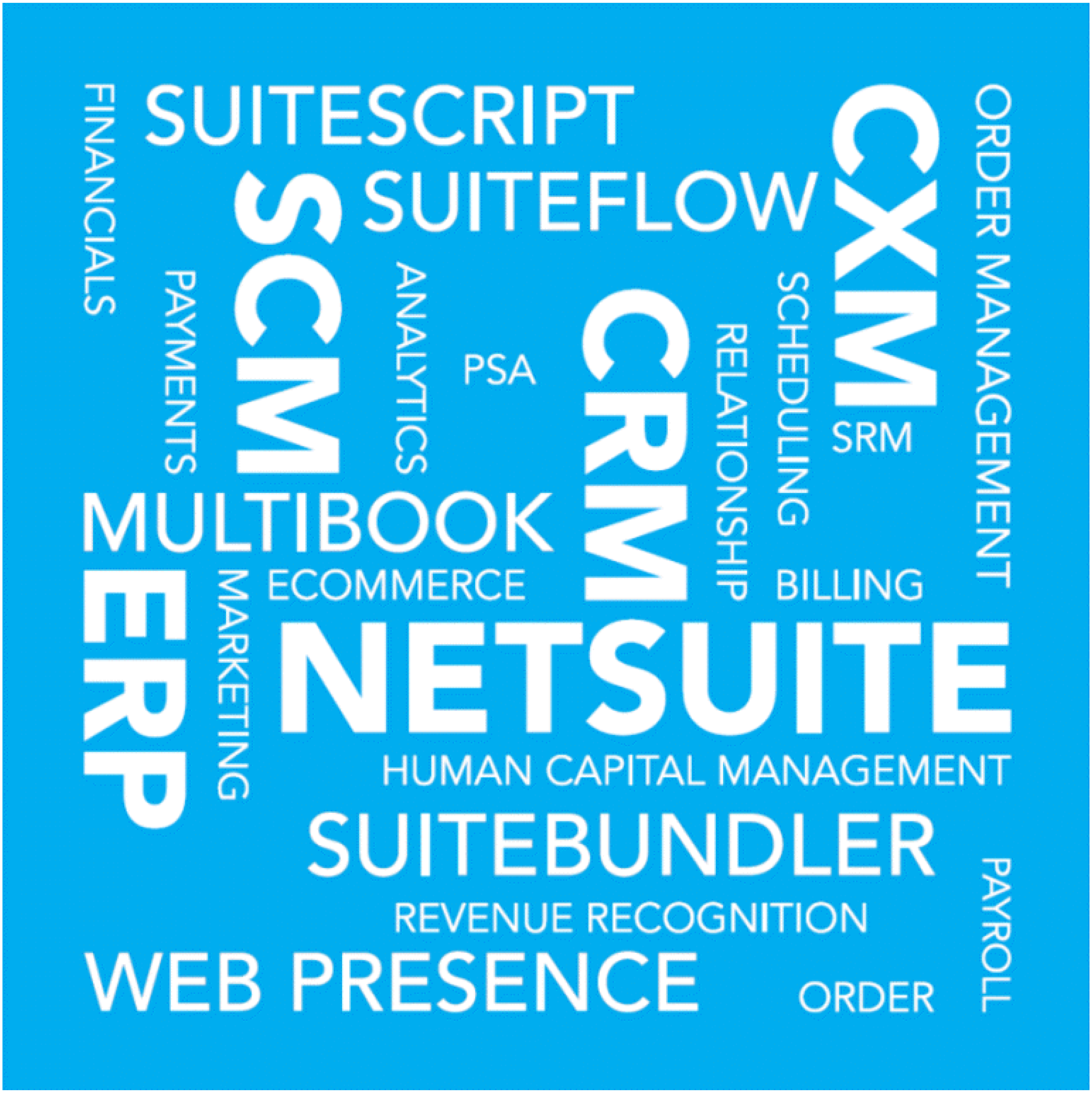
Managing Users & Roles



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NetSuite Users & Roles

The following topics describe how to manage NetSuite roles and permissions to provide your account users with the access they need. A role is a defined access configuration that can be assigned to users. A user is an individual who has access to a NetSuite account.

- For an introduction to the NetSuite access model, including definitions of users and roles, see NetSuite Access Overview.
- For details about standard roles provided by NetSuite, how to create customized roles, and tools for managing roles, see NetSuite Roles Overview.
- To understand how to work with the different kinds of users that can access NetSuite, see NetSuite Users Overview.
- For tips for working with permissions, see NetSuite Permissions Overview.

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

NetSuite Access Overview

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

Users

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

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

Roles

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

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

NetSuite Account Access

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

- The first step for setting up account access is to set up roles. See NetSuite Roles Overview.
  - To get an understanding of NetSuite roles, review the standard roles and associated permissions. See Standard Roles Permissions Table.
  - You cannot modify standard roles, but you can create customized versions of them. In most cases, assigning customized roles is more practical for maintenance and update purposes. See Customizing or Creating NetSuite Roles.
  - NetSuite provides some tools for managing roles. See Showing Role Permission Differences and Use Searches to Audit Roles.
- After roles have been set up, users can be given access and assigned roles. See NetSuite Users Overview.
  - NetSuite lets you monitor users' login activity. See Login Audit Trail Overview.
- NetSuite has a complex permission structure, with permissions divided into different types and different access levels. See NetSuite Permissions Overview.
  - The following link provides access to a Microsoft Excel worksheet listing the usage of most NetSuite permissions: NetSuitePermissionsUsage.xls. You can use this list to understand the implications of assigning a specific permission, or to find the permission required to provide access to a specific task or page. For more information, see Permissions Documentation.
  - A global permissions feature can be enabled, so that permissions can be assigned directly to employees, as well as to roles. See Using the Global Permissions Feature.
- NetSuite's Advanced Employee Permissions feature can be enabled to give you more flexibility and control over the employee information that users with certain roles can access in NetSuite. When this feature is enabled, administrators can customize or create roles to use the Employee Public, Employee Confidential, and Employee Administration permissions. For more information, see the help topic Assigning Advanced Employee Permissions to a Role. Administrators also can create custom employee permissions when this feature is enabled. For more information, see the help topic Creating Custom Advanced Employee Permissions.
- In addition to permissions, NetSuite has role restrictions that define the record instances of a record type that can be accessed by a role. See Permissions and Restrictions.

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

Internal Controls for NetSuite Access

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

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

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

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

NetSuite Roles Overview

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

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

Standard Roles

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

Custom Roles

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

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

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

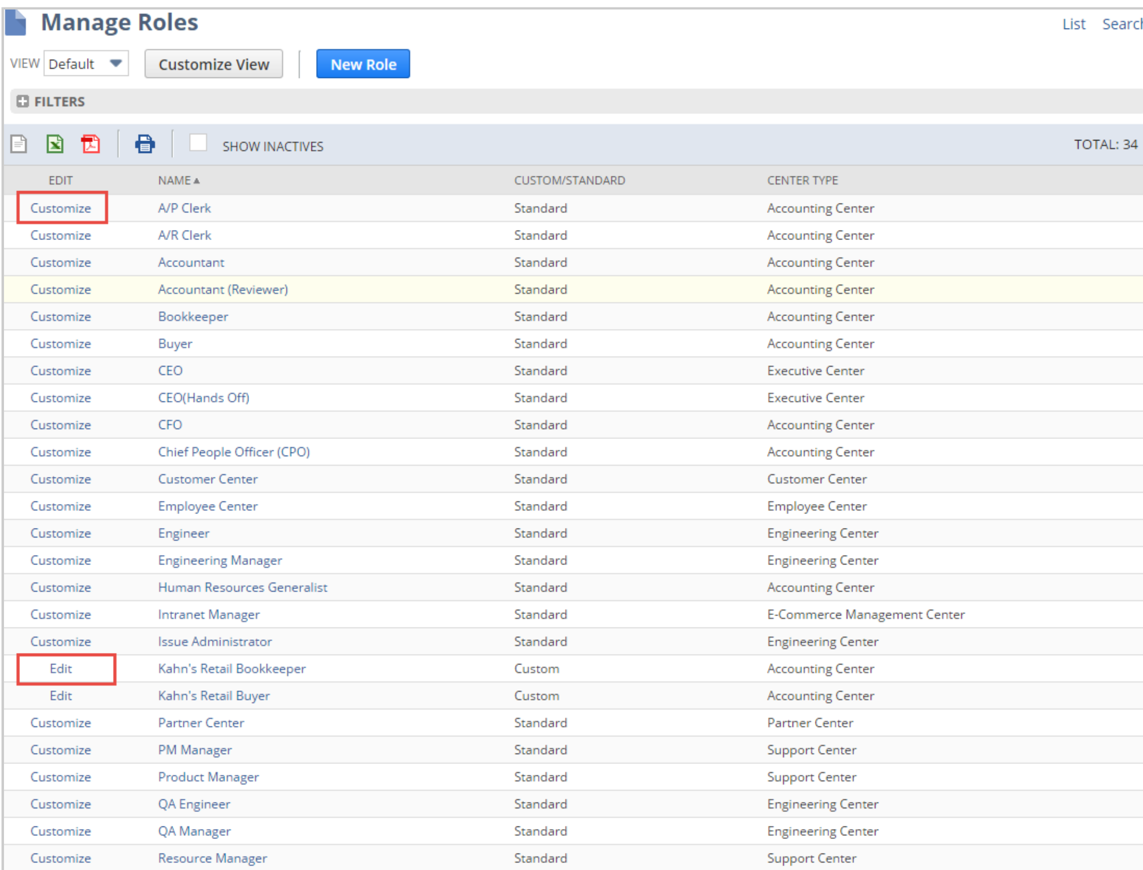
- For information about changes you can make to roles, see the following:

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

Manage Roles Page

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

Figure 1. Manage Roles Page



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

Show Permission Differences Between Roles Page

NetSuite provides a management tool that enables you to see at a glance the differences among multiple roles' permissions. Go to Setup > Users/Roles > Show Role Differences to open the Show

Permission Differences Between Roles page. For more information, see Showing Role Permission Differences.

Figure 2. Role Permission Difference Results

Role Permission Differences

New

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

Role Search

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

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

The NetSuite Account Administrator

The NetSuite account administrator is the key contact for NetSuite and your users. This person:

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

Key administrator tasks may include:

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

The NetSuite account administrator uses the The Administrator Role.

The Administrator Role

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

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

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

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

As of NetSuite 2018.1, Administrators and users with Full Access roles must use two-factor authentication in newly provisioned accounts. For information, see the help topic 2FA by Phone or Authenticator App.

An important auditing consideration for the Administrator role is that it does not show up in access reports. The standard Administrator role in NetSuite has all permissions for an account at all levels. However, in lists of roles and permission assignments, users with the Administrator role do not appear, nor does the Administrator role itself. The built-in Administrator role, as well as the Full Access role, a similarly powerful role, do not show up in the list of roles for reporting, though they can be assigned to users when users are given access. The lack of visibility of the Administrator and the Full Access roles is an important consideration for audits of user access to NetSuite. An alternative role with administrator level permission can be created to minimize the number of administrators who do not show on access reports, and at the same time still providing elevated rights.

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

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

Separate Administration Permissions

Several Setup type administration permissions are available to be assigned to users other than account administrators. With these permissions, you can limit the number of account administrators by assigning these administrative tasks to other users. The available Setup permissions are:

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

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

Permissions Requiring Two-Factor Authentication (2FA)

> **Important:** In 2018.1, the requirement for 2FA for these administrative permissions is enforced only in newly provisioned accounts. In 2018.2, the 2FA requirement will be enforced in all NetSuite accounts.

Administrative permissions that require 2FA include:

- Access Token Management (for Token-based Authentication)
- Two-Factor Authentication
- Two-Factor Authentication base

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

- Set Up OpenID Single Sign-on
- Set Up SAML Single Sign-on
- Integration Application
- Device ID Management

For more information about 2FA, see the help topic Two-Factor Authentication. See also 2FA by Phone or Authenticator App.

Customizing or Creating NetSuite Roles

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

- Go to the Role Record

- Enter Basic Role Information
- (OneWorld Only) Restrict Access to Subsidiaries
- Set Employee Restrictions
- Set Department, Class, and Location Restrictions
- Set as Issue Role for Issue Management
- Set as Web Services Only Role
- Set as Single Sign-On Only
- Restrict by Device ID
- Restrict by IP Address
- Set Two-Factor Authentication Requirements
- Set Permissions
- Set Employee Access
- Set Default and Restricted Forms
- Set Search Defaults
- Set Preferences for the Role
- Translate Custom Role Name
- Select a Dashboard

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

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

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

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

> **Important:** If you are using the Advanced Employee Permissions feature, restrictions set on the Role page are only applicable to the Employees and the Employee Administration permissions. The Employee Public and Employee Confidential permissions ignore the restrictions set on this page. For more information, see the help topic Assigning Advanced Employee Permissions to a Role.

Go to the Role Record

To begin customizing or creating a role:

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

Enter Basic Role Information

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

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

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

(OneWorld Only) Restrict Access to Subsidiaries

1. Select from the **Subsidiaries** list to limit the subsidiary values that users with this role can select for customer and vendor records, and to limit the transaction, customer, and vendor records that users with this role can edit, based on these records' selected subsidiaries.
   - If you do not select one or more subsidiaries, by default NetSuite restricts the employee's access to the subsidiary assigned to that employee on the employee's record. See the help topic Assigning a Subsidiary to an Employee.
   - Subsidiary restrictions automatically apply to classes, departments, and locations. For example, if only Location A is assigned to Subsidiary X and a role is restricted to Subsidiary X , then users with that role have access only to Location A, even if that role does not have any location restrictions.
   - Only a role with access to all subsidiaries assigned for a department can edit that department. If at least one subsidiary is not available to a role, that role cannot edit the department.
   - For more information, see the help topic Controlling Employee Access to Subsidiaries.

   > **Important:** These subsidiary restrictions apply only to customer, vendor, and transaction records, as described above. These restrictions are not intended to be applied to any other standard records, such as employees. These restrictions can also be used to restrict access to custom records, based on values in a Subsidiary list/record custom field, if the **Apply Role Restrictions** box is checked for the field. See the help topic Applying Role-Based Restrictions to Custom Records.
   >
   > If the **Allow Cross-Subsidiary Record Viewing** box is checked for a role, users with this role can see item records from all subsidiaries if the Item record has been customized to include additional subsidiaries. **Allow Cross-Subsidiary Record Viewing** does not operate on all subsidiary-dependent records.

2. Check the **Allow Cross-Subsidiary Record Viewing** box to allow users logged in with this role to see, but not edit, records for subsidiaries to which the role does not have access. Note that this setting does not allow viewing of employee payroll or commissions data.

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

Set Employee Restrictions

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

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

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

Check the **Allow Viewing** box to allow users logged in with this role to see, but not edit, data for employees to which the role does not have access. Note that this setting does not allow viewing of employee payroll or commissions data. Also, users cannot view non-subordinate employee records other than their own record when the **Employee Restrictions** field is set to **own and subordinates only**.

Check the **Do Not Restrict Employee Fields** box to allow users with this role to select any employee in employee fields. For example, a sales manager could select any sales rep in the **Sales Rep** field on a customer record even if that sales rep is part of another team.

Check the **Restrict Time and Expenses** box to restrict the time and expenses employees with this role can enter and view when you add the Track Time and Expense Report permissions. Employees with this role will not be able to enter expense reports or time transactions on behalf of other employees. Employees with this role will be able to view expense reports and time transactions for their subordinates. Reports and searches will only return time or expense transactions entered by the employee or their subordinates. Class, department, location, and subsidiary restrictions will not be applied for expense and time transactions.

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

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

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

Set Department, Class, and Location Restrictions

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

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

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

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

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

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

Set as Issue Role for Issue Management

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

Set as Web Services Only Role

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

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

Set as Single Sign-On Only

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

  This setting prohibits a user from accessing NetSuite through Web services or the user interface without going through inbound single sign-on. This type of role supports strict control of credentials from the external application. For more details, see the help topic Setting Up a Single Sign-on Only Role.

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

Restrict by Device ID

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

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

Restrict by IP Address

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

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

Set Two-Factor Authentication Requirements

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

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

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

Set Permissions

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

- You can set permissions for a role on the **Permissions** subtab. Permissions are divided into four different types on the **Transactions**, **Reports**, **Lists**, **Setup**, and **Custom Record** subtabs.
  - To add a permission, click a line in a list, click **Insert**, and select a permission. Or you can click the blank line at the bottom of a list, select a permission, and click **Add**.
  - To remove a permission, click it in a list, and click **Remove**.
  - To set the level of access for a permission, click a line in a list and select from the **Level** column. For information about these levels, see Access Levels for Permissions.
  - For Custom Record permissions only, you can select a value in the **Restrict** column to limit this role's access to custom records. (Each custom record permission provides access to a custom record type.)

- Select **Viewing and Editing** to restrict users with this role to viewing or editing only the records of this type that they or their subordinates created.
- Select **Editing Only** to restrict users with this role to editing only the records of this type that they or their subordinates created. They can view all records of this type.
- Leave this column blank to allow users with this role to view and edit all records of this type.

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

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

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

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

Set Employee Access

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

Set Default and Restricted Forms

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

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

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

Set Search Defaults

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

You make these selections by record type. When you select a record type on the Standard or Custom Record subtab, you can do the following:

- In the **Search Form** column, select a saved search to simplify the default search form for the selected record type.

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

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

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

  Preferred search results also can be defined on a saved search record. See the help topic Defining a Saved Search as Preferred Results.
- In the **List View** column, you can select a saved search to be the default list view for the selected record type. To make that saved search the only list view available, check the **Restricted** box.

  For each record type that is available in a list, a system-defined set of columns displays by default. The displayed set of records and fields is called a list view. The selection of a saved search here overrides the system default definitions.
- In the **Sublist View** column, you can select a saved search to be the default sublist view for the selected record type. To make that saved search the only sublist view available, check the **Restricted** box.

  Some record lists may be displayed on a subtab of another record. For example, a list of transactions may display on the **History** subtab of an item record. This type of list is called a sublist. The selection of a saved search here overrides the system default definitions.
- In the **Dashboard View** column, you can select a saved search to be the default view in a dashboard List portlet for the selected record type. To make that saved search the only dashboard view available, check the **Restricted** box.

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

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

Set Preferences for the Role

- You can set role-based defaults for user preferences, to be set for users logging in with that custom role. See Setting Role-Based Preferences.

Translate Custom Role Name

- If the Multi-Language feature is enabled in your account, you can translate the custom role name into languages that have been set up as company preferences. See Translating Custom Role Names.

Select a Dashboard

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

Only dashboards that have been published to the role's assigned center are available. See the help topic Publishing Dashboards Overview.

- For a custom role, click the **Dashboard** subtab to view the dashboard currently published to the role. Dashboards cannot be published from the Dashboard tab of a custom role. Publishing a dashboard to a custom role can only be done from the Publish Dashboard link in the Home Settings portlet.

Changing Custom Roles

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

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

To edit a custom role:

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

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

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

Inactivating Roles

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

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

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

To inactivate a custom or standard role:

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

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

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

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

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

Setting Default Forms for Roles

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

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

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

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

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

To set a default form for roles:

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

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

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

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

8. To have this form to be the only form available to this role, check the box in the **Restricted** column.
9. Click **Save**.

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

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

Restricting Accounts for Roles

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

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

To restrict access to accounts, you first set restrictions on account records.

To set account restrictions:

1. Go to Lists > Accounting > Accounts.
2. Click **Edit** next to the account you want to restrict.

3. Choose to restrict the account by class, department, location, or any combination of above.
4. If you use NetSuite OneWorld, restrict by subsidiary.
5. Click **Save**.

Next, you must set up restrictions for user roles. By default, NetSuite roles do not restrict users by class, department, or location. To restrict accounts, you must set up both account restrictions and role restrictions.

To set role restrictions:

1. Go to Setup > Users/Roles > Manage Roles.
2. Click **Edit** next to the role you need to change.
3. At the top of the page, select the department, class, or location restrictions.
4. If you use NetSuite OneWorld, select the subsidiaries to which this role has access. Press and hold **CTRL** to select more than one subsidiary.

   In NetSuite OneWorld accounts, if you do not select one or more subsidiaries, then by default NetSuite restricts the employee's access to the subsidiary assigned to that employee on the employee's record. For information on assigning a subsidiary to an employee, see the help topic Entering Address Information for an Employee.

   For more information, see the help topic Controlling Employee Access to Subsidiaries.
5. Click **Save**.
6. Repeat these steps for each user role to which you need to add role restrictions.

Now, when your employees work in NetSuite, they are restricted to only the accounts you have set up.

Customizing the Customer Center Role

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

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

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

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

To customize the Customer Center role:

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

   You select this name when you assign the role on customer records.
4. Click the **Permissions** subtab.
   1. On the **Transactions**, **Lists**, and **Setup** subtabs, click the name of the task to which you want to change access.

   2. In the **Level** column, adjust the permission level for the task.
   3. Click **Edit**.
   4. Repeat these steps for each task you want to edit the access level for.
5. Click the **Forms** subtab, and on the **Transaction** and **CRM** subtabs, check the box in the **Preferred** column next to the form you want customers to use in the Customer Center. This overrides the preferred form selected on the Transaction Forms page.
   - The Customer Center and My Account section of your website use the transaction and entry forms marked as (External) in the Custom Forms list. Note the following:
     - External forms, meaning forms with names appended with (External), can be marked Preferred for Customer Center roles, but not for other roles.
     - Forms that are not external cannot be marked as Preferred for Customer Center roles, so they are not listed on the Forms tab of Customer Center role records.
     - When a non-online order form is marked Preferred for Customer Center, it is saved as the form for the order. However, an online form is not saved as the form for an order, even if it is preferred; instead the preferred non-online order form is used.

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

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

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

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

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

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

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

Retail Clerk Roles

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

Users can be assigned the Retail Clerk role to complete point-of-sale tasks in the NetSuite user interface. The Retail Clerk (Web Services Only) is intended for use in web services transactions and is marked as a Web Services Only role. For details about Web services roles, see the help topic Setting a Web Services Only Role for a User.

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

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

Showing Role Permission Differences

NetSuite provides a function you can use to quickly review the differences in permissions between roles. You can select one role to be the basis for the permissions comparison, then select one or more other roles to be compared. You can choose to show all of the roles' permissions or the ones that are different, then simply touch a button to see a list. You then can export the role permission differences list as a .CSV or .XLS file.

To compare permissions for two or more roles:

1. Go to Setup > Users/Roles > Show Role Differences.
2. Select a role to be the base role, meaning its permissions are the basis for comparisons with other roles' permissions.
3. Select one or more roles to be compared with the base role.

4. Choose whether to list all permissions or the permissions that are different for the base role versus one or more of the compared roles. To list only the permissions that are different, check the **Only Show Different** box.
5. Click **Show**.

   The Role Permission Differences page lists permissions in alphabetical order by category, showing the permission level for each of the selected roles.

   To compare permissions for another set of roles, click the **New** button at the bottom of the page.

   To export the list as a CSV or XLS file, click an Export button.

Use Searches to Audit Roles and Permissions

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

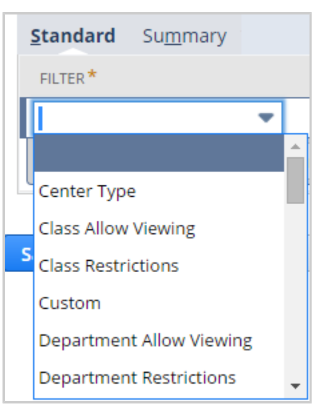
> **Note:** Role record searches do not support the nlapiLoadSearch(type, id) search API.

Use Searches to Audit Roles

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

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

Figure 3. Role Record Search Fields



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

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

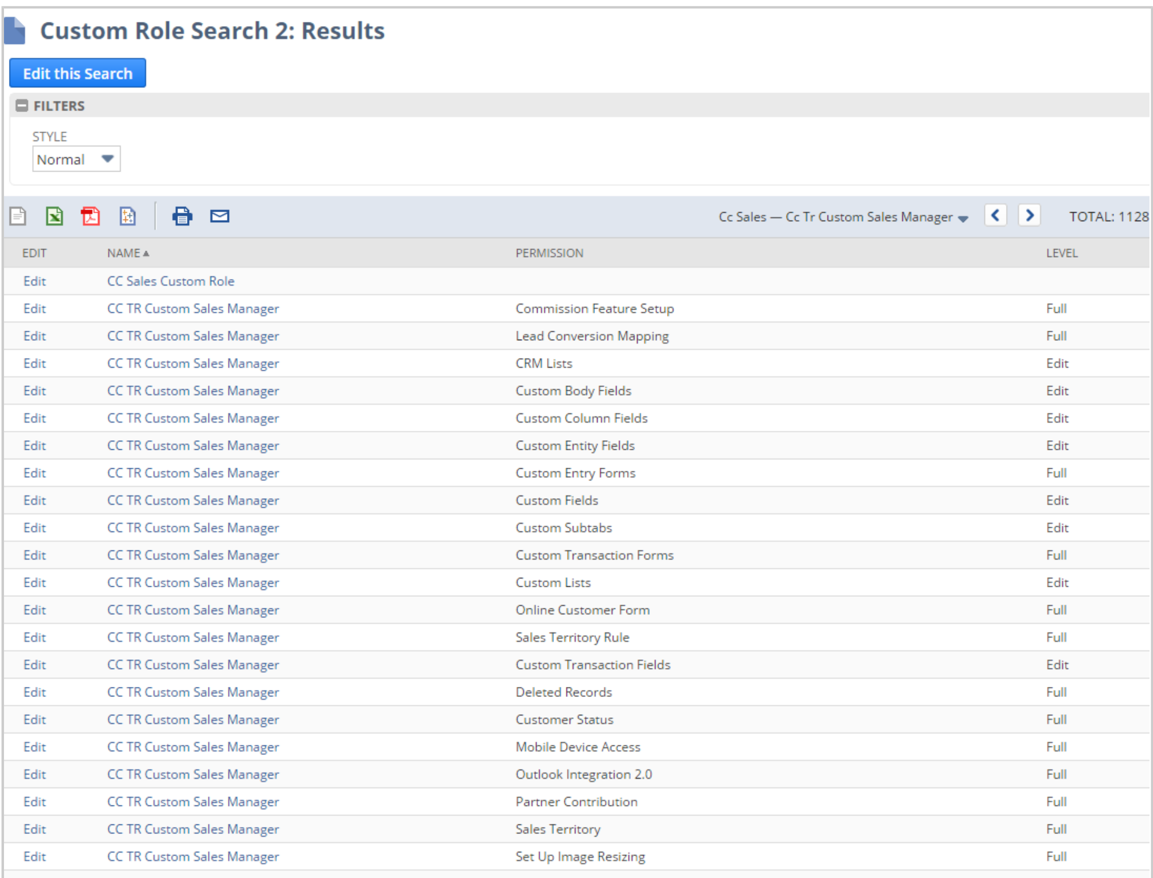
- Permission Change: Provides the name of a permission to which a change was made.
- Permission Change Date: Provides the date a change was made to a permission.
- Permission Change Level: Provides the level a permission was changed to.

Role Search Example

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

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

Figure 4. Role Record Search Results


Custom Role Search 2: Results

Edit this Search

FILTERS

STYLE
Normal

Cc Sales — Cc Tr Custom Sales Manager TOTAL: 1128

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

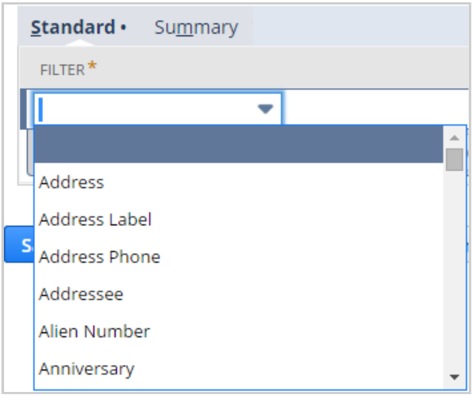
Use Searches to Audit Permissions By Employee

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

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

All employee record fields are available for employee record searches.

Figure 5. Employee Record Filter Fields



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

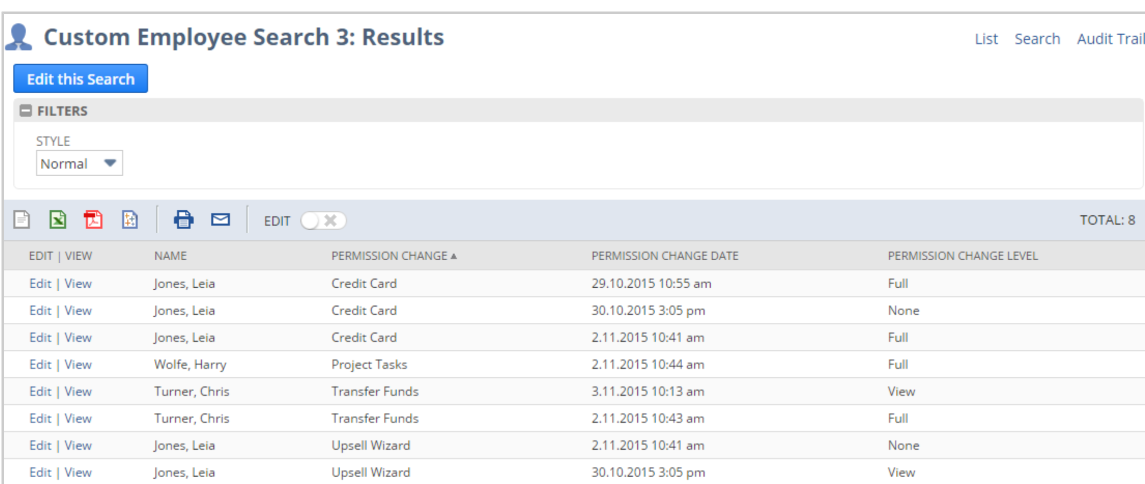
- Role: Provides a role’s name.
- Role Change: Provides the name of a role to which a change was made.
- Role Change Action: Provides the action taken on a role.
- Role Change Date: Provides the date an action took place.

Employee Search Example

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

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

Figure 6. Employee Search Results



Setting Role-Based Preferences

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

To set role-based preferences:

1. Click **Edit** next to a custom role or Customize next to a standard role.
2. On the **Preferences** subtab, select a preference, choose the desired value in the popup, and click Add.
3. Repeat step 3 to set additional preferences as desired.
4. Click **Save**.

Role-Based Preferences vs. Other Preference Levels

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

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

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

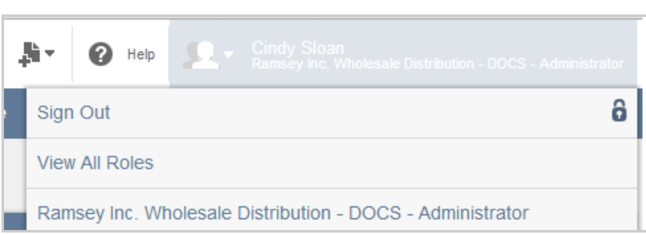
Role-Based Preferences in Bundles

When a custom role is added to a bundle, role-based preferences are included. When the bundle is installed in a target account, role-based preferences are applied to users who log in with that role, except for users who have already set preferences to non-default values.

Translating Custom Role Names

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

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



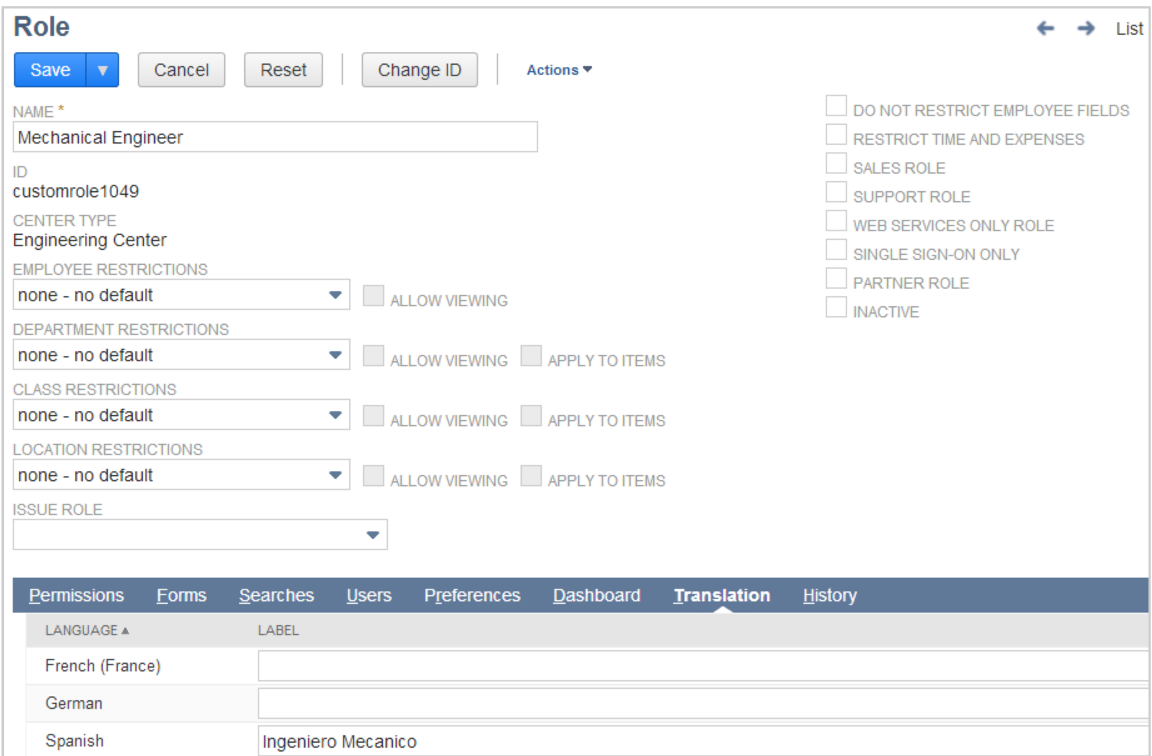
Before you can translate roles names, you need to select translation languages at Seup > Company > General Preferences, on the Languages subtab. For details, see the help topic Configuring Multiple Languages.

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

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

To define translations for an existing custom role name:

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



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

Mass Updating a Permission on Custom Roles

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

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

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

To mass update a permission for multiple roles:

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

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

12. Choose one of the following options: **Perform Update**, or **Save**.

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

Adding Custom Role Fields to be Mass Update Filter Criteria

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

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

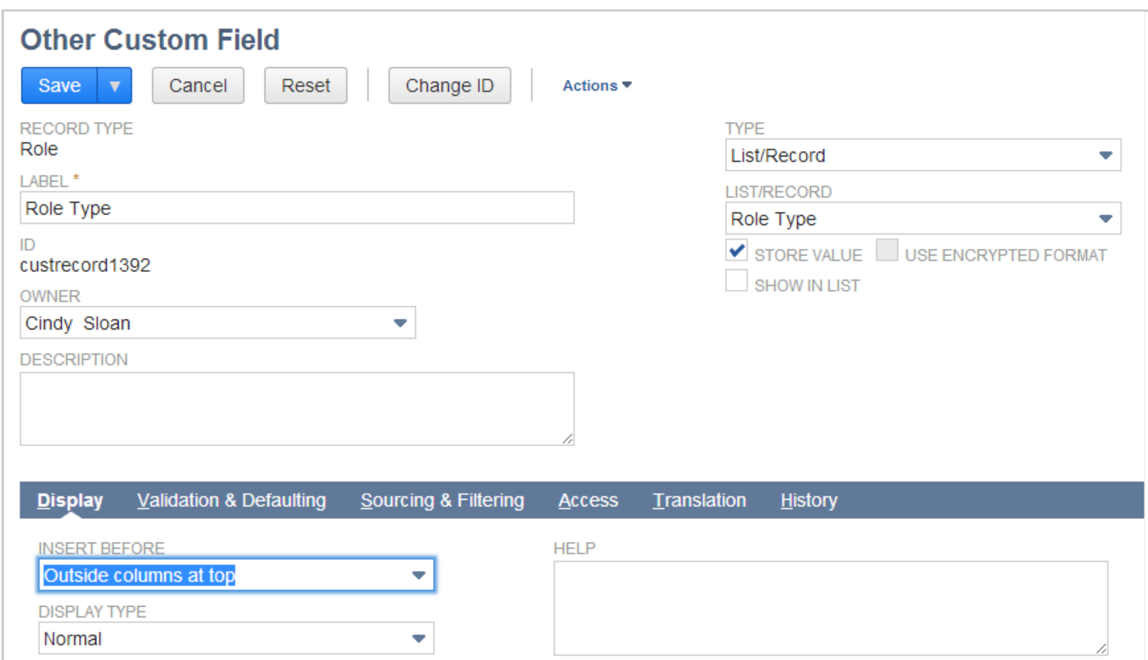
To create a custom field to be added to the role record:

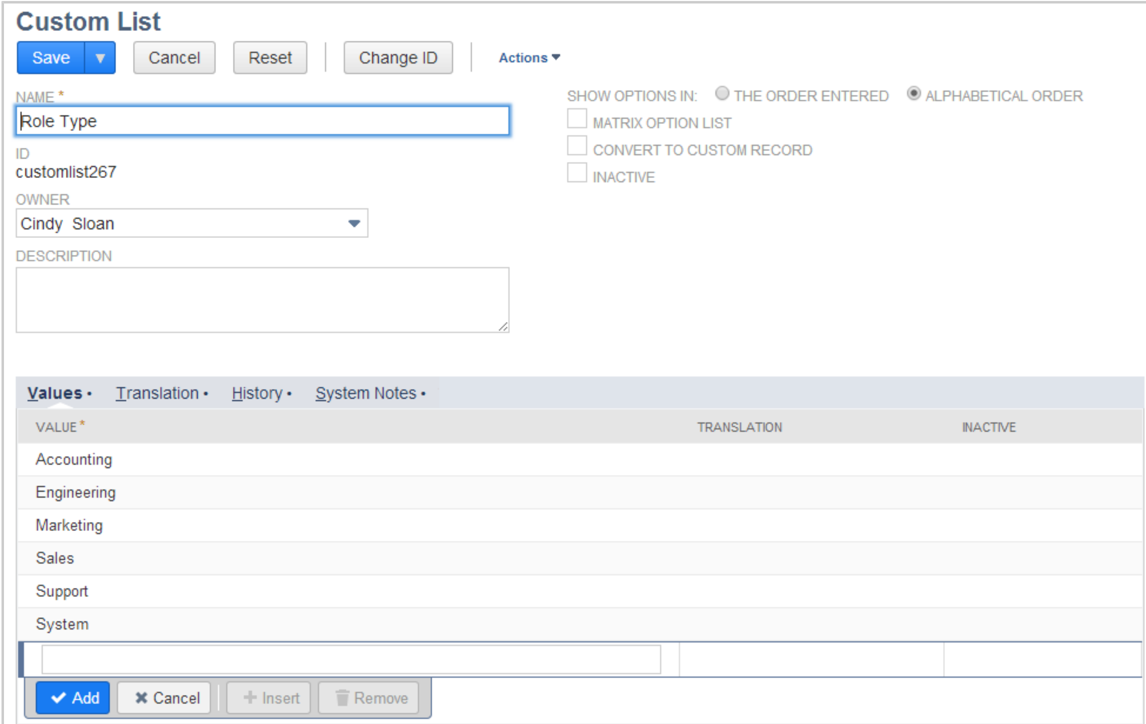
1. Go to Customization > Lists, Records, & Fields > Other Custom Fields > New.
2. From the **Record Type** dropdown list, select **Role**.
3. In the **Label** field, enter a name for the field.
4. From the **Type** dropdown list, select the type of field.

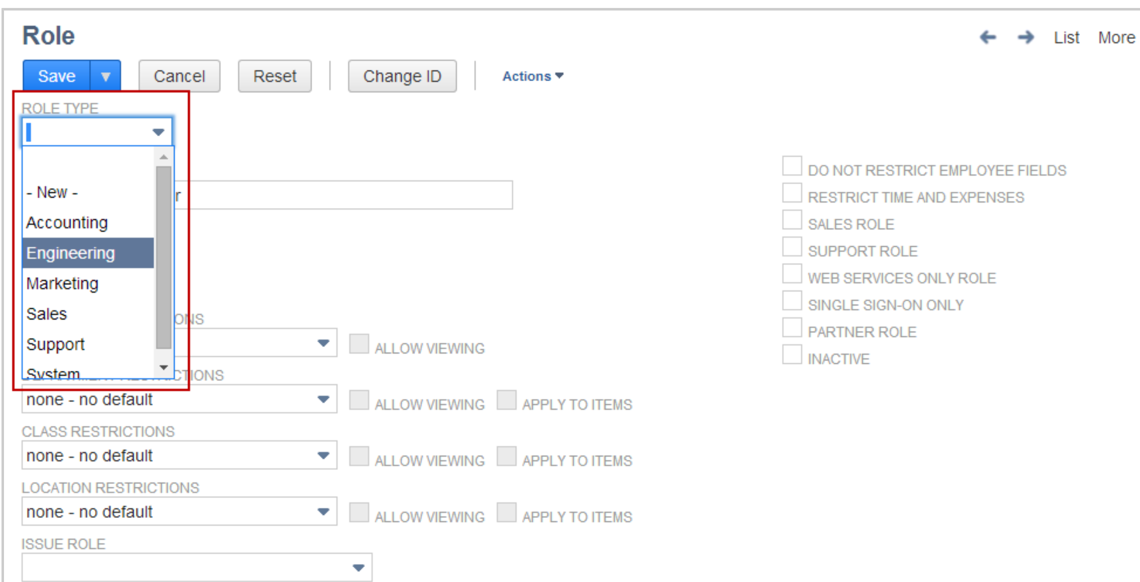
   For example, you can choose **List/Record** if you want the field to be a dropdown list with multiple options. For this choice, you need to select the list or record that supplies dropdown list options. You may need to first create a custom list of these options, then return to creating this custom field.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

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

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







Mass Updating the Role Assigned to Customers

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

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

To mass update the customer role:

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

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

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

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

Standard Roles Permissions Table

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

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

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

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

The Full Access role can be used for token-based authentication. This role can login, create a token for itself, and tokens for other users. For more information about token-based authentication in NetSuite, see the help topic Token-based Authentication.

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

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

A/P Clerk				
View	**Create**	**Edit**		**Full**
Accounts Payable Accounts Payable Graphing Amortization Schedules Bill Of Materials Inquiry Deferred Expense Report Employee Public Employee Record Financial History Inventory Non Posting Registers Notes Tab Purchase Order Reports Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Reports	Export Lists Kudos Resource Tableau Workbooks Export	Accounting Lists Accounts Payable Register Bill Purchase Orders Bill Of Materials Bills Classes Credit Returns Departments E-mail Template Enter Vendor Credits Item Receipt Items Locations Memorized Transactions Other Lists	Pay Bills Pay Sales Tax Purchase Order Receive Order Requisition Statistical Account Register Tax Details Tab Tax Items Track Messages Units Vendors Vendor Return Authorization Approval Vendor Return Authorization Vendor Returns Vendors	Calendar Contacts Deleted Records Documents and Files Events Find Transaction Inbound Shipment Mobile Device Access Outlook Integration 1.0 Ownership Transfer Phone Calls Perform Search Posting Period on Transactions Report Customization Report Scheduling Subscription Plan Tasks Template Categories Vendor Bill Approval Web Services

A/R Clerk			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Accounts Receivable Accounts Receivable Graphing Bill Of Materials Inquiry Employee Public Employee Record Fair Value Dimension Fair Value Formula Fair Value Price Financial History Generate Price Lists Generate Statements Inventory Item Revenue Category Lead Snapshot/Reminders Notes Tab Project Profitability Project Revenue Rules Project Templates Revenue Arrangement Revenue Arrangement Approval Revenue Commitment Revenue Commitment Reversal	Export Lists Kudos Recognize Gift Certificate Income Resource Tableau Workbooks Export	Accounting Lists Accounts Receivable Register Bill Of Materials Cash Sale Charge Charge Rule Classes Competitors Customer Deposit Customer Payment Customer Payment Authorization Customers Departments Deposit Application E-mail Template Fulfill Orders Invoice Invoice Sales Orders Item Fulfillment Items Jobs Locations	Calendar Charge — Run Rules Contacts Deleted Records Documents and Files Events Find Transaction Invoice Approval Mobile Device Access Outlook Integration 1.0 Perform Search Phone Calls Posting Period on Transactions Project Tasks Report Customization Report Scheduling Tasks Template Categories Track Time Web Services

A/R Clerk			
View	**Create**	**Edit**	**Full**
Revenue Element Revenue Management VSOE Revenue Recognition Field Mapping Revenue Recognition Plan Revenue Recognition Rule Revenue Recognition Schedules Tax Reports Time Tracking Transaction Detail View Gateway Asynchronous Notifications View Payment Events Work Calendar		Memorized Transactions Other Lists Override Payment Hold Print Shipment Documents Sales Order Shipping Partner Package Shipping Partner Shipment Subscriptions Tax Details Tab Track Messages Transfer Order Unbilled Receivable Registers Units	

Accountant				
View	**Create**	**Edit**		**Full**
Access Payment Audit Log Account Detail Accounts Payable Accounts Payable Graphing Accounts Receivable Accounts Receivable Graphing Amortization Reports Balance Sheet Bill Of Materials Inquiry Check Item Availability Commit Orders Component Where Used Deferred Expense Report Employee Public Employee Reminders Expenses Fair Value Dimension Fair Value Formula Fair Value Price Financial Statements General Ledger Generate Price Lists Generate Statements Income Income Statement Inventory Lead Snapshot/Reminders Net Worth Notes Tab Project Profitability Project Revenue Rules Project Templates Purchase Order Reports Purchases Revenue Arrangement Revenue Arrangement Approval Revenue Element Revenue Recognition Field Mapping Revenue Recognition Plan Revenue Recognition Rule Revenue Recognition Reports	Export Lists Kudos Recognize Gift Certificate Income Resource Tableau Workbooks Export	Accounting Lists Accounting Management Accounts Accounts Payable Register Accounts Receivable Register Adjust Inventory Amortization Schedules Bank Account Registers Bill Purchase Orders Bills Build Assemblies Build Work Orders Cash Sale Charge Charge Rule Check Classes Close Work Orders Competitors Create Allocation Schedules Credit Card Credit Card Refund Credit Card Registers Credit Memo Credit Returns CRM Groups Currency Revaluation Customer Deposit Customer Payment Customer Payment Authorization Customers Departments Deposit Deposit Application Distribute Inventory	Fixed Asset Registers Generate Revenue Commitment Generate Revenue Commitment Reversals Invoice Invoice Sales Orders Issue Components Items Jobs Locations Long Term Liability Registers Make Journal Entry Mark Work Orders Built Mark Work Orders Firmed Mark Work Orders Released Mass Updates Memorized Transactions Non Posting Registers Other Asset Registers Other Current Asset Registers Other Current Liability Registers Other Lists Other Names Pay Bills Pay Sales Tax Purchase Order Reconcile Reconcile Reporting Requisition Revenue Commitment Revenue Commitment Reversal	Bill Of Distribution Blanket Purchase Order Calendar Charge — Run Rules Contacts Count Inventory Create Inventory Counts Deleted Records Distribution Network Documents and Files Employee Record Events Find Transaction Inventory Cost Template Invoice Approval Item Demand Plan Item Revisions Item Supply Plan Manufacturing Cost Template Manufacturing Routing Mobile Device Access Outlook Integration 1.0 Pay Tax Liability Perform Search Phone Calls Planned Standard Costs Posting Period on Transactions Post Vendor Bill Variances Posting Period On Transactions Project Tasks Purchase Contract Report Customization

Accountant				
View	**Create**	**Edit**		**Full**
Sales Sales by Partner Sales By Promotion Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Reports Tax Time Tracking Transaction Detail Trial Balance View Gateway Asynchronous Notifications View Payment Events Work Calendar		E-mail Template Employees Enter Opening Balances Enter Vendor Credits Equity Registers	Revenue Management VSOE Revenue Recognition Schedules Sales Order Statistical Account Register Subscriptions Tax Details Tab Tax Reports Track Messages Track Time Transfer Funds Transfer Inventory Unbilled Receivable Registers Unbuild Assemblies Units Vendor Return Authorization Approval Vendor Return Authorization Vendor Returns Vendors Work Order Work Order Close Work Order Completion Work Order Issue	Report Scheduling Request For Quote Revalue Inventory Cost Standard Cost Version Subscription Plan Tasks Tegata Accounts Tegata Payable Tegata Receivable Template Categories Transfer Order Transfer Order Approval Vendor Bill Approval Vendor Request For Quote Web Services

Accountant (Reviewer)				
View		**Create**	**Edit**	**Full**
Access Payment Audit Log Accounting Lists Accounting Management Accounts Accounts Payable Accounts Payable Graphing Accounts Payable Register Accounts Receivable Accounts Receivable Graphing Accounts Receivable Register Adjust Inventory Amortization Reports Amortization Schedules Balance Sheet Bank Account Registers Bill Of Materials Inquiry Bill Of Materials Bills Build Assemblies Build Work Orders Cash Flow Statement Cash Sale Charge	Income Statement Inventory Invoice Issue Components Item Revenue Category Items Jobs Lead Snapshot/Reminders Locations Long Term Liability Registers Make Journal Entry Mark Work Orders Build Mark Work Orders Firmed Mark Work Orders Released Memorized Transactions Net Worth Non Posting Registers Notes Tab Other Asset Registers Other Current Asset Registers Other Current Liability Registers Other Lists Other Names Pay Sales Tax Project Profitability Project Revenue Rules	Export Lists Kudos Resource Tableau Workbooks Export	Bills E-mail Template Mass Updates Override Payment Hold Track Messages	Bill Of Distribution Blanket Purchase Order Calendar Charge — Run Rules Contacts Count Inventory Create Inventory Counts Deleted Records Distribution Network Documents and Files Employee Record Events Find Transaction Inventory Cost Template Item Demand Plan Item Revisions Item Supply Plan Manufacturing Cost Template Manufacturing Routing Mobile Device Access

Accountant (Reviewer)				
View		**Create**	**Edit**	**Full**
Charge Rule Check Check Item Availability Classes Close Work Orders Commit Orders Competitors Component Where Used Costed Bill Of Materials Inquiry Create Allocation Samples Credit Card Credit Card Refund Credit Card Registers Credit Memo Credit Returns CRM Groups Currency Revaluation Customer Deposit Customer Payment Customer Payment Authorization Customers Deferred Expense Reports Departments Deposit Deposit Application Distribute Inventory Employee Public Employee Reminders Employees Enter Completions Enter Opening Balances Enter Vendor Credits Equity Registers Expenses Fair Value Dimension Fair Value Formula Fair Value Price Financial Statements Fixed Asset Registers General Ledger Generate Price Lists Generate Statements Income	Purchase Contract Purchase Order Purchases Reconcile Reporting Request For Quote Requisition Revalue Inventory Cost Revenue Arrangement Revenue Arrangement Approval Revenue Commitment Revenue Commitment Reversal Revenue Element Revenue Management VSOE Revenue Recognition Field Mapping Revenue Recognition Plan Revenue Recognition Reports Revenue Recognition Rule Revenue Recognition Schedules Sales Sales By Partner Sales By Promotion Sales Order Sales Order Reports Sales Order Transaction Report Statistical Account Registers Subscription Plan Subscriptions Tax Tax Details Tab Tax Reports Time Tracking Track Time Transaction Detail Transfer Funds Transfer Inventory Transfer Order Trial Balance Unbilled Receivable Registers Unbuild Assemblies Units Vendor Return Authorization Approval Vendor Return Authorization Vendor Returns Vendors View Gateway Asynchronous Notifications View Payment Events Work Calendar Work Order Work Order Close Work Order Completion Work Order Issue			Outlook Integration 1.0 Perform Search Phone Calls Planned Standard Cost Posting Period on Transactions Project Tasks Report Customization Report Scheduling Standard Cost Version Tasks Tegata Accounts Tegata Payable Template Categories Vendor Bill Approval Web Services

Advanced Partner Center			
View	**Create**	**Edit**	**Full**
Bill Of Materials Inquiry Bill Of Materials Financial History	Export Lists Kudos Notes Tab	Campaign History Cases CRM Groups	Calendar Contacts Customers

Advanced Partner Center			
View	**Create**	**Edit**	**Full**
Items Knowledge Base Lead Snapshot/Reminders Marketing Campaigns Non Posting Registers Partner Commission Reports Project Templates Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Reports Sales Order Transaction Report Support Support Case Snapshot/Reminders Tax Details Tab Units Work Calendar	Promotion Tableau Workbooks Export	Estimate Opportunity Sales Order Track Messages	Deleted Records E-mail Template Events Find Transaction Jobs Mobile Device Access Outlook Integration 1.0 Partners Perform Search Phone Calls Project Tasks Report Customization Report Scheduling Subscription Plan Subscriptions Tasks Template Categories Web Services

Bookkeeper			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Accounting Management Accounts Accounts Payable Accounts Payable Register Accounts Receivable Accounts Receivable Register Bank Account Registers Bill Of Materials Inquiry Check Item Availability Commit Orders Component Where Used Credit Card Registers Deferred Expense Report Employee Public Employee Reminders Equity Registers Fixed Asset Registers Generate Price Lists Generate Statements Inventory Lead Snapshot/Reminders Long Term Liability Registers Non Posting Registers Notes Tab Other Asset Registers Other Current Asset Registers Other Current Liability Registers View Project Profitability Project Templates Purchase Order Reports Revalue Inventory Costs Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Statistical Account Register Tax	Export Lists Kudos Recognize Gift Certificate Income Resource Tableau Workbooks Export	Accounting Lists Adjust Inventory Bill Purchase Orders Bill Of Materials Bills Cash Sale Charge Charge Rule Check Classes Competitors Credit Card Credit Card Refund Credit Memo Credit Returns CRM Groups Currency Revaluation Customer Deposit Customer Payment Customer Payment Authorization Customers Departments Deposit Deposit Application E-mail Template Employees Enter Opening Balances Enter Vendor Credits Invoice Invoice Sales Orders Item Revisions Items Jobs Locations Make Journal Entry Memorized Transactions	Bill Of Distribution Calendar Charge — Run Rules Contacts Count Inventory Create Inventory Counts Deleted Records Distribution Network Documents and Files Employee Record Events Find Transaction Inventory Cost Template Invoice Approval Item Demand Plan Item Supply Plan Manufacturing Cost Template Manufacturing Routing Mobile Device Access Outlook Integration 1.0 Perform Search Phone Calls Planned Standard Cost Post Vendor Bill Variances Posting Period on Transactions Project Tasks Report Customziation Report Scheduling Standard Cost Version Subscription Plan Tegata Accounts Tegata Payable Tegata Receivable Tasks Template Categories

Bookkeeper			
View	**Create**	**Edit**	**Full**
Tax Details Tab Tax Reports Time Tracking Transaction Detail Unbilled Receivable Registers View Gateway Asynchronous Notifications View Payment Events Work Calendar		Other Lists Other Names Pay Bills Pay Sales Tax Purchase Order Reconcile Reconcile Reporting Requisition Sales Order Subscriptions Track Messages Transfer Funds Transfer Order Units Vendor Return Authorization Approval Vendor Return Authorization Vendor Returns Vendors	Track Time Vendor Bill Approval Web Services

Buyer			
View	**Create**	**Edit**	**Full**
Accounts Payable Accounts Payable Graphing Amortization Schedules Bill of Materials Inquiry Employee Public Financial History Inventory Non Posting Registers Notes Tab Purchase Order Reports Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report	Export Lists Kudos Resource Tableau Workbooks Export	Accounting Lists Accounts Payable Register Bill Purchase Orders Bill Of Materials Bills Classes Departments Email Template Item Receipt Items Locations Memorized Transactions Other Lists Receive Orders Requisition Statistical Account Registers Tax Items Track Messages Units Vendor Returns Vendors	Blanket Purchase Order Blanket Purchase Approval Calendar Contacts Deleted Records Documents and Files Employee Record Events Find Transaction Inbound Shipment Mobile Device Access Outlook Integration 1.0 Ownership Transfer Perform Search Phone Calls Purchase Contract Purchase Contract Approval Purchase Order Report Customization Report Scheduling Request for Quote Requisition Approval Template Categories Vendor Return Authorizations Vendor Return Approvals Web Services

CEO					
View	**Create**	**Edit**	**Full**		
Access Payment Audit Log Accounts Payable Accounts Payable Gra phing	Export Lists Kudos Recognize Gift Certificate Inc ome	E-mail Tem plate Fax Messag es	ADP Import Data Accounting Lists Accounting Manage ment Accounts	Edit Forecast Employee Commis sion Transaction	Pay Bills Pay Sales Tax Payroll Liability Pay ments Perform Search

ORACLE NETSUITE

CEO					
View	**Create**	**Edit**	**Full**		
Accounts Receivable Accounts Receivable Graphing Amortization Reports Amortization Schedules Balance Sheet Bill Of Materials Inquiry Check Item Availability Commission Reports Commit Orders Component Where Used Costed Bill Of Materials Inquiry Create Allocation Schedules Employee Public Employee Reminders Expenses Fair Value Dimension Fair Value Formula Fair Value Price Financial Statements General Ledger Generate Price Lists Generate Statements Income Income Statement Individual Paycheck Inventory Item Revenue Category Lead Snapshot/Reminders Net Worth Notes Tab Partner Authorized Commission Reports Partner Commission Reports Project Profitability Project Revenue Rules Project Templates Purchase Order Reports Purchases Quota Reports Resource Allocations Return Authorization Reports Revalue Inventory Cost Revenue Arrangement Revenue Arrangement Approval Revenue Commitment Revenue Commitment Reversal Revenue Element Revenue Management VSOE	Tableau Workbooks Export	Fax Template Letter Messages Letter Template Mail Merge Mass Updates PDF Messages PDF Template Reconcile Tax Reports Track Messages	Accounts Payable Register Accounts Receivable Register Adjust Inventory Approve Online Bill Payments Audit Trail Bank Account Registers Bill Of Distribution Bill Purchase Orders Bill Of Materials Bills Blanket Purchase Order Blanket Purchase Order Approval Build Work Orders Calculate Time Calendar Cash Sale Cash Sale Refund Check Classes Close Work Orders Competitors Contacts Count Inventory Create Inventory Counts Credit Card Credit Card Refund Credit Card Registers Credit Memo Credit Returns CRM Groups Currency Revaluation Customer Deposit Customer Payment Customer Payment Authorization Customer Refund Customers Deleted Records Departments Deposit Deposit Application Distribution Network Documents and Files	Employee Commission Transaction Approval Employee Record Employees Enter Completions Enter Opening Balances Enter Vendor Credits Enter Year-To-Date Payroll Adjustments Equity Registers Estimate Events Expense Report Finance Charge Financial History Find Transactions Fixed Asset Registers Fulfill Orders Import Online Banking (QIF) File Internal Publisher Inventory Cost Template Invoice Invoice Approval Invoice Sales Orders Issue Components Item Fulfillment Item Receipt Item Revisions Item/Category Layouts Items Jobs Locations Long Term Liability Registers Make Journal Entry Manufacturing Cost Template Manufacturing Routing Mark Work Orders Built Mark Work Orders Firmed Mark Work Orders Released Matching Rules For Online Banking Memorized Transactions Mobile Device Access Non Posting Registers Opportunity	Phone Calls Planned Standard Cost Post Vendor Bill Variances Posting Period on Transactions Presentation Categories Print Shipment Documents Process GST Refund Project Tasks Publish Forms Purchase Contract Purchase Contract Approval Purchase Order Receive Order Receive Returns Reconcile Reporting Refund Returns Report Customization Report Scheduling Request For Quote Requisition Requisition Approval Resource Resource Allocation Approval Return Auth. Approval Return Authorization Sales Order Sales Order Approval Set Up Budgets Ship Items Shipping Partner Package Shipping Partner Shipment Standard Cost Version Statement Charge Statistical Account Register Store Categories Store Content Categories Store Content Items Store Tabs Subscription Plan Subscriptions System Status Tasks

CEO					
View	**Create**	**Edit**	**Full**		
Revenue Recognition Field Mapping Revenue Recognition Plan Revenue Recognition Reports Revenue Recognition Rule Revenue Recognition Schedules Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Reports Tax Tax Details Tab Time Tracking Trial Balance View Gateway Asynchronous Notifications View Payment Events Web Site Report Web Store Report Work Calendar				Other Asset Registers Other Current Asset Registers Other Current Liability Registers Other Lists Other Names Outlook Integration 1.0 Outlook Integration 2.0 Ownership Transfer	Tegata Accounts Tegata Payable Tegata Receivable Template Categories Timer Track Time Transfer Funds Transfer Order Transfer Order Approval Unbilled Receivable Registers Units Usage Vendor Bill Approval Vendor Request For Quote Vendor Return Auth. Approval Vendor Return Authorization Vendor Returns Vendors View Online Bill Pay Status Web Services Work Order Work Order Close Work Order Completion Work Order Issue

CEO (Hands Off)						
View				**Create**	**Edit**	**Full**
Access Payment Audit Log Accounting Lists Accounting Management Accounts Accounts Payable Accounts Payable Graphing Accounts Payable Register Accounts Receivable Accounts Receivable Graphing Accounts Receivable Register	Credit Memo Credit Returns Currency Revaluation Customer Deposit Customer Payment Customer Payment Authorization Customer Refund Customers Departments Deposit Deposit Application Edit Forecast Employee Commission Transaction Approval	Inventory Invoice Invoice Sales Orders Issue Components Item Fulfillment Item Receipt Items Jobs Lead Snapshot/Reminders Locations Long Term Liability Registers Make Journal Entry Mark Work Orders Built Mark Work Orders Firmed	Receive Order Receive Returns Reconcile Reporting Refund Returns Request For Quote Requisition Resource Allocations Return Auth. Approval Return Authorization Return Authorization Reports Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order	Export Lists Kudos Tableau Workbooks Export	Bills E-mail Template Fax Messages Fax Template Letter Messages Letter Template Mail Merge PDF Messages PDF Template	Blanket Purchase Order Calendar Contacts Deleted Records Documents and Files Employee Commission Transaction Employee Record Events Find Transaction Inbound Shipment Mobile Device Access Outlook Integration 1.0 Outlook Integration 2.0 Ownership Transfer Perform Search Phone Calls Project Tasks Report Customization Report Scheduling Resource Resource Allocation Approval Subscription Plan System Status Tasks Template Categories

CEO (Hands Off)						
View				**Create**	**Edit**	**Full**
Adjust Inventory ADP Import Data Amortization Reports Approve Online Bill Payments Audit Trail Balance Sheet Bank Account Registers Bill Of Materials Bill Of Materials Inquiry Bill Purchase Orders Build Work Orders Calculate Time Cash Flow Statement Cash Sale Cash Sale Refund Check Classes Close Work Orders Commission Reports Competitors Credit Card Credit Card Refund Credit Card Registers	Employee Public Employee Reminders Employees Enter Completions Enter Opening Balances Enter Vendor Credits Enter Year-To-Date Payroll Adjustments Equity Registers Estimate Expense Report Expenses Finance Charge Financial History Financial Statements Fixed Asset Registers General Ledger Generate Price Lists Generate Statements Import Online Banking (QIF) File Income Income Statement Individual Paycheck	Mark Work Orders Released Memorized Transactions Net Worth Non Posting Registers Notes Tab Opportunity Other Asset Registers Other Current Asset Registers Other Current Liability Registers Other Lists Other Names Partner Authorized Commission Reports Partner Commission Reports Pay Bills Pay Sales Tax Payroll Liability Payments Posting Period on Transactions Print Shipping Documents Process GST Refund Project Profitability Purchase Contract Purchase Order Purchase Order Reports Purchases Quota Reports	Sales Order Approval Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Set Up Budgets Shipping Partner Package Shipping Partner Shipment Statement Charge Statistical Account Register Subscriptions Tax Tax Details Tab Tax Reports Tegata Accounts Tegata Payable Tegata Receivable Time Tracking Timer Track Time Transfer Funds Transfer Order Trial Balance Unbilled Receivable Registers Units Vendor Request For Quote Vendor Return Authorization Approval Vendor Return Authorization Vendor Returns Vendors View Gateway Asynchronous Notifications View Online Bill Pay Status View Payment Events Web Site Report Web Store Report Work Calendar Work Order Work Order Close		Track Messages	Transfer Order Approval Vendor Bill Approval Web Services

CEO (Hands Off)						
View				Create	Edit	Full
			Work Order Completion Work Order Iss ue			

CFO					
View	Create	Edit	Full		
Access Payment Audit Log Account Detail Accounts Payable Accounts Payable Graphing Accounts Receivable Accounts Receivable Graphing Amortization Reports Balance Sheet Bill Of Materials Inquiry Budget Build Assemblies Check Item Availability Commission Reports Commit Orders Component Where Used Costed Bill Of Materials Inquiry Custom Record Types Deferred Expense Report Employee Commission Schedules/Plans Employee Public Employee Reminders Expenses Fair Value Dimension Fair Value Formula Fair Value Price Financial Statements General Ledger Generate Price Lists Generate Statements Income Income Statement Individual Paycheck Inventory Item Fulfillment Item Receipt Item Revenue Category Lead Snapshot Reminders Net Worth Partner Authorized Commission Reports Partner Commission Reports Print Shipping Documents Project Profitability	Export Lists Kudos Tableau Workbooks Export Vendor Request For Quote	Override Payment Hold Tax Details Tab Tax Reports	Accounting Book Accounting Lists Accounting Management Accounts Accounts Payable Register Accounts Receivable Register Adjust Inventory Amortization Schedules Approve OnlineBill Payments Approve Vendor Payments Audit Trail Balance Location Costing Group Accounts Bank Account Registers Bill Of Distribution Bill Of Materials Bill Purchase Orders Bill Sales Orders Bills Blanket Purchase Order Blanket Purchase Order Approval Build Work Orders Calculate Time Calendar Cash Sale Cash Sale Refund Charge Charge Rule Charge — Run Rules Check Class Mapping Classes Close Work Orders Competitors Contacts Copy Budgets Count Inventory Create Allocation Schedules Create Inventory Counts Credit Card Credit Card Refund	Estimate Events Expense Report Fax Messages Fax Template Finance Charge Financial History Find Transaction Fixed Asset Registers Foreign Currency Variance Mapping Fulfill Orders Generate Revenue Commitment Generate Revenue Commitment Reversals Global Account Mapping Import Online Banking (QIF) File Inbound Shipment Intercompany Adjustments Inventory Cost Template Invoice Invoice Approval Invoice Sales Orders Issue Components Item Account Mapping Item Revisions Items Jobs Journal Approval Letter Messages Letter Template Location Costing Group Location Mapping Locations Long Term Liability Registers Mail Merge Make Journal Entry Manufacturing Cost Template Manufacturing Routing Mark Work Orders Built	Perform Search Phone Calls Planned Standard Cost Post Time Post Vendor Bill Variances Posting Period on Transactions Print Checks and Forms Process GST Refund Project Tasks Publish Search Purchase Contract Purchase Contract Approval Purchase Order Receive Order Receive Returns Reconcile Reconcile Reporting Refund Returns Report Customization Report Scheduling Request For Quote Requisition Requisition Approval Resource Resource Allocation Approval Return Auth. Approval Return Authorization Revalue Inventory Cost Revenue Commitment Revenue Commitment Reversal Revenue Management VSOE Revenue Recognition Schedules Sales Order Sales Order Approval Set Up Budgets

CFO					
View	**Create**	**Edit**	**Full**		
Project Revenue Rules Project Templates Purchase Order Reports Purchases Quota Reports Resource Allocations Return Authorization Reports Revenue Arrangement Revenue Arrangement Approval Revenue Element Revenue Recognition Field Mapping Revenue Recognition Plan Revenue Recognition Reports Revenue Recognition Rule Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Fulfillment Reports Sales Order Reports Shipping Partner Package Shipping Partner Shipment Tax Time Tracking Unbuild Assemblies View Gateway Asynchronous Notifications View Payment Events Work Calendar			Credit Card Registers Credit Memo Credit Returns CRM Groups Currency Revaluation Customer Deposit Customer Payment Customer Payment Authorization Customer Refund Customers Department Mapping Departments Deposit Deposit Application Distribution Network Documents and Files Email Template Employee Commission Transaction Employee Commission Transaction Approval Employee Record Employees Enter Completions Enter Opening Balances Enter Vendor Credits Enter Year-To-Date Payroll Adjustments Entity Account Mapping Equity Registers	Mark Work Orders Built Firmed Mark Work Orders Built Released Mass Updates Matching Rules for Online Banking Memorized Transactions Mobile Device Access Non Posting Registers Notes Tab Opportunity Other Asset Registers Other Current Asset Registers Other Current Liability Registers Other Lists Other Names Outlook Integration 1.0 Outlook Integration 2.0 Override Estimated Cost On Transactions Ownership Transfer PDF Messages PDF Template Partner Commission Transaction Partner Commission Transaction Approval Pay Bills Pay Sales Tax Pay Tax Liability Payroll Liability Payments	Standard Cost Version Statement Charge Statistical Account Registers Subscription Plan Subscriptions Tasks Tegata Accounts Tegata Payable Tegata Receivable Template Categories Timer Track Messages Track Time Transaction Detail Transfer Funds Trial Balance Unbilled Receivable Registers Units Vendor Bill Approval Vendor Return Auth. Approval Vendor Return Authorization Vendor Returns Vendors View Online Bill Pay Status Web Services Work Order Work Order Close Work Order Completion Work Order Issue

Chief People Officer (CPO)			
View	**Create**	**Edit**	**Full**
Commission Reports Employee Commission Transaction Employee Commission Transaction Approval Employee Public Employee Reminders Expense Categories Find Transaction Individual Paycheck Payroll Check Register	Export Lists Resource Tableau Workbooks Export Vendors	Email Template Form W-2 Wage and Tax Statement Kudos Track Messages	Advanced Government Issued IDs Amend W-4 Basic Government Issued IDs Calendar Departments Documents and Files Edit Profile Employee Change Reason Employee Effective Dating Employee Record Employee Social Security Numbers

Chief People Officer (CPO)			
View	**Create**	**Edit**	**Full**
Payroll Hours & Earnings Payroll Items Payroll Summary & Detail Reports Purchase Order Reports Tax Details Tab Tax Reports Workforce Analytics			Employees Events Expense Report Generic Resources Government Issued ID Types Job Management Job Requisitions Locations Manage Users News Item Notes Tab Organization Value Perform Search Phone Calls Positions Report Customization Report Scheduling Tasks Template Categories Termination Reasons Time-Off Administration Track Time View Login Audit Trail Work Calendar Work Places

Consultant			
View	**Create**	**Edit**	**Full**
Accounts Receivable Un-Billed Classes Customers Departments Jobs Divisions Locations Non Posting Registers Project Profitability Statistical Account Registers Subscriptions Time Tracking	Kudos Project Tasks	Calendar Cases Documents and Files Find Transaction Perform Search Purchase Order Requisition	Events Expense Report Phone Calls Report Scheduling Resource Allocations Tasks Track Time

Customer Center			
View	**Create**	**Edit**	**Full**
Accounts Receivable Register Cash Sale Charge Charge Rule Credit Memo Customer Deposit Customer Payment Authorization Estimate Fulfill Orders Fulfill Sales Order Invoice Issues Non Posting Registers	Deposit Application Generate Statements Item Fulfillment Print Shipment Documents Return Authorization Shipping Partner Package Shipping Partner Shipment	Cases Contacts Customer Payment Customer Profile Sales Order	Charge — Run Rules Deleted Records Web Services

Customer Center			
View	**Create**	**Edit**	**Full**
Return Authorization Reports Sales Order Transaction Report Track Messages			

Employee Center			
View	**Create**	**Edit**	**Full**
Amend W-4 Commission Reports Employee Confidential Employee Public Employee Reminders Employee Self Employee SS Numbers Financial History Individual Paycheck Non Posting Registers Project Profitability Resource Allocations Sales Order Transaction Report Time Tracking Work Calendar	Export Lists Kudos Resource Tableau Workbooks Export	Contacts Edit Profile Employee Record Notes Tab	Calendar Cases Deleted Records Documents And Files Events Expense Report Find Transaction Mobile Device Access Perform Search Phone Calls Project Tasks Purchase Order Request For Quote Requisition Requisition Approval Resource Allocation Approval Requisition Approval Tasks Track Messages Track Time Vendor Request For Quote Web Services

Engineer			
View	**Create**	**Edit**	**Full**
Cases Contacts Email Template Employee Public Employee Record Template Categories Track Messages	Export Lists Kudos Tableau Workbooks Export	Issue Reports Issues Mail Merge Mark Issue As Showstopper	Calendar Deleted Records Documents and Files Events Mobile Device Access Notes Tab Outlook Integration 1.0 Perform Search Report Scheduling System Status Tasks Web Services

Engineering Manager			
View	**Create**	**Edit**	**Full**
Cases Contacts Employee Confidential Employee Public Employee Record Track Messages	Export Lists Kudos Tableau Workbooks Export	Issues Perform Search	Calendar Deleted Records Documents and Files Events Issue Reports Mark Issues As Showstoppers Mobile Device Access

Engineering Manager			
View	**Create**	**Edit**	**Full**
			Notes Tab Outlook Integration 1.0 Report Scheduling Tasks Web Services

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

Full Access					
View		Full			
		Credit Card Refund Credit Card Registers Credit Memo CRM Group CRM Lists (Other Lists) Currency Currency Revaluation Custom Record Entries	Generate Statements Government Issued ID Types Import Online Banking (QIF) File Import XML Transaction Income Registers	Payment Methods Payroll Items Payroll Liability Payments Posting Period on Transactions Presentation	Track Messages Track Time Transfer Funds Transfer Inventory Two-Factor Authentication base User Access Tokens (TBA) Vendors View Online Bill Pay Status Website (External) publisher

Human Resources Generalist			
View	Create	Edit	Full
Commission Reports Employee Commission Transaction Employee Commission Transaction Approval Employee Public Employee Reminders Expense Categories Find Transaction Individual Paycheck Payroll Check Register Payroll Hours & Earnings Payroll Items Payroll Summary & Detail Reports Purchase Order Reports Workforce Analytics	Export Lists Resource Tableau Workbooks Export Vendors	Email Template Form W-2 Wage and Tax Statement Kudos Track Messages	Advanced Government Issued IDs Amend W-4 Basic Government Issued IDs Calendar Departments Documents and Files Edit Profile Employee Change Reason Employee Effective Dating Employee Record Employees Employee Social Security Numbers Events Expense Report Generic Resources Government Issued ID Types Job Management Job Requisitions Locations Manage Users News Item Notes Tab Organization Value Perform Search Phone Calls Report Customization Report Scheduling Tasks Template Categories Termination Reasons Time-Off Administration Track Time View Login Audit Trail Work Calendar Work Places

Intranet Manager			
View	Create	Edit	Full
Bill Of Materials Inquiry Employee Confidential	Export Lists Kudos	E-mail Template	Bill Of Materials Calendar

Intranet Manager			
View	**Create**	**Edit**	**Full**
Employee Public Employee Record Find Transaction Notes Tab Web Site Report Web Store Report	Resource Tableau Workbooks Export	Track Messages	Color Themes Custom Item Fields Documents and Files Deleted Records Events Internal Publisher Item/Category Layouts Items Mobile Device Access Online Customer Form Outlook Integration 1.0 Perform Search Phone Calls Presentation Categories Publish Employee List Publish Forms Publish RSS Feeds Related Items Report Scheduling Resource Create Set Up Image Resizing Set Up Web Site Store Categories Store Content Categories Store Content Items Store Tabs Tasks Template Categories Units Web Services Website (External) Publisher

Issue Administrator			
View	**Create**	**Edit**	**Full**
Cases Employee Public Employee Record Tax Details Tab	Export Lists Kudos Tableau Workbooks Export		CRM Groups Calendar Deleted Records Documents and Files Events Import CSV File Issue Reports Issue Setup Issues Mark Issue As Showstopper Mass Updates Mobile Device Access Outlook Integration 1.0 Perform Search Publish Dasboards Publish Search Report Scheduling Tasks Web Services

Marketing Administrator					
View	**Create**	**Edit**	**Full**		
Cases Employee Public Employee Reminders Financial History Find Transaction Lead/Snapshot Reminders Marketing Campaign Reports Project Templates Quota Reports Sales By Partner Sales By Promotion Sales Force Automation Web Site Report Work Calendar	Export Lists Kudos Tableau Workbooks	Classes Departments E-mail Template Locations Track Messages Vendors	Backup Your Data Bulk Manage Roles Calendar Campaign History Color Themes Companies Competitors Contact Roles Contacts CRM Groups CRM Lists Custom Body Fields Custom Column Fields Custom Entity Fields Custom Entry Forms Custom Event Fields Custom Fields Custom Item Fields Custom Lists Custom PDF Layouts Custom Record Entries Custom Record Types Custom Subtabs Custom Transaction Fields Custom Transaction Forms Customer Profile Customer Status Customers Delete Event Deleted Records Documents and Files	Duplicate Detection Setup Duplicate Entity Management Employees Events Fax Messages Fax Template Import CSV File Internal Publisher Jobs KPI Scorecards Knowledge Base Letter Messages Letter Template Mail Merge Manage Users Marketing Campaign Reports Marketing Campaign Marketing Template Mass Updates Mobile Device Access Notes Tab Online Custom Record Form Online Customer Form Other Names Outlook Integration 1.0 Partners PDF Messages	PDF Template Perform Search Phone Calls Presentation Categories Project Tasks Promotion Public Template Categories Publish Dashboards Publish Knowledge Base Publish Search Record Custom Field Report Customization Report Scheduling Resource Sales Force Automation Setup Sales Order Reports Set Up Campaigns Set Up Campaign E- mail Addresses Set Up Domains Shortcuts Subscriptions Tasks Template Categories Two-Factor Authentication base Upsell Assistant Upsell Setup Upsell Wizard Users & Passwords Web Services

Marketing Assistant			
View	**Create**	**Edit**	**Full**
Bill Of Materials Inquiry Bill Of Materials Employee Public Financial History Items Lead Snapshot/Reminders Marketing Campaign Reports Project Templates Quota Reports Sales Sales By Partner Sales By Promotion Sales Force Automation	Export Lists Kudos Knowledge Base Tableau Workbooks Export	CRM Lists E-mail Template Fax Messages Fax Template Letter Messages Letter Template Mail Merge Partners PDF Messages PDF Template Promotion Track Messages	Calendar Campaign History Companies Competitors Contacts CRM Group Customers Deleted Records Documents and Files Duplicate Entity Management Events Find Transaction Jobs

Marketing Assistant			
View	**Create**	**Edit**	**Full**
Sales Order Reports Units Work Calendar			Marketing Campaigns Marketing Template Mass Updates Mobile Device Access Notes Tab Outlook Integration 1.0 Perform Search Phone Calls Project Tasks Publish RSS Feeds Report Customization Report Scheduling Resource Subscriptions Tasks Template Categories Upsell Assistant Upsell Setup Upsell Wizard Website (External) Publisher Web Services

Marketing Manager			
View	**Create**	**Edit**	**Full**
Bill Of Materials Inquiry Bill Of Materials Employee Confidential Employee Public Financial History Items Lead Snapshot/Reminders Marketing Campaign Reports Project Templates Quota Reports Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Reports Units Web Site Report Web Store Report Work Calendar	Export Lists Knowledge Base Kudos Tableau Workbooks Export	CRM Lists Custom Body Fields Custom Column Fields Custom Entity Fields Custom Event Fields Custom Fields Custom Lists E-mail Template Fax Messages Fax Template Letter Messages Letter Template Mail Merge PDF Messages PDF Template Perform Search Publish Knowledge Base Track Messages	Calendar Campaign History Companies Competitors Contact Roles Contacts CRM Group Custom Transaction Forms Customer Status Customers Deleted Records Documents and Files Duplicates Entity Management Events Find Transaction Internal Publisher Jobs Marketing Campaigns Marketing Template Mass Updates Mobile Device Access Notes Tab Online Customer Form Outlook Integration 2.0 Partners Perform Search Phone Calls Project Tasks Promotion Public Template Categories Report Customization Report Scheduling Resource Sales Territory Rule

Marketing Manager			
View	**Create**	**Edit**	**Full**
			Set Up Campaign E-mail Addresses Set Up Image Resizing Setup Campaigns Subscriptions Tasks Template Categories Upsell Assistant Upsell Setup Upsell Wizard Web Services

Partner Center			
View	**Create**	**Edit**	**Full**
Cases Find Transaction Notes Tab Partner Commission Reports Project Templates Resource Allocations Sales By Partner Sales By Promotion	Export Lists Tableau Workbooks Export	Competitors Customers Jobs Subscriptions	Deleted Records Partners Perform Search Promotion Resource Allocation Approval Web Services

Payroll Manager			
View	**Create**	**Edit**	**Full**
Email Reports Employee Confidential Employee Public Employee Reminders Financial History Find Transaction Form 940 Form 941 Form W-4 Employee's Withholding Allowance Certificate Make Journal Entry Manage Payroll Notes Tab Payroll Check Register Payroll Hours & Earnings Payroll Journal Report Payroll Liability Report Payroll Summary & Detail Reports Project Profitability Time Tracking	Export Lists Kudos Posting Period on Transaction Resource Tableau Workbooks Export	E-mail Template Form W-2 - Wage and Tax Statement Track Messages	Calendar Contacts Deleted Records Documents and Files Employee Record Employee SS Numbers Employees Enter Year-To-Date Payroll Adjustments Events Individual Paycheck Mobile Device Access Outlook Integration 1.0 Paychecks Payroll Items Payroll Liability Payments Perform Search Phone Calls Process Payroll Report Customization Report Scheduling Run Payroll Set Up Payroll Tasks Template Categories Track Time Vendors Web Services Workplaces

Payroll Setup			
View	Create	Edit	Full
Email Reports Employee Public Employee Reminders Financial History Find Transaction Form 940 Form 941 Form W-4 Employee's Withholding Allowance Certificate Make Journal Entry Manage Payroll Notes Tab Payroll Check Register Payroll Journal Report Payroll Liability Report Payroll Summary & Detail Reports Project Profitability Time Tracking	Export Lists Kudos Posting Period on Transaction Resource Tableau Workbooks Export	E-mail Template Form W-2 - Wage and Tax Statement Track Messages	Calendar Contacts Deleted Records Documents and Files Employee Record Employee SS Numbers Employees Enter Year-To-Date Payroll Adjustments Events Individual Paycheck Locations Mobile Device Access Outlook Integration 1.0 Paychecks Payroll Items Payroll Liability Payments Perform Search Phone Calls Process Payroll Report Customization Report Scheduling Run Payroll Set Up Payroll Tasks Template Categories Track Time Vendors Web Services Workplaces

PM Manager			
View	Create	Edit	Full
Employee Confidential Employee Public Employee Record Find Transaction Lead Snapshots/Reminders Partners Project Templates Provisioning Support Support Case Snapshot/Reminders Tax Details Tab Work Calendar	Export Lists Kudos Resource Tableau Workbooks Export	CRM Groups Companies Contacts Email Template Issues Issue Reports Mark Issue As Showstopper Opportunity Perform Search Track Messages	Calendar Cases Competitors Customers Documents and Files Events Financial History Jobs Knowledge Base KPI Scorecards Mail Merge Mark Issue As Showstopper Mass Updates Mobile Device Access Notes Tab Outlook Integration 1.0 Phone Calls Project Tasks Publish Dashboards Publish Knowledge Base Report Customization Report Scheduling Resource Allocation Approval Resource Allocations Subscriptions

PM Manager			
View	**Create**	**Edit**	**Full**
			Tasks Template Categories

Product Manager			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Charge Charge Rule Credit Memo Employee Public Employee Record Find Transaction Invoice Lead Snapshot/Reminders Partners Project Templates Provisioning Sales Order Support Support Case Snapshot/Reminders Tax Details Tab View Gateway Asynchronous Notifications View Payment Events Work Calendar	Export Lists Kudos Resource Tableau Workbooks Export	CRM Groups Companies Contacts Email Template Issues Opportunity Perform Search Track Messages	Calendar Cases Charge — Run Rules Competitors Customers Deleted Records Documents and Files Events Financial History Issue Reports Jobs Knowledge Base Mail Merge Mark Issue as Showstopper Mass Updates Mobile Device Access Notes Tab Outlook Integration 1.0 Outlook Integration 2.0 Phone Calls Project Tasks Project Templates Publish Knowlege Base Report Customization Report Scheduling Subscriptions Tasks Template Categories Web Services

QA Engineer			
View	**Create**	**Edit**	**Full**
Cases Employee Public Employee Record Tax Details Tab	Kudos	Issues Perform Search Track Messages	Calendar Documents and Files Events Issue Reports Issue Setup KPI Scorecards Mark Issue As Showstopper Mobile Device Access Notes Tab Outlook Integration 1.0 Publish Dashboards System Status Tasks

QA Manager			
View	**Create**	**Edit**	**Full**
Cases Employee Confidential Employee Public Employee Record Tax Details Tab	Kudos	Issues Kudos Perform Search Track Messages	Calendar Documents and Files Events Issue Reports Issue Setup KPI Scorecards Mark Issue As Showstopper Mobile Device Access Notes Tab Outlook Integration 1.0 Publish Dashboards Tasks

Resource Manager				
View		**Create**	**Edit**	**Full**
Audit Trail Bill Of Materials Calendar Contacts Custom Entity Fields Custom Entity Forms Custom Event Fields Custom Fields Custom HTML Layouts Custom Item Fields Custom Lists Custom PDF Layouts Custom Record Entries Custom Record Types Custom Sublists Custom Subtabs Email Template Employee Public Employee Reminders Employees Generic Resources	Import CSV File Items KPI Scorecards Locations Mass Updates Notes Tab Other Custom Fields Outlook Integration 2.0 Project Profitability Project Templates Report Customization Report Scheduling Subsidiaries Subsidiary — Tax Engine Selection SuiteScript SuiteSignOn Tasks Tax Details Tab Template Categories Time Tracking Two-Factor Authentication Two-Factor Authentication Base Vendors Workflow Work Calendar	Custom Body Fields Custom Center Categories Custom Center Links Custom Centers Custom Column Fields Custom Transaction Forms Kudos Perform Search Publish Forms Publish Search	Customers Events	Deleted Records Documents and Files Employee Record Jobs Mobile Device Access Project Tasks Resource Allocation Approval Resource Allocations Review Custom GL Plug-in Executions Subscriptions

Retail Clerk (Note that this role cannot be customized. See Retail Clerk Roles.)			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Bill Of Materials Inquiry Bill Of Materials Calendar Deposit Application Edit Profile Employee Public Employee Record Employee Reminders Events Fulfill Orders Item Fulfillment	Kudos Phone Calls	Contacts	Cases Charge Charge Rule Charge — Run Rules Credit Memo Customer Deposit Customer Payment Customer Payment Authorization Customer Refund Customers Documents and Files Find Transaction

Retail Clerk (Note that this role cannot be customized. See Retail Clerk Roles.)			
View	**Create**	**Edit**	**Full**
Items Locations Print Shipment Documents Purchase Order Requistion Sales Order Fulfillment Reports Shipping Partner Package Shipping Partner Shipment Tasks Time Tracking Track Messages Transaction Detail View Gateway Asynchronous Notifications View Payment Events			Invoice Invoice Approval Invoice Sales Orders Mobile Device Access Notes Tab Perform Search Sales Order Transfer Order Transfer Order Approval

Retail Clerk (Web Services Only) (Note that this role cannot be customized. See Retail Clerk Roles.)			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Bill Of Materials Inquiry Currency Employee Public Employees Locations View Gateway Asynchronous Notifications View Payment Events	Kudos		Bill Of Materials Charge Charge Rule Charge — Run Rule Credit Memo Custom Record Entries Customer Deposit Customer Payment Customer Payment Authorization Customer Refund Customers Deposit Application Documents and Files Employee Record Find Transaction Invoice Sales Order Set Up Web Services Track Time Transfer Order Approval View Unencrypted Credit Cards Web Services

Revenue Accountant				
View	**Create**	**Edit**	**Full**	
Account Detail Balance Sheet Bill Of Materials Billing Schedules Create Allocation Schedules Currency Customer Deposit Customer Payment Customer Payment Authorization Customer Refund Employee Public Employee Reminders	Resource	Accounts Accounts Receivable Cash Sale Cash Sale Refund Credit Memo Customers Email Template Fair Value Dimension Fair Value Formula Fair Value Price Invoice Item Revenue Category Invoice Sales Orders	Amortization Reports Amortization Schedules Calendar Deferred Expense Report Documents and Files Events Find Transaction Generate Revenue Commitment Generate Revenue Commitment Reversals Make Journal Entry Mass Updates	Revenue Management VSOE Revenue Recognition Plan Revenue Recognition Reports Revenue Recognition Rule Tasks Template Categories

Revenue Accountant				
View	**Create**	**Edit**	**Full**	
Employees Financial Statements Fulfill Orders General Ledger Income Income Statement Items Jobs Project Profitability Purchase Order Reconcile Reporting Sales Order Fulfillment Reports Sales Order Reports Time Tracking Trial Balance Units		Item Revenue Category Non Posting Registers Return Authorization Revenue Recognition Field Mapping Sales Order	Notes Tab Perform Search Phone Calls Project Tasks Report Customization Revenue Commitment Revenue Commitment Reversal Report Scheduling Revenue Arrangement Revenue Arrangement Approval Revenue Element	

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

Sales Administrator				
View	**Create**	**Edit**	**Full**	
Access Payment Audit Log Accounts Receivable Accounts Receivable Register Bill Of Materials Inquiry Bill Of Materials Commission Reports Employee Public Employee Reminders Financial History Find Transaction Items Lead Snapshot/Reminders Marketing Campaign Reports Non Posting Registers Project Templates Quota Reports Resource Allocations Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Shipping Items Shipping Partner Registration Statistical Account Register Subscription Plan Tax Details Tab Unbilled Receivable Registers Units View Payment Events View Gateway Asynchronous Notifications Work Calendar	Export Lists Kudos Resource Tableau Workbooks Export	Cash Sale CRM Lists Custom Body Fields Custom Column Fields Custom Entity Fields Custom Event Fields Custom Fields Custom Lists Custom Subtabs Custom Transaction Fields Custom Transaction Forms Mass Updates	Bulk Manage Roles Calendar Commission Feature Setup Companies Competitors Contact Roles Contacts CRM Groups Custom Entry Forms Custom Transaction Forms Customer Status Customers Deleted Records Documents and Files Duplicate Detection Setup Duplicates Entity Mgmt. Edit Forecast Edit Manager Forecast E-mail Template Employee Commission Schedules/Plans Employee Commission Transaction Employee Record Employees Establish Quotas Estimate Events Fax Messages Fax Template	Find Transaction Internal Publisher Jobs KPI Scorecards Lead Conversion Lead Conversion Mapping Letter Messages Letter Template Mail Merge Manage Users Marketing Template Mobile Device Access Notes Tab Online Customer Form Opportunity Outlook Integration 1.0 Outlook Integration 2.0 Override Estimated Cost On Transactions Partner Authorized Commission Reports Partner Commission Reports Partner Commission Schedules / Plans Partner Commission Transaction Partner Contribution PDF Messages PDF Template Perform Search Phone Calls Project Tasks Projects Promotion Publish Search Publish Dashboards Report Customization Report Scheduling Resource Allocation Approval Sales Campaigns Sales Force Automation Setup Sales Order Sales Order Approval Sales Territory Sales Territory Rule Set Up Domains Subscriptions Tasks Team Selling Contribution Telephony Integration Template Categories Track Messages Two-Factor Authentication base Upsell Assistant

Sales Administrator				
View	**Create**	**Edit**	**Full**	
				Upsell Setup Upsell Wizard Web Services

Sales Manager				
View	**Create**	**Edit**	**Full**	
Access Payment Audit Log Accounts Receivable Accounts Receivable Register Bill Of Materials Inquiry Bill Of Materials Cases Check Item Availability Commission Reports Commit Orders Employee Confidential Employee Public Employee Record Financial History Item Revisions Items Lead Snapshot/Reminders Marketing Campaigns Marketing Campaign Reports Non Posting Registers Project Templates Quota Reports Resource Allocations Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Statistical Account Registers Subscription Plan Tax Details Tab Unbilled Receivable Registers Units View Gateway Asynchronous Notifications View Payment Events Web Site Report Web Store Report Work Calendar	Export Lists Kudos Resource Tableau Workbooks Export	Campaign History Cash Sale CRM Lists Custom Body Fields Custom Column Fields Custom Entity Fields Custom Event Fields Custom Fields Custom Lists Custom Subtabs Custom Transaction Fields Fax Messages Fax Template Letter Messages Letter Template Mail Merge Mass Updates Override Payment Hold PDF Messages PDF Template	Bill Of Distribution Calendar Commission Feature Setup Companies Competitors Contact Roles Contacts CRM Groups Custom Entry Forms Custom Transaction Forms Customer Status Customers Deleted Records Distribution Network Documents and Files Edit Forecast Edit Manager Forecast E-mail Template Employee Commission Schedules/Plans Employee Commission Transaction Establish Quotas Estimate	Events Find Transaction Internal Publisher Jobs Lead Conversion Lead Conversion Mapping Marketing Template Mobile Device Access Notes Tab Online Customer Form Opportunity Outlook Integration 1.0 Outlook Integration 2.0 Override Estimated Cost On Transactions Partner Commission Schedules/Plans Partner Commission Transaction Partner Contribution Perform Search Phone Calls Project Tasks Promotion Report Customization Report Scheduling Resource Allocation Approval Sales Campaigns Sales Order Sales Order Approval Sales Territory Sales Territory Rule Set Up Image Resizing Subscriptions Tasks Team Selling Contribution Template Categories Track Messages Upsell Assistant Upsell Wizard Web Services

Sales Person			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Bill Of Materials Inquiry Bill Of Materials	Export Lists Kudos Resource	Campaign History Cash Sale Edit Forecast	Calendar Competitors Contacts

Sales Person			
View	**Create**	**Edit**	**Full**
Cases Commission Reports CRM Lists Duplicate Entity Management Employee Commission Transaction Employee Public Employee Record Financial History Items Lead Snapshot/Reminders Marketing Campaigns Marketing Campaign Reports Non Posting Registers Project Templates Quota Reports Resource Allocations Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Subscription Plan Tax Details Tab Units View Payment Events View Gateway Asynchronous Notifications Work Calendar	Notes Tab Tableau Workbooks Export	Estimate Fax Messages Fax Template Letter Messages Letter Template Mail Merge Mass Updates Opportunity PDF Messages PDF Template Sales Order	CRM Groups Customers Deleted Records Documents and Files E-mail Template Events Find Transaction Jobs Lead Conversion Lead Conversion Mapping Marketing Template Mobile Device Access Outlook Integration 1.0 Outlook Integration 2.0 Perform Search Phone Calls Project Tasks Report Customization Report Scheduling Resource Allocations Approval Sales Campaigns Subscriptions Tasks Template Categories Track Messages Upsell Assistant Web Services

Sales Vice President			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Accounts Receivable Accounts Receivable Register Bill Of Materials Inquiry Bill Of Materials Cases Check Item Availability Commission Reports Commit Orders Component Where Used Costed Bill Of Materials Inquiry Employee Public Employee Record Item Revisions Items Lead Snapshot/Reminders Marketing Campaigns Non Posting Registers Quota Reports Sales Sales By Partner Sales By Promotion Sales Force Automation Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Reports	Export Lists Kudos Tableau Workbooks Export	Campaign History Cash Sale Fax Messages Fax Template Letter Messages Letter Template Mail Merge Mass Updates Override Payment Hold PDF Messages PDF Template	Bill Of Distribution CRM Groups Calendar Companies Competitors Contact Roles Contacts Customers Distribution Network Documents and Files Edit Forecast Edit Manager Forecast Email Template Establish Quotas Estimate Events Find Transaction Manufacturing Cost Template Manufacturing Routing Mobile Device Access Notes Tab Opportunity Perform Search Phone Calls Report Customization Report Scheduling

Sales Vice President			
View	**Create**	**Edit**	**Full**
Statistical Account Register Subscription Plan Tax Details Tab View Gateway Asynchronous Notifications View Payment Events Web Site Report Web Store Report			Sales Campaigns Sales Order Sales Order Approval Tasks Template Categories Track Messages

Store Manager				
View	**Create**	**Edit**	**Full**	
Access Payment Audit Log Accounts Receivable Bill Of Materials Inquiry Employee Confidential Employee Public Employee Record Find Transaction Inventory Lead Snapshot/Reminders Non Posting Registers Purchase Order Reports Resource Allocations Sales Sales By Partner Sales By Promotion Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Reports View Gateway Asynchronous Notifications View Payment Events Web Site Report Web Store Report Work Calendar	Export Lists Kudos Resource Tableau Workbooks Export	Companies Competitors Custom Item Fields Custom Lists Customers E-mail Template Jobs Override Payment Hold Projects Non Posting Registers Notes Tab Perform Search Shipping Items Shipping Partner Registration Track Messages Units Vendors	Bill Of Materials Calendar Cash Sale Cash Sale Refund Color Themes Contacts CRM Groups CRM Lists Deleted Records Documents and Files Duplicate Entity Management Events Find Transaction Internal Publisher Item/Category Layouts Item Demand Plan Item Supply Plan Items Media Items Mobile Device Access Online Customer Form Outlook Integration 1.0 Override Payment Hold Phone Calls Perform Search Presentation Categories	Project Tasks Project Templates Publish Forms Publish RSS Feeds Purchase Order Related Items Report Customization Report Scheduling Resource Allocation Approval Resource Create Requisition Sales Order Sales Order Approval Set Up Domains Set Up Image Resizing Set Up Web Site Setup an Online Store Store Content Items Store Tabs System Email Template Tasks Template Categories Transfer Order Transfer Order Approval Uncategorized Presentation Items Upsell Assistant Upsell Setup Upsell Wizard Units Website (External) publisher Web Services

Support Administrator					
View	**Create**	**Edit**	**Full**		
Access Payment Audit Log Bill Of Materials Inquiry Employee Confidential Employee Public Employee Reminders Financial History	Export Lists Kudos Receive Returns Refund Returns Return Auth. Approval Return Authorization	Bill Of Materials Inquiry Classes Color Themes Departments E-mail Template Items Locations	Audit Trail Backup Your Data Bulk Manage Roles Calculate Time Calendar Case Alerts Cases	Delete Event Deleted Records Documents and Files Duplicates Mgmt. And Merging Employees	Publish Search Record Custom Field Report Customization Report Scheduling Resource Resource Allocation Approval Save Dashboards Set Up Intellisync link

Support Administrator					
View	**Create**	**Edit**	**Full**		
Lead Snapshot/Reminders Memorized Transactions Project Templates Promotion Quota Reports Resource Allocations Return Authorization Reports Sales Force Automation View Gateway Asynchronous Notifications View Payment Events Vendors Web Site Report Web Site Report Work Calendar	Tableau Workbooks Export	Marketing Template Track Messages Units	Companies Competitors Contact Roles Contacts Create Public Search CRM Groups CRM Lists Custom Body Fields Custom Column Fields Custom Entity Fields Custom Entry Forms Custom Event Fields Custom Fields Custom Item Fields Custom PDF Layouts Custom Lists Custom Record Entries Custom Record Types Custom Subtabs Custom Transaction Fields Custom Transaction Forms Customer Profile Customers	Escalation Assignment Escalation Assignment Rule Events Fax Messages Fax Template Find Transaction Guided Start Import CSV File Import XML Transaction Internal Publisher KPI Scorecards Jobs Knowledge Base Letter Messages Letter Template Mail Merge Manage Users Mass Updates Media Items Mobile Device Access Notes Tab Online Case Form Other Names Outlook Integration 1.0 Partners PDF Messages PDF Template Perform Search Permission Level Phone Calls Project Tasks Projects Publish Dashboards Publish Knowledge Base	Set Up XML Import Shortcuts Support Support Case Issue Support Case Origin Support Case Priorty Support Case Snapshot/Reminders Support Case Status Support Case Territory Support Case Territory Rule Support Case Type Support Setup System Email Template Tasks Telephony Integration Template Categories Time Tracking Timer Track Time Two-Factor Authentication base Users & Passwords Web Services Web Site (External) publisher

Support Manager				
View	**Create**	**Edit**	**Full**	
Bill Of Materials Inquiry Bill Of Materials CRM Lists Employee Confidential Employee Public Items Lead Snapshot/Reminders Other Lists Project Templates	Export Lists Kudos Resource Projects Tableau Workbooks Export	Competitors Customers E-mail Template Fax Messages Fax Template Issues Jobs Letter Messages Letter Template	Calendar Cases Companies Contact Roles Contacts CRM Groups Deleted Records Documents and Files	Online Case Form Outlook Integration 1.0 Phone Calls Project Tasks Project Templates Publish Knowledge Base Report Customization Report Scheduling

Support Manager				
View	**Create**	**Edit**	**Full**	
Publish RSS Feeds Resource Allocations Sales Sales By Partner Sales By Promotion Sales Order Reports Support Support Case Snapshot/ Reminders Units Work Calendar		Mail Merge Mass Updates PDF Messages PDF Template Perform Search Projects Sales Order Reports Track Messages	Duplicate Entity Management Escalation Assignment Escalation Assignment Rule Events Find Transaction Internal Publisher Issues Edit Items View Knowledge Base Mobile Device Access Notes Tab	Resource Allocation Approval Support Case Issue Support Case Origin Support Case Territory Support Case Territory Rule Support Case Type Support Setup System Email Template Tasks Template Categories Track Time Website (External) publisher Web Services Work Calendar

Support Person			
View	**Create**	**Edit**	**Full**
Bill Of Materials Inquiry Bill Of Materials CRM Lists Duplicate Entity Management Employee Public Items Lead Snapshot/Reminders Project Templates Publish Knowledge Base Publish RSS Feeds Resource Allocations Support Support Case Snapshot/Reminders Units Website (External) publisher Work Calendar	Export Lists Knowledge Base Kudos Resource Notes Tab Tableau Workbooks Export	Companies Competitors Customers E-mail Template Fax Messages Fax Template Issues Jobs Letter Messages Letter Template Mail Merge Mass Updates PDF Messages PDF Template Perform Search Track Messages	Calendar Cases Contacts Deleted Records Documents and Files Events Find Transaction Items Mobile Device Access Outlook Integration 1.0 Perform Search Phone Calls Project Tasks Report Customization Report Scheduling Resource Allocation Approval Resource Create Tasks Template Categories Track Time Web Services

System Administrator			
View	**Edit**	**Full**	
Employee Public Employee Reminders Find Transaction Notes Tab Payment Reminders Undelivered Emails	E-mail Template Kudos Override Payment Hold Track Messages	Billing Information Bulk Manage Roles Classes Create Public Search Credit Card Processing Custom Body Fields Custom Column Fields Custom Entity Fields Custom Entry Forms Custom Event Fields Custom Fields Custom Item Fields	Custom Transaction Forms Deleted Records Departments Duplicate Detection Setup Employee Record Employee SS Numbers Employees Enable Features Events Internal Publisher Jobs KPI Scorecards

System Administrator			
View	**Edit**	**Full**	
		Custom Layouts Custom Lists Custom PDF Layouts Custom Record Types Custom Sublists Custom Subtabs Custom Transaction Fields	Locations Manage Users Outlook Integration 1.0 Publish Dashboards Publish Search Save Dashboards Set Up Company Set Up Credit Card Processing Tasks Template Categories Two-Factor Authentication base Web Services

Vendor Center			
View	**Create**	**Edit**	**Full**
Accounts Payable Register Find Transaction Non Posting Registers Notes Tab Purchase Orders Requisition Sales Order Transaction Report			Deleted Records Track Time Vendor Request For Quote Web Services

Warehouse Manager			
View	**Create**	**Edit**	**Full**
Access Payment Audit Log Bill Of Materials Inquiry Bill Of Materials Check Item Availability Commit Orders Component Where Used Costed Bill Of Materials Inquiry Inventory Item Revisions Items Non Posting Registers Notes Tab Purchase Order Reports Revalue Inventory Cost Sales Order Sales Order Fulfillment Reports Sales Order Reports Sales Order Transaction Report Units Vendors View Gateway Asynchronous Notifications View Payment Events	Export Lists Resource Tableau Workbooks Export	Bills E-mail Template Perform Search Shipping Items Shipping Partner Registration Track Messages	Adjust Inventory Bill Of Distribution Build Work Orders Calendar Close Work Orders Contacts Count Inventory Create Inventory Counts Deleted Records Distribution Network Documents and Files Enter Completions Events Find Transaction Fulfill Orders Inbound Shipment Inventory Cost Template Issue Components Item Demand Plan Item Fulfillment Item Receipt Item Supply Plan Manufacturing Cost Template Manufacturing Routing Mark Word Orders Built Mark Work Orders Firmed Mark Work Orders Released Media Items Mobile Device Access Ownership Transfer

Warehouse Manager			
View	Create	Edit	Full
			Outlook Integration 1.0 Perform Search Permission Level Phone Calls Planned Standard Cost Print Shipment Documents Purchase Order Receive Items Receive Order Receive Purchase Orders Receive Returns Report Customization Report Scheduling Requisition Requisition Approval Shipping Items Shipping Partner Package Shipping Partner Registration Shipping Partner Shipment Standard Cost Version Tasks Template Categories Transfer Order Transfer Order Approval Units Vendor Bill Approval Work Order Work Order Close Work Order Completion Work Order Issue Web Services

NetSuite Users Overview

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

On each record, you need to provide an email address, which serves as the user ID, and a password for login to NetSuite. Each record has an Access subtab, where you can enable the Give Access option and assign roles. On vendor, partner, and customer records, the Access subtab is on the System Information subtab.

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

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

The Manage Users Page

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

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

For more information, see Viewing Your NetSuite Users List.

The Login Audit Trail

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

For more information, see Login Audit Trail Overview.

Manage Different Types of Users

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

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

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

Employee Users

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

- For instructions for setting up NetSuite access for employees, see the help topic Giving an Employee Access to NetSuite.
- For instructions for assigning roles, see the help topic Assigning Roles to an Employee.
- For instructions for limiting employees' ability to enter time records, see the help topic Restricting Employee Time Tracking Entries.
- For instructions for adding employees, see the help topic Adding an Employee.

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

If the Global Permissions feature is enabled, you also can assign permissions directly to employees, on a Global Permissions subtab of the Access subtab. These permissions supersede permissions for the employee's assigned role, in the event of a conflict. For more information, see Using the Global Permissions Feature.

You can use employee searches to track employees' roles and changes to them. The following role fields are available to be used as filters for employee searches: Center Type, Custom, Inactive, Internal ID, Level, Name, Permission, Permission Change, and Permission Change Date. The following role fields are available to be displayed as results for employee searches: Center Type, Custom/Standard, From Bundle, Inactive, Internal ID, Level, Name, Permission, Permission Change, Permission Change Date, and Permission Change Level.

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

Vendor Users

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

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

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

For more information about setting up vendors, see the help topics Adding a Vendor Record, Assigning Roles to Vendors, and Using the Vendor Center.

Partner Users

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

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

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

Customer Users

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

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

Giving Customers Access

To allow customer access to NetSuite, an administrator must first enable the Customer Access feature. For instructions, see Enabling the Customer Access Feature.

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

customer access has been enabled, roles can be assigned to customer users in the following ways:

- Providing Access to Customers Individually
- Using CSV Import to Provide Access to Multiple Customers

You can determine the sales order form that is shown to Customer Center users. See Setting the Customer Center Sales Order Form.

Enabling the Customer Access Feature

To enable the Customer Center:

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

Providing Access to Customers Individually

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

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

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

   The customer uses this email address to log in to NetSuite.
4. Click the **System Information** subtab.
5. Click the **Access** subtab.
6. Click the **Give Access** box.

7. If you run multiple websites, you can restrict a customer's login access to a specific website (for example, the website that the customer registered on). To assign a customer to a website, in the **Assigned Website** field, select a website. For more information, see the help topic Assign Customers to Websites.
8. To assign the standard Customer Center role, in the **Role** field, select **Customer Center**. If you customized the Customer Center role, select the name of the custom role. For more on customizing this role, see Customizing or Creating NetSuite Roles.
9. To notify customers about their NetSuite login information, check the **Send Notification Email** box.

   For security reasons, passwords are not included in the email messages. You must contact your customer with this information.

   To customize the email message, go to Setup > Company > System Email Templates. Next to **Standard Customer Center Access E-mail**, click **Edit**.
10. Enter and confirm the customer's password.

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

    For details about password requirements, see the help topic NetSuite Password Requirements.
11. To assign individual logins to the customer's contacts, on the **Access** subtab, check the **Access** box next to the contacts you want to grant access to.

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

    1. Make sure that an email address is listed for each of the contacts that you want to assign login access to.
    2. Enter a password for each of the contacts.
    3. Check the **Notify** box for the contacts that you want to notify by email.

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

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

Using CSV Import to Provide Access to Multiple Customers

You can use the Import Assistant to provide access to a large set of customers at , without needing to individually update each customer record.

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

To complete a CSV import to provide customer access:

1. Create a CSV file of customer data, with values for the following fields (and other fields as necessary):
   - **Unique ID**

You can use Internal ID, or Customer ID. Internal ID is recommended. For information about obtaining internal ID values, see the help topic Displaying Internal IDs.

- **Email address**

  This field is required for NetSuite access. You can omit its value for customers that already have this field populated in their NetSuite records.

- **Give Access**

  Set the value of this field to Yes for all customers to which you want to provide access.

- **Password**
- **Confirm Password**
- **Role**

  For most customers, this value should be Customer Center.

2. Go to Setup > Import/Export > Import CSV Records.
3. Select an **Import Type** of **Relationships** and a **Record Type** of **Customers Only**. Click the **Select** button and browse to the CSV file you created. Click Next.
4. Select a **Data Handling** value of **Update** and click Next.
5. Map all of the fields listed in step 1 and any other required fields. Click **Next.**
   - For information about importing customer records, see the help topic Customers Only Import.
   - For information about mapping import fields, see the help topic CSV Field Mapping Tasks.
6. Give the import map a name and click **Save & Run**.

Setting the Customer Center Sales Order Form

When a customer views a sales order in the Customer Center, the form used to display the order depends on how the order was originally entered in NetSuite.

- For a sales order created in the Customer Center or entered directly into NetSuite, the order is displayed using the preferred sales order form defined at Customization > Forms > Transaction Forms at the time the order was saved.
- For a sales order created through the Web Store, the order is displayed using the form that was defined at the time the order was saved in the Sales Order Type filed at Setup > Site Builder > Set Up Web Site on the Shopping subtab, Checkout Preferences.

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

If your default external form is an invoice form instead of a cash sale, you can do the following to determine which fields show on the form:

1. Go to Customization > Forms > Transaction Forms.
2. Click **Customize** next to Sales Order Invoice - External.
3. Go to the **Printing Fields** subtab and check (or clear) the **Print/Email** box for fields you want to show (or not show.)

   The **Screen Fields** subtab controls the appearance of the form when it is viewed from an internal role, such as Administrator.
4. Check the **Web Store form** box at the top of the form.

5. Click **Save**.

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

Changing a User's NetSuite Password

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

For more information about user passwords, see the help topic Password Reset Tips for Administrators.

To change a user's NetSuite password:

1. Do one of the following:
   - If the user is an employee, go to Lists > Employees > Employees.
   - If the user is not an employee, go to List > Relationships, and then click **Customers**, **Partners**, or **Vendors**.

   > **Note:** A lead or prospect record is created when a user creates a user name and password on your website, but does not make a purchase. When the user makes a purchase, the lead or prospect record is automatically converted to a customer record.

2. Next to the user's name, click **Edit**.
3. Click the **Access** subtab.

   > **Important:** If you do not see the **Access** subtab on the user record, click the **System Information** subtab, and then click the **Access** subtab.

4. Verify that the **Give Access** box is checked.
5. Enter a password in the **Password** field. As you type, the characters are validated against password policy criteria and the results are displayed.
6. Enter the password in the **Confirm Password** field.
7. To send an email notification to the user, check the **Send Notification Email** box.

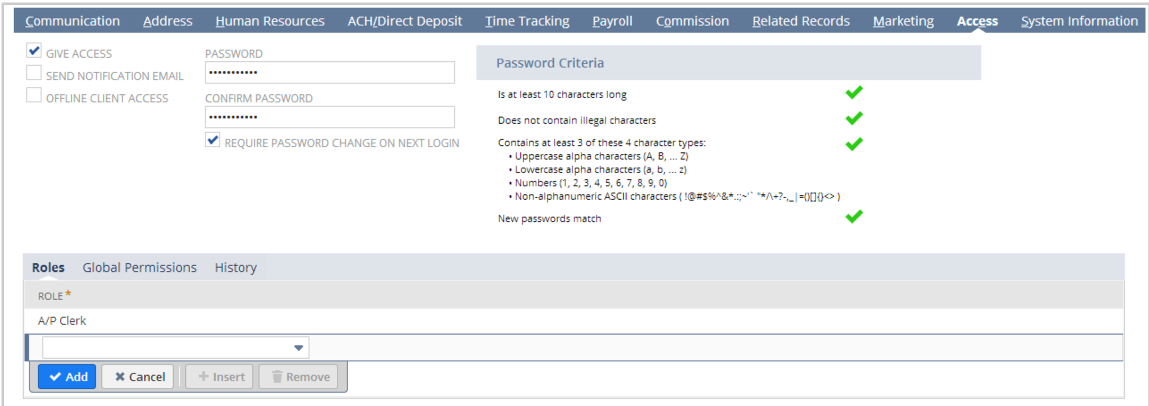
   > **Note:** The notification email includes the user's login email address (the user name) and the administrator's email address, but does not include the account password. To obtain the password, the user must contact the administrator who changed the password. For security reasons, do not email the new password to the user.

8. To require the user to create and save a new password, check the **Require Password Change on Next Login** box. For security reasons, you should select this option.

   > **Note:** The Require Password Change on Next Login option is not available on Customer records. Passwords for users with a Customer Center role do not expire.

9. Click **Save**.

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



NetSuite permits each user a maximum of six failed login attempts. When a user exceeds this maximum (usually because of an incorrect password), an email message is sent to notify the account administrator, and the user is locked out of NetSuite for 30 minutes. The administrator cannot unlock the user's access before the lockout period expires.

For more information about password requirements, see the help topic NetSuite Password Requirements. For instructions for users changing their passwords, see the help topic Change Password Link.

Viewing Your NetSuite Users List

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

To view your Users list:

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

Login Audit Trail Overview

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

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

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

Search results also indicate whether each login attempt was successful, and include a Security Challenge column that tracks the status of users' answers to security questions when these questions are presented.

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

Login Audit Trail Security Challenge Column

A security challenge is an instance when a user is prompted to answer a security question before login to NetSuite. This situation can occur when a user attempts to use a new browser or computer, when a user forgets their NetSuite password, or if it has been more than 90 days since the user's last login.

For more information, see the help topic Setting Up Security Questions.

When a security challenge occurs, if the user answers the question correctly, the security challenge has a status of "Success", and login to NetSuite proceeds. If the user provides 6 consecutive wrong answers, the security challenge has a status of "Failure", the user is locked out of NetSuite for 30 minutes, and an email is sent to the account administrator.

The Security Challenge column in the Login Audit Trail indicates whether a security challenge occurred for each login attempt, and displays the status for any challenges that occurred. If this column does not display either Success or Failure for a row, it means no security challenge occurred for that login. This information can help administrators to detect hacking attempts, which can be evidenced by a high number of failures in a short period of time.

Login Audit Trail Search Capabilities

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

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

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

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

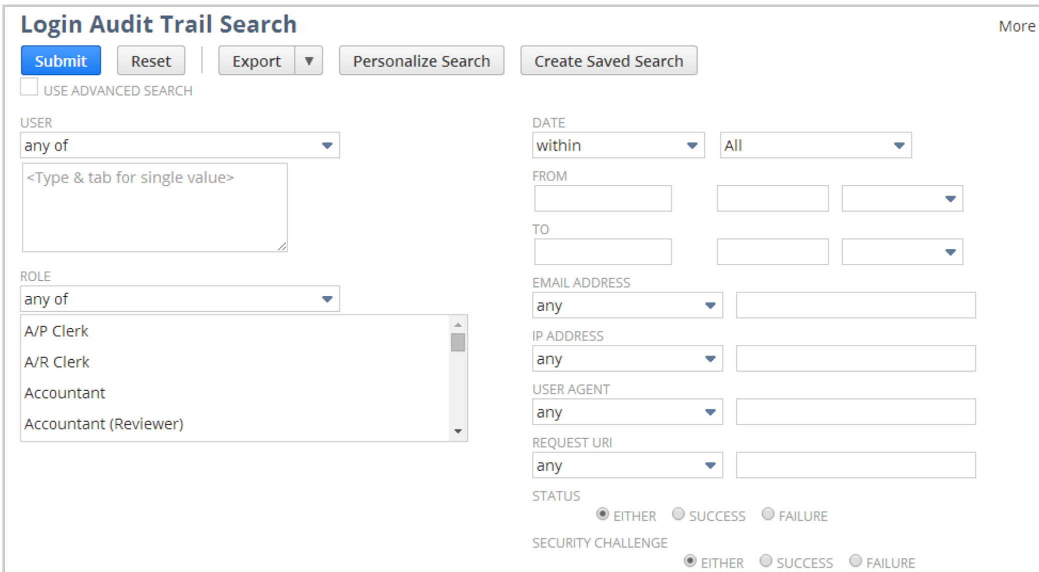
- Defining a Simple Login Audit Trail Search
- Defining an Advanced Login Audit Trail Search

Defining a Simple Login Audit Trail Search

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

To define a simple Login Audit Trail search:

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



2. Define filters for searching login activity:
   - **User** — select one or more users, holding down the **CTRL** key to select more than one. To search by exclusion, change the dropdown list to **none of**.
   - **Role** — select one or more roles.
   - **Date Range** — select a named time period (such as last fiscal year), or enter a start date and end date to define a custom date range.
   - **Email Address** — enter an email address in the field.
   - **IP Address** — select search logic in the dropdown list, and enter an IP address or part of an IP address.
   - **User Agent** — select search logic, and enter a value like “Mozilla” to find the client browser used to access your account.
   - **Request URI** — select search logic, and then enter a URI (or any part of a URI) for a NetSuite page used for login.

     The list below includes examples you might use to find the services used to access your account:
     - /app/center/mobile/iphone.nl
     - /app/reporting/webquery.nl
     - /app/site/hosting/restlet.nl
     - /app/webservices/wslogin.nl
     - /internal/admin/acctrepl.nl

- **Status** — select an option: Success, Failure, or Either.
- **Security Challenge** — select an option: Success, Failure, or Either. (For details about this column, see Login Audit Trail Security Challenge Column.

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

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

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

Defining an Advanced Login Audit Trail Search

To define an advanced Login Audit Trail search:

1. Go to Setup > Users/Roles > View Login Audit Trail.
2. Check the **Use Advanced Search** box.
3. Click the **Criteria** subtab to define filters.
   - Select a field from the **Filter** dropdown list, select a value in the field popup, and click **Add**, repeating to define additional filter fields.
   - Available filter fields include: Date, formulas, IP Address, Role, User, Employee fields, Role fields, and in some cases Customer, Partner, and/or Vendor fields.
   - For more information, see the help topic Advanced Search Criteria Filters.
4. Click the **Results** subtab to define columns to appear in search results.
   - Select a field from the **Field** dropdown list and click **Add**, repeating to define additional results fields.
   - Available results fields include: Date, Email Address, formulas, IP Address, Request URI, Role, Security Challenge, Status, User, User Agent, Employee fields, Role fields, token-based Authentication fields (Detail, Token-based Access Token Name, Token-based Application Name) and in some cases Customer, Partner, and/or Vendor fields.
   - You also can set up sorting and summarizing options for results. For more information, see the help topic Search Results Display Options.
5. After you have defined criteria and results display options for an advanced search, you can:

- Click the **Submit** button to run the search and open a NetSuite page with a list of results.
- Click the **Reset** button to clear the criteria and results options you defined.
- Click the **Export** button to run the search and save results to a .csv file that you can save to disk or open on your desktop. For more information about exporting search results, see the help topic Exporting Search Results.
- Click the **Personalize Search** button to open a saved search page with no criteria or results options defined, where you can define a personalized search form to be your default search form for the record type.
- Click the **Create Saved Search** button to open a saved search page that includes the criteria and results options you defined. For more information, see the help topic Saved Searches.

Restricting an Individual User View

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

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

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

To restrict your view:

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

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

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

NetSuite Permissions Overview

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

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

You can use the following sources to understand permissions:

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

Be aware of the following:

- If the Advanced Employee Permissions feature is enabled in your account, you can customize or create roles to use the Employee Public, Employee Confidential, and Employee Administration permissions. For more information, see the help topics Advanced Employee Permissions and Standard NetSuite Roles and Assigning Advanced Employee Permissions to a Role. This feature also enables you to customize employee permissions. For more information, see the help topic Creating Custom Advanced Employee Permissions.
- If the Global Permissions feature is enabled in your account, you can assign permissions directly to employees. Employees retain these global permissions with all of their roles. If there is a conflict between role-based permissions and global permissions, global permissions take precedence. For more information, see Using the Global Permissions Feature.
- A special permission is required to see unmasked credit card numbers, the View Unencrypted Credit Card Numbers permission. To make this permission available to be assigned to roles in your account, you need to complete a signed agreement. For information, see the help topic Credit Card Number Security and Compliance.
- A special permission is available that masks employee information on financial reports. For more information, see Hiding Employee Information on Financial Reports.
- When you newly enable a feature in your account, you must consider permissions associated with the added feature. Customized roles that you have already assigned to users may need to be updated to reflect the proper permissions associated with the added feature. See Customizing or Creating NetSuite Roles.

Permissions and Restrictions

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

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

Permissions and Restrictions Example

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

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

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

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

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

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

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

Reviewing Permissions Assigned to Roles

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

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

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

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

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

Access Levels for Permissions

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

- **VIEW** - User has access to view existing files only. The user cannot create new, edit existing, or delete existing files.
- **CREATE** - User can create new and view existing files. The user cannot edit or delete existing files.
- **EDIT** - User has access to create new, view existing, and edit existing files. The user cannot delete existing files.
- **FULL** - User has access to create new files and view, edit, and delete existing files.

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

Permissions Documentation

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

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

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

The NetSuitePermissionsUsage.xls file includes the following columns:

- SUBTAB - Subtab of the Roles page Permissions subtab where each permission is listed: Lists, Reports, Setup, and Transactions (sorted alphabetically)
- PERMISSION NAME - Name of each permission (sorted alphabetically)
- USAGE DESCRIPTION - Description of how each permission is used, meaning the record types, tasks, and/or pages that each permission makes accessible (sorted alphabetically)
- MINIMUM LEVEL - The minimum access level required (view, create, edit, or full) for each permission usage

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

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

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

Two-Factor Authentication

In 2018.1, any newly-provisioned accounts require two-factor authentication for the following admin-level permissions.

- Access Token Management
- Device ID Management
- Set Up OpenID Single Sign-on
- Set Up SAML Single Sign-on
- Two-Factor Authentication
- Two-Factor Authentication base
- Integration Application

Any standard or customized roles containing two-factor authentication required permissions are affected.

For more information, see the help topic Two-Factor Authentication.

Feature Permissions Documentation

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

Accounting (ERP) and Banking

- Assigning Revenue Commitment Permissions
- Revenue Management Roles and Permissions
- Tax Permissions
- Setting Fixed Assets Management Permission Levels
- Setting Reconciliation Permissions

Administrator Features

- Add SAML Single Sign-on Permissions to Roles
- Required Permissions for CSV Imports
- Permissions Requiring Two-Factor Authentication (2FA)

Advanced Employee Permissions

- Advanced Employee Permissions
- Advanced Employee Permissions Best Practices
- Employee Administration Permission Overview
- Employee Confidential Permission Overview
- Employee Public Permission Overview
- Employee Self Permission Overview

Country Specific Features

Roles and Permissions for Japan Localization Features

SuiteCloud Platform

SuiteBuilder

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

SuiteCloud Development Framework

- Creating an SDF Developer Role
- Roles and Permissions as an XML Definition
- Setting Roles and Permissions for SuiteScript

SuiteTalk

- Assigning the Web Services Permission to a Role
- Project Task Permissions
- Role and Permission Considerations When Developing in SuiteTalk
- Roles and Permissions in Web Services

SuiteFlow

Required Permissions for SuiteFlow

SuiteScript

- Permission Names and IDs
- SuiteScript Debugger Metering and Permissions

NetSuite for Mobile

Mobile Device Access Permission

NetSuite for Outlook

Required Permissions for NetSuite for Outlook

Order Management

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

Sales, Marketing, and General

- D&B Roles and Permissions
- Roles and Permissions

SuiteAnalytics

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

SuiteCommerce

- Applying Permissions to SSP Application Files
- Audience Permissions for Hosted Sites

- Customer Center Custom Permissions
- Feature Access Permissions
- My Account Menu Permissions
- SCIS Roles and Permissions
- SuiteCommerce InStore Permissions

SuiteSocial

Step 2: Grant Permissions (part of Using the SuiteSocial Admin Setup Assistant)

Using the Global Permissions Feature

The Global Permissions feature allows administrators to assign to employees permissions that apply across all of their assigned roles. With global permissions, administrators can make changes to each employee's permissions directly on the employee record.

To enable the Global Permissions feature:

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

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

To assign global permissions to an employee:

1. After the Global Permissions feature has been enabled, open an employee record.
2. Click the **Access** subtab, and the **Global Permissions** subtab.
3. Select a permission from the **Permission** dropdown list, select an access level for that permission (**View**, **Create**, **Edit**, **Full**) from the **Level** dropdown list, and click **Add**.
4. Repeat step 3 until you have added all desired permissions.
5. Click **Save**.

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

Giving Access to the Transactions Subtab on Entity Records

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

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

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

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

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

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

    This level of access allows employees to view the transaction but not edit it.
11. Click **Add**.
12. Repeat these steps for each type of transaction you want this role to view.
13. Click **Save**.

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

To assign employees this custom role:

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

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

Transactions Subtab on Entity Records

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

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

Giving Access to Financial Statements

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

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

For information about assigning permissions, see NetSuite Permissions Overview.

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

Hiding Employee Information on Financial Reports

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

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

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

To hide employee information on financial reports:

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

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

Setting Permissions for Custom Records

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

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

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

1. Go to Setup > Users/Roles > Manage Roles, and select a role from the list.

2. Click the **Lists** subtab, select **Custom Record Entries** from the dropdown list, set the access level, and click **Save**.

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

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

OpenID Single Sign-on Permission

The OpenID Single Sign-on feature supports inbound single sign-on to NetSuite from Google Apps, using Google Account authentication. This feature allows users who have logged in to Google Apps to go directly to NetSuite. Users do not need to log in separately to NetSuite, because their Google identity is used to access their NetSuite data.

When this feature is enabled, you can provide Google OpenID access to your account users by assigning the OpenID Single Sign-on permission to their roles. To access NetSuite from Google Apps, a user must have at least one role with this permission.

For more information, see the help topic OpenID Single Sign-on.

SAML Single Sign-on Permission

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

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

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

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