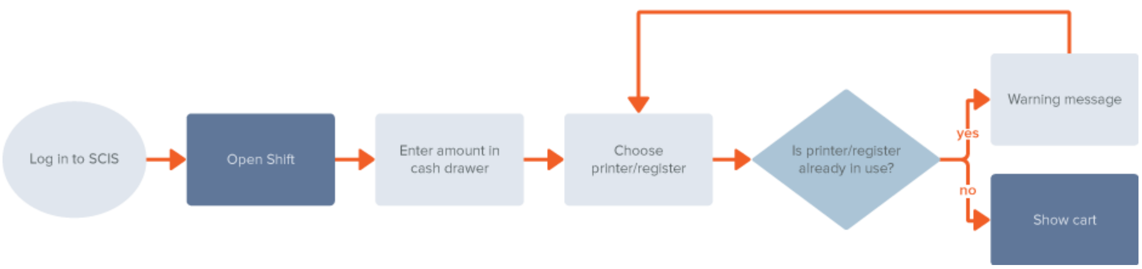
This section includes workflow diagrams showing the workflow for sales associates opening and closing the cash drawer with Advanced Cash Management and without. Workflows for sales associates are slightly different depending on whether or not Advanced Cash Management is enabled for SCIS. This section also includes information on tracking opening and closing drawer transactions in NetSuite.

Workflows for Sales Associates

At the beginning of a shift, the sales associate receives a cash drawer. Before entering any sales transactions, the sales associate must enter an **Initial Loan** or **Open Shift** transaction to document the amount of cash in the drawer.

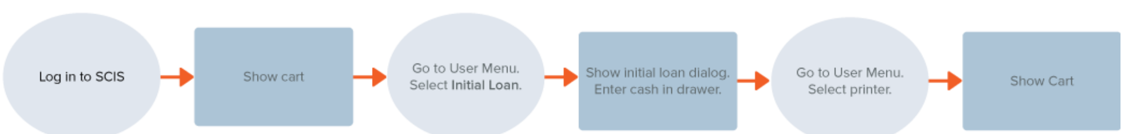
Opening a Shift with Advanced Cash Management

When Advanced Cash Management is enabled, after logging in to SCIS, the sales associate must enter the initial loan amount and then select a cash drawer.



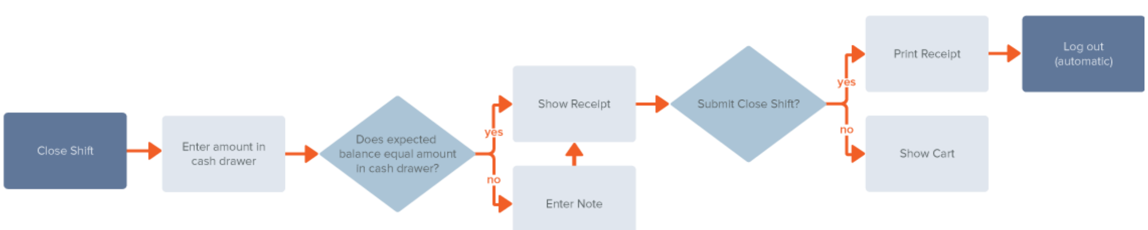
Opening a Shift with Standard Cash Management

If Advanced Cash Management is **not** enabled, then the sales associate uses the **Drawer Operations...** option in the User Menu to open the **Initial Loan** dialog screen. Next, enter the total amount for each cash denomination in the cash drawer.



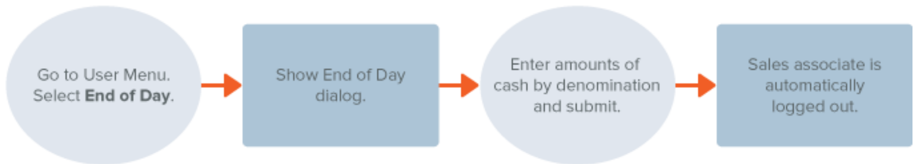
Closing a Shift with Advanced Cash Management

If Advanced Cash Management is enabled, the sales associate must select **Close Shift** from the User Menu (Drawer Operations... > Close Shift). Next, count the cash in the drawer, and then enter the amount of cash in the drawer. If the amount of cash in the drawer does not equal the expected amount, then the sales associate must enter a note to explain why. A Close Shift receipt is printed and then the sales associate is automatically logged out of SCIS.



Closing a Shift with Standard Cash Management

If Advanced Cash Management is **not** enabled, then the sales associate selects **End of Day** from the User menu to start the process. Next, the sales associate enters the amount of cash in the drawer.



Tracking Opening and Closing Drawer Transactions

SuiteCommerce InStore (SCIS) enables administrators and managers to track the cash transactions that happened during a shift. The custom transactions, **SCIS Opening Drawer** and **SCIS Closing Drawer** show a line for each cash denomination that moves from the safe to the cash drawer, and from the cash drawer back to the safe.

Opening Drawer

Typically, at the beginning of a shift, the sales associate receives cash in a drawer. If you use standard cash management capabilities, when the sales associate logs into SCIS, his or her Cash Drawer account is created automatically. If you use Advanced Cash Management, then an SCIS Shift record is created after the sales associate enters an Opening Shift transaction. In either case, the first task for a sales associate is to enter the opening drawer amount.

In NetSuite, the administrator can see the sales associate's cash drawer account on transactions entered using standard cash management. With Advanced Cash Management, the shift is displayed on each cash sale transaction submitted. The administrator can also view or edit SCIS Opening Drawer transactions.

To view SCIS Opening Drawer transactions:

1. Go to Customization >Lists, Records & Fields > Transaction Types.
2. Find **SCIS Opening Drawer** in the list. Click **List** in that row.
3. Click **View** to view details of the SCIS Opening Drawer.

   Each line in the list tracks the transfer of cash from the SCIS Store Safe Account to each sales associate's cash drawer account. Note that only the last amount entered as part of the opening drawer is displayed in the list.

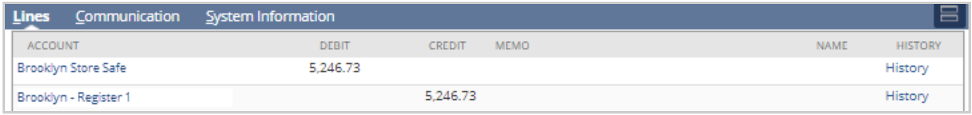
Closing Drawer

At the end of each shift, the sales associate uses SCIS to enter the amount of cash that is in his or her cash drawer. Whether you use standard cash management or Advanced Cash Management, this is tracked as an SCIS Closing Drawer transaction in NetSuite. After the sales associate submits the closing drawer transaction, he or she is automatically logged out of SCIS. An administrator can view or edit the SCIS Closing Drawer transaction in NetSuite.

To view SCIS Closing Drawer transactions:

1. Go to Customization > Lists, Records & Fields > Transaction Types.
2. Find **SCIS Closing Drawer** in the list. Click **List** in that row.

3. Click **View** to see details of the SCIS Closing Drawer transaction.



The Closing Drawer transaction tracks the transfer of cash from the sales associate's cash drawer account or the register account back to the SCIS Store Safe Account. Note that only the last amount entered as part of the SCIS Closing Drawer transaction is displayed in the list.

- Cash Management in SCIS
- SCIS Cash Management Setup
- Cash Drawers

SCIS Ship from Store, Pickup In-Store Overview

Note: Advanced Order Management is required to set up order fulfillment capabilities for SCIS. Contact your NetSuite account representative for more information.

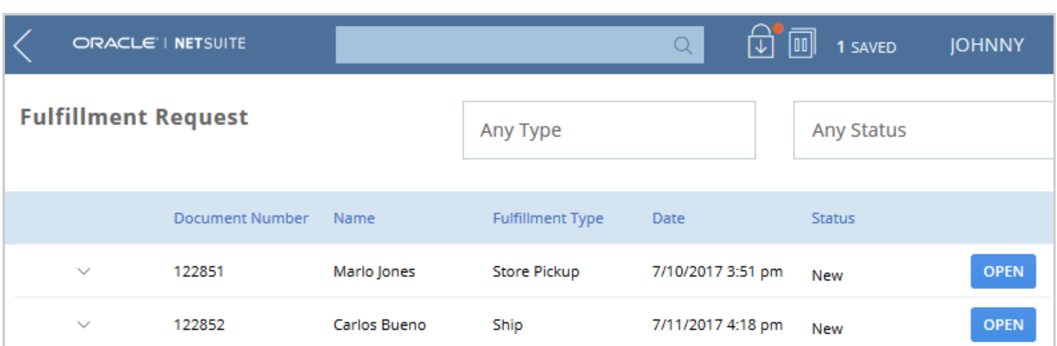
With SuiteCommerce InStore (SCIS), merchants who have SCA websites can enable customers to order online, and then have orders shipped from store locations or picked up in-store. This topic includes general overview information about the ship from store, pickup in-store capabilities.

To enable shipping and pickup from store, you must configure your fulfillment process in NetSuite. Also, ensure that you have enabled the features required to perform your workflow. For more information, read Setting Up Ship from Store, Pickup In-Store for SCIS.

SCIS supports the following order management features:

- Fulfillment Request
- Pick, Pack, and Ship
- Automatic Location Assignment Rules
- Store Pickup

Sales associates click or touch the shopping bag icon in the SCIS header bar to view the **Fulfillment Request** page. Here, the sales associate sees a list of all orders for shipping and pickup.



Sales associates can use filters at the top of the page to filter orders by type or status. For example, sales associates can filter the list to view only orders for shipping. Alternately, they can filter the list to show orders for pick up, or all orders. The information that is displayed on this page, is output from a saved search. For more information, read Ship from Store, Pickup In-Store Workflow.

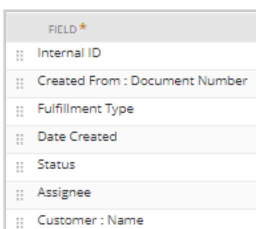
Setting Up Ship from Store, Pickup In-Store for SCIS

This topic includes instructions for administrators to set up Ship From Store, Pickup In-Store capabilities in SuiteCommerce In-Store (SCIS). The first step is configuring fulfillment requests in your account. Next, customize the SCIS Sales Order Minimal transaction form, ensure permissions are set properly for the SCIS Clerk role used to log in to SCIS. Finally, confirm the SCIS Fulfillment Requests saved search is configured correctly.

> **Important:** Fulfillment requests must be configured properly to use ship from store and pickup in-store capabilities in SCIS.

To set up ship from store, pickup in-store for SCIS:

1. Complete **all** the steps for Setting Up Fulfillment Requests.
2. Customize the **SCIS Sales Order Minimal** transaction form to show the **Fulfillment Choice** field and the **Location** field.
   a. Go to Customization > Forms > Transaction Forms.
   b. Click Edit next to the Sales Order form you use for SCIS.
   c. On the **Screen Fields** subtab, check the **Show** box next to the **Location** and **Fulfillment Choice** fields.
3. Ensure that the **SCIS Settings** record has your customized Sales Order transaction form selected.
4. Ensure that the Fulfillment Request permission is present on the **SCIS Clerk** role used to log in to SCIS (Setup > Users/Roles > Manage Roles).
5. Ensure that the **SCIS Fulfillment Requests** saved search includes all of the required fields. The Results subtab should have the following:



> **Note:** You can modify the saved search by changing the filters available, but you cannot change the columns that are displayed.

Ship from Store, Pickup In-Store Workflow

This topic includes general information for administrators about sales associates' workflow for fulfilling orders in SuiteCommerce InStore (SCIS).

Ship from Store

SCIS enables sales associates to perform the entire fulfillment process: pick, pack and ship. When a sales associate is working on an order, the order is displayed on the list as in progress, along with the current status and the sales associate's name. Only the sales associate who is working on an order, can complete fulfillment on that order.

Note the following:

- After picking items for the order, the sales associate must select a shipping method for the order.
- The shipping method determines the shipping label that is printed for the package.
- The same shipping items configured for use on your website are also available in SCIS for shipping from the store. Customers can track orders using the My Account application associated with your SCA website.
- When the sales associate prints the shipping label, the label is sent by email message. The shipping label must be printed in PDF format.

> **Important:** To print shipping labels, the administrator must ensure the appropriate shipping items are configured in NetSuite. For more information, read the help topic Setup Shipping.

Pickup in Store

When an order is marked for pickup in-store, the sales associate finds it on the Fulfillment Request list. Next, the sales associate marks the items in the order as picked. When the customer arrives at the store for pickup, the sales associate prints the receipt. At this time, the sales associate (and customer) have the option to add items to the order.

For more information about the workflow for sales associates, read the help topic Fulfilling Orders for Shipping and Pickup with SCIS.

Note the following limitations for shipping from store and pickup in store:

- Serialized inventory and lot numbered items cannot be shipped.
- Partial quantities cannot be shipped or picked up in store. If the entire quantity on a line item is not available, then the sales associate must reject that line on the picking list. The order appears on the Fulfillment Request list again, assigned to a different location for processing.

Setting Up Quotes in SCIS

In NetSuite, you can provide customers with an estimate before the order is accepted. In SuiteCommerce InStore (SCIS) estimates are called Quotes. A sales associate can create a quote in SCIS based on items and discounts in the cart, and then print or email the quote to the customer. After the customer has reviewed the order amount, the sales associate can make changes as needed, and then convert the quote into a sales order or cash sale.

As the NetSuite administrator, you define the fields that are displayed in the Quotes entry form in SCIS. In SCIS, the sales associate enters information in required fields. Any sales associate can use SCIS to find a quote and convert it to a sale. You can find existing quotes by scanning the transaction number displayed on the receipt, or by typing the transaction number or the customer's name in SCIS.

To set up quotes in SCIS, you must complete the following tasks:

1. Modifying Role Permissions for Quotes
2. Defining Fields for Display on the Quote Form in SCIS

Modifying Role Permissions for Quotes

The sales associate must have permission to create Estimates. To grant additional permissions to sales associates, you must modify the SCIS Clerk role. Also, check that permissions are set properly for creating quotes.

To modify the SCIS Clerk role permissions for quotes:

1. Go to Setup > Users/Roles > Manage Roles.
2. Click **Customize** next to the **SCIS Clerk** role.
3. On the **Transactions** subtab, change the level of access for the **Estimate** permission to **Create**.
4. Click **OK** to accept the change.
5. Click **Save** to save your changes.

To check that permissions for Quotes are set appropriately:

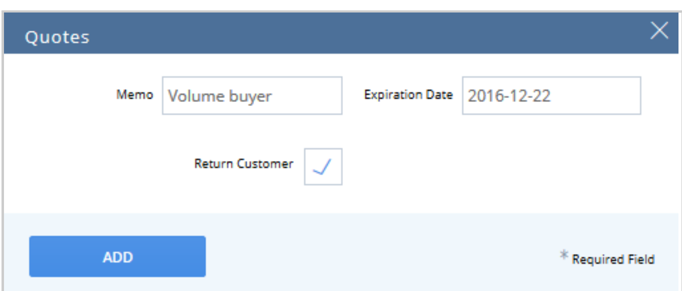
1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find **SCIS Permission**, and click **List** in that row.
3. On the SCIS Permission records for quotes, ensure that the expected roles appear in the list of **Authorized Roles**. For example, if you want sales associates to enter and modify quotes, the SCIS Clerk role must be an Authorized role.

   Click **Edit** next to the following roles:

   - QUOTES_CREATE
   - QUOTES_UPDATE
   - QUOTES_CONVERT
4. Click **Save** after making changes.

Defining Fields for Display on the Quote Form in SCIS

To configure the entry form used for Quotes in SCIS, an administrator must create a copy of the default saved search, and then modify the CustomConfiguration.js file. By creating a modified copy of the default saved search, you can define which fields appear in the popup window presented to the sales associate in SCIS. In the configuration file, you will define the search you want to use.



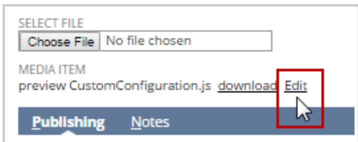
To create a modified copy of the saved search for quotes:

1. Go to Reports > Saved Searches > All Saved Searches.
2. Click **Edit** next to **Estimate Header Fields**.
3. Check the **Public** box.
4. Click the **Results** subtab. Select the fields you want to display in the Quotes popup window.

   > **Important:** Ensure the fields that are on the original saved search also exist on your customized saved search. If you have created a custom Quote form with custom fields, you should be able to select those fields on the Results subtab.
5. Click **Save**.

To define your saved search for quotes in the CustomConfiguration.js file:

1. Go to Setup > SuiteCommerce Advanced > Web Site Hosting Files.
2. Find the **SuiteCommerce InStore folder** in the File Cabinet. Go to Web Site Hosting Files > Live Hosting Files > SSP Applications > NetSuite Inc. - POS > SuiteCommerce InStore
3. Click **Edit** next to **CustomConfiguration.js**.
4. In the file record, click **Edit**.



5. Add the following line in the CustomConfiguration.js file, after the section where forms are defined. Replace `'customsearch_xxxx_xxxx_xxxx'` with the ID for the custom search you want to use.

```
quote: {
          quoteHeaderFieldSavedSearch: 'customsearch_xxxx_xxxx_xxxx'
          },
```

Note the following example:

```
//      Forms used to validate different records. For example different forms can be used here to validate
//      fields
forms: {
        //      customer: -2,
        //      invoice: 92,
        //      cashSale: 95,
        //      creditMemo: 94,
        //      customerRefund: 41,
        //      customerPayment: 70,
        //      salesOrder: 68,
},
quote: {
                quoteHeaderFieldSavedSearch: 'customsearch_ns_pos_quote_header_field_2'
    },
```

After you modify the saved search, then a sales associate can click Quotes in SCIS to open the popup window and enter information in the fields you have defined.

Discounts, Markups, and Promotions for SCIS

- Configuring Discounts
- Price Override for SCIS
- Promotions and Coupon Codes for SCIS

Configuring Discounts

In NetSuite, discounts are a type of item record. You must configure discount items in NetSuite, and then make the discount available for SCIS by selecting it on the SCIS Settings record. Sales associates can then apply discounts to the orders they create in SuiteCommerce InStore (SCIS).

To create a discount for SuiteCommerce InStore:

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

2. Click **Discount** in the list of item types.
3. Enter information in the fields listed below:
   - **Item Name/Number** – Enter a name for the discount. The information you enter here is displayed in SCIS.
   - **Description** – (Optional) Enter a description for the discount. The information in this field is not displayed in SCIS.
   - **Rate** – Enter a dollar amount or percentage for the rate of discount. The information in this field is displayed in SCIS.
   - **Subsidiary** – (Required if you use OneWorld) Select a subsidiary from the list.
4. Click **Save**.
5. Go to Customization > Lists, Records, & Fields.
6. Scroll to **SCIS Settings** , and then click **List** in that row.
7. Click **Edit** next to an existing SCIS Settings record to make changes.
8. Click the **General** subtab.
9. In the **SCIS Location Discounts** list, select the discounts that you want to make available to SCIS.

   > **Note:** If you use multiple SCIS websites, note that discounts defined on the SCIS settings record are applied depending on the combination of location, subsidiary, and website defined on the filters subtab. For particular discounts to be available to a particular employee, the location and subsidiary defined on the employee record must match those settings on the SCIS Settings record.

10. Click **Save**.

To apply a discount in SCIS, the sales associate clicks the order subtotal to view a list of the discounts available. The sales associate can select one of the discounts in the list, or add a custom discount. If a custom discount is selected, then the sales associate enters the discount amount, and is required to submit a discount reason.

Discount Reasons

Discount Reasons is a custom transaction body field that displays when a custom discount is applied to a sale. The sales associate is required to enter a value in this field. The value is output on the resulting transaction record. This custom field does not require any configuration.

SCIS Discount Reasons (List) is a custom record type that you have the option to modify. SCIS installs two default values: **Regular Customer**, and **Other**. You can modify this list to define reasons for applying sales discounts that make sense for your organization.

To modify the list of discount reasons:

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find **SCIS Discount Reasons (List)**, and then click **List** in that row.
3. Edit existing values, or enter additional values into the list.
4. Click the **Filters** subtab, and then select the Location, Website, and Subsidiary where you want these settings to apply. You can select more than one value in each box.

   > **Note:** By default, the filters are set to apply to all locations, websites, and subsidiaries.

5. Click **Save**.

Price Override for SCIS

In SuiteCommerce InStore (SCIS), store managers and sales associates can override the subtotal of an order. The price override capability allows you to increase the amount of the order. There is no additional configuration required from administrators to support price override capability.

To apply a price override or markup in SCIS, the sales associate clicks on the amount in the line-item in the cart or the order subtotal. He or she can then use the custom discount dialog to increase the amount. For more information, read the help topic Applying a Markup or Price Override.

Promotions and Coupon Codes for SCIS

In SuiteCommerce InStore (SCIS), you can connect a discount item with a promotion or coupon code. For example, a customer might bring a flyer to your store promoting a 10% discount on their purchase. The sales associate enters the coupon code from the flyer, and then the 10% discount is applied to the order subtotal.

SCIS supports SuitePromotions which allow you to stack multiple promotions and automatically apply them on a transaction, as well as standard promotions and the Advanced Promotions SuiteApp. In each case, an administrator must complete the following tasks before promotion codes can be used in SCIS:

1. Configure promotion records in NetSuite.
2. Use the SCIS Settings record to define the discounts associated with the promotions you plan to offer

For more information about the different options available for configuring promotions, read the help topic Promotions Overview.

> **Important:** Existing standard and Advanced promotions are not compatible with Stackable Promotions and Auto-Apply. For more information, read the help topic Migrating to SuitePromotions.

To enable SuitePromotions capabilities, go to Setup > Enable Features. Click the **Transactions** subtab, and then check the boxes next to **SuitePromotions**, and **Auto-Apply Promotions**.

Coupon Codes and SCIS

Because the administrator enables features and configures records for SCIS, different types of promotions and coupon code eligibility may not be obvious to sales associates. Sales associates only add items to the order and enter coupon codes. The administrator is responsible for configuring promotion records with stackable and auto-apply capabilities, and then training sales associates as needed.

To learn more about configuring all types of promotions, read the help topic Creating Promotions.

To learn how sales associates apply different types of promotions to orders in SCIS, read the help topic Applying Promotion Codes to Transactions in SCIS.

Returns and Refunds

Sales associates use the SuiteCommerce InStore (SCIS) to process returns and issue refunds to customers. An administrator can view a customer record in NetSuite to see returns and credit memos associated with that customer. Alternatively, the administrator can search NetSuite for a particular transaction, or view Sales reports for the day.

Item Returns

To enter a return, the sales associate logs into SCIS to search the customer profile and retrieve the transaction. When a return is processed in SCIS, a Customer Return transaction and a Credit Memo are generated in NetSuite. The customer return and credit memo are separate transaction records in NetSuite, apart from the original cash sale when the item was purchased.

If the customer chooses to purchase a different item, the sales associate can add that item to the return transaction. In this case an invoice is created in NetSuite for the new order. The credit memo is applied to the new order and the customer refund shows the amount to be refunded to the customer after the credit memo is applied.

Refunds

Typically, a refund is processed using the same payment method that was used to make a purchase. A refund is processed as part of the return. The refund amount is displayed on the Customer Refund transaction.

Note that with SCIS and NetSuite, a credit memo is always generated as part of the return transaction. Customers can use credit memos as store credit the next time they come to the store or shop online. If the customer chooses to be refunded in cash, or by credit card, the credit memo is closed out at the time of the refund.

SCIS offers the sales associate three choices for how to provide a refund while processing a return:

- Refund Cash
- Refund Credit Card
- Refund Credit Memo

If the sales associate chooses to refund cash or credit card, then the refund is processed similar to a sale transaction. The sales associate can refund the customer from the cash drawer or by scanning the credit card used for the original purchase.

Refund Credit Memo

When the sales associate chooses to refund the customer with a credit memo, a Credit Memo is saved for that customer in NetSuite. The sales associate uses SCIS to search for the customer, and then retrieve the return transaction. The credit memo number is displayed on the receipt from the return. The sales associate can apply that credit memo to the customer's next purchase. An administrator can view the credit memo on the customer record in NetSuite.

> **Note:** A credit memo cannot be used as payment unless it is associated with a customer record. If a credit memo is required for refund of a purchase made using the Default Customer record, then the sales associate must create a new customer record. For more information, see Default Customer.

Return Reasons

Optionally, sales associates can select a return reason before submitting an item return transaction. Return Reasons is a custom list installed by SCIS. The custom list includes values you can modify, or you can add more.

> **Note:** If a return reason is not selected, then the text, **Return Reason** appears on the transaction in NetSuite.

To modify or add return reasons:

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find **SCIS Return Reasons (List)**, and then click **List** in that row.
3. Add or modify the list:
   - Click **New SCIS Return Reasons (List)** to add a new value to the list.
   - Click **Edit** next to an existing value to change the name or modify filter settings.
4. Click the **Filters** subtab, and then select the Location, Website, and Subsidiary where you want these settings to apply. You can select more than one value in each box.

   > **Note:** By default, the filters are set to apply to all locations, websites, and subsidiaries.

5. Click **Save**.

Gift Certificates in SuiteCommerce InStore

To sell a gift card or gift certificate in SuiteCommerce InStore (SCIS), an administrator must configure a gift certificate item record in NetSuite. A check box on this item record defines the gift certificate as a physical gift card or a digital gift certificate. The digital gift certificate is redeemable with only the authorization code. The gift certificate can be configured so that the sales associate sets the amount at the time of sale. For more information, see Configuring Gift Certificates for SCIS.

An administrator can also modify the CustomConfiguration.js file to configure the default values displayed in fields on gift certificates. Changing the default values in these fields is an optional customization. For more information, see Setting Gift Certificate Attributes For SCIS.

Selling Gift Certificates

After Gift Certificates are configured in NetSuite they are treated as items in SCIS. After the gift certificate is added to the cart, the sales associate can click on the line-item to change the information, if needed. When a **gift card** is added to the cart, SCIS prompts the sales associate to swipe the card, and then enter the price (if the gift card is configured with a variable amount). For more information useful for sales associates, read the help topic Working with Gift Cards in SCIS.

Selling a **digital gift certificate** is similar, except there is no card to swipe. Also, the sales associate is prompted to enter information for the notification email message that is sent to the recipient. The sales associate enters the names of the gift certificate giver and recipient, the email address of the recipient, the authorization code, and a message. When the order is complete, the authorization code is sent to the gift recipient in an email message and printed on the receipt.

Applying a Gift Certificate as Payment

After the sales associate adds items to an order, he or she clicks the Other Payment button in SCIS, and then selects Gift Certificate. Next, the sales associate swipes the gift card, or enters the authorization code for a digital gift certificate. After the authorization code has been entered, the transaction summary window shows the gift certificate amount applied to the order and the remaining amount due. For more information useful for sales associates, read the help topic Paying with a Gift Card.

Configuring Gift Certificates for SCIS

To offer Gift Certificates in SuiteCommerce InStore (SCIS), you must first set them up in NetSuite. Ensure the gift certificate feature is enabled, and accounting preferences are set correctly. This section includes instructions on how to set up gift certificates for sale in SCIS.

To set up gift certificates for SCIS:

1. Ensure the Gift Certificates feature is enabled at Setup > Company > Enable Features. Click the **Items & Inventory** subtab.
2. Set accounting preferences:
   a. Go to Setup > Accounting > Preferences > Accounting Preferences.
   b. Click the **Items/Transactions** subtab.
   c. In the Other Item Preferences section, set the following:
      - In the **Matrix Item Name/Number Separator** field, enter **-**.

      - In the **Gift Certificate Auth Code Generation** field, select **System Generated**.
3. Go to Lists > Accounting > Items > New. Click **Gift Certificates**.
4. In the **Item Name/Number** field, enter a name for your gift certificate. This field displays internally in NetSuite on lists. If you want to display a different name for the gift certificate on the SCIS website, then enter it in the **Display Name/Code** field.
5. If you use OneWorld, select the **Subsidiary**. Optionally, you can select a **Location**.
6. On the **Accounting** subtab, select the following:
   - **Income account**
   - **Liability account**
   - **Tax Schedule**
7. On the **Custom** subtab, check the **SCIS Gift Card** box if you want this to be a gift card. Leave the box clear if you want to use a digital gift certificate. The digital gift certificate generates an email message to the gift certificate recipient at the time of sale. If you use a gift card, you must also modify the CustomConfiguration.js file.

   For more information, read Setting Gift Certificate Attributes For SCIS.
8. On the **Web Store** subtab, set the following:
   a. Check the **Display in Web Store** box to display the gift certificate in SCIS.
   b. (Optional) Check the **Variable Amount** box, if you want to allow the sales associate to set the gift certificate amount.
   c. (Optional) Enter a maximum amount for the gift certificate in the **Maximum Variable Amount** field.
   d. Click **Web Site List**, and then select the SCIS website in the **Site** column. Under **Site Category**, select **Home**.
9. (Optional) If you want to define a set price for the gift certificate, instead of a variable price, click the **Sales/Pricing** tab, and then enter the amount.

10. Click **Save**.
11. Upload images for the gift certificate. The process for uploading images for gift certificates is the same process for uploading images to other types of items. For more information, see Configuring Item Images for SCIS.
12. Create a QuickAdd key for the Gift Certificate. For more information, see Configuring QuickAdd Keys.

Setting Gift Certificate Attributes For SCIS

When you use gift cards in SuiteCommerce InStore (SCIS), you must modify the CustomConfiguration.js file to include settings for swiping gift cards. You can configure default gift certificate attributes for SCIS. These attributes are displayed in entry fields when sales associates create new gift certificates. The default values you set are displayed as prompts in SCIS. When selling a gift certificate, the sales associate overwrites the default values.

> **Note:** CustomConfiguration.js includes settings for card separator and gift card fields. Accept the defaults. Changing these settings in the configuration file can affect gift certificate capabilities.

Gift Card Separator, Scanning, and Fields

To use physical gift cards in SCIS, you must modify gift card settings in the CustomConfiguration.js file. Find the following code snipet, and then make modifications as described in the code sample given here:

```
//   RegularExpression used to decide if a character is a Card separator
      //   Used to distinguish Gift Card and Employee Access Cards fields
      //
      //   separator: '[\|/]',
         separator: '[-]',


      //   Characters ignored during the scan
      //
      //   ignore: ['%', '?'],

      //   Gift card Fields in order of appereance.
      //
      //   fields: ['upccode', 'quantity', 'giftcertauthcode'],
   },
```

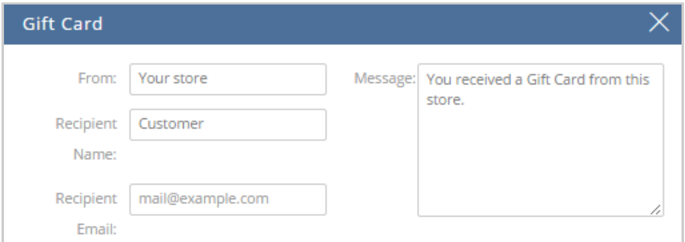
Modifying Display of Authentication Code

You can hide the authorization code field on the gift certificate entry form at the point of sale. Add the following line to the CustomConfiguration.js file:

```
hideAuthorizationCode: true
},
```

To display the authorization code field, change the setting from `true` to `false`.

Modifying Gift Card Entry Field Attributes



Define the following parameters in the `giftCertificate` entry:

- **defaultFromName**: defines the default name of the purchaser of the gift certificate. By default, this name is automatically read from the application environment.
- **defaultToName**: specifies the default recepient of the gift certificate.
- **fallbackEmail**: defines a generic email address associated with the gift certificate.
- **defaultMessage**: specifies a default message that appears on the gift certificate receipt.

The following code sample shows the syntax for the `giftCertificate` entry:

```
//   Gift card selling configuration
   giftCertificate: {
      //   The name that appears on the gift certificate in the 'From' field by default
      //
      //   defaultFromName: 'Your store'

      //   The name that appears on the gift certificate in the 'To' field by default
      //
      //   defaultToName: 'Customer',

      //   The email that apperars on the 'Email' field by if the order customer has
      //   no email set and the user didn't specify a email on the gift certificate
      //
      //   fallbackEmail: 'mail@example.com',

      //   The message that appears on the gift certificate in the 'Message' field by default
      //
      //
      //   defaultMessage: 'You received a Gift Card from this store',
   },
```

SCIS Gift Certificates FAQ

The following questions are frequently asked about configuring gift certificates for SuiteCommerce InStore (SCIS).

What format should I use when ordering a batch of gift certificates?

When ordering a batch of gift cards from a third-party printer, use barcode Code 128. Use the format, UPC//authcode, for example 12345//00001. Ensure the UPC Code field is populated on the gift certificate record in NetSuite.

How many numbers can I use in a gift certificate?

System generated gift certificates use 10 alphanumeric characters. If you enter the gift certificate number manually at the point of sale or set it up in the back end, you can use 9 alphanumeric characters.

Does SCIS only support system generated authorization codes?

Recommended setup steps include selecting the **System Generated** option in the **Gift Certificate Auth Code Generation** field in **Accounting Preferences**.

However, you can choose to show or hide the authorization code on the gift certificate entry form in SCIS. Also, during the sale of a gift certificate, if you choose not to show the Authorization Code field on the gift certificate, or show it and leave it empty, then the code is automatically generated. Alternately, the sales associate can enter a 9 character alphanumeric code at point of sale.

How do I scan a physical gift card?

If you are scanning the gift card to pay for items purchased, you can swipe the gift card to get the authorization code, or enter the code manually.

If the customer is purchasing a gift card, you must scan the barcode. SCIS performs a search, to identify the gift card as an item. Then the dialog is displayed where the sales associate must enter the required information, and then add it to the cart.

Can an order that includes a physical Gift Card be shipped?

No, a gift card cannot be shipped. You can only ship line items that are not gift certificates. You can ship line by line, excluding the gift certificate.

SCIS No Sale

Typically, the cash drawer opens automatically based on the payment method used on an order. However, sales associates can use the **No Sale** option in the SCIS User menu to open the cash drawer without a sales transaction. After the sales associate selects No Sale in the User Menu, he or she must choose a reason for opening the cash drawer.

Administrators must enable permissions for roles that are authorized to use the No Sale option, and roles that require manager override. Administrators must also define reasons for opening the cash drawer. Configure SCIS Open Drawer Reason custom records for this purpose.

To enable permission to use No Sale:

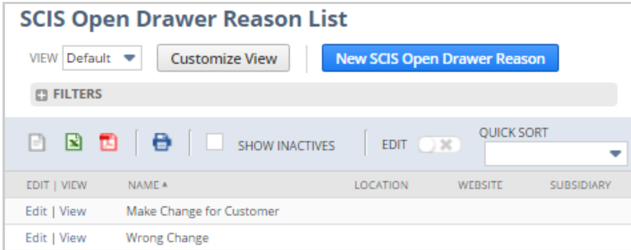
1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find **SCIS Permission**, and then click **List** in that row.
3. Click **Edit** next to **OPEN_CASH_DRAWER**.
4. In the **Authorized Roles** list, select the roles who are authorized to use No Sale.
5. In the **Require Authorization Roles** list, select the roles that require manager override.
6. Click **Save**.

Employees with authorized roles enter their SCIS Access Codes to allow employees that require authorization to open the cash drawer.

To configure SCIS Open Drawer Reason custom records:

1. Go to Customization > Lists, Records, & Fields > Record Types.

2. Find **SCIS Open Drawer Reason** and click **List** in that row.



3. Click **New SCIS Open Drawer Reason**.
   a. Enter a **Name** for the reason. This name is what displays to the sales associate using SCIS.
   b. Choose the SCIS **Location**, **Website**, and **Subsidiary** where this open drawer reason should apply. You can also apply the record globally, by marking the **Apply to All** boxes.

The reasons you define appear in a list that displays when the sales associate selects the No Sale option in the SCIS User Menu. The cash drawer will not open until the sales has selected a reason.

Voiding a Line and Deleting a Transaction

In SuiteCommerce InStore (SCIS), a sales associate can void an item to remove it from a transaction, or delete the transaction entirely. When an item is voided from a sales transaction, it is replaced with the void item configured during installation. Administrators can view or modify transactions in NetSuite.

Voiding a Line in a Transaction

To remove an item from a sales transaction, the sales associate must void the item by clicking X on the transaction line in SCIS. This action removes the item from the transaction and replaces that item with a **void item** (ns_pos_voiditem). The void item is not visible to the sales associate using SCIS, but appears on the transaction record in NetSuite.

You must configure the void item during installation of SuiteCommerce InStore.

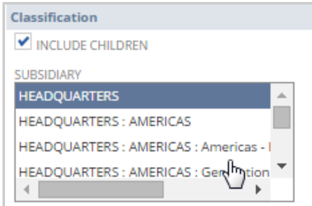
Note that performing a void on a transaction requires additional permission. Be sure to select authorized roles on the SCIS Permission custom record. For more information, see SuiteCommerce InStore Permissions.

Void Item and Multiple Subsidiaries

When you have more than one subsidiary, you must update the void item created during installation to support all subsidiaries associated with your SuiteCommerce InStore site. To update the void item, you must modify the item record in NetSuite.

To apply the void item to multiple subsidiaries:

1. Go to Lists > Accounting > Items.
2. Find **ns_pos_voiditem** in the list.
3. Click **Edit** to modify this record.
4. In the **Subsidiary** list, select all the subsidiaries associated with your SuiteCommerce InStore implementation.



5. Click **Save**.

Deleting a Transaction

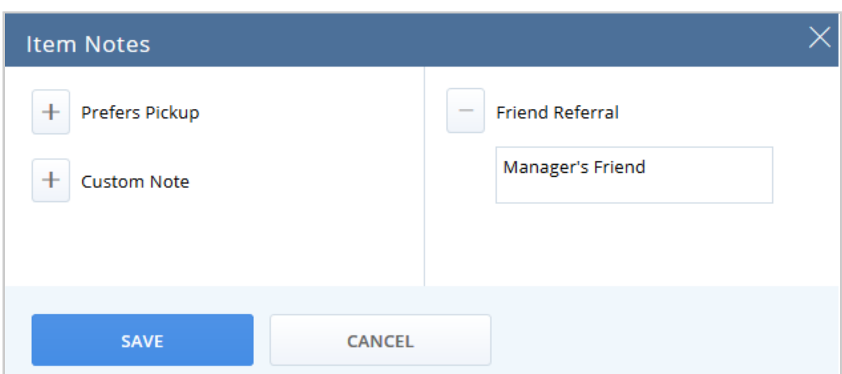
To delete a transaction, the sales associate clicks the trash can icon in SCIS. When a transaction is deleted, there is no record of it in NetSuite.

Defining SCIS Transaction Notes

Administrators can use the SCIS Transaction Note Types custom record to define notes for different types of information needed on a transaction. This custom record is installed with SuiteCommerce InStore (SCIS).

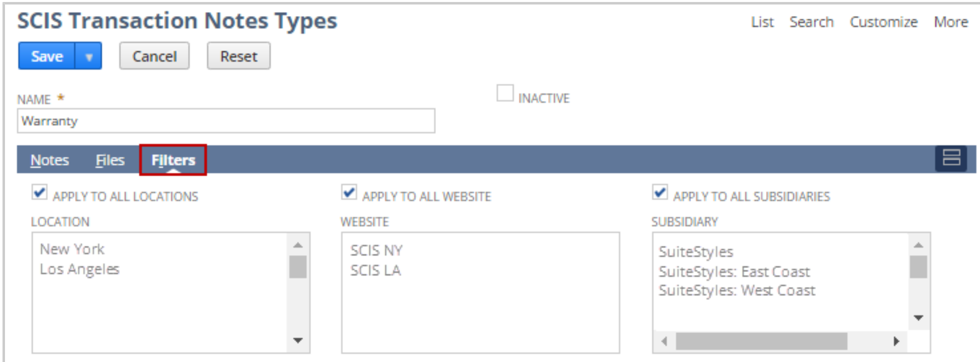
After an administrator has defined transaction notes, sales associates can add them as they build orders. For example, a transaction note can be used to indicate that the customer was referred by a friend. The sales associate can add the note to a line item on an order or to the entire transaction in SCIS. After the order is submitted, the note displays on the transaction form in NetSuite.

The following screenshot, shows the user interface for adding a note. After the sales associate chooses a note type on the left, then he or she can enter additional information on the right. The names of the SCIS Transaction Note Types displayed here are: Prefers Pickup, Custom Note, and Friend Referral.



To define SCIS Transaction Note Types:

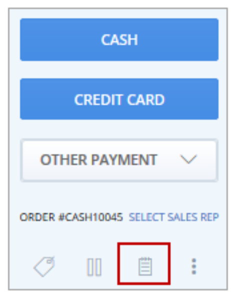
1. Go to Customization > Lists, Records, & Fileds > Record Types > SCIS Transaction Notes Types.
2. Click **New SCIS Transaction Note Types**.
3. Enter a **Name** for the transaction note type. The name is displayed in SCIS. The sales associate can select a note type, and then enter additional information. The Custom Note is installed by default.
4. On the **Filters** subtab, you can select particular **Locations**, **Websites**, and **Subsidiaries**, or make the note available to all of them.



Note: Settings on the **Notes** subtab and **Files** subtab do not affect SCIS.

5. Click **Save**.

In SCIS, sales associates can apply one note to a line item on an order, or apply multiple notes to a transaction. Be aware of the following capabilities depending on where the note is added.



Adding a Note to a Line Item

- Only one note can be added to a line item.
- After the transaction is submitted, each note is stored on the line item on the transaction form in NetSuite.
- Line-item notes are recommended for comments related to a particular item.

Adding a Note to a Transaction

- Multiple notes can be added to a transaction.
- After the transaction is submitted, the notes are attached to the transaction form in NetSuite, on the **Communication** subab under **User Notes**.
- Transaction-level notes are recommended for notes related to the whole transaction.

SCIS Saved Search and Reporting

SuiteCommerce InStore (SCIS) includes a set of saved searches that you can use as reports. Saved searches installed with the SuiteApp are locked. To modify any SCIS saved search you must first make a copy, and then create a customized report for your organization. Read the following sections to learn more about SCIS reporting capabilities:

- Modifying Saved Searches for SCIS
- Custom SCIS Sales Reports
- SCIS Audit Log
- Publishing Saved Searches to SCIS Users

Modifying Saved Searches for SCIS

The SuiteCommerce InStore SuiteApp installs a set of saved searches in your NetSuite account. Many of these saved searches are used for displaying certain fields and data from your NetSuite account in SuiteCommerce InStore (SCIS). For example, the saved search, **SCIS Individual Customer Form Fields** exposes fields to the customer entry form used in SCIS. Also, the **SCIS Locations** saved search displays location information from your NetSuite account on the Nearby Locations subtab of the Product Detail Page in SCIS.

For a list of saved searches installed by SCIS, see SCIS Custom Fields, Lists, Records, and Searches.

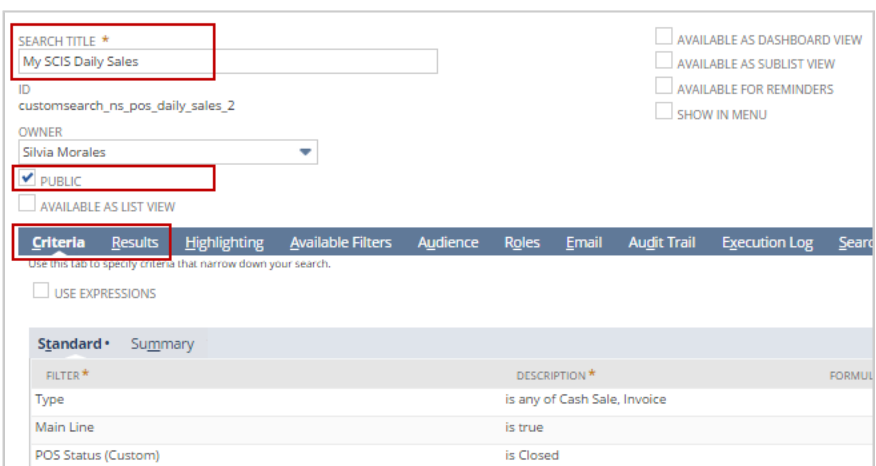
For instructions on specific search modifications, see SCIS Locations, and Custom SCIS Sales Reports.

> **Note:** Saved searches installed with SCIS are locked. To modify any of the saved searches you must first make a copy, and then make changes to your copy.

The following procedures provide instructions for modifying any type of saved search.

To make a copy of an SCIS saved search:

1. Go to Reports > All Saved Searches.
2. Click **Edit** next to the saved search you want to copy.
3. Change the name in the **Search Title** field.

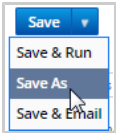


4. (Optional) Check the **Public** box so others can view the report in NetSuite. Set other check boxes on the form as needed.

   > **Note:** To make the saved search available to sales associates on the User Menu in SCIS, you **must** check the Public box.

5. Change the values on saved search subtabs as needed. The most common modifications are adding and removing values on the **Criteria** subtab, and changes to the **Results** subtab.

6. Click **Save As**.



After you click Save As, a new ID is generated for the modified saved search. The name of your modified saved search and the ID are displayed on the list of saved searches.

Custom SCIS Sales Reports

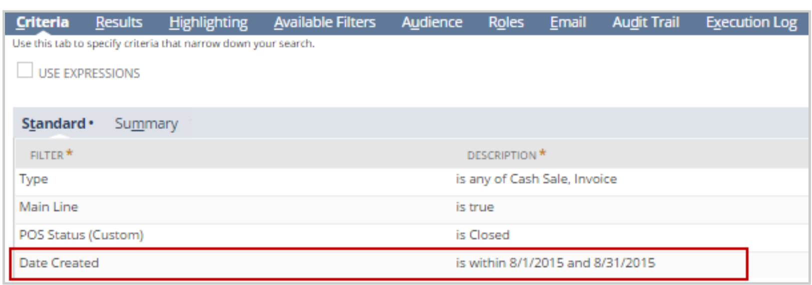
In NetSuite, you can view sales reports by using the saved searches included in SuiteCommerce InStore (SCIS). The following sales reports are installed by default:

- SCIS Daily Sales
- SCIS Sales by Department
- SCIS Daily Tenders

To modify the data displayed in NetSuite, you must first make a copy of an SCIS saved search. Then, create your own custom search to meet your business needs. For example, you may want to create a saved search that shows SCIS sales for each month. To do this, copy one of the saved transaction searches installed by SCIS. Next, set the date filter, and then save a report for each month.

To create a sales report for each month:

1. Follow the instructions for Modifying Saved Searches for SCIS.
2. On the criteria subtab, select **Date Created**, and then select the first and last day of the month.



3. Click **Save As**.

Publishing Saved Searches to SCIS Users

As an administrator, you can share information with employees about day to day business operations by defining a saved search for display in the SCIS User Menu. For example, you might share a list of customers who were in the store this week, or inventory that is out of stock. Sales associates can click a Saved Search link in the User Menu, and then view report data organized in a way that makes sense for your organization.

To define a saved search that displays on sales associates' User Menu, create a saved search, and then select the saved search on the SCIS Settings record. The SCIS Settings record defines the audience of sales associates who can access the saved search.

> **Note:** The number of results returned from a saved search can impact performance. Saved searches that return more than 1,000 rows may not display properly.

To publish a saved search to the User Menu in SCIS:

1. Create a saved search.
   a. Go to Reports > All Saved Searches.
   b. You can copy and then modify an existing SCIS saved search, or create a new one. The most common modifications are adding and removing values on the **Criteria** subtab, and changing values on the **Results** subtab.

      > **Note:** Saved searches installed with SCIS are locked. To modify any of the saved searches you must first make a copy, and then make changes to your copy.

   c. Be sure to check the **Public** box so others can view the report in NetSuite. Set other check boxes on the form as needed.
   d. Change the values on saved search subtabs as needed.
   e. Click **Save As**.
2. Go to Customization > Lists, Records, & Fields > Record Types.
3. Find **SCIS Settings** in the list, and then click **List** in that row.
4. Click **Edit** next to an **SCIS Settings** record.
5. Select one or more saved searches in the **SCIS Saved Searches** list.
6. Click **Save**.

The saved search will display in the User Menu depending on the settings for SCIS Location, Subsidiary, and Website that exist on the SCIS Settings record. Sales associates whose employee records match the same criteria as the SCIS Settings record are able to view the saved search.

SCIS Audit Log

In NetSuite, you can track the restricted operations that were performed in SuiteCommerce InStore (SCIS). The SCIS Audit Log shows the time and date when a restricted operation occurred. It shows the operation, the employee who initiated the operation, and the employee who authorized the operation. The audit log enables you to track each restricted operation. SCIS Audit logs are automatically generated based on transactions that SCIS users submit.

EDIT | VIEW	OWNER	DATE CREATED ▲	OPERATION	AUTHORIZER	TRANSACTION	APPROVED
Edit | View	Sam Smith	7/23/2015 2:22 pm	Apply Gift Card	Johnathan Brooker	Cash Sale #CASH14926	Yes
Edit | View	Sam Smith	7/23/2015 2:31 pm	Line Discount	Johnathan Brooker	Cash Sale #CASH14927	Yes
Edit | View	Sam Smith	7/23/2015 2:31 pm	Apply Custom Discounts	Johnathan Brooker	Cash Sale #CASH14927	Yes

To view the SCIS Audit Log:

1. Go to Customization > Lists, Records, & Fields.
2. Find **SCIS Audit Log** in the list, and then click **List** in that row.
3. Sort the list by clicking the header of the **Date Created** column. You can drill down on certain columns to access more information.
   - **Owner** – Shows the employee who initiated the operation. This is the sales associate logged in to SuiteCommerce InStore.

- **Date Created** – Shows the date and time when the operation occurred.
- **Operation** – Shows the name of the operation.
- **Authorizer** – Shows the employee who authorized the operation.
- **Transaction** – Shows the transaction on which the operation was initiated. For example, if a sales associate applied a credit memo to an invoice, Invoice is the transaction that displays in this column. The transaction number is also included.
- **Approved** – Shows Yes or No depending on whether the operation was successfully authorized.

Calculating Taxes on Transactions

SuiteCommerce InStore (SCIS) calculates tax based on the tax settings you configure in NetSuite. For sales tax to be calculated correctly, you must enable the Advanced Taxes feature in NetSuite, set the tax preferences required for SCIS, and create tax schedules. Set up tax preferences according to SuiteCommerce InStore Installation guidelines. For more information, see Setting Accounting and Tax Preferences.

Tax Schedules, created in NetSuite, determine how taxes are calculated for items in each nexus. Tax schedules are useful in countries such as the U.S. and Canada where some goods and services are not taxable in certain states and provinces. For more information on setting up Tax Schedules, see the help topic Creating Tax Schedules.

> **Note:** The Advanced Taxes feature is required for SuiteCommerce InStore. Tax schedules are required in accounts that use Advanced Taxes. For more information, see the help topic Advanced Taxes.

You create nexuses to establish different tax jurisdictions. For general information about setting up tax nexuses, see the help topic Nexuses and Subsidiaries.

Tax Codes and Tax Groups

In NetSuite there are important distinctions between tax codes and tax groups. You can create a tax group to combine several tax codes that can be applied to one transaction, even if the taxes are paid to different jurisdictions. The tax group rate is the sum of these separate tax codes.

For example, if you have two retail locations in Illinois, you may have the following tax groups configured in NetSuite:

- **Tax Group IL_ASES** – The tax rate is 7%, which is the sum of the two tax codes included in the group.
  - Includes two tax codes: IL_IL state tax of 6.25%, and IL_ASES at 0.75%.
  - Applicable to certain postal codes, such as 60002.
- **Tax Group IL_ALGONQUIN_ARXL** – The tax rate is 7.75%, which is the sum of three tax codes included in the group.
  - Includes three tax codes: IL_IL at a rate of 6.25% (State), IL_ALGONQUIN at 0.75% (City), and IL_ARXL at 0.75% (Transit).
  - Applies only to postal code 60102.

The setting in NetSuite, **Enable Tax Lookup on Sales Transactions**, determines the appropriate tax group or tax code for a customer based on the postal code in the customer's shipping address.

Sales Tax for Customers

Based on the example above, if a product is sold to the "Default Customer" with the postal code 60102 (ALGONQUIN), NetSuite sets the tax rate to 7.75%. Alternatively, if no tax group exists, tax calculation for the order depends on the tax item set on the Default Customer record. To charge tax on the order, note that the customer record must be marked as taxable, and a tax nexus must be configured. Both of these are tax preference settings included in the installation guidelines.

The default customer record is marked as taxable by default. Also, note that part of configuration is setting the default tax item for new customers.

Cash and Carry

When selecting a customer on an SCIS transaction, the sales tax is calculated based on the tax code or tax item set on the customer record. If there is no tax code or tax item on the customer record, then the tax is calculated based on the SCIS location address. Note that **Customers Default to Taxable** is a tax preference setting included in the installation guidelines.

Delivery Orders

For products that are ordered through SCIS (perhaps the product is available at a different store location and being shipped to the customer), tax is calculated based on the tax code or tax item set on the customer record. You configure tax settings for new customers as part of installation.

SCIS Custom Fields, Lists, Records, and Searches

This section includes reference information about the custom fields, lists, records, and searches installed by the SuiteCommerce InStore SuiteApp. Read this section to learn general information, such as which custom fields require configuration. Links to detailed configuration steps are included in the descriptions. To view or configure custom fields in NetSuite, go to Customizaton > Lists, Records, & Fields, and then make a selection from the list.

This section also includes general information about saved searches associated with SuiteCommerce InStore (SCIS). SCIS uses data from saved searches in the customer profile, to display location information on the Product Detail Page, and to show sales report data in SCIS and in NetSuite. Administrators can view and modify all saved searches in NetSuite.

Read the following sections for more information about custom fields, lists, records, and searches associated with various elements of SCIS:

- Mobile Device Settings
- Customer Group Fields
- Customer Profile
- Discounts and Returns
- Employee
- Location
- Item
- Transactions
- Opening and Closing Drawer
- QuickAdd Keys
- Payments
- Printer Settings
- Sales Reports

Mobile Device Settings

The following custom records are used to configure the mobile device you use to run SCIS. You configure these custom records after installing the SCIS POS application. For more information, read Installing SCIS Mobile Apps.

SCIS Mobile Device

- **ID**: customrecord_ns_pos_mobile_device
- **Description**: Use this record immediately after installing the SCIS POS application on a mobile device. This custom record stores the mobile device ID. It also stores the SCIS website and printer technology associated with the mobile device.

SCIS Domain Whitelist

- **ID**: customrecord_ns_domain_whitelist

- **Description**: This custom record contains a list of domains that are allowed access to SCIS. This list of whitelisted domains are global to your account, regardless of location or subsidiary. The following domains are available by default and cannot be disabled. These domains are required for SCIS to function properly:
  - system.netsuite.com
  - system.na1.netsuite.com
  - system.na2.netsuite.com
  - sandbox.netsuite.com

> **Note:** After applying any configuration changes, including changes to the Domain Whitelist, or Certificates, the user must log out and log in again to refresh the updated settings to the device.

SCIS Mobile Certificate

- **ID**: customrecord_ns_pos_certificate
- **Description**: This custom record stores the list of authorizing certificates. As certificates go out of date, you must add updated certificates to the list. After applying any configuration changes, the user must log out and log in again to refresh the updated settings to the device.

Cash Management

SCIS Store Safe Account

- **ID**: custrecord_ns_pos_location_safeaccount
- **Description**: Account used for tracking the amount in the store safe. You must define a store safe account for each point-of-sale location. Set this field on the Location record.

SCIS Cash Drawer Difference

- **ID**: custrecord_ns_pos_location_diffaccount
- **Description**: A custom field on location records. For each location that uses SCIS, you must select the account to use when there is a discrepancy between the amount in the cash drawer and the amount entered in SCIS for the Closing Drawer transaction.

SCIS Register

- **ID**: customrecord_ns_pos_registers
- **Description**: (Required for Advanced Cash Management) A custom record that must be configured for each cash drawer and printer combination used at the retail store.

SCIS Shift

- **ID**: customrecord_ns_shifts
- **Description**: (Advanced Cash Management) A custom record that is created automatically each time a sales associate opens a shift in SCIS.

Customer Group Fields

You can use custom fields and lists to configure customer record settings for SuiteCommerce InStore (SCIS). The following apply to customer records used with SCIS. You can find custom list and custom field in NetSuite, and modify them as needed. For information about how to modify Customer Group settings, see Configuring SCIS Customer Group.

SCIS Customer Group (List)

- **ID**: customrecord_ns_pos_customergroup
- **Description**: Enables you to group customers according to a specific business need. For example, by default, SCIS uses SCIS Customer Group (List) to create tiered customer levels. The default values for this list are: Bronze, Silver, and Gold. You can modify these values at Customization > Lists, Records, & Fields > Record Types.

SCIS Customer Group

- **ID**: custentity_ns_pos_customergroup
- **Description**: Defines a customer group on each customer record. Sales associates can set the customer group on the Customer Profile in SCIS. Administrators can set the customer group the customer record in NetSuite.

Customer Profile

You can modify custom searches installed by the SuiteCommerce InStore SuiteApp to configure fields that display in the Customer Profile in SuiteCommerce InStore (SCIS). The following saved searches generate fields for the customer entry form used in SCIS, and data for the Customer Profile. You can find these saved searches in NetSuite at Reports > Saved Searches > All Saved Searches. For more information about modifying any of the custom searches that impact the Customer Profile, read Modifying Saved Searches for SCIS.

SCIS Customer Notes Types

- **ID**: customrecord_ns_pos_customer_notes_types
- **Description**: Defines notes for different types of information associated with a customer. After an administrator has defined customer notes, sales associates can add them to the customer profile in SCIS. For more information, read Defining SCIS Customer Notes.

Customer Saved Searches

- SCIS Individual Company Form
- SCIS Individual Customer Form
- SCIS Support Calls
- SCIS Shipping Status List
- SCIS Transactions Detail
- SCIS Transactions Totals
- SCIS Purchases and Returns

- SCIS Purchase Breakdown

SCIS Individual Company Form

- **ID**: customsearch_ns_pos_company_customer
- **Description**: Defines fields for company customers on the customer entry form in SCIS. For more information, see Configuring the Customer Entry Form.

SCIS Individual Customer Form

- **ID**: customsearch_ns_pos_individual_customer
- **Description**: Defines fields shown for individual customers on the Customer Profile in SCIS. For more information, see Configuring the Customer Entry Form.

SCIS Support Calls

- **ID**: customsearch_ns_pos_supportcalls
- **Description**: Returns the information that is used on the Customer Profile in the time line to show Support Calls.

SCIS Shipping Status List

- **ID**: customsearch_ns_pos_shipping_status
- **Description**: Returns the information that is used in the Customer Profile time line on the Shipments Tabs.

SCIS Transactions Detail

- **ID**: customsearch_ns_pos_transactions
- **Description**: Returns the information that is used in the Customer Profile on the TimeLine.

> **Warning:** Do not modify this saved search. Changing the ID or removing fields from the default search may cause errors in the Customer Profile.

SCIS Transactions Totals

- **ID**: customsearch_ns_pos_last_transactions
- **Description**: Returns the information that is used on the Customer Profile in the Visit Count Chart.

SCIS Purchases and Returns

- **ID**: customsearch_ns_pos_purchases_returns
- **Description**: Returns the information that is used in the Customer Profile to generate the Purchases & Returns Chart.

SCIS Purchase Breakdown

- **ID**: customsearch_ns_pos_purchase_breakdown

- **Description**:Returns the information that is used in the Customer Profile to generate the Purchases Breakdown Chart.

Discounts and Returns

SuiteCommerce InStore (SCIS) installs the following custom fields and records that apply to discounts and returns. Configure the custom fields described below with values that make sense for your organization.

Discount Reason

- **ID**: custbody_ns_pos_tran_dct_reason
- **Description**: Stores the custom discount applied to an order. This custom field requires no configuration. When a custom discount is applied, this field stores the reason for the discount as entered by the sales associate at the time of the transaction. When a custom discount is applied to the order, the discount reason is output to this field on the custom subtab of the transaction form. When a custom discount is applied to an item in the cart, the discount reason is output to the description field on the transaction line (on the Items subtab). SCIS requires the sales associate to enter a reason before a custom discount can be applied. For more information about setting up discounts, see Configuring Discounts for more information.

SCIS Discount Reasons (List)

- **ID** customrecord_ns_pos_dtreasons
- **Description**: Specifies a predefined list of reasons for applying a custom discount. The sales associate can select a predefined reason for the discount, and then that selection is displayed in NetSuite on Cash Sales and Invoices. SCIS requires a sales associate to select a reason before a custom discount can be applied. This custom field is installed with default values, however, you can modify the values in the list. For more information, see Discount Reasons.

SCIS Return Reasons (List)

- **ID**: customrecord_ns_pos_return_reasons
- **Description**: Enables you to define reasons for an item return. A sales associate must select one of these reasons when performing a return or exchange. For more information, see Returns and Refunds.

Employee

The following custom fields apply to employee records used with SuiteCommerce InStore (SCIS). You can find these custom fields and records in NetSuite, and then modify them as needed. Read the following for more information.

SCIS Access Code

- **ID**: custentity_ns_pos_accesscode
- **Description**: Configure this custom field on the employee record. You must enter a pass code in this field for employees who have roles authorized to perform restricted operations. This field is associated with roles and permissions. For more information, see Manager Override.

SCIS Locations

- **ID**: custentity_ns_pos_employee_scislocations
- **Description**: This is a custom list on the employee record. The options in the list are sourced from the list of store locations that you configured in NetSuite. If you hve employees that work at more than one location, selecting SCIS locations is a one-time setting when configuring a new Employee. For more information, read Working with Employees in Multiple SCIS Locations.

SCIS User Settings

- **ID**: customrecord_ns_pos_defaultcustomer
- **Description**: This custom record defines critical user settings, such as Default Customer record, default sales rep, and cash drawer account. One of these custom records is automatically created for each employee, however configuration is required For more information, see SCIS User Settings.

SCIS Permission

- **ID**: customrecord_ns_pos_permission
- **Description**: Stores the permission required for an action. Each permission has a name, a description, the roles that can perform the action, and the roles that require authorization to perform the action. A POS Permission custom record exists for each action that requires authorization. All actions that require authorization are logged on the SCIS Audit Log. For more information, see SuiteCommerce InStore Permissions.

Item

The following custom fields apply to item records used with SuiteCommerce InStore (SCIS). You can find these custom fields in NetSuite, and then modify them as needed.

SCIS Gift Card

- **ID**: custitem_ns_pos_physical_item
- **Description**: Used exclusively for gift certificates, this check box differentiates a gift certificates in card form from digital gift certificates. You can access this field on gift certificate item records in NetSuite. For more information, see Configuring Gift Certificates for SCIS.

Additional UPCs

- **ID**: custitem_ns_pos_additional_upcs
- **Description**: Defines additional UPC codes for items. You can enter a comma separated list of UPC codes in this custom field on item records. For more information, see Configuring Item Records for SCIS

Location

SuiteCommerce InStore (SCIS) uses the standard location record along with the custom records described below to define various settings such as store locations, available shipping methods and discounts. For step-by-step instructions on setting up standard location records and custom records related to location settings, read Configuring Locations for SCIS.

SCIS Settings

- **ID**: customrecord_ns_pos_location_settings
- **Description**: Defines settings for: shipping methods, predefined discounts, custom discounts, and saved searches. Define specific locations where certain shipping methods, discounts, and saved searches are available. Also, use this custom record to configure location-specific printer settings and custom attributes, and more.

> **Note:** After applying any changes to the Printer Settings, the sales associate must log out of SCIS on the mobile device, and then log in again to refresh the updated settings. For changes to printer settings, the user must also select the printer again from the main menu in the SCIS for iOS app.

For more information, see SCIS Settings.

SCIS Custom Attributes

- **ID**: customrecord_ns_pos_extra_attrs
- **Description**: Use these records to define attributes for customizing certain areas of SCIS. For more information, read Creating SCIS Custom Attributes.

SCIS Service Hours

- **ID**: custrecord_ns_pos_servicehours
- **Description**: Displays service hours for your store location in the Nearby Stores subtab on product display pages. This is a custom field on the Location record in NetSuite. Setting this field is optional.

SCIS Location Distance

- **ID**: customrecord_ns_pos_locationdistance
- **Description**: Defines the distance between store locations. The field shows on the nearby stores tab on the product display page. For more information, see SCIS Location Distance.

Default Order Location

- **ID**: custrecord_ns_pos_default_so_location
- **Description**: Defines the location where sales orders should be fulfilled from. You can set the location of the warehouse where SCIS orders are fulfilled. Applies to delivery and pickup orders created through SCIS. Hidden from the SCIS user interface, this location is automatically set on sales order transactions for fulfillment purposes. Configure this field on the Location record.

SCIS Store Safe Account

- **ID**: custrecord_ns_pos_location_safeaccount
- **Description**: Defines the account you use to track the amount in your store safe. You must define a safe account for each point-of-sale location. Set this field on the Location record.

Custom Searches for Location

The following saved searches generate location information for SCIS. You can modify these searches to meet your business needs, see Modifying Saved Searches for SCIS.

To modify the locations displayed in SCIS, you must edit the CustomConfiguration.js file. For more information, see Customize Location Display.

SCIS Inventory Locations

- **ID**: customsearch_ns_pos_inventory_locations
- **Description**: Saved search that returns the information used on the All Inventory tab on the Product Display Page.

SCIS Locations

- **ID**: customsearch_ns_pos_locations
- **Description**: Saved search that returns the list of locations you have configured in NetSuite. These locations are displayed on the Nearby Stores subtab in SCIS.

Opening and Closing Drawer

SuiteCommerce InStore (SCIS) uses custom transaction types and custom records to track opening drawer and closing drawer transactions. Custom transaction types track the movement of cash from the store safe account into a cash drawer and from the cash drawer back to the safe. A store safe account custom record is created for each point-of-sale location. The cash drawer difference account tracks any discrepancy found in the process of reconciling the amount entered by a sales associate during the closing drawer transaction.

- Custom Transaction Types
- Custom Records for Opening and Closing Drawer Transactions

Custom Transaction Types

Custom transactions types are used internally in NetSuite for Opening Drawer and Closing Drawer transactions, which are specific to SCIS. The following custom transaction types are added to your NetSuite account when you install SCIS.

SCIS Opening Drawer

- **ID**: customtransaction_ns_pos_initial_loan
- **Description**: Transaction type used to record each opening drawer that is performed by a sales associate at the beginning of a shift.

SCIS Closing Drawer

- **ID**: customtransaction_ns_pos_end_of_day
- **Description**: Transaction type used to record the closing drawer transaction that is performed by a sales associate at the end of a shift.

Custom Records for Opening and Closing Drawer Transactions

The custom records described below appear on the location record. You must set a safe account and cash drawer difference account for each point-of-sale location. For instructions on setting up location records for SCIS, see Configuring Locations for SCIS.

For more information about how the custom records are used, see Cash Management in SCIS.

SCIS Cash Drawer Difference

- **ID**: custrecord_ns_pos_location_diffaccount
- **Description:** Use this field on the Location record to select the account where funds should be allocated when there is a discrepancy between the amount in the cash drawer and the amount entered in SCIS for the Closing Drawer transaction. You must define a cash drawer difference account for each point-of-sale location.

SCIS Open Drawer Reason

- **ID**: customrecord_ns_pos_opendrawerreasonlist
- Description: Administrators use this record to define reasons for opening the cash drawer. When a sales associate opens the cash drawer using the No Sales option, he or she must select a reason from the list. For more information, read SCIS No Sale. Read also, SCIS Cash Drawer.

Payments

The following custom lists and records are required for accepting payments with SuiteCommerce InStore (SCIS). You can find these custom lists and records in NetSuite. Configuration is required.

SCIS Quick Cash Denominations

- **ID**: customrecord_ns_pos_quickcash
- **Description**: Enables you to define the denominations that appear on Quick Cash buttons in SCIS. Sales associates use Quick Cash buttons when accepting cash for purchases. You can also configure various actions associated with each payment method including which payment methods require a signature, or can trigger the cash drawer to open. For more information, see Modifying Cash Payment Denominations.

SCIS Gateway

- **ID**: customrecord_ns_pos_gateway
- **Description**: Used in credit card payment processing, this record must be defined to associate a location with a payment gateway. For more information, see Configuring SCIS Gateway Records.

SCIS Payment Method

- **ID**: customrecord_ns_pos_payment_method
- **Description**: Defines payment methods used by SuiteCommerce InStore, such as cash and credit card. Configuring a custom record for each payment method is required. For more information, see Configuring SCIS Payment Methods for more information.

SCIS Payment Device

- **ID**: customrecord_ns_pos_emv_device
- **Description**: Defines an EMV payment device for use with SuiteCommerce InStore. Configuring a custom record for each EMV payment device is required. For more information, see Configuring EMV Payment Services for SCIS.

Printer Settings

The following custom records are included to store printer settings for SCIS. Note that SCIS only supports specific paper sizes. Do not enter additional paper sizes. For more information, read Setting Up Receipt Printers for SCIS.

SCIS Available Printers

- **ID**: customrecord_ns_pos_printers
- **Description**: List of known devices for printing receipts. You must configure a custom record for each printer associated with a point-of-sale device configured for SCIS.

SCIS Paper Size

- **ID**: customrecord_ns_pos_paper
- **Description**: SCIS only supports the following paper sizes: A4 or Letter for Air print, and 2 inches or 3 inches for Star printers.

SCIS Printing Settings (AirPrint)

- **ID**: customrecord_ns_pos_printing_airprint
- **Description**: Stores preferences for the AirPrint receipt printer. Including the printer name, paper size, and SCIS settings record.

SCIS Printing Settings (Star)

- **ID**: customrecord_ns_pos_printing_star
- **Description**: Stores preferences for the Star receipt printer. Including the printer name, paper size, and SCIS settings record.

QuickAdd Keys

QuickAdd keys are used in SuiteCommerce InStore (SCIS) to add items to a transaction. Configuration of QuickAdd Groups and QuickAdd Keys is required. For more information, see Configuring QuickAdd Keys.

SCIS QuickAdd Group

- **ID**: customrecord_ns_pos_hotkeygroup
- **Description**: List that defines the tabs that appear in the QuickAdd bar in the main application screen. You can configure QuickAdd Groups as filters to hide or expose products based on criteria such as user role, location, or customer. To define a QuickAdd Group, go to Customization > Lists, Records, & Fields > Lists. Click SCIS QuickAdd Group, and then add or modify values in the list.

SCIS QuickAdd Key

- **ID**: customrecord_ns_pos_hotkey

- **Description**: Used to configure QuickAdd Keys. You configure one custom record for each QuickAdd Key associated with a product for sale. To define a QuickAdd Key, go to Customization > Lists, Records, & Fields > Record Types.

Sales Reports

The following saved searches affect the data in the sales report available to sales associates logged in to SuiteCommerce InStore (SCIS). You can create modified saved searches to create sales reports for viewing in NetSuite. For more information, see Custom SCIS Sales Reports.

SCIS Retail Tenders

- **ID**: customsearch_ns_pos_retail_tenders
- **Description**: Returns the information that is used in Sales Reports, on the Retail Tenders Chart.

SCIS Sales by Department

- **ID**: customsearch_ns_pos_sales_by_department
- **Description**: Returns the information that is used in the Sales Report, on the Sales by Class Chart.

SCIS Daily Sales

- **ID**: customsearch_ns_pos_daily_sales
- **Description**: Returns the Net Sales information that is displayed on the Sales Report in the SuiteCommerce InStore User Menu.

SCIS Receipts

SuiteCommerce InStore (SCIS) uses the following custom record and custom list so that you can customize receipts. For more information about setup and configuration, see Advanced Receipt Templates for SCIS.

SCIS Receipt Template

- **ID**: customrecord_ns_pos_receipt_templates
- **Description**: SCIS supports the Advanced PDF/HTML Templates feature for customizing receipts. The SCIS Receipt Template custom record links your customized receipt template to SCIS. NetSuite recommends that you use the template installed by SCIS as the basis for your custom receipt templates. You can create as many Advanced HTML/PDF templates as desired. For more information, read, Advanced Receipt Templates for SCIS.

SCIS Receipt Template Type

- **ID**: customlist_ns_pos_template_type
- **Description**: The SCIS Receipt Template type is a custom list with two entries: **Print** and **Email**. You can create as many different SCIS Receipt Template records as you want, but there are only two template types.

> **Important:** Do not add or remove values from this list.

Transactions

The following custom fields are associated with transactions entered using SuiteCommerce InStore (SCIS). Data displayed in custom fields on transaction records in NetSuite provide more information about each transaction.

- SCIS Transaction Line-Item Fields
- Custom Subtab on Transaction Records
- Billing Subtab on Transaction Records
- Other Custom Lists and Records for Transactions

SCIS Transaction Line-Item Fields

Transaction line fields are used to store and retrieve information about the line items within a transaction. These fields are typically displayed on the Items subtab on Invoices and Cash Sales generated from SCIS.

Void Quantity

- **ID**: custcol_ns_pos_voidqty
- **Description**: Stores the quantity of a voided item on an order. This field is used when you add an item back to the order, so the item retains its original quantity.

Void %

- **ID**: custcol_ns_pos_voidpct
- **Description**: Stores the ID for the percent discount applied to a line item voided from an order. The field is blank if the discount is a fixed amount.

Voided Item

- **ID**: custcol_ns_pos_voideditem
- **Description**: Stores the ID of the item voided in a transaction.

Returned Quantity

- **ID**: custcol_ns_pos_returnedqty
- **Description**: Stores the quantity of items returned. Used on validated returns to calculate returnable items.

SCIS Return Reason (TX)

- **ID**: custcol_ns_pos_returnreason
- **Description**: Stores the reason for the return. If an item is returned, a reason must be set.

Unvalidated Return

- **ID**: custcol_ns_pos_unvalidated_return
- **Description**: Used during a return transaction, this field stores the return validation setting. This hidden field applies to an item on a sales transaction. For more information, see Returns and Refunds.

Custom Subtab on Transaction Records

The following fields show on the Custom subtab on sales transactions. The custom fields described below may or may not be populated based on the type of transaction submitted in SuiteCommerce InStore. For example, if a credit memo was not issued, the SCIS Returns Credit Memo field remains empty.

SCIS Returns Credit Memo

- **ID**: custbody_ns_pos_returns_creditmemo
- **Description**: Stores information about the credit memo used in a return transaction when another item was purchased.This field is populated on an invoice form generated from an exchange transaction. It links the invoice with the return by showing the credit memo transaction number.

SCIS Created From

- **ID**: custbody_ns_pos_created_from
- **Description**: Used to create a reference to the original transaction. This field applies to sales transactions, for example, an invoice created from a sales order.

Sales Associate

- **ID**: custbody_ns_pos_sales_associate
- **Description**: Stores the sales associate's name on the transaction.

POS Status

- **ID**: custbody_ns_pos_transaction_status
- **Description**: Defines the status of a transaction. The POS Status field appears on all transactions entered with SCIS. This field contains values that are not part of the standard transaction record. This is a read-only field that is set automatically as transactions are created and processed with SCIS. It requires no configuration. For more information, see POS Status Definitions.

Billing Subtab on Transaction Records

The following fields are displayed on the Billing subtab of sales transactions.

Total Tendered

- **ID**: custbody_ns_pos_total_tendered
- **Description**: Stores the total amount of money accepted from the customer to complete a transaction. This field applies to sales and customer payments.

Credit Card Signature

- **ID**: custbody_ns_pos_signature_image
- **Description**: Stores the electronic signature provided by the customer after performing a credit card transaction.

Change Due

- **ID**: custbody_ns_pos_change_due
- **Description**: Lists the amount of change due when performing a cash transaction.

Suspended Total

- **ID**: custbody_ns_pos_suspended_total
- **Description**: Stores the total for each suspended transaction. This field stores the total of the transaction at the moment when the transaction was suspended, and displays it in the list of suspended orders. For more information, about suspended transactions, see the help topic Saving an order.

Other Custom Lists and Records for Transactions

The following custom lists and records are also associated with transactions, but they do not appear on the transaction record.

SCIS Transaction Status

- **ID**: customlist_ns_pos_transaction_status
- **Description**: Used internally to store the status of transactions generated by SCIS. The values in this list are displayed in the POS Status field on transactions. Do not modify the values in this list. The POS Status field is updated automatically as transactions are submitted and processed.

SCIS Audit Log

- **ID**: customrecord_ns_pos_audit_log
- **Description**: Stores information about every transaction generated from SuiteCommerce InStore related to authorization requests based on permissions.

  To view the audit log, go to Customization > Lists, Records, & Fields. Next, find SCIS Audit Log in the list. Then, click List in that row. You can click a column header on the list page to sort data. For more information, see SCIS Audit Log.

SCIS Open Credit Memos

- **ID**: customsearch_ns_pos_open_credit_memos
- **Description**: Saved search that returns Open Credit Memos for a specific customer. Supports the refund to Credit Memo feature.

SCIS Transaction Notes Types

- **ID**:customrecord_ns_pos_notes_types

- **Description**: This record is configured by administrators, and then used by sales associates to capture additional information on orders. For more information for administrators about configuring SCIS Transaction Note Types, read Defining SCIS Transaction Notes.