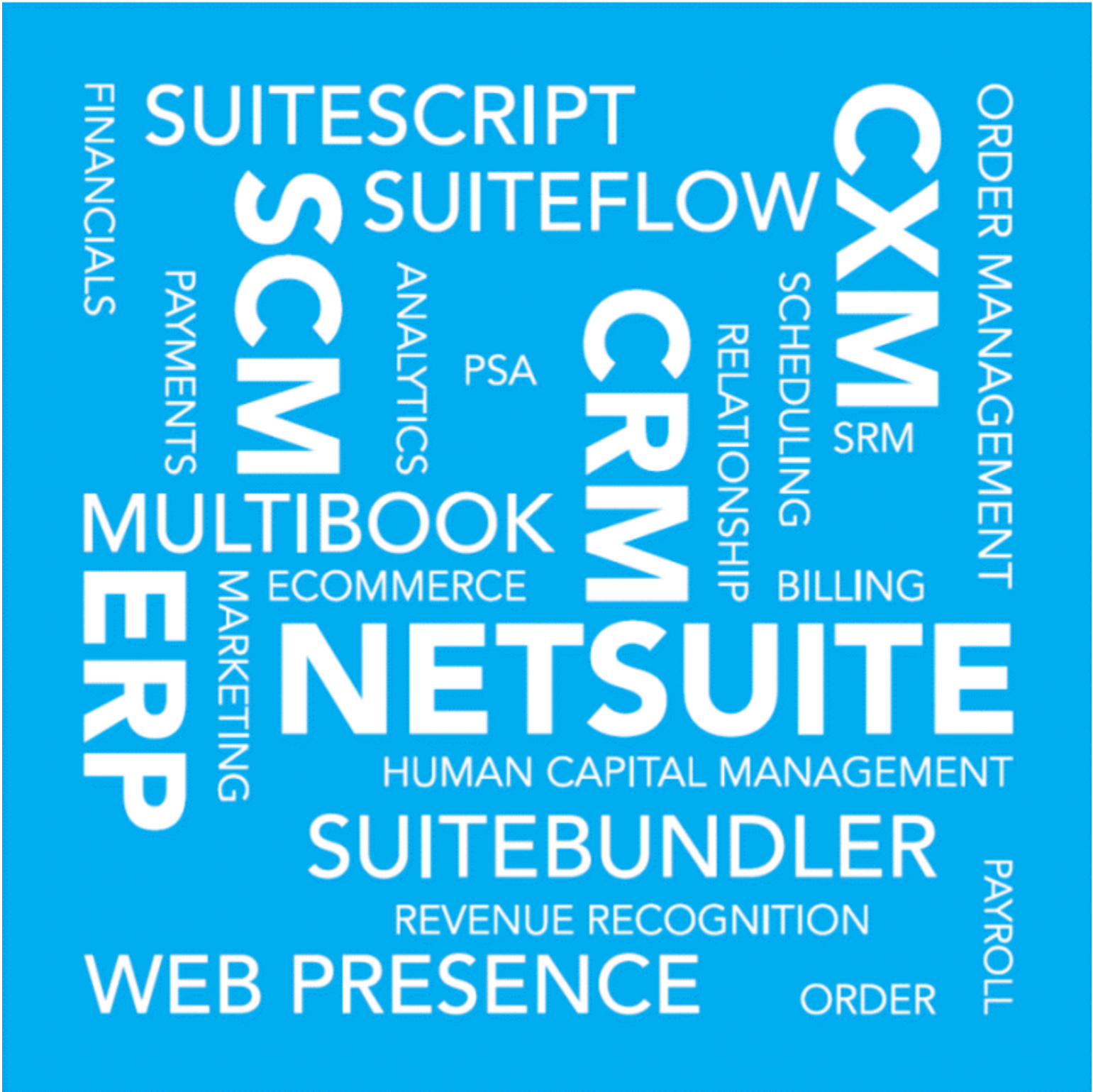


# Administrator Guide



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# NetSuite Account Administration

Review the following subject areas in NetSuite's administrator documentation for guidance in administering your NetSuite account:

- **Account Setup**
  - [Centers Overview](#)
  - [Enabling Features](#)
  - [NetSuite Company Settings](#)
  - [Classifications in NetSuite](#)
  - [Getting Started with NetSuite OneWorld](#)
- **Managing Users and Roles**
  - [NetSuite Access Overview](#)
  - [NetSuite Roles Overview](#)
  - [NetSuite Users Overview](#)
  - [NetSuite Permissions Overview](#)
- **CSV Imports Overview**
- **Auditing and Data Management**
  - [Tracking Changes in NetSuite](#)
  - [Avoiding Duplicates](#)
  - [Managing Transactions](#)
- **NetSuite Account Types**
  - [Understanding NetSuite Account Types](#)
  - [NetSuite Sandbox](#)
  - [NetSuite Development Accounts](#)
- **NetSuite Data Centers**
  - [Understanding Multiple Data Centers](#)
  - [Product Features to Verify for Data Center Moves](#)
  - [Understanding NetSuite URLs and Data Centers](#)
  - [Account Mobility Tasks](#)
- **Performance**
  - [Application Performance Management \(APM\)](#)
  - [Performance Best Practices](#)
  - [Troubleshooting Performance Issues](#)
- **Authentication**
  - [Understanding Password Requirements and Policies](#)
  - [NetSuite Login Pages](#)
  - [Token-based Authentication](#)
  - [Two-Factor Authentication](#)
  - [Device ID Authentication](#)
  - [Inbound Single Sign-on](#)



- SAML Single Sign-on
- OpenID Single Sign-on
- Outbound Single Sign-on (SuiteSignOn)
- Guidelines for NetSuite Administrators
- Understanding NetSuite IP Addresses

# Guidelines for NetSuite Administrators

The following sections list guidelines for NetSuite account administrators:

- [Account Guidelines](#)
- [Security Guidelines](#)
- [Role and Permission Guidelines](#)
- [Customization Guidelines](#)
- [Data Migration Guidelines](#)
- [Release Preparation Guidelines](#)
- [Sandbox Account Guidelines](#)

For links to other NetSuite help topics aimed at account administrators, see [NetSuite Account Administration](#).

## Account Guidelines

- To enable logins through NetSuite, you must create a login page hosted on the NetSuite secure server and display a link to this login page on a different page. For more information, see the help topic [Displaying Login Fields on Your Web Page](#).
- You should always follow the best practice of ensuring that your NetSuite account and related integrations are data center agnostic. Never hard-code URLs or other identifiers to specify a particular data center. For more information, see [Understanding Multiple Data Centers](#).

### To find your account number:

1. Go to Setup > Company > Company Information.
2. On the right side of the Company Information page, note your **Account ID**. This is your account number.

## Security Guidelines

- Set a strong password policy that has at least a 10-character minimum and includes at least three of these four character types: uppercase, lowercase, numbers, non-alphanumeric ASCII characters.
- When creating new users, always require that they change their password the first time they log in.
- Monitor the Login Audit Trail's Security Challenge column to determine if outside people are trying to access the system.
- Use IP Address Restriction for users that handle confidential data. This feature supports the restriction of users' NetSuite access to specific computers. You can restrict at the company or employee level.
- When an employee leaves, immediately remove their access to NetSuite:
  - Mark the employee record as inactive
  - Remove the assigned roles and global permissions

## Role and Permission Guidelines

- Give employees only the amount of access they need to do their job.

- Separate roles by job function. For users with multiple job functions, create roles for each job function.
- Carefully consider the permissions assigned to a role. Create roles to limit users to only the permissions they need to do their job.
- Have a backup administrator role.
- Avoid using the Full Access role.
- Never assign standard roles to users, including the Administrator role.
- Customize standard roles and assign custom roles to users.
- Assign each role being used to yourself and test the role. Verify that the role has all permissions and access to necessary data from beginning to end of a required process.
- Assign new and custom roles before a user starts accessing the account.
- Audit roles using saved searches.
- Use the Global Permissions Feature to assign permissions to employees.
- Ensure that any role that needs to see Customer or Vendor transactional information has the Lists > Financial History permission enabled. This permission enables viewing of the transactions related to the entity.
- Global Permissions apply to every role assigned to an employee; assign Global Permissions carefully.
- Before enabling the Advanced Employee Permissions feature, read and understand [Advanced Employee Permissions Best Practices](#).
- Audit permission assigned to employees using saved searches.
- Consider the level of role permissions and use restrictions when necessary to further control access to a record.
- An account administrator can set preferences that tailor the NetSuite account 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.

## Customization Guidelines

- Before customizing, identify what is unique to your business and what is needed to support your business practices.
- Assess whether the required functionality exists in NetSuite.
- Plan and design before you act.
- Limit who can add custom elements.
- Custom fields:
  - Field naming convention: \_abbreviation\_description
  - Use the **Description** field to provide business reasons for the field, who asked for it, and notes for the backup administrator.
- Custom forms:
  - Use custom forms as your preferred forms. Treat standard forms as templates for your custom forms.
  - Create a naming convention.
  - Define a custom field as mandatory on the custom form, do not define it as mandatory at the field level.

- Custom records:
  - Save your custom record first, then add fields.
  - Use permissions only when the record is ready to be used.
- Test incrementally as you work with custom records and elements.
- Use permissions only when the custom record is ready to be used.

## Data Migration Guidelines

- Import Customer records first.
- Import Contact records second.
- Consider values associated with the **Global Subscription Status** field.
- Designate one address as the primary address when importing multiple email addresses.
- When importing various transactions:
  - Do not import large numbers of historical transactions — storage costs money. The space allowed for your account is listed on your sales order.
  - Use entity account names and numbers when importing transactions, not the Chart of Accounts number.
  - Imported transactions behave as if they were created in the user interface. If you import an invoice or vendor bill with inventory items, that transaction affects the inventory.
  - When you import open accounts payable and accounts receivable transactions, make sure the amounts are not duplicated in account balances you import later.
- Use the following best practices to facilitate successful imports:
  - Scrub your data before importing it.
  - Save data from other applications into separate CSV files, with the exception of importing Customer/Prospect/Lead with contacts.
  - Apply CSV file formatting guidelines. Adjust data to conform to NetSuite file conventions and record types.
  - Perform test imports with a sample set of data; use only two or three records to start.
  - Perform import tasks during off-peak hours.
  - Break large jobs into smaller chunks to improve performance.
  - The record limit per imported file is 25,000.
  - Identify whether the imports will take place in production or on the sandbox.

## Release Preparation Guidelines

- Monitor the New Release portlet on your dashboard.
- Learn the New Release process.
- Refer to SuiteAnswers for the latest release news and training.
- Log into and use your Release Preview account to prepare, preview, and manage your release upgrade.
- If you find an issue, contact support from your Release Preview account to report that issue.
- Develop and use a test plan.

- Testing in your NetSuite Release Preview, when it is available, can be helpful in identifying potential problems. If you encounter difficulties when testing in Release Preview, it might indicate that your processes are tied to a specific data center. Testing in Release Preview is not a foolproof method of finding all potential problems, but it could help to raise awareness in certain areas. For example, URLs could be hard-coded with data center specific identifiers, or some processes might not be using dynamic discovery methods.
- NetSuite recommends choosing the **Send Email To** option on the Email Preferences page for both the Sandbox and Release Preview s. This option ensures email messages from your Sandbox and Release Preview s are delivered to the addresses you specify.


## Sandbox Account Guidelines

- Only refresh your sandbox when you are completely ready: A refresh completely replaces the content of the sandbox account with the content of the production account. After your sandbox account has been refreshed from production, it cannot be restored to its prior state. For example, bundles (SuiteApps) created in your sandbox that have not been installed on your production account will be overwritten by a sandbox refresh request.
- Before requesting a sandbox refresh, please ensure that your company is fully notified and ready for the refresh from production.
- There is a 30-day grace period after expiration during which an inactive sandbox account can be re-activated and the data retained. If you do not renew the sandbox account before this grace period ends, the sandbox is deleted and the data is purged. Contact your NetSuite account representative for more information.
- NetSuite recommends choosing the **Send Email To** option on the Email Preferences page for both the Sandbox and Release Preview accounts. This option ensures email messages from your Sandbox and Release Preview accountss are delivered to the addresses you specify.

# Understanding NetSuite IP Addresses

We do not support the use of NetSuite IP addresses to access or manage access to any NetSuite services. Using IP addresses to manage access to NetSuite is sometimes called whitelisting. Using IP addresses (either as part of a URL or in your Domain Name Server, or DNS) to access NetSuite services prevents dynamic DNS routing.

NetSuite Customer Support will not provide you with a list of services or IP addresses for outbound communication from NetSuite. You should not modify routing to NetSuite services by using IP addresses manually resolved from DNS.

 **Note:** IP addresses for outbound communication from NetSuite are not documented in the NetSuite Help Center or in SuiteAnswers.

If, despite our recommendations, you choose to use IP addresses to access or manage access to NetSuite services— in firewall or proxy configuration —it is your responsibility to update these settings when NetSuite IP address ranges change.

Ensure that you understand the following:

- **The IP addresses of NetSuite services may change at any time without notice.**
- Customer Support will not provide a list of NetSuite IP addresses.
- Customer Support will not be able to assist you when your integration breaks due to a change in NetSuite IP addresses.
- If you decide to deploy a firewall, ensure that you have the resources to make it work in cloud environment.
- If you are programming a firewall to accept inbound requests from NetSuite, please accept inbound requests from all \*.netsuite.com sources.
- Using IP addresses to directly access NetSuite services can result in unpredictable service outages or significant performance degradation.

You should not rely on methods that require explicit reference to any NetSuite IP address. Modifying the results of DNS translation prevents optimal resource allocation. This practice can cause unpredictable service outages or performance degradation. Rather than whitelisting, there are better, more secure, and less fragile methods to protect your account from unauthorized access.

See the following topics for more information about managing access to NetSuite services.

- User access to NetSuite, see the help topic [Two-Factor Authentication](#).
- SuiteTalk (web services), see the help topic [Integration Record Overview](#). See also [Token-based Authentication and Web Services](#).
- RESTlets, see the help topic [Token-based Authentication](#).
- Outbound calls from NetSuite using SuiteScript 2.0, see the help topics [N/http Module](#) and [N/https Module](#).
- Client application access to NetSuite, see the help topic [Token-based Authentication](#).
- Access to an external SFTP server from NetSuite, see the help topic [SFTP Authentication](#).
- Access to NetSuite through SuiteAnalytics Connect (ODBC), see the help topic [Authentication Using Server Certificates for ODBC](#).
- Websites and web stores, see the help topic [Point Domain Names at NetSuite](#).
- Email services, see the help topic [Email Best Practices](#).

To access a NetSuite service (routing), use APIs for dynamic service discovery. See the subsection **Dynamic Discovery of URLs for Web Services and RESTlet Clients** in the [Understanding Multiple Data Centers](#) topic. See [Understanding NetSuite URLs and Data Centers](#) for a comprehensive list of NetSuite URLs. See also the topic [URLs for Account-Specific Domains](#).

# Centers Overview


The flexible NetSuite user interface adjusts automatically to different users' business needs. For each user, NetSuite displays a variable set of tabbed pages, called a **center**, based on the user's assigned role. Each NetSuite center provides, for users with related roles, the pages and links they need to do their jobs.

Each tabbed page of each center displays a collection of real-time data called a **dashboard**. Dashboard data is displayed in a variety of dynamic data display windows called **portlets**. NetSuite allows individual users to personalize their own dashboards, and allows administrators to publish personalized dashboards to other users.

When a user logs in to NetSuite, the system determines the user's default assigned role and displays the associated center. If a user has multiple assigned roles, NetSuite provides a list of them under the dropdown arrow in the upper right corner, that can be used to change roles. When a user changes roles, the interface refreshes to display a different center as needed.

NetSuite includes several standard centers. Each standard center is designed to make the most-used links easy to find for the roles that use that center. For example, the Accounting Center's tabbed pages provide data and links that are relevant for Accountants, Bookkeepers, Payroll Managers, and Clerks.

- To review a list of standard centers and their related roles, see [NetSuite Standard Centers](#).
- To understand the special NetSuite Account Center and the special roles that can access it, see [The NetSuite Account Center](#).
- To understand the design of standard centers, see the following:
  - [The Classic Center](#)
  - [The Sales Center](#)

 **Note:** If the standard Sales Center does not meet your needs, see the help topic [The Enhanced Sales Center SuiteApp](#).

- [The E-Commerce Management Center](#)
- [Pages Common to all Centers](#)

For users with business needs that do not match the setup of the standard centers, NetSuite supports customization of the user interface in the following ways:

- Create custom centers with custom tabs and links. See the help topic [Creating and Editing Custom Centers](#).
- Add custom tabs to standard or custom centers. See the help topic [Creating Center Tabs](#).
- Add custom links to standard or custom centers. See the help topic [Creating Center Links](#).
- Create custom roles that use custom centers. See the help topic [Customizing or Creating NetSuite Roles](#).

## NetSuite Standard Centers

When you open NetSuite for the first time, a default set of tabbed pages, called a center, displays. The tabbed pages included in the center are based on your default assigned role.

The following table lists the NetSuite standard centers and the roles they support. Click on the links in the table links to review information specific to that center. Also, see [Pages Common to all Centers](#) for more information.



**Note:** If these centers do not meet your needs, you can modify them by adding custom tabs and links, or you can create custom centers and custom roles. For information, see the help topic [Custom Centers](#).

Center	Standard Roles in this Center	Pages (Tabs) Displayed
The Accounting Center <div> <b>Note:</b> The revenue roles and tab are available only when advanced revenue management is enabled. </div>	<ul style="list-style-type: none"> <li>A/P Clerk</li> <li>A/R Clerk</li> <li>Accountant</li> <li>Accountant (Reviewer)</li> <li>Bookkeeper</li> <li>CFO</li> <li>Payroll Manager</li> <li>Revenue Accountant</li> <li>Revenue Manager</li> </ul>	Activities Customers Revenue Vendors Payroll and HR (Except for A/P Clerk role) Financial Reports Documents Setup Payments (Payroll Manager role only) Support
The Classic Center	<ul style="list-style-type: none"> <li>Administrator</li> <li>Full Access</li> <li>Payroll Setup</li> </ul>	Activities Payments (Payroll Setup role only) Transactions Lists Reports Documents Setup Customization Support
The E-Commerce Management Center	<ul style="list-style-type: none"> <li>Store Manager</li> <li>Intranet Manager</li> </ul>	Activities Web Site Sales Contacts (Store Manager role only) Reports Documents Setup Support
Engineering *Only available with the Issue Management feature.	<ul style="list-style-type: none"> <li>Engineer</li> <li>Engineering Manager</li> <li>Issue Administrator</li> <li>QA Engineer</li> <li>QA Manager</li> </ul>	Activities Issues Reports Documents Support
The Executive Center	<ul style="list-style-type: none"> <li>CEO</li> <li>CEO (Hands Off)</li> </ul>	Activities Sales Contacts Reports Documents Setup Customization Support
The Marketing Center	<ul style="list-style-type: none"> <li>Marketing Administrator</li> <li>Marketing Manager</li> <li>Marketing Assistant</li> </ul>	Activities Leads Campaigns Reports Documents Setup

Center	Standard Roles in this Center	Pages (Tabs) Displayed
		Support
The Project Center	Consultant	Activities Projects Time & Expenses Resources Reports Documents Support
The Sales Center <div>  <b>Note:</b> If the standard Sales Center does not meet your needs, see the help topic <a href="#">The Enhanced Sales Center SuiteApp</a>.           </div>	<ul style="list-style-type: none"> <li>Sales Administrator</li> <li>Sales Manager</li> <li>Sales Person</li> </ul>	Activities Leads Opportunities Customers Forecast Reports Documents Setup Support
The Shipping Center	Warehouse Manager	Activities Shipping Receiving Inventory Reports Documents Setup Support
The Support Center	<ul style="list-style-type: none"> <li>PM Manager</li> <li>Product Manager</li> <li>Support Administrator</li> <li>Support Manager</li> <li>Support Person</li> </ul>	Activities Cases Customers Issues Reports Documents Setup Support
The System Administrator Center	System Administrator	Activities Setup Support

## Pages Common to all Centers

The following pages (or tabs) are included in all centers and are accessible to all roles:

- The Home Page
- The Activities Page
- The Documents Page
- The Setup Page

## The Home Page

The Home page displays every time you log in to NetSuite.

Some of the features the Home page are:

- A quick and easy search tool by type of record
- Key Performance Indicators that show the business statistics most important to you
- Shortcuts that link to the areas you use most
- Reminders that alert you to important things that need to be done
- Settings that include:
  - Adding information to your Home page
  - Individual preferences for working throughout the entire NetSuite application
  - A tool for synchronizing events, contacts, and tasks
  - A link for changing your email and password

To set up your Home page, click Personalize. In the Add Content panel that appears, you can choose the other content items to include on your dashboard.

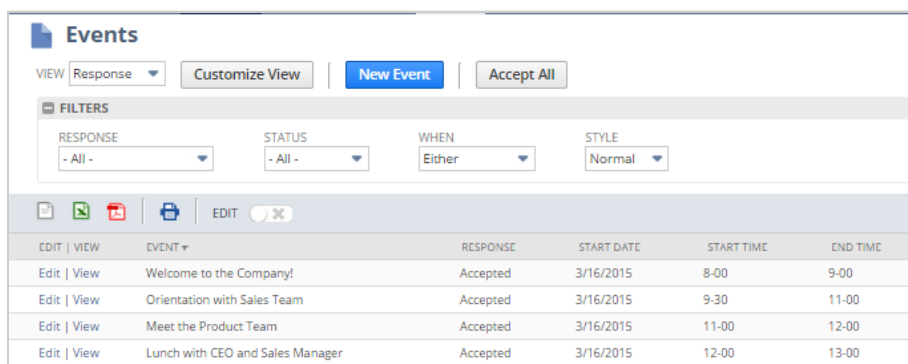
## The Activities Page

The Activities page is used to display your calendar, events, tasks, and phone calls, and other activities. You can customize this page by adding individual portlets such as Phone Calls, Tasks, Activities Links, Calendars, Quick Add: New Events, and more. For information on personalizing your dashboard, see the help topic [Adding a Portlet to a Dashboard](#).

For example, the Activities Links portlet provides links to quickly access various activity list pages. You can also create new records (for example: events, tasks, and phone calls) or search existing activity records.



On list pages, you can customize your view, filter the listed records, create new records, and perform other actions as appropriate for the record. Clicking the Events link, for example, displays a list page of your events. Your first day on the job, it might look like this:



You can view your calendar and scheduled events using the Calendar portlet. For more information, see the help topic [Navigating Your Calendar](#).

In the Tasks and Phone Calls portlets, you can quickly create new tasks or phone calls or edit existing records.

To reorganize the portlets on the page, click and hold the upper right corner of the portlet and drag it to where you want it positioned on the page.

For more information about the various types of activities and records on this page, see:

- [Working with Your Calendar and Activities](#)
- [Working with Events](#)
- [Working with CRM Tasks or Project Tasks](#)
- [Working with Phone Calls](#)
- [Attaching Events, Tasks, and Calls to Records and Transactions](#)

## The Documents Page

The Documents page and navigation menu allow you to manage your documents and templates.

You can click the Documents tab or Documents Overview menu link to access the NetSuite File Cabinet, where you can store and organize your business documents online and then associate them with company, customer, contact, vendor, other name, partner, task, event and case records.

In the File Cabinet, you can quickly search for, download, move, and delete existing files. You can use Add buttons to upload additional files to the File Cabinet. For more information, see the help topic [Working with the File Cabinet](#).

Additional menu items on the Documents page include:

- Files
- Templates has the following menu items:
  - Email Templates: see the help topic [Working with Email Templates](#).
  - Fax Templates: see the help topic [Using Fax Templates](#).
  - Letter Templates [Using Letter Templates](#).
  - PDF Templates: see the help topic [Advanced PDF/HTML Templates](#)
  - Select Template Files to access the template files in the File Cabinet.

For more information, see the help topic [Working with Email Templates](#).

Available menu items vary based on the features you have enabled in your account. If Mail Merge is enabled in your account, see the help topic [Working with Mail Merge](#).

## The Setup Page

The Setup page is where NetSuite account administrators (and other users with a role granting permission) manage the details of your NetSuite account. The menu items available on the Setup page depends on your assigned role and permissions. If you are not an account administrator, many setup tasks are unavailable to you. Some menu items available on the Setup page are unique to a specific role or roles. See the following topics for information about Setup page menu items.

- **Company:** see [Set Company Preferences](#).
- **Accounting:** see .
- **Sales:** see the help topic [Setting Up SFA](#).
- **Marketing:** see the help topic [Setting Up Marketing](#).
- **Support:** see the help topic [Support Management](#).
- **Issues:** see the help topic [Issue Management](#). In particular, see the help topic [Setting Issue Management Preferences](#).

- **Import/Export:** see the help topics [CSV Imports Overview](#) and [Additional Import and Export Options](#).
- **Users/Roles:** See the help topic [NetSuite Users & Roles](#).
- **Integration:** see the following topics:
  - [Company-Wide Preferences](#)
  - [Using the Web Services Usage Log](#)
  - [Web Services Security](#)
  - [Setting Up SuiteSignOn Integration](#) (Outbound single sign-on)
  - [Setting Up Inbound Single Sign-on](#)

You may also see the following menu items on the Setup page, depending on what features are enabled in your account.

- **Payroll:** depending on which payroll feature your company is using, see either [NetSuite Payroll](#) or [Payroll Solutions](#).
- **Customization:** see the help topic [Customization](#).
- **Site Builder:** see the help topic [SuiteCommerce Site Builder](#). See also [SuiteCommerce Overview](#).

## The NetSuite Account Center

The NetSuite Account Center portlet (located on the Support tab) is the access point to the NetSuite Account Center. The NetSuite Account Center enables certain employees from your company to access the customer center for your NetSuite account.

The only employees who can access the NetSuite Account Center are those assigned one of two special roles: the NetSuite Support Center role and the NetSuite Support Center (Basic) role. The account administrator must exercise good judgement when deciding which users should be assigned these roles. Access should be limited to only those employees in your company who are required to perform specific tasks related to your NetSuite account.

These special roles are not displayed in the results of a search for all roles in your account (Setup > Users/Roles > Manage Roles > Search). They are also not listed in the [Standard Roles Permissions Table](#).

However, these roles are available in the dropdown list when assigning roles to a user. Be very sure you understand the implications of the role permissions before you assign either of these roles to users.

- NetSuite Support Center (Basic) role has no transaction permissions. Users in this role see only cases, issues, and contact Support links in the Customer Center - Home Links portlet.

Customer Center - Home Links	
Support	
Contact Support	
See Support Cases	
See Support Issues	

- The NetSuite Support Center role has transaction permissions. Users in this role see links to make payments, review statements, transactions, and estimates, review support cases and issues, edit the user profile, and contact Support in the Customer Center - Home Links portlet.

Customer Center - Home Links		
<b>Billing</b>	<b>Orders</b>	<b>Support</b>
Make a Payment	See Estimates	Contact Support
Print a Statement		See Support Cases
See A/R Register		See Support Issues
See All Transactions		Edit Your Profile

See the following tables to compare role permissions.

Permissions: NetSuite Support Center			
View	Create	Edit	Full
<b>Transactions:</b> <ul style="list-style-type: none"> <li>■ Cash Sale</li> <li>■ Customer Deposit</li> <li>■ Deposit Application</li> <li>■ Estimate</li> <li>■ Invoice</li> </ul> <b>Lists:</b> <ul style="list-style-type: none"> <li>■ Accounts Receivable Register</li> <li>■ Non Posting Registers</li> </ul> <b>Reports:</b> <ul style="list-style-type: none"> <li>■ Return Authorization Reports</li> <li>■ Sales Order Transaction Report</li> </ul>	<b>Transactions:</b> <ul style="list-style-type: none"> <li>■ Generate Statements</li> <li>■ Item Fulfillment</li> <li>■ Return Authorization</li> </ul>	<b>Transactions:</b> <ul style="list-style-type: none"> <li>■ Customer Payment</li> </ul>	<b>Transactions:</b> <ul style="list-style-type: none"> <li>■ Find Transaction</li> </ul> <b>Setup:</b> <ul style="list-style-type: none"> <li>■ Deleted Records</li> </ul>

Permissions: NetSuite Support Center (Basic)			
View	Create	Edit	Full
None	None	None	None

The same permission comparison information is available through in the User Interface. See the help topic [Showing Role Permission Differences](#).

### To give an employee access to the NetSuite Account Center portlet:

1. Go to **Lists > Employees > Employees**.
2. Click **Edit** next to the name of the employee you want to give access.
3. On the **Access** subtab, select **NetSuite Support Center** or **NetSuite Support Center (Basic)** in the **Role** field.
4. Click **Add**.
5. Click **Save**.

The employee might need to log out and log back in again to see the NetSuite Account Center link.

The NetSuite Account Center displays the following portlets and tabs:

- The **Customer Center - Home Links** portlet – users with the NetSuite Support Center role may make payments, review statements, transactions, and estimates, review support cases and issues, edit the user profile, and contact Support. Users with the NetSuite Support Center (Basic) role can view support cases and issues and contact Support.
- The **SuiteIdeas** tab – Click the link to launch the SuiteIdeas site and review and vote for NetSuite product enhancements. For information, see the help topic [Voting for Enhancements](#).
- On the **Storage Info** tab – see a summary of storage usage for your account, categorized by file, data and record type. The Storage Info data in the NetSuite Account Center is updated monthly, on the first week of the following month. For example, the data showing as of February 1 is the

storage information data for the month of January. For more current storage information, see the Total Storage Size (MB) entry on Billable Components tab of the Billing Information page at Setup > Company > NetSuite Account Information > View Billing Information. The Total Storage Size (MB) information on the Billing Information page is updated weekly, as can be seen on the Component Usage tab.

## Exiting the NetSuite Account Center

Exiting the NetSuite Account Center is slightly different than the usual procedure for switching to another role. You are, in effect, leaving NetSuite's account and returning to the account of your company.

### To exit the NetSuite Account Center:

1. From the Change roles icon, select **View All Roles**.
2. On the Choose Roles page, click the desired role.

## The Classic Center

The Classic Center is the set of pages seen by the Administrator, Full Access, and Payroll Setup roles.

## The Lists Page

If you log in with the Administrator role or if you use the classic interface, all lists can be found on the Lists page.

A list is a group of records of a specific type. List records include customers, vendors, items, employees, partners, and more.

NetSuite requires you to enter records before you fill out transactions. After you enter a record, it is included in lists. For example, if you want to pay a bill for a new vendor, you must first create a new vendor record. Then, when you go to the Enter Bills page, you can choose the vendor from the list.

The Search link at the upper left of most list pages brings you to a search page for the list record type, where you can enter filter criteria to search for a specific record, or set of records.

### To view a list:

1. Click **Lists Overview**.
2. On the Lists page, click the link for the type of list you want to see.

Here are some procedures you can use with most lists:

- Click a column heading to sort the list by that column.
- Click a View link or a name to drill down to the detail record.
- Check the **Show Inactives** box to see inactive records.  
If the **Show Inactives** box is checked, you can inactivate records on many lists by checking the boxes in the Inactive column and clicking **Save**.
- Select a different View to show only specific information.
- Select a different alphabetical group if you have a long list and want to see records that aren't showing.

If you view the list in report format, all records are included without breaking long lists into smaller lists.

- Click **Refresh** after you select new list options.
- Click **Print** to print the list.
- Click **New** to create a new record.
- Click **Export** to export this list as a CSV file that can be opened in a spreadsheet program.
- Click **Customize View** to create a custom view for the list.

## The E-Commerce Management Center

The roles of Store Manager and Intranet Manager belong to the E-Commerce Management Center. Users with these roles can set up your website, configure your domain, and preview the site on the Setup tab.

For more information about the different options available for setting up and building a website, see the help topic [Commerce](#).

The Web Site page also displays in this center. It contains portlets that can be configured to display various statistics to help you analyze the effectiveness of your website. The E-Commerce Management Center - Links portlet provides an alternative method of accessing the same items that are listed in menu on the Web Site page.

## The Support Center

### The Setup Page

Set up the Support Center specifying preferences for how you want to use the Customer Service feature and create case issues, types, origins, rules, and territories.

For more information, see the help topic [Setting Up Case Management](#). In particular, see the help topic [Setting Up Support Checklist](#).

## The Sales Center

### The Opportunities Page

You can use the Opportunities tab to access your important lead, prospect, and customer records. You can then create opportunities, estimates, and sales orders for your customers to drive up sales.

View items and promotion codes that can help you create opportunities, and report your success with the Open Opportunities by Sales Rep, Open Estimates, and Prospect Analysis Summary reports.

Click the name of a record or transaction to go to the corresponding list. Click New next to the link to create a new record or transaction. Click Search next to the link to set criteria for searching records or transactions of that type.

You can personalize the Opportunities page by choosing to display customized portlets of information. Click Personalize Dashboard, and in the Add Content panel that appears, you can choose to display



snapshots relevant to your opportunities and estimates, add reminders to display, and set up saved searches to display results, among other options.

## The Prospects Page

From the Prospects page, you can access your calendar, view and create prospect and contact records, view reports on prospects, and create estimates or sales orders for prospects.

View your prospect and contact records under the Relationships heading. Records hold valuable communication information as well as CRM information such as events, tasks, and related documents.

Under the Transactions heading, create new Promotion Codes, prepare estimates, and enter sales orders.

Under the Other heading, conduct searches or conduct mass updates. Click CRM Lists to create new lead sources.

View reports on prospects under the Prospect Reports heading. You can print, email, or export reports or view them in separate applications like Microsoft® Excel.

You can personalize the Prospects page by choosing to display customized portlets of information. Click Personalize Dashboard, and in the Add Content panel that appears, you can choose to display snapshots relevant to your prospects, add reminders to display, and set up saved searches to display results, among other options.

## The Leads Page

From the Leads page, you can access your calendar, view and create lead and contact records, view reports on leads, and create estimates or sales orders for leads.

View your lead and contact records under the Relationships heading. Records hold valuable communication information as well as CRM information such as events, tasks, and related documents.

Under the Transactions heading, create new Promotion Codes, prepare estimates, and enter sales orders.

Under the Other heading, conduct searches or conduct mass updates. Click CRM Lists to create new lead sources.

View reports on leads under the Lead Reports heading. You can print, email, or export reports or view them in separate applications like Microsoft® Excel.

You can personalize the Leads page by choosing to display customized portlets of information. Click Personalize Dashboard, and in the Add Content panel that appears, you can choose to display snapshots relevant to your leads, add reminders to display, and set up saved searches to display results, among other options.

## The Forecast Page

You can set up the Forecast page to show snapshots and portlets to give you at-a-glance information on predicted future sales. In the Settings portlet, click Customize Page. Choose to display snapshots relevant to your sales probability, set up reminders and set up saved searches among other options.

In the Sales Center-Forecast portlet, you can prepare estimates, enter sales orders and enter cash sales under the Transactions heading. Under the Reports heading, view your Sales Forecast Summary

Report, open estimates and sales orders and see which promotion codes and lead sources are bringing in the most business.

# Enabling Features

The Enable Features page is where you turn on or off features in NetSuite.

**Note:** Changes made to feature settings are captured in system notes. For more information, see [Searching System Notes](#).

## To enable features:

1. Go to Setup > Company > Enable Features.
2. Check the boxes next to features you want to use.
3. Assign any permissions related to the newly enabled features to custom roles as necessary.

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 [Customizing or Creating NetSuite Roles](#).

**Note:** Depending on the product you subscribe to, some features may not be available for you to use. If you have questions about the availability of the features mentioned below, please contact your account representative.

The following topics describe the features available on each subtab of the Enable Features page.

- [General Company Features](#)
- [Accounting Features](#)
- [Tax Features](#)
- [Transaction-Related Features](#)
- [Items and Inventory Features](#)
- [Employee and Payroll Features](#)
- [CRM and SFA Features](#)
- [Analytics Features](#)
- [Ecommerce Features](#)
- [SuiteCloud Features](#)




**Important:** You can click the Audit Trail link in this page header to review a list of changes to enabled features, including the users who made the changes, dates of the changes, and whether the feature was enabled or disabled. See [Auditing Account Preferences](#).



## General Company Features

You can enable the following features on the **Company** subtab of the Enable Features page.

Feature	Description
<b>Classifications</b>	
Departments	Track and classify your transactions by category. This adds a link to Departments on your Lists page.
Locations	Track activity by location. This adds a link to Locations on your Lists page.

Feature	Description
Classes	Sort transactions in any way you find helpful. This adds a link to Classes on your Lists page.
<b>Projects</b>	
Projects	Track projects for customers. A project is a subrecord of a customer record that shows costs and revenues for a particular project.
Project Management	Track additional information about projects and keep them separate from customers.
Job Costing and Project Budgeting	Calculate costs for project labor and account for those costs in your general ledger, and create project specific cost and billing budgets.
Advanced Project Profitability	Create a customized project profitability report based on accounts and items instead of transactions.
Related SuiteApps	Manage and edit project task assignments using a graphical interface that displays project resources and assigned tasks. For more information about installing the Project Task Manager SuiteApp, see the help topic <a href="#">Project Task Manager</a> .
<ul style="list-style-type: none"> <li>Project Task Manager</li> </ul>	
<b>ERP General</b>	
Multiple Units of Measure	Define various units used to stock, purchase, and sell inventory items, and track non-monetary accounts. The Statistical Accounts feature must be enabled. (Go to Setup > Company > Enable Features. On the Accounting subtab, Statistical Accounts is listed under Advanced Features.)
Use Deletion Reason	Make it mandatory for users to provide a reason for deleting transaction records. All transactions listed at Setup > Company > Auto-Generated Numbers on the Transaction Numbers subtab are affected by this feature. This feature can be disabled after use.
Multi-Subsidiary Customer	In NetSuite OneWorld, assign one primary subsidiary and multiple secondary subsidiaries to a customer or subcustomer record at Lists > Relationships > Customers > New. When you select a multi-subsidiary customer on a transaction, you can associate the transaction with any subsidiary assigned to the customer.
<b>Resource Management</b>	
Resource Allocations	Allocate resources to projects, view and manage resource allocations, and monitor utilization rates.
Related SuiteApps	For more information about installing the resource allocation SuiteApps, see:
<ul style="list-style-type: none"> <li>Resource Allocation Chart</li> <li>Resource Skill Sets</li> <li>Resource Allocation Approval Workflow</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Resource Allocation Chart/Grid SuiteApp</a></li> <li><a href="#">Resource Skill Sets</a></li> <li><a href="#">Resource Allocations Custom Approval Workflow</a></li> </ul>
<b>International</b>	
Multi-Language	<p>Check this box to do the following:</p> <ul style="list-style-type: none"> <li>Allow users to choose the language of the NetSuite user interface. See the help topic <a href="#">Choosing a Language for Your NetSuite User Interface</a>.</li> <li>Allow customers to see item names, descriptions, and expense categories in the language selected on the customer's record on printed transaction forms.</li> <li>Allow translation of website elements to display in each visitor's language. These elements include website items, saved searches, tabs, categories, email forms, text, and images, and formatted website text. See the help topic <a href="#">Setting Up a Site for Multiple Languages</a>.</li> </ul>




Feature	Description
	<p>Note that only the system-supported languages available as user preferences are supported for printed transaction forms. Additional languages are supported for website translations.</p> <p>At Setup &gt; Company &gt; General Preferences, you need to specify the languages for which you want to provide translation strings for items on printed transaction forms and/or your website. See <a href="#">Configuring Multiple Languages</a>. After you have specified a language in General Preferences, you can translate item names and descriptions on item records or by going to Lists &gt; Mass Update &gt; Bulk Update Translation. See the help topic <a href="#">Multi-Language Names and Descriptions</a>.</p>
Multiple Currencies	<p>Use foreign currencies for sales and purchase transactions and account for the fluctuations in exchange rates. This feature enables the creation of sales transactions in multiple currencies for individual customers and to track open balances in each transaction currency. This feature also enables you to enter purchase transactions in multiple currencies for individual vendors, and keep track of open balances in each transaction currency. When you create a vendor record, you set a primary currency and additional currencies available for transactions with that vendor. See the help topic <a href="#">Working with Currencies</a>.</p> <p>When the Foreign Currency Management feature of Multi-Book Accounting is enabled, this feature is also required and cannot be disabled.</p> <div>  <p><b>Important:</b> In a past release, the functionality associated with the Multiple Currencies, Multi-Currency Customers, and Multi-Currency Vendors features were combined in the Multiple Currencies feature. If you are new to NetSuite, already using all three features, or not using all three features, only the Multiple Currencies box will appear on the Company subtab of the Enable Features page. You can enable or disable this feature. When you enable this feature, you gain access to support for multiple currency customers and vendors. If you are already using Multiple Currencies and Multi-Currency Customers or Multi-Currency Vendors but not all three features, you will continue to see and maintain three boxes on the Company subtab. Regardless of the number of boxes visible in your account, the functionality associated with these three features remains the same.</p> </div> <div>  <p><b>Note:</b> After qualifying revaluation transactions, the system generates the Realized Gain/Loss, Unrealized Gain/Loss, Unrealized Matching Gain/Loss, Rounding Gain/Loss accounts. Depending on the year in which your NetSuite account was established, you may also have the Exchange Rate Variance account.</p> </div>
Currency Exchange Rate Integration	<p>Automatically update currency exchange rates by the specified provider one time each day.</p> <p>Agree to the Notice, as required. NetSuite stores the user ID and time and date stamp of account changes in system notes.</p> <p>Click the Xignite or Thomson Reuters Forex Data link to go to their respective websites.</p> <div>  <p><b>Note:</b> To choose an exchange rate provider, method for obtaining exchange rates, and anchor currencies, go to Setup &gt; Accounting &gt; Preferences &gt; Accounting Preferences. On the General subtab, under Exchange Rate Integration, select a Rate Provider. For more information, see the help topic <a href="#">Exchange Rate Integration</a>.</p> </div>
<b>Data Management</b>	
Inline Editing	Edit records directly from their corresponding lists and from search results.




Feature	Description
	 <b>Note:</b> When this feature is enabled, inline editing is available by default for all search results in dashboard portlets. However, each Custom Search portlet has an Allow Inline Editing setup option that you can use to enable or disable inline editing for specific portlets. See the help topic <a href="#">Displaying Saved Search Results in Dashboard Portlets</a> .
File Cabinet	Enable the ability to upload or link to documents and images, and then associate them with records your customers, vendors, and employees can view.
Duplicate Detection & Merge	Have NetSuite to compare customer and contact records and notify you of possible duplicates.
Related SuiteApps <ul style="list-style-type: none"> <li>Box Document Management</li> </ul>	Click this link to install the Box.NET SuiteApp. This SuiteApp enables you to upload documents to your Box.NET account and associate those documents with your NetSuite account. To install the SuiteApp, you must first have a Box.NET account. <div>  <b>Note:</b> This SuiteApp is maintained and supported directly by Box.           </div>
<b>Social</b>	
Related SuiteApps <ul style="list-style-type: none"> <li>SuiteSocial</li> </ul>	Click this link to install SuiteSocial. This SuiteApp is a NetSuite social collaboration tool that enables you to more tightly connect social interactions to your NetSuite data and track important changes to that data. With the interactive news feed, you can see updates posted by your colleagues, and be notified when relevant NetSuite records are created or edited. You can post your own messages or status, and access the records you are following.
<b>Access</b>	
IP Address Rules	Create access rules for employees based on the IP address of the computer used to log in. For more information about this feature, see the help topic <a href="#">Enabling and Creating IP Address Rules</a> .
<b>Mobile</b>	
Mobile Push Notification	Enable users to receive push notifications on mobile devices.

## Accounting Features

You can enable the following features on the **Accounting** subtab of the Enable Features page. Many of these features create system-generated accounts when enabled. These accounts are included in the descriptions. For a complete listing of system-generated accounts, see the help topic [Feature-Specific, System-Generated Accounts](#).

Feature	Description
<b>Basic Features</b>	
Accounting	Use NetSuite for your business's accounting.

Feature	Description
	 <b>Note:</b> Enabling this feature creates the system-generated Undeposited Funds and Refunds Payable accounts. If you are using NetSuite Canadian Edition, you will also have Payable and Expenses accounts. If you are using NetSuite (U.S.), you will have the additional Sales Tax Payable account.
A/R (Accounts Receivable)	Maintain accounts receivables records and track invoices, receipts, cash sales, payments, and customer records.
	 <b>Note:</b> Enabling this feature creates the system-generated Accounts Receivable account.
A/P (Accounts Payable)	Maintain accounts payable records and track purchases, bills, vendors, and payee records.
	 <b>Note:</b> Enabling this feature creates the system-generated Accounts Payable account.
Accounting Periods	Group transactions as they occur during periods of time, and to allow management of financials by these defined time periods.
GL Audit Numbering	<p>Apply gapless numbering sequences to all general ledger posting transactions. Gapless numbering sequences enables companies to meet international auditing requirements. When this feature is enabled, GL Audit Numbering is listed as a required task when you close the last month in an accounting period. You can set up and run numbering sequences as part of the required task. You can also perform a variety of GL Audit Numbering tasks on demand at Transactions &gt; Management &gt; GL Audit Numbering Sequences.</p> <p>The Accounting Periods feature is a requirement for using the GL Audit Numbering feature. GL Audit Numbering is independent of other transaction numbering you have set up at Setup &gt; Company &gt; Auto-Generated Numbers.</p>
<b>Advanced Features</b>	
Expense Allocation	Account for fixed expenses without splitting them among individual departments, classes or locations in advance of incurring the expenses.
Dynamic Allocation	<p>Dynamically calculate the weight of any statistical allocation, based on the balance of the statistical account through statistical journals, at the time the allocation journal is generated. This feature also enables you to run multiple dynamic allocation schedules in a specific sequence, or batch.</p> <p>This is an enhancement to the current fixed rate allocation where you must specify the fixed allocation weight for the entire life cycle of the allocation schedule. This feature cannot be disabled after it has been used.</p>
Revenue Recognition	Check this box to amortize revenue from your sales.
Revenue Commitments	Check this box to recognize revenue as separate from billing. You can use this feature to recognize revenue prior to billing customers.
VSOE	Check this box to enable advanced revenue recognition forecasting.
Sales Order Revenue Forecasting	Check this box to enable forecasting of sales order revenue recognition. This feature enables you to forecast revenue based on sales order amounts and return authorization amounts.
Amortization	<p>Allocate an expense across a range of time and then recognize the expense in increments, only as goods or services are used. For example, defer a prepaid expense such as insurance and amortize the proper amount over the period the insurance is in effect.</p> <p>Enabling this feature creates the system-generated Deferred Expense and Accumulated Depreciation accounts.</p>

Feature	Description
Advanced Revenue Management	<p>Enable advanced revenue management. This feature automates revenue forecasting, allocation, recognition, reclassification, and auditing. It is compliant with the ASC 606 revenue standard.</p> <p>When you enable this feature, it cannot be disabled. Accounting Periods must also be checked.</p> <p>Enabling this feature creates the system-generated Deferred Revenue, Unbilled Receivables, and Revenue Arrangement (non-posting) accounts.</p> <p>If you currently use the classic Revenue Recognition features, contact your sales or account representative to find out how to get Advanced Revenue Management. The assistance of NetSuite Professional Services or a qualified NetSuite partner is required to move from classic Revenue Recognition to Advanced Revenue Management.</p>
Multiple Budgets	Create multiple budgets for the same combination of customer, item, class, location or department criteria.
Intercompany Time and Expense	<p>Allow intercompany time entries and expense transactions, and the transfer of time and/or expense charges from one subsidiary to another in a OneWorld account.</p> <div>  <b>Warning:</b> If this feature is disabled, users cannot enter intercompany time or expenses, meaning records that have different subsidiaries for employee and customer. </div> <p>When this feature is enabled, by default users can enter intercompany time and expenses. You can change related preferences to disallow either intercompany time or expenses, or to enable the creation of automated intercompany adjustments for expenses. These preferences are available at Setup &gt; Accounting &gt; Accounting Preferences, on the General subtab.</p> <div>  <b>Note:</b> If you enabled this feature after April 2014, when you created a qualifying journal entry the system created a single Intercompany Clearing Account of the Type: Other Current Asset. The account was set to the Root Subsidiary and included all child subsidiaries. Adjustment journal entries correctly posted to this new account, and no other currency-locked Intercompany Clearing Accounts were created. If you enabled this feature prior to April 2014, when you created a new adjustment journal entry the system created a new Intercompany Clearing Account (no currency), which became the parent of all other existing clearing accounts. New adjustment journal entries use this parent account, and the existing currency-locked Intercompany Clearing Account remained intact. If you edit a transaction that originally posted to the existing currency-locked Intercompany Clearing Account, the GL Impact of that transaction affects that account. </div>
Automated Intercompany Management	<p>Create intercompany sales orders from intercompany purchase orders, reconcile intercompany transactions, and generate intercompany elimination journal entries automatically using the Period Close Checklist.</p> <div>  <b>Note:</b> Enabling this feature creates the system-generated CTA Elimination account after a qualifying transaction. For example, a user must first run the Elimination process so that an Elimination Journal Entry is created that uses this account. </div>
Automated Intercompany Drop Ship	Enable the cross-subsidiary order and fulfillment process for external orders.
Consolidated Payments	<p>Enable this feature to apply payments, credits, and deposits either through the top-level customer or through individual subcustomers and to print consolidated customer statements.</p> <p>For more information, see the help topic <a href="#">Consolidated Payments</a>.</p>



Feature	Description
Multiple Calendars	Use the Multiple Calendars feature to create different accounting period and tax period rollups for your subsidiaries. Create fiscal calendars to define accounting and tax period rollups.
Statistical Accounts	Track non-monetary data and then use this information on reports and income statements to view its relationship with the financial activity of your organization. If you check the Dynamic Allocation box, located under Advanced Features, you can run any allocation schedule weighted by the balance of a statistical account. Multiple Units of Measure must be enabled to use this feature. This feature cannot be disabled after it has been used.
Foreign Currency Variance Mapping	Enable this feature to define posting rules that specify the accounts to which foreign currency variances post.

## Multi-Book Accounting Features




**Important:** Multi-Book Accounting is available only in NetSuite OneWorld accounts. Please contact your sales or account representative to find out how to get Multi-Book Accounting. The assistance of NetSuite Professional Services is required to implement this feature

Multi-Book Accounting	
Multi-Book Accounting	Check this box to use multiple accounting books to manage your business. For more information, see the help topic <a href="#">Multi-Book Accounting Overview</a> .
Chart of Accounts Mapping	Check this box to allow different account values to be used across accounting books. Multi-Book Accounting must also be checked. For more information, see the help topic <a href="#">Chart of Accounts Mapping</a> .
Foreign Currency Management	Check this box to manage foreign currency transactions automatically across accounting books. Multi-Book Accounting must also be checked. The feature must be enabled on the Company tab. For more information, see the help topic <a href="#">Foreign Currency Management</a> .
Revenue and Expense Management	Check this box to recognize revenue and amortize expenses per accounting book. Multi-Book Accounting must also be checked. For more information, see the help topic <a href="#">Revenue and Expense Management</a> .
Extended Accounting Period Close Process	Check this box to use independent closure of accounting periods by accounting book. Multi-Book Accounting must also be checked. For more information, see the help topic <a href="#">Accounting Book Period Close Management</a> .

## Tax Features





On the **Tax** subtab of the Enable Features page, you can enable tax features, and access the installation pages of related SuiteApps:



Feature	Description
Advanced Taxes	Use the Advanced Taxes feature. This feature enables you to use tax schedules to track taxes for each nexus in which your company is required to pay taxes.


Feature	Description
	<div>  <b>Warning:</b> If you enable Advanced Taxes, then you cannot disable it in the future.         </div> <p>For more information, see the help topic <a href="#">Advanced Taxes</a>.</p>
EU Mini One Stop Shop	Check this box if your company is registered for the EU Mini One Stop Shop (MOSS) VAT scheme. The MOSS feature in NetSuite enables you to charge the appropriate tax on B2C sales of digital services based on the VAT rate of the customer's EU member state. For more information, see the help topic <a href="#">EU Mini One Stop Shop (MOSS)</a> .
SuiteTax – Beta	Check this box to define different tax engines for different tax jurisdictions and visualize tax details on each transaction. For more information, see the help topic <a href="#">SuiteTax</a> .
Related SuiteApps <ul style="list-style-type: none"> <li>International Tax Reports</li> <li>Tax Audit Files</li> <li>Withholding Tax</li> <li>Supplementary Tax Calculation</li> </ul>	For more information about installing the tax SuiteApps, see the help topic <a href="#">Taxation Features Provided by SuiteApps from NetSuite</a> .

## Transaction-Related Features

You can enable the following features on the **Transactions** subtab of the Enable Features page.

Feature	Description
<b>Basic Features</b>	
Estimates	Provide estimates to your customers and then convert them into invoices. <div>  <b>Note:</b> Enabling this feature creates the system-generated Estimates account.         </div>
Sales Orders	Track customer orders and then convert them into invoices. <div>  <b>Note:</b> Enabling this feature creates the system-generated Sales Orders account.         </div>
Return Authorizations	Use return authorization numbers to track approved returns. <div>  <b>Note:</b> Enabling this feature creates the system-generated Return Authorizations account.         </div>
Purchase Orders	Issue purchase orders, receive against those orders and create bills from those receipts. <div>  <b>Note:</b> Enabling this feature creates the system-generated Purchase Orders account.         </div>
Vendor Return Authorizations	Use return authorization numbers to track items you return to vendors.

Feature	Description
	 <b>Note:</b> Enabling this feature creates the system-generated Vendor Return Authorizations and Purchases Returned Not Credited accounts.
Request for Quote	Send a request to one or more vendors asking them to provide specifics about their pricing, terms and conditions in regard to a purchase contract for a product they sell.
Requisitions	<p>Use Requisition transactions to initiate the purchasing process when an employee or company representative needs something that must be purchased using company funds. The person requesting the purchase (requestor) specifies which items, services or expenses they need a buyer to purchase. Buyers can then use requisitions to create the purchase orders necessary to fulfill the requisition requests.</p>  <b>Note:</b> Enabling this feature creates the system-generated Requisitions account.
Purchase Contracts	Allows purchasing managers and buyers to use contracted terms, pricing, and delivery schedules when purchasing materials for a company. For example, instead of having terms and pricing based only on a specific purchase order being placed, buyers can automatically take advantage of quantity-based terms and discounts based on an annual volume of goods or services purchased.
Blanket Purchase Orders	Improve buyer efficiency and accuracy and potentially reduce procurement spending. Blanket purchase orders define a pre-determined price for a set quantity of items you will buy from a vendor during a time period. The blanket purchase order specifies the item, price, quantity, terms and effective time period.
Related SuiteApps	<p>For more information, see the following:</p> <ul style="list-style-type: none"> <li>Advanced Procurement Approvals</li> <li>Warranty and Repairs Management</li> <li>NetSuite Approvals Workflow</li> </ul>
<b>Sales</b>	
Multiple Prices	Set at least four different price levels for each item.
Quantity Pricing	Enable quantity pricing, which lets you automatically apply different sales prices to items that depend on the quantity being sold. This enables you to offer discounts to customers who buy in bulk.
Gross Profit	<p>Enable Gross Profit estimates and track gross profits at the item and transaction level.</p> <p>(Gross Profit = Sales – Costs)</p> <p>Gross profit estimates are based on a complex interaction of prices, discounts, costs, and ultimately gross profits at several levels. Gross profit estimates supply decision-making information to sales teams and executives throughout the sales process, from the opportunity stage early in the sales cycle on through to the issuance of an invoice.</p>
Alternate Sales Amount	Calculate alternate sales amounts on sales orders, estimates, opportunities, and return authorizations.






Feature	Description
	Alternate sales amounts can be used to calculate commission and sales forecasts and can be used to measure quotas.
Promotion Codes	Create codes that can be used to associate customers and sales with partners and track campaign return on investment. If you associate a discount item with a promotion code, the code can be used as a coupon code for any item or for specific items that you select when creating the code.
SuitePromotions	Leverage some of NetSuite's multiple (stacked) promotions capabilities on your SuiteCommerce Advanced Site. Promotion Codes and Auto-Apply Promotions must also be enabled. For more information, see the help topic <a href="#">Promotions</a> .
Auto-Apply Promotions	Automatically apply multiple promotions to a transaction. For more information, see the help topic <a href="#">Promotions Overview</a> .
Related SuiteApps	For more information, see the help topic <a href="#">Creating Advanced Promotions</a> .
■ Advanced Promotions	
<b>Shipping &amp; Receiving</b>	
Advanced Shipping	Fulfill and bill your sales orders in separate steps.
Pick, Pack and Ship	Allow greater flexibility to process orders by using separate transactions to pick items from inventory, pack them to be shipped, and then ship the items to the customer.
Shipping Label Integration	Integrate your UPS or FedEx account with NetSuite, allowing you to receive tracking numbers and print bar code shipping labels.
Advanced Receiving	Receive orders separately from bills.
	 <b>Note:</b> Enabling this feature creates the system-generated Accrued Purchases account.
Multiple Shipping Routes	Enables shipment to several different addresses and use of different shipping methods on the same transaction.
Inbound Shipment Management	Provides tracking and management of incoming shipments.
<b>Billing</b>	
Bill Costs to Customers	Purchase goods and services and sell them directly to your customers.
Advanced Billing	Create billing schedules to invoice sales over a range of time or a contract term, such as a one-year membership billed monthly. Billing schedules manage the billing process to track when to invoice customers and how much to bill. The Advanced Billing feature requires that you also enable the Sales Orders feature.
Charged-based Billing	Enable Charge-Based Billing, so that you can create billable charges for projects. Charges are calculated according to charge rules. These charge rules can be based on fixed dates, project progress, milestones, or on time entries. Enabling this feature adds the Charge-Based billing type for projects and a Create Charges page to your account.
Billing Operations	Create and manage bill runs, bill run schedules, and billing groups. After clicking Save, new menu options are available from the Transactions > Billing menu.
<b>Payment Processing</b>	



Feature	Description
Credit Card Payments	Accept credit card payments.  <b>Note:</b> Enabling both this feature and Customer Access creates the system-generated Unapproved Customer Payments account.
Credit Card Soft Descriptors	If you sell products under varying brand or company names, check this box to create a list of the names used and associate those descriptors with the items you sell under each name. When customers receive credit card statements, the descriptor associated with the item purchased is shown.
Send Purchase Card Data	With the Purchase Card Data module, NetSuite identifies when payments are made with a purchase card so you can take advantage of potential lower card processing fees. Purchase cards, also called Level II and Level III cards, can bring cost savings to you, the merchant, and to your customers. When you enter a credit card payment for a customer, NetSuite determines, based on the card's bank identification number (BIN), whether or not it is a purchase card. It then passes the extended transaction data along with the payment authorization request for processing.
PayPal Integration	Allow customers to pay with PayPal. This enables you to set up PayPal as a payment method. Customers are taken to the PayPal site for checkout, and payment is deposited into your PayPal account.
Electronic Funds Transfer	Allow customers to pay electronically. You must set up this service before you can use it. To do this, go to Setup > Set Up ACH Processing.  <b>Note:</b> Enabling this feature creates the system-generated Failed ACH Transactions account.
Online Bill Pay	Allow customers to automatically pay bills online as they are entered.
ACH Vendor Payments	Pay vendors and pay employee expense report using ACH transactions.

## Items and Inventory Features

You can enable the following features on the **Items & Inventory** subtab of the Enable Features page.

Feature	Description
<b>Items</b>	
Drop Shipments & Special Orders	Ship items from your vendor directly to your customer.
Matrix Items	Track inventory and pricing of items separately based on item options, such as tracking shirts by color and size.
Multiple Vendors	Manage procurement of items you buy from more than one vendor. Identify and track each vendor's name, item code, and purchase price.
Gift Certificates	Sell gift certificate items of set or variable amounts to customers. When customers purchase gift certificates, they enter recipient information, and the gift certificate message, amount, and code is emailed to the recipient. Gift certificates are applied toward the total order amount and can be reused if there is a remaining amount after a sale.

Feature	Description
Sell Downloadable Files	Enable download item records and online forms with downloads included. You can attach files to download item records that customers can purchase and download in the Web store. The online forms with downloads allow you to offer leads free downloads when they provide their contact information. You can also use this feature to share files with customers free of charge. For example, you can attach the customer's terms of service to the customer record, and the customer can access the file through the Customer Center.
Bar Coding and Item Labels	Generate bar codes to identify transactions and items. Then, you can print labels with the item's bar code.
Advanced Item Location Configuration	Check this box to enable advanced management of the item attribute information that is associated with each location. Use this feature to filter and access only the data that you need for specific locations.
<b>Inventory</b>	
Inventory	Track quantities and profit from buying and selling inventory. <div>  <b>Note:</b> Enabling this feature creates the system-generated Inventory Asset and Cost Of Goods Sold accounts. </div>
Multi-Location Inventory	Track inventory for multiple locations. You must also enable Locations, Inventory, Advanced Shipping and Advanced Receiving. <div>  <b>Note:</b> After you have enabled the Multi-Location Inventory feature and distributed items, you cannot turn the feature off without contacting Customer Support. </div> <div>  <b>Note:</b> Enabling this feature creates the system-generated Transfer Orders and Inventory In Transit accounts. </div>
Assembly Items	Use raw materials (inventory items) to build assembly items in NetSuite.
Advanced Bill of Materials	Check this box to enable the Advanced Bill of Materials feature. <div>  <b>Note:</b> If you enable this feature, it can introduce changes to assembly, item revision, manufacturing routing, work order, assembly build, and assembly unbuild records. These changes can affect customization and integrations related to these records. For more information, see the help topic <a href="#">Advanced Bill of Materials</a>. </div>
Work Orders	Use assembly work orders to track the production of assembly items needed for stock or to fill orders. Work orders track the quantities of assemblies that need to be built and the quantities of components, or member items, needed to do so. <div>  <b>Note:</b> Enabling this feature creates the system-generated Work Orders account. </div>
Serialized Inventory	Track the purchase and sale of physical inventory items by assigning a serial number to each item.

Feature	Description
	 <b>Note:</b> After you have enabled the Serialized Inventory feature and serialized items have been created, the Serialized Inventory feature may not be turned off.
Lot Tracking	Assign lot numbers to groups of inventory items for tracking purposes.   <b>Note:</b> After you have enabled the Lot Tracking feature and the lot tracking items have been created, the Lot Tracking feature may not be turned off.
Bin Management	Create bin records that identify the places you store inventory items within your warehouse and track on-hand quantities. Tracking bins helps warehouse employees know exactly where to go to find items they need when picking and fulfilling orders. Bins also specify exactly where items need to be put away in stock when you receive them.
Advanced Bin/Numbered Inventory Management	Manage bins and use them with serial and lot numbered inventory.
Inventory Status	Check this box to assign statuses to inventory and drive internal processes. You can also choose to make items unavailable for allocation to orders based on the associated inventory status. For more information, see the help topic <a href="#">Inventory Status</a> .
Advanced Inventory Management	Enable NetSuite to anticipate demand for items and adjust suggested item ordering. Purchases of new stock are based on previous purchases and sales of items.
Landed Cost	Track the costs associated with purchasing items apart from the material cost. For example, landed cost can include duty fees, insurance, and shipping cost.
Demand Planning	Calculate future demand for items and use demand plans and supply plans to regulate inventory replenishment. You must enable the Advanced Inventory Management feature to use this feature. For more details, read the help topic <a href="#">Demand Planning</a> .
Distribution Resource Planning	Use the Distribution Resource Planning feature to plan and optimize inventory across locations and, for OneWorld accounts, subsidiaries. Items can be transferred between locations to meet supply needs within a preset distribution network.
Available to Promise	Check item availability based on outstanding transfer orders, purchase orders, work orders, and sales orders. Read the help topic <a href="#">Available to Promise</a> .
Standard Costing	Identify costing opportunities by maintaining standard costs across cost categories and perform variance analysis. Read the help topic <a href="#">Standard Costing</a> .
Group Average Costing	Group average costing enables you to track one average cost for an item across multiple locations within a defined group. Group average costing is available only when you have enabled the Multi-Location Inventory feature. Group average costing is available for inventory items and assembly items.
Intercompany Cross-Subsidiary Fulfillment	In NetSuite OneWorld, check this box to use the Intercompany Cross-Subsidiary Fulfillment feature to fulfil orders and receive returns across multiple subsidiaries. For more information, see the help topic <a href="#">Intercompany Cross-Subsidiary Fulfillment</a> .
Manufacturing Work In Process	Allows WIP tracking with work order issue and completion against a work order. Read the help topic <a href="#">Manufacturing Work In Process (WIP)</a> .

Feature	Description
Inventory Count	Support improved tracking of inventory and tighter control over assets. When this feature is enabled, you can enter regular periodic counts of on-hand item quantities to maintain inventory accuracy. Keeping an accurate item count can help reduce required safety stock, which lowers your overhead costs.
Manufacturing Routing and Work Center	Record quantity completions, resource costs, and overheads against a list of work order operations.
Supply Chain Control Tower	Check this box to simulate inventory supply and demand across your supply chain. For more information, see the help topic <a href="#">Supply Chain Control Tower</a> .
Related SuiteApps	For more information, see the following.
<ul style="list-style-type: none"> <li>Supply Chain Management</li> <li>Grid Order Management</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Supply Chain Management Reports</a></li> <li><a href="#">Grid Order Management</a></li> </ul>

## Employee and Payroll Features




You can enable the following features on the **Employees** subtab of the Enable Features page.






**Important:** To use some of the listed features, you will need SuitePeople provisioned on your account. For more information, see the help topic [SuitePeople Overview](#).

Feature	Description
<b>HR Information System (SuitePeople)</b>	
Compensation Tracking	Track basic wage and salary information for employees directly from the employee record.
Job Management	Create jobs with job descriptions and assign them to employees.
Job Requisitions	Create job requisitions for recruiting, associate requisitions with jobs, and track status through the hiring process.
Time-Off Management	Define and manage time-off plans according to company policies and assign them to employees based on location, department, class, or subsidiary.
Effective Dating	Make changes to the employee record that are back-dated or future-dated to a specific date.
Termination Reason Tracking	Specify various termination details on the employee record. If the Workforce Analytics feature is also enabled, you can see a high level snapshot and synopsis of the employees who are leaving your company and the reasons why they are leaving on the Turnover Analysis page (Reports > Employees/HR).
Basic Government-Issued ID Tracking	Track a variety of government-issued identification information about your employees. You can enable either Basic or Advanced Government-Issued ID Tracking features, but not both.
Advanced Government-Issued ID Tracking	Create, edit, and delete your own custom types of government-issued identification to match your company's employee identification policies. You can enable either Basic or Advanced Government-Issued ID Tracking features, but not both.
Workforce Analytics	Measure and analyze company headcount, hiring, and turnover trends. To access the Turnover Analysis page, from Reports > Employees/HR the <b>Termination Reason Tracking</b> box must also be checked.




Feature	Description
<b>Performance Management (SuitePeople)</b>	
Kudos	Enable your employees to give social-based recognition to each other for accomplishments, achievements, and milestones.
<b>Payroll</b>	
Payroll	<p>Pay your employees through the NetSuite Payroll Service. Calculate wages, deductions, and liabilities, and always have the latest tax data. This feature supports U.S. payroll only.</p> <div>  <b>Note:</b> Enabling this feature creates the system-generated Payroll Adjustments account. </div>
Service Printed Check and Stubs	Use your payroll service provider to print check stubs.
Paycheck Journal	Allow Web services integrations with external payroll systems and building of custom payroll solutions with SuiteScript. This feature supports payroll solutions in any country, and for non-U.S. subsidiaries in OneWorld accounts.
<b>Time &amp; Expenses</b>	
Expense Reports	<p>Track employee expenses and turn them into bills.</p> <div>  <b>Note:</b> Enabling this feature creates the system-generated Unapproved Expense Reports, Advances Paid, and Accounts Payable accounts. </div>
Approval Routing	<p>Set up an approval hierarchy required to process expense reports and purchase requests.</p> <p>If this feature is not enabled, each expense report or purchase request is automatically routed to the employee's immediate supervisor and then to accounting.</p> <p>When this feature is enabled, after an employee enters an expense report or purchase request, additional processing of the transaction depends on the employee's expense limit or purchase limit, the employee's designated supervisor or approver, and the approval limit of the supervisor or approver.</p>
Per-Employee Billing Rates	<p>Check this box to create billing classes that set billable time rates when different employees charge different rates for the same service.</p> <p>If you associate a billing class with an employee and set rates for the billing class on a service item, the proper rate defaults to bill the customer on time tracking transactions.</p>
Billing Rate Cards	Define different rates for groups of billing classes.
Purchase Requests	Allow employees to enter purchase requests online.
Time Tracking	<p>Let employees record the hours they work.</p> <div>  <b>Warning:</b> The following capabilities are not available to NetSuite CRM+ users. Other users may be able to: </div> <ul style="list-style-type: none"> <li>Record billable hours and invoice customers for them.</li> <li>Record time for payroll items.</li> </ul>
Weekly Timesheets	Track employee time with a customizable weekly timesheet.


Feature	Description
	 <b>Important:</b> Time Tracking is required to use Weekly Timesheets.
New Weekly Timesheets Interface	<p>Enable an updated user interface for your company's weekly timesheet. The updated interface includes column headings, fixed time entry columns, and a memo popup window for each entry.</p>  <b>Important:</b> Time Tracking and Weekly Timesheets are required to use the New Weekly Timesheets Interface.
Time Tracking for CRM	<p>Track time associated with cases, tasks, and events. When this option is enabled, a Time subtab is available on case, task, and event records.</p>
<b>Commissions</b>	
Employee Commissions	<p>Create schedules that calculate commissions for sales representatives and their managers and pay commissions when they are earned.</p>  <b>Note:</b> Enabling this feature creates the system-generated Commissions Payable account.
Commission on Custom Fields	<p>Create custom transaction column fields for use as the commission basis on commission schedules. Custom transaction column fields must be of currency type and can be based on any standard or custom currency amount field.</p>
<b>Permissions</b>	
Global Permissions	<p>Enable the assigning of permissions directly to employees as well as to roles. When this feature is enabled, a Global Permissions subtab is available on the Access subtab of each employee record.</p>
Advanced Employee Permissions	<p>Check this box to customize or create NetSuite roles to use one or a combination of new employee permissions introduced with this feature.</p>  <b>Important:</b> Before enabling this feature, review <a href="#">Advanced Employee Permissions Best Practices</a> .

## CRM and SFA Features

You can enable the following features on the **CRM** subtab of the Enable Features page.

Feature	Description
<b>Basic Features</b>	
Customer Relationship Management	Manage all your business relationships with lists of contacts, companies, events, and tasks.
Sales Force Automation	Use SFA to manage your sales process.
Customer Support and Service	Track, route, and manage customer support request.
Marketing Automation	<p>Create targeted marketing campaigns and customize your email communications.</p> <p>You must agree to the NetSuite Marketing Application Terms of Service before you can enable this feature. To agree to the terms, click Terms of Service. Read the terms, check the box at the bottom of the page and click Close Window.</p>

Feature	Description
Related SuiteApps	For more information, see the help topic <a href="#">Creating Email Campaigns Using the Campaign Assistant</a> .
<ul style="list-style-type: none"> <li>■ Campaign Assistant</li> </ul>	
<b>Sales</b>	
Opportunities	Create opportunity records you can use to track sales opportunities.
	<div>  <b>Note:</b> Enabling this feature creates the system-generated Opportunities account.         </div>
Lead Conversion	<p>Convert leads to prospects, contacts, opportunities, and tasks. Before you begin using the Lead Conversion feature, you should do the following:</p> <ul style="list-style-type: none"> <li>■ Set the Default Lead Type preference to Individual at Setup &gt; Company &gt; General Preferences.</li> <li>■ Set the Preferred Lead Form preference to Standard Lead Form at Setup &gt; Sales &gt; Sales Preferences.</li> </ul>
Advanced Forecasting	Manage your sales forecast as three different amounts—worst case, most likely, and upside.
Team Selling	Assign sales teams to transactions and customers. Team Selling lets you calculate split commission for multiple sales representatives on a transaction.
Historical Metrics	Track historical pipeline and forecast KPIs for the company and for each representative. Historical forecast and pipeline amounts can be used for comparison KPIs.
<b>Support</b>	
Email Case Capture	Forward your support email to NetSuite. Then, when a message is received by NetSuite, a case is automatically created using information from the email message.
Automated Case Escalation	Set up rules and assignments that determine when a case is escalated
Issue Management	Use issue records to track problems with products that need resolution outside of the support team.
Knowledge Base	Create a searchable database for FAQs, support cases and more.
Help Desk	Track internal support cases submitted by employees separately from support cases submitted by customers.
<b>Marketing</b>	
Online Forms	Add forms to your existing Web store or site to provide new leads and customer service.
Mail Merge	<p>Create and manage fax, email, letter, and PDF documents you create for those you do business with.</p> <p>You must agree to the NetSuite Marketing Application Terms of Service before you can enable this feature. To agree to the terms, click <a href="#">Terms of Service</a>. Read the terms, check the box at the bottom of the page and click <a href="#">Close Window</a>.</p>
CRM Template Categories	<p>Categorize your email and campaign templates.</p> <p>You can create new categories at Documents &gt; Templates &gt; Template Categories &gt; New.</p>
Capture Email Replies	Track all replies to email that was originally sent from NetSuite.

Feature	Description
	For example, if a support representative responds to a case record by email and the customer replies to the email, the response is automatically saved on the case record as well.
Subscription Categories	Categorize campaigns into different subscriptions. This allows message recipients to subscribe to some kinds of campaigns and unsubscribe from others.
Upsell Manager	Use the search capabilities to match customers with items they are likely to buy.
Sales Campaigns	Sales campaigns allow sales representatives to send email campaigns to their customers and track their responses.
<b>Partners</b>	
Partner Relationship Management	Use records to manage your partners. Track the sales your partners bring in by associating partners with promotion codes or including partner codes in links to online forms. You must enable this feature to enable the Partner Access and Advanced Partner Access features.
Partner Commissions/Royalties	Create schedules that calculate commission for partners and pay commission when it is earned.
<div>  <b>Note:</b> Enabling this feature creates the system-generated Commissions Payable account. </div>	
Multi-Partner Management	Associate more than one partner with each sales transaction.

## Analytics Features


You can enable the following features on the **Analytics** subtab of the Enable Features page.

Feature	Description
<b>Dashboards</b>	
KPI Scorecards	Add the ability to display a portlet on your dashboard that shows the results of multiple KPIs for multiple date or period ranges.
<b>Connectivity</b>	
SuiteAnalytics Connect	Enable the SuiteAnalytics Connect feature to access and query your NetSuite data using SQL through database standards such as ODBC, JDBC, and ADO.NET.
<b>Third-party Analytics Integration</b>	
Export to Tableau® Workbook	Enable users to export saved search and report results as Tableau® workbooks.

## Ecommerce Features

You can enable the following features on the **Web Presence** subtab of the Enable Features page.

Feature	Description
Web Site	



Feature	Description
Web Site	Create a website that provides your customers with information about your company and its goods and services.
Web Store	Run a store that seamlessly integrates with NetSuite accounting. If you check this, you must also check Allow Online Ordering, Operate a Web site and Use Sales Orders.
Advanced Site Customization	Use HTML templates to customize the appearance of your website.
Multiple Web Sites	Create more than one website in your NetSuite account, each with its own branding, look, and feel. Each site can have a separate URL, separate items, and separate shopping carts. In addition, each site can have a different source.
Advanced Web Reports	Gain access to detailed page hits and hosted page reports, customer page reports, keyword, referrer, and new visitor reports.
Advanced Web Search	Use an advanced search form in your website.
Descriptive URLs	Allow tab, category and item pages of your website to use descriptive URL components of your choosing for search engine optimization.  <div>  <b>Note:</b> You can only enable the Descriptive URLs feature if you have set up a domain.  For Site Builder: Setup &gt; Site Builder &gt; Setup Tasks &gt; Set Up Web Site.  For SuiteCommerce Advanced: Setup &gt; SuiteCommerce Advanced&gt; Set Up Web Site. Click <b>Edit</b> next to a website, then click the <b>Domains</b>. </div>
URL Component Aliases	Manage URL components used for facets in your SuiteCommerce Advanced website. Also, track multiple URL component aliases on item and category records. For more information, read the help topic <a href="#">URL Components</a> .
Site Management Tools	When this feature is enabled, the Site Management Tools administrator interface is enabled on your SuiteCommerce Advanced site. This feature lets you manage content, add landing pages, and enhance existing pages on your SCA site. To enable this feature, the SuiteCommerce Advanced feature must also be enabled. For more information on Site Management Tools, see the help topic <a href="#">SMT Overview</a> .
Customizable Checkout Subdomains	Create a customizable checkout subdomain for your site.
Asynchronous afterSubmit Sales Order Processing	When this feature is enabled, afterSubmit user events are triggered asynchronously when a sales order is created during web store checkout. When an afterSubmit user event runs in asynchronous mode, the next page is loaded during the period of time the afterSubmit user event is still processing. Web store Sales Orders process afterSubmit scripts in the background. This is a global setting. This setting causes all afterSubmit user events and workflows triggered by web store checkout to run asynchronously.
Asynchronous afterSubmit Customer Processing	Check this box if you want afterSubmit user events to be triggered asynchronously when a sales order is created during web store checkout.
Web Site Duplicate Email Management	Check this box if you want to prevent shoppers from creating new customer accounts when they have already signed up for an account on your website.
Commerce Categories	Enable commerce categories. Commerce categories let you create a hierarchical structure of categories and subcategories for organizing your items. For more information on commerce categories, see the help topic <a href="#">Commerce Categories</a> .
<b>Publishing</b>	


Feature	Description
Host HTML Files	Upload your HTML website to your NetSuite file cabinet. You can then publish your website as a tab as your Home page or in conjunction with the NetSuite Shopping cart and Checkout tabs. Use NetSuite smart tags in the HTML of your website to pull information directly from your account to display in your website.
External Catalog Site (WSDK)	Use the shopping cart and checkout pages with your Web catalog or Web store. If you check this, you must also check Allow Online Ordering, Use Sales Orders, Operate a Web Site and Operate a Web Store.
Document Publishing	Publish links to your Microsoft® Word, PowerPoint, and other document files in your file cabinet to your intranet or website. When you click this link from your site, the document opens in a separate window for viewing. Enabling Document Publishing adds a Publishing subtab to the records of all files in your file cabinet. If you do not check this box, you can only publish images from your file cabinet to your intranet or website.
Intranet	Create an internal website to publish information for your company.
<b>Access</b>	
Customer Access	Give customers online access to their invoice and payment information.
Online Ordering	Give customers limited access to your account so they can place orders online. If you check this, you must also check Allow Customer Access.
Vendor Access	Give vendors online access to their transaction history and purchase orders.
Partner Access	Give partners online access to view reports, promotions codes and their partner records.
Advanced Partner Access	Assign an Advanced Partner Center role to partners that gives access to more records and transactions than the Standard Partner Center.
<b>SuiteCommerce Real User Monitoring</b>	
SuiteCommerce Real User Monitoring	Enable real user monitoring data collection.

## SuiteCloud Features

You can enable the following features on the **SuiteCloud** subtab of the Enable Features page.

Feature	Description
<b>SuiteBuilder</b>	
Item Options	Create and use item-specific options on purchase and sales transactions.
Custom Records	Use custom records to create a database of information specific to your business. This feature is also required for center and tab customization.
Advanced PDF/HTML Templates	Enable powerful, template-based rendering of selected transactions. The Advanced PDF/HTML Templates feature provides a template-based model for print customization of transaction and entry forms. These HTML-based templates provide greatly expanded customization capabilities over the previously supported transaction form layouts, now known as basic layouts.
<b>SuiteScript</b>	

Feature	Description
Client SuiteScript	Add advanced functionality to your account with industry-standard JavaScript.
Server SuiteScript	Use server-side scripting to customize your business workflows and processes.
SuiteScript Server Pages	Support the creation of SSP applications to use website and other customizations.
<b>SuiteFlow</b>	
SuiteFlow	Enable automation of business processes without custom code.
<b>SuiteGL</b>	
Custom GL Lines	Support plug-ins that allow for GL impact customization.
Custom Transactions	Allow creation of custom transaction types for your business.
Custom Segments	Allow creation of custom segments for your business.
<b>SuiteBundler</b>	
Create Bundles with SuiteBundler	Enable the packaging together of groups of customization objects so they can be shared between NetSuite accounts.
<b>SuiteTalk (Web Services)</b>	
Web Services	Enable the NetSuite web services API. This feature lets you integrate external systems and to migrate data using a standards-based interface.
<b>Manage Authentication</b>	
SuiteSignOn	Enable single sign-on integration in your account. This feature permits you to bypass the authentication step when accessing an integrated third-party application from the NetSuite user interface.
OpenID Single Sign-on	Enable authentication with a Google Account. This feature allows users to link directly to NetSuite from a variety of Google applications, without logging in to NetSuite separately.
SAML Single Sign-on	Enable single sign-on access from external applications to NetSuite, using authentication from a third-party identity provider compliant with SAML v2.0. For more information, see the help topic <a href="#">SAML Single Sign-on</a> .
Token-based Authentication	Enable NetSuite's token-based authentication feature. For more information, see the help topic <a href="#">Token-based Authentication</a> .
<div>  <b>Note:</b> The features Client SuiteScript and Server SuiteScript must also be enabled to use token-based authentication with RESTlets. </div>	
<b>Integration Add-ons</b>	
Telephony Integration	Dial using any TAPI-enabled telephone hardware from any phone number field in the application.
Related SuiteApps	For more information, see the help topic <a href="#">Installing the NetSuite for Outlook SuiteApp</a> .
<div>  Outlook Integration </div>	
<b>SuiteCloud Development Framework</b>	
SuiteCloud Development Framework	Enable SuiteCloud Development Framework (SDF). For more information, see the help topic <a href="#">SuiteCloud Development Framework</a> .

Feature	Description
	<div> <b>Note:</b> The features Client SuiteScript, Server SuiteScript, and SuiteTalk (Web Services) must also be enabled to use SDF.</div>



# NetSuite Company Settings

For information about the various company settings you need to define to set up your NetSuite account, see the following:

- [Configuring Company Information](#)
- [Set Company Preferences](#)
- [Configuring Multiple Languages](#)
- [Enabling and Creating IP Address Rules](#)
- [Renaming Records and Transactions](#)
- [Set Auto-Generated Numbers](#)
- [Setting Up States, Provinces, and Counties](#)
- [Supported Countries](#)
- [Setting Printing and Fax Preferences](#)
- [Setting Email Preferences](#)
- [Setting Up Duplicate Detection](#)
- [Using System Alerts](#)
- [Searching Bulk Processing Jobs](#)
- [Configuring Administrative Notifications](#)
- [Managing Plug-ins](#)
- [SuiteCloud Plus Settings](#)

If you are using NetSuite CRM+, see the following:

- [Setting Up Transactions for NetSuite CRM+](#)
- [The Setup Page for NetSuite CRM+ Users](#)
- [Using Telephony Integration](#)

## Configuring Company Information

The Company Information page is where an administrator, or another user with Set Up Company permission, can enter basic identifying information for an account.

Setting up company information requires View permission, and changes made to company information are captured in system notes. For more information, see [Searching System Notes](#).



**Important:** If you plan to set up a OneWorld account with multiple subsidiaries, the data that you enter on the Company Information page provide the values that NetSuite uses to create your root (top-level) subsidiary. After defining your root subsidiary, you can create additional child subsidiaries at lower levels in an organizational hierarchy. For more information, see [Setting Up OneWorld](#).



**Note:** You can add custom fields and user event scripts to the Company record in both single instance and OneWorld accounts. Customizing the company record enables you to add fields and business logic that are specific to the country or region in which your business operates. Go to Customization > Lists, Records, & Fields > Other Custom Fields. In single instance accounts, select Company as the Record Type. In OneWorld accounts, select Subsidiary as the Record Type. Complete the fields as required and then save the custom field. For more information, see the help topic [Creating a Custom Field](#).

### To enter basic company information:

1. Go to Setup > Company > Company Information.
2. On the Set Up Company page, enter your company information:
  - **Company Name** – Enter your company's name in the format that you want it to appear in on all forms except checks.
  - **Legal Name** – Enter the legal name of your company.
  - **E-Document Country for Free Use** – Select the country where you want to send e-documents to. If the Electronic Invoicing SuiteApp is installed on your account, you can use this SuiteApp to send e-documents to one country for free. To send e-documents to multiple countries, you must purchase a license for Electronic Invoicing. After you send an e-document, you cannot edit this field.
  - **E-Document Sender** – Select the employee whose name and email address you want to appear as the sender of e-documents sent by your company. If you do not select an employee, the name and email address of the user who sent the e-document will be shown as the sender.
  - **Recipient of E-Document Notifications** – Enter the email address of the recipient of email notifications when bulk processes have finished or encountered errors. If you do not enter an email address, the notifications will be sent to account administrators.
  - **Ship to Attention** – Enter the name of the designated contact person for your company as recorded on your UPS account.



**Note:** This field is required for UPS Integration.

- **Company Logo (Forms)** – Select your company logo to show on printed and emailed transaction forms.

To upload a logo, go to Documents > Files > Images > New. Be sure to check the **Available Without Login** box. Logos must be in JPG or GIF file format.

If you have uploaded a logo, but do not see it in the list, make sure that the correct folder is selected in the Company Logo Folder list on the Setup > Company > General Preferences page.



**Note:** To print your logo on standard forms, the logo must be no more than 200 pixels wide and 60 pixels high.

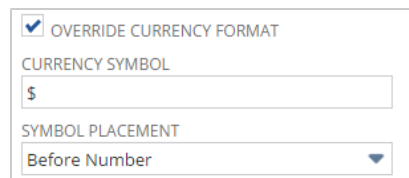
- **Company Logo (Pages)** – Select a company logo to show on the pages of your Customer, Partner, and Vendor Centers.

- **Display Logo Internally** – Check this box to show the logo selected in the Company Logo (Pages) field on all pages of your NetSuite account next to the Oracle | NetSuite logo.
- **Web Site** – Enter the URL of your website.
- **County/State/Province** – Set up counties, states, and provinces. For information, see [Setting Up States, Provinces, and Counties](#).
- **Country** – This field shows the country set for the company. For information, see [Supported Countries](#).
- **Return Email Address** – Enter the return email address used to send email forms and reports from NetSuite.
- **Fax** – Enter an optional fax number for your company.
- **Currency** – (Available when the Multiple Currencies feature is enabled.) Choose a base currency for the company. Choose carefully because after transactions have been entered with the selected base currency, you can no longer edit this field.

To add a currency, go to Lists > Accounting > Currencies > New. For information about working with multiple currencies, see the help topic [Working with Currencies](#). You can format the currency on the currency record.

- **Currency fields** – (Available when the Multiple Currencies feature is **not** enabled.) Use these fields to select a currency and format how currency amounts appear on reports and printed transactions.
  - **Currency Locale** – Select a country to determine the currency for your account. The currency locale specifies the symbol, symbol placement, and thousands separator for currency values.
  - **Format Sample** – This field displays the default currency format for the currency. The currency format is the combination of the symbol, thousands separator, and level of decimal precision to display amounts on transactions.
  - **Override Currency Format** – Check this box to override the default currency format for this currency. If you check the Override Currency Format box, the Currency Local field disappears, and the Currency Symbol and Symbol Placement (Before Number or After Number) fields appear.

Customized currency formats apply to currency fields displayed on the screen including viewing forms, editing and creating new forms, list pages, search results, and printed documents. Customized currency formats are **not** reflected in reports or CSV import and export results.



- **Symbol** – Enter the currency symbol and text that you want to use for this currency. Include spaces if you want to separate the symbol from the currency value. For example, \$ USD or \$USD.
- **Symbol Placement** – Select to place the currency symbol before or after the number.

The Format Sample field shows how currency amounts will display using the customized currency format.

See the help topic [Customizing Currency Formats](#) for more information about currency formats.


- **National business identification number** – (This number varies from country to country. It is usually assigned by a national tax agency.)
  - **Australia - ABN** – Enter your ABN (Australian Business Number), which is required if your company is required to be registered for the goods and services tax (GST). If you do not have an ABN, and you need one, please visit the Australian Taxation Office website at <http://www.ato.gov.au>.
  - **Canada - Business Number** – Enter the 15-digit registration number that identifies your company to the Canada Revenue Agency (CRA). If you do not have a Business Number, visit the CRA website at <http://www.cra-arc.gc.ca/menu-eng.html>.
  - **UK - VAT Registration No.** – Enter your company's VAT registration number. If you do not have a VAT registration number, please visit the HMRC website at <http://www.hmrc.gov.uk>.
  - **US - Employer Identification Number** – Enter your company's U.S. federal employer identification number (EIN). If you do not have an EIN, visit the IRS website at <http://www.irs.treas.gov>.
- **ACN (Australia only)** – Enter your ACN (Australian Company Number). For information about the ACN, see <http://www.asic.gov.au>.
- **SSN or TIN (Social Security Number, Tax ID Number)** – If your business is a proprietorship or you do not have an EIN, enter your SSN or TIN.
- If your account has the EU Mini One Stop Shop feature enabled:
  - **MOSS Applies** – Check this box if the Mini One Stop Shop (MOSS) VAT scheme applies to this company.
  - **MOSS Nexus** – Select the EU member state (tax nexus) where you are registered for MOSS VAT returns.
- **UPS 3rd Party Billing Account Number** – Available when Third Party Billing is enabled on the Preferences subtab at Setup > Accounting > Shipping. Enter the UPS account number that should be used by default when Third Party Billing is selected on a UPS-integrated item fulfillment. This can be your company's master account number that should be used regardless of location.  
 You can override this account number on item fulfillments to enter another 3rd party account.  
 To set a default for customers when billing recipients, enter the customer's UPS or FedEx account number on the customer record.
- **FedEx 3rd Party Billing Account Number** – Available when Third Party Billing is enabled on the Preferences subtab at Setup > Accounting > Shipping. Enter the FedEx account number that should be used by default when Bill Third Party is selected on FedEx-integrated item fulfillments.
- **3rd Party Billing Zip** – Available when Third Party Billing is enabled on the Preferences subtab at Setup > Accounting > Shipping. Enter the zip code or postal code associated with the 3rd party accounts.
- **3rd Party Billing Country** – Available when Third Party Billing is enabled on the Preferences subtab at Setup > Accounting > Shipping. Select the country associated with the 3rd party account numbers.
- **First Fiscal Month** – Select the first month of your fiscal year.
- **Time Zone** – Select the time zone where your company is located. Individuals can set their personal time zones at Home > Set Preferences.
- **Allowed IP Addresses** – Available when the IP Address Rules feature is enabled. Enter the IP addresses from which you want to allow access to your NetSuite account.

For more information, see the help topic [Enabling and Creating IP Address Rules](#).

- **Account ID** – This field shows the NetSuite account ID for your company, which is required when you submit a support case.
- **Customer Center Login** – This field shows the URL for your NetSuite-provided Customer Center login page.
- Check the **GL Impact Locking** box to permit NetSuite to automatically generate journal entries (copy and adjustment) when changes are made to a transaction that posted to the general ledger.

When this box is checked, transactions that post to the general ledger display the GL Impact subtab. This subtab records the general ledger impact of this transaction and any modifications.


You can check and clear this box, as required.

 **Note:** This option is visible in implementations that are not OneWorld and only when the GL Audit Numbering feature is enabled. For more information, see the help topics [Using GL Audit Numbering](#) and [Using GL Impact Locking](#).

### 3. Set up address information.

#### To set up address information:

You can define separate shipping and return addresses, in addition to the main address defined for your company. If you do not define a separate shipping or return address, it defaults to be the same as the main address. You do not need to define a billing address at the company level. Billing addresses can be defined on transactions as needed.

 **Note:** The following steps list the address fields included in the default address form. The address form shown may vary according to the country where the company is located, and depends on the custom address forms defined in your account. For more information, see the help topic [Customizing Address Forms](#).

1. Click the **Addresses** subtab.
2. You can enter address information for your main business, shipping (used for receiving shipments), or receiving returns (used on return forms). To enter address information, click the **Edit** link next to the **Address** field and complete the following:
  - **Country** – Select your company's country.
  - **Attention** – Enter the person at this address who should be notified of receipt of documents or goods.
  - **Addressee** – Enter the company name that will appear on the shipping label.
  - **Phone** – Enter your company's phone number.
  - **Address 1** – Enter your company's address in the format that you want it to appear in on all forms except checks.
  - **Address 2** – Enter an optional second address line in the format that you want it to appear on all forms except checks.
  - **City** – Enter your company's city in the format that you want it to appear in on all forms except checks.
  - **State** – Enter your company's state in the format that you want it to appear in on all forms except checks.
  - **Zip** – Enter your company's postal code in the format that you want it to appear in on all forms except checks.

- **Address** – The address information that you enter in the above fields will automatically appear in this field. Here, you can see how your address will appear on all forms except checks. You can check the **Override** box to edit this formatting.
- 3. To view the address location in Google Maps, click the **Map** link next to the **Address** field.
- 4. Click **Save**.

To update this information at any time, return to Setup > Company > Company Information, make changes, and save your changes.

## Set Company Preferences

An administrator, or another user with the Set Up Company permission, can set company preferences for how information is input and processed in NetSuite, on the General Preferences page.

This page is available at Setup > Company > General Preferences. These preferences apply to all users in the account.

Some of the preferences available here also can be set at the subsidiary (OneWorld only), role, or individual user level. See [NetSuite Preference Levels Overview](#). You can prohibit these types of overrides on the Overriding Preferences subtab of this page. See [Overriding Company Preferences](#).

For information about the General Preferences page, see:

- [Setting General Account Preferences](#)
- [Overriding Company Preferences](#)
- [NetSuite Password Requirements](#)
- [Configuring Multiple Languages](#)
- [Custom Preferences](#)
- [Accounting Contexts](#)



**Important:** You can click the Audit Trail link in this page header to review a list of changes to general company preferences, including the users who made the changes, dates of the changes, and preference values before and after changes. This list includes preferences that have been reset through scripting. See [Auditing Account Preferences](#).

Other company preferences pages are available from the Setup > Accounting, Setup > Sales, and Setup > Marketing menus.

## NetSuite Preference Levels Overview

NetSuite offers a variety of preferences that you can set to tailor NetSuite accounts to your individual needs. These preferences are available at the levels shown in the following table:

Preference Type	Applies To	Set By	Set On	For details, see
User	Current user only	User	Home > Set Preferences page	<a href="#">Setting Personal Preferences</a>
Role	Users logging in with the role	Account Administrator	Role record, Preferences subtab	<a href="#">Setting Role-Based Preferences</a>
Subsidiary (OneWorld only)	Users assigned to the subsidiary	Account Administrator	Subsidiary record, Preferences subtab	<a href="#">Editing Subsidiary Records</a>
Company	All users in the account	Account Administrator	Setup > Company > Preferences > General	<a href="#">Set Company Preferences</a>

Preference Type	Applies To	Set By	Set On	For details, see
			Preferences ( Administrator ) page	


- The preferences that you can set at each level vary according to the edition of NetSuite you are using and the features enabled in your account.
- The same preferences are available at the user and role levels. Some of these preferences are also available at the company and subsidiary levels.
- If a company-level preference is set not to allow overrides, you cannot set this preference at the subsidiary, role, or user levels. See [Overriding Company Preferences](#).
- If the same preference is set at multiple levels, these conflicting preferences are processed in the following order:
  - An individual user preference takes precedence over role, subsidiary, and company preferences.
  - A role-based preference takes precedence over subsidiary and company preferences.
  - A subsidiary-based preference takes precedence over a company preference.
  - A company preference takes precedence over the system default.

## Setting General Account Preferences

### To set up general preferences:




1. Go to Setup > Company > General Preferences.
2. Enter values and select text in preferences fields.
3. Click **Save** when done.

To update or make changes to these preferences at any time, return to Setup > Company > General Preferences, make changes, and click **Save**.

 **Note:** Changes made to general preferences are captured in system notes. For more information, see [Searching System Notes](#).


### General Preferences:



Preference	Setting
Date Format	Select the format for abbreviated dates. By default, users can override this preference at Home > Set Preferences. To prevent this, clear the Allow Overrides box for this preference on the Overriding Preferences subtab. For more information, see <a href="#">Date Formats</a> .
Long Date Format	Select the format for formal dates. By default, users can override this preference at Home > Set Preferences. To prevent this, clear the Allow Overrides box for this preference on the Overriding Preferences subtab. For more information, see <a href="#">Date Formats</a> .
Time Format	Select the format for time entries to display online and in printed forms. By default, users can override this preference at Home > Set Preferences. To prevent this, clear the Allow Overrides box for this preference on the Overriding Preferences subtab.
Number Format	Select the format to display numbers entered on transaction forms and entity forms online. Users can override this preference at Home > Set Preferences. For more information, see <a href="#">Number Formats</a> .


Preference	Setting
Negative Number Format	Select the format to display negative numbers entered on transaction forms and entity forms online. User can override this preference at Home > Set Preferences. For more information, see <a href="#">Number Formats</a> .
Phone Number Format	Select a default phone number format. When users enter phone numbers, they automatically change to this format. The format that you specify here is used on all online forms. By default, users can override this preference at Home > Set Preferences. To prevent this, clear the Allow Overrides box for this preference on the Overriding Preferences subtab.
First Day of Week	Select the day to begin each calendar week. <div>  <b>Note:</b> If you use Weekly Timesheets, updating the selected first day of the week will apply to any new timesheets. Existing timesheets will not be changed. This may result in shorter timesheets to accommodate the change. </div>
Search Sorting	Select the alphabetical order to use when displaying search results. Select Language Specific to use the alphabetical order specific to your NetSuite language settings. Select English (U.S.) to use the U.S. English alphabetical order. By default, users can override this preference at Home > Set Preferences. To prevent overrides, clear the Allow Override box for this preference on the Overriding Preferences subtab.
Add Primary Contact to Bill To Address	Check this box to add the primary contact for each entity to its Bill To address.
Use Last Name First for Employees	Check this box to list employees by last name first for tax and payroll purposes.
Use Last Name First for Entities	Check this box to list all entities (including contacts, customers, partners, and vendors) by last name first for tax and payroll purposes. <div>  <b>Note:</b> This preference applies to entity records defined as Individual (not Company) entered after the preference is set. You will need to do a mass update to set this preference for preexisting entity records. </div>
Pre-Populate Contact Address	Check this box to automatically fill address fields with customer addresses for contacts created from customer record.
Show Employees as Contacts	Check this box to create a contact record for each employee record. <div>  <b>Warning:</b> Be aware that enabling this preference can make changes to employee records visible in the audit trail to users with access to contact records. Do not enable this preference if you do not want users with access to contact records to be able to view employee record changes. </div>
Show Display Name with Item Codes	Check this box to display both item name and display code when an item is selected on transactions and records.
Password Policy	<p>Built-in password policies support three levels of password validation for NetSuite users. These policies enforce the following requirements for password length and content:</p> <ul style="list-style-type: none"> <li>Strong: minimum length of 10 characters, at least 3 of these four character types — uppercase letters, lowercase letters, numbers, non-alphanumeric ASCII characters</li> <li>Medium: minimum length of 8 characters, at least 2 of these four character types — uppercase letters, lowercase letters, numbers, non-alphanumeric ASCII characters</li> <li>Weak (Not Recommended): minimum length of 6 characters</li> </ul>




Preference	Setting
	<p><b>Note:</b> The selected password policy determines the minimum acceptable value for the Minimum Password Length field. The policy does not affect the Password Expiration in Days field value.</p> <p>All NetSuite accounts are set to a Strong policy by default. For more information, see the help topic <a href="#">NetSuite Password Requirements</a>.</p>
Minimum Password Length	<p>The Minimum Password Length is the minimum number of characters required for user passwords. The default value for this field is determined by the selected password policy. Because the default password policy is Strong, the default Minimum Password Length is 10 characters.</p> <p>You can, if desired, make the minimum password length value longer than the minimum required by the policy. You cannot make this value shorter.</p> <p>If any users in your account have the View Unencrypted Credit Cards permission, a Strong policy is required. In these cases, you cannot change the default Password Policy value. Passwords for new users logging in with the Customer Center role, and for website shoppers, require a minimum of 6 characters. Passwords for Customer Center users and website shoppers who existed before that release were not affected by this change. For more information, see the help topic <a href="#">NetSuite Password Requirements</a>.</p>
Password Expiration in Days	<p>Enter the number of days that users can continue to log in to your NetSuite account before they are prompted to change their password.</p> <p><b>Note:</b> As of December 10, 2015, valid values are 1-365. Values entered before that date are not affected by this limit. However, if any data on the General Preferences page is changed, only valid values within this range will be accepted for the Password Expiration in Days field. For accounts provisioned after this date, the value for Password Expiration in Days is set to 180 days by default.</p> <p>Days are calculated from the date that each user last changed their password, not from the date that the company preference is changed. Dates of the previous password change and current password expiration are displayed in the user's My login audit portal.</p> <p><b>Important:</b> It is strongly recommended that you set a value for Password Expiration in Days to ensure that the Password Policy is applied to existing users.</p> <ul style="list-style-type: none"> <li>Employees using a role with the View Unencrypted Credit Card permission are prompted to update passwords at least every 90 days, unless the value set here is less than 90 days.</li> <li>You can enable the Require Password Change on Next Login option on employee records; or you can use CSV import to update this option on many employee records at one time.</li> </ul> <p><b>Note:</b> Passwords for users with a Customer Center role do not expire. That is, the value set in the Password Expiration in Days field is not applied to Customer Center users' passwords.</p> <p>For more information, see the help topic <a href="#">NetSuite Password Requirements</a>.</p>
Idle Session Timeout In Minutes	<p>The number of minutes that a user's NetSuite user interface session can be idle before locking the user's session. The default value is 180 minutes (3 hours). Valid values range from 15 minutes to 720 minutes (12 hours).</p>
Internal Web Site	<p>Select the site from which tabs can be published to the internal centers.</p>
Allow Free-Form States in Addresses	<p>Check this box to allow the entry of free-form text in State/Province fields.</p> <ul style="list-style-type: none"> <li>When this preference is enabled, the State/Province field is a free-form text field. You can type any text into the field, and it is not converted to standard state or province identifiers. The text you enter is stored on the record or transaction.</li> </ul>

Preference	Setting
	<p>■ When this preference is disabled, the State/Province field is a list where you can choose from standard U.S. States and Canadian Provinces. Any text you enter is converted to standard state or province identifiers.</p> <div>  <b>Note:</b> If you enable this preference, you must enter the two-letter abbreviation for the state or province for the system to properly determine the transaction nexus. If you use the full name of the state or province, the system will not be able to determine the correct transaction nexus. </div> <p>This preference affects the State/Province field on entity records, location records and transactions. It also affects the search fields on entity, location, and transaction searches. This preference does not affect Web store address entries or UPS and FedEx shipping. UPS and FedEx look exclusively at the Zip Code and Country fields to determine shipping rates.</p>
Use State Abbreviations in Addresses	Check this box to use the standard abbreviations for states in address fields and labels. If you clear this box, the full name of the state is used.
Company Logo Folder	<p>Select the File Cabinet folder where your company (and for OneWorld accounts, subsidiary) logo is or will be stored.</p> <p>This selection determines the files that are listed in the Company Logo (Forms) and Company Logo (Pages) on the Setup &gt; Company &gt; General Preferences page.</p> <p>In OneWorld accounts, these files are also listed in the Subsidiary Logo (Forms) on the Setup &gt; Company &gt; Subsidiaries &gt; Subsidiary page. The logo selected on the Setup Company Information page is used for the main subsidiary. Logos for other subsidiaries can be set on their Subsidiary pages.</p>
Customer Center Login Page	<p>If you have a custom login page for users with Customer Center roles, select the HTML file for that login page here.</p> <p>For more information, see the help topic <a href="#">Creating Custom Pages for Login to Your NetSuite Account</a>.</p>
Default Role for New Customers	<p>Select the role assigned by default to customers granted NetSuite access.</p> <p>This role displays on the Access subtab when Customer records are edited.</p>
Customer Center Welcome Message	<p>Enter the message to display to users of the Customer Center.</p> <p>When a customer is logged in, this message is followed by the customer's name. When no customer is logged in, it is followed by "Guest".</p>
Show Help Link in Customer Center	<p>Clear this check box to remove the online help link so it is not visible to Customer Center users.</p> <p>By default, this box is checked and the help link is available.</p> <p>This preference does not affect any other centers.</p>
Horizontal Labels	Check this box to display labels to the left of fields on record pages. By default labels appear above fields.
Delay Loading of Sublists	<p>Check this box to delay loading of information on subtabs until they are clicked. Enabling this preference decreases page-load times.</p> <p>By default, users can override this preference at Home &gt; Set Preferences. To prevent this, clear the Allow Override box for this preference on the Overriding Preferences subtab.</p>
Screen Font	<p>By default, the font is Open Sans. Select the default font for text displayed in online pages.</p> <p>By default, users can override this preference on the Appearance subtab at Home &gt; Set Preferences. To prevent this, clear the Allow Overrides box for this preference on the Overriding Preferences subtab.</p>
Landing Page	Select a tab created by a custom Suitelet deployment to be the first page displayed when users log into this NetSuite account. This preference overrides any user-defined landing page preferences for a standard or custom center tab set at Home > Set Preferences. If both this preference and the user landing page preference are unset, the user's Home page is the initial landing page.

Preference	Setting
	<p>The list of available landing pages includes all deployed Suitelets, by their deployment IDs. This list does not include Suitelets that do not have at least one deployment. This preference is intended for use in cases where an initial account setup assistant is displayed for account setup and configuration.</p>
Number of Rows in List Segments	<p>When users look at a long list in NetSuite, the list is divided into segments. Enter the maximum number of records for each segment.</p> <p>For example, if you have 200 customers and you would like them to be displayed in groups of 25 per page, then set the segment size to 25. To see the next set of 25, users can click the Next icon. Click the Previous icon to return to previous segments of the list.</p> <p>By default, users can override this preference at Home &gt; Set Preferences. To prevent this, clear the Allow Override box for this preference on the Overriding Preferences subtab.</p>
Maximum Entries in Dropdowns	<p>Enter the maximum number of records to display in lists. After a list has reached the limit you set here, the list will pop up in a window of its own. The highest number you can enter is 500. If you always want lists to pop up, set the maximum to zero. If you always want lists to be lists, set the maximum to 500.</p> <p>By default, users can override this preference at Home &gt; Set Preferences. To prevent this, clear the Allow Override box for this preference on the Overriding Preferences subtab.</p> <div>  <b>Note:</b> The Case/Task/Event field for time transactions is displayed as a list only if the sum of all company-wide case, task, and event records is less than 5000 and less than the number entered here. Roles that can enter time transactions on behalf of other employees will always have a pop-up field displayed. </div>
Log System Notes on Update Only	<p>When this preference is enabled, system notes are generated only when records are updated, not when they are created. Record creation system notes are not needed because data is available in the newly created record itself.</p> <p>This preference was added in 2012.2. By default, it is enabled in all accounts as of that release or later, and disabled in all accounts that existed before that release.</p> <p>NetSuite recommends that this option be enabled in all accounts, to provide storage savings and performance improvements.</p> <p>Before you enable this option, you should first review any saved searches containing system notes fields, as these searches may use data from record creation system notes. If your account includes searches that rely on record creation system notes, you can either revise the searches before enabling the Log System Notes on Update Only option, or you can leave this option disabled.</p>
Show Quick Add Row on Lists	<p>Check this box to allow quick add on direct editable lists. Quick add allows users to create new records from lists and only add basic information. Users can turn this preference off on individual lists.</p> <p>By default, users can override this preference at Home &gt; Set Preferences. To prevent this, clear the Allow Override box for this preference on the Overriding Preferences subtab.</p>
Show List When Only One Result	<p>Check this box to return search results as a list when there is only one record in results. By default, NetSuite opens the individual record when there is only one record in search results.</p> <div>  <b>Note:</b> When this preference is enabled, NetSuite no longer automatically selects a single result from the suggestion list. </div> <p>By default, users can override this preference at Home &gt; Set Preferences. To prevent this, clear the Allow Override box for this preference on the Overriding Preferences subtab.</p>
Default Customer Type	<p>Choose whether new customers are classified as individuals or companies by default. For companies, company names are used. For individuals, first and last names are used.</p>
Default Lead Type	<p>Choose whether new Leads are classified as individuals or companies by default. For companies, company names are used. For individuals, first and last names are used.</p>

Preference	Setting
Default Vendor Type	Choose whether new vendors are classified as individuals or companies by default. For companies, company names are used. For individuals, first and last names are used.
Default Partner Type	Choose whether new partners are classified as individuals or companies by default. For companies, company names are used. For individuals, first and last names are used.
Auto Name Customers	Check this box to cause the Auto box on customer records to be checked by default, so that the customer ID is copied from the customer name. When the Auto box is not checked, users can enter the ID rather than have it copied from the name.
Auto Inactivate Contacts with Customers	When a customer is made inactive, automatically inactive the customer's contacts.
Show Individuals as Contacts	Check this box to create a contact record for every individual-type customer record.
Hide Attachment Folders	<p>Check this box if you want the default attachment folders to only show in the file cabinet for administrators. All roles will still have access to files that are attached to customers and other records.</p> <p>The following folders are affected:</p> <ul style="list-style-type: none"> <li>■ Attachments Received</li> <li>■ Attachments Sent</li> <li>■ Mail Merge</li> </ul> <p>For more information, read the help topic <a href="#">Hiding Attachment Folders</a>.</p>
Assign Tasks to Partners	<p>Check this box to make it possible for tasks to be assigned to partners.</p> <div>  <b>Note:</b> Before a task can be assigned to a partner, the Assign Tasks box on the Info subtab of the partner's record must be checked. </div>
Email Employee on Approvals	Check this box to automatically send email messages to employees when their supervisors approve their purchase requests, expense reports, and time transactions.
Maintenance Complete Email Notification	Check this box to cause email messages to be sent automatically to all active account administrators when scheduled account maintenance is complete.
Show Reports in Grid	Check this box to display reports in a grid format by default. By default, users can override this preference at Home > Set Preferences. To prevent this, clear the Allow Overrides box for this preference on the Overriding Preferences subtab.
Collapse VSOE Column by Default on Sales Transactions	Check this box to collapse the VSOE column for sales transactions such as sales orders, invoices, and cash sales.
Time Selectors Use Fiscal Calendars Based on First Month	<p>When this box is checked, date range selectors for fiscal elements (for example, this fiscal year) account for the First Fiscal Month setting in Setup &gt; Company &gt; Company Information.</p> <p>When this box is not checked, time selectors strictly reflect definitions for accounting years, quarters, and periods, as defined in the custom Fiscal Calendar.</p> <p>For example, a company has a custom Fiscal Calendar for 2014 aligned with business weeks. The calendar starts on the first Monday of March, which falls on March 3, 2014 and ends on March 1, 2015. The First Fiscal Month is set to March. If the <b>Time Selectors Use Calendars Based on First Month</b> box is checked, the <b>this fiscal year</b> selector returns a date range from March 1, 2014 to February 28, 2015. If the box is not checked, this selector returns a date range of March 3, 2014 to March 1, 2015.</p>

Preference	Setting
Web Site Hosting Files Always Available	<p>This box is checked by default. It affects how files in the Web Site Hosting Files Folder are made available online. This is a global setting that can override the Available Without Login check box setting on individual file records.</p> <ul style="list-style-type: none"> <li>When the box is checked, your settings for the Available Without Login check box on individual files are ignored. Files stored in the Web Site Hosting Files Folder are accessible on any URL listed on the file.</li> <li>When the box is cleared, your settings for the Available Without Login check box on individual files are recognized. You can clear the Available Without Login box on individual files stored in the Web Site Hosting Files folder to make them unavailable on a shopping domain.</li> </ul> <p>For more information, see the help topic <a href="#">Making Web Site Hosting Files Always Available</a>.</p>
Show Transaction Numbering Setup	<p>Check this box to display the Transaction Numbers subtab at Setup &gt; Company &gt; Auto-Generated Numbers.</p> <p>Auto-generated numbers for transaction records are internal numbers that cannot be overwritten. These are unique, gapless numbers that are generated when transaction records are created.</p> <p>Set up of internal transaction numbers requires that this box be checked. By default, this box is not checked.</p> <p>For more information about transaction numbers, see <a href="#">Auto-Generated Transaction Numbers</a>. For details about auto-generated numbering, see <a href="#">Set Auto-Generated Numbers</a>.</p>
Asynchronous Project Plan Recalculation	<p>Check this box to enable your project plans to recalculate in the background when time is tracked against that project.</p> <p>When project plans recalculate asynchronously, you maintain access to NetSuite and your project plans during recalculation.</p> <div style="border: 1px solid #0070C0; padding: 5px; margin: 10px 0;"> <p> <b>Note:</b> Because recalculations are asynchronous, project plan data may be out of date when accessed before the recalculations are complete.</p> </div> <p>When the recalculation is complete, the updated project plan is displayed the next time it is opened. If the recalculation fails for any reason, a warning appears at the top of the project the next time it is opened.</p>
Preferred Subcustomer Form	Select the form to use by default when subcustomers are created.

## Overriding Company Preferences

Some company preferences can be overridden by subsidiary-level preferences (OneWorld only), role-level preferences, and user preferences set by individual employees. You can disallow individual overrides of company preferences on the Overriding Preferences subtab of Setup > Company > General Preferences.

### To prohibit individual overrides of company preferences:

1. Go to Setup > Company > General Preferences.
2. On the **Overriding Preferences** subtab, clear the **Allow Override** box next to the preferences you do not want to be overridden by individual user preferences.
3. Click **Save**.

After you have prohibited an override, individuals cannot set their own preferences. Note that it is not possible to prohibit overrides of company preferences by subsidiary-level or role-level preferences.

A company preference may have been set on one of the preferences pages available from the Setup menu by an administrator or by other users with setup permissions, or may be system-generated.

## Configuring Multiple Languages

If the Multi-Language feature has been enabled in your account:

### System-Supported Languages

- Users can choose from the following system-supported languages to be used for their NetSuite user interface:

<input type="checkbox"/> Chinese (Simplified)	<input type="checkbox"/> Italian
<input type="checkbox"/> Chinese (Traditional)	<input type="checkbox"/> Japanese
<input type="checkbox"/> Czech	<input type="checkbox"/> Korean
<input type="checkbox"/> Danish	<input type="checkbox"/> Portuguese (Brazilian)
<input type="checkbox"/> Dutch	<input type="checkbox"/> Russian
<input type="checkbox"/> English (AU)	<input type="checkbox"/> Spanish
<input type="checkbox"/> English (CA)	<input type="checkbox"/> Spanish (Latin America)
<input type="checkbox"/> English (International)	<input type="checkbox"/> Swedish
<input type="checkbox"/> English (UK)	<input type="checkbox"/> Thai
<input type="checkbox"/> English (U.S.)	<input type="checkbox"/> Turkish
<input type="checkbox"/> French	
<input type="checkbox"/> French (Canada)	
<input type="checkbox"/> German	

These choices are available in user preferences as soon as the Multi-Language feature is enabled. See the help topic [Choosing a Language for Your NetSuite User Interface](#).

- Customers can be allowed to see item names, descriptions, and expense categories in the language selected on the customer's record on printed transaction forms.
  - Only these system-supported languages are supported on printed transaction forms, because NetSuite provides pre-translated strings for general terms.
  - To enable the entry of item translation strings in a specific language, you need to specify that language on the Languages subtab of the General Preferences page, as described in [Enabling the Entry of Translation Strings for a Specific Language](#).
- Website elements can be translated to display in each visitor's language. These elements include website items, saved searches, tabs, categories, email forms, text, and images, and formatted website text.
  - The system-supported languages are supported for website translations. The following languages also are supported for website translations:

<input type="checkbox"/> Afrikaans	<input type="checkbox"/> Estonian	<input type="checkbox"/> Indonesian	<input type="checkbox"/> Romanian
<input type="checkbox"/> Albanian	<input type="checkbox"/> Filipino	<input type="checkbox"/> Kannada	<input type="checkbox"/> Serbian (Cyrillic)
<input type="checkbox"/> Arabic	<input type="checkbox"/> Finnish	<input type="checkbox"/> Latvian	<input type="checkbox"/> Serbian (Latin)
<input type="checkbox"/> Armenian	<input type="checkbox"/> French (Canada)	<input type="checkbox"/> Lithuanian	<input type="checkbox"/> Slovak
<input type="checkbox"/> Bahasa Malay	<input type="checkbox"/> Greek	<input type="checkbox"/> Luxembourgish	<input type="checkbox"/> Slovenian
<input type="checkbox"/> Bengali	<input type="checkbox"/> Gujarati	<input type="checkbox"/> Marathi	<input type="checkbox"/> Tamil

<ul style="list-style-type: none"> <li>■ Bosnian</li> <li>■ Bulgarian</li> <li>■ Croatian</li> </ul>	<ul style="list-style-type: none"> <li>■ Hebrew</li> <li>■ Hindi</li> <li>■ Hungarian</li> <li>■ Icelandic</li> </ul>	<ul style="list-style-type: none"> <li>■ Norwegian</li> <li>■ Persian (Iran)</li> <li>■ Polish</li> <li>■ Punjabi</li> </ul>	<ul style="list-style-type: none"> <li>■ Telugu</li> <li>■ Ukrainian</li> <li>■ Vietnamese</li> </ul>
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- To enable the entry of website translation strings in a specific language, you need to specify that language on the Languages subtab of the General Preferences page, as described in [Enabling the Entry of Translation Strings for a Specific Language](#).

## Enabling the Entry of Translation Strings for a Specific Language

### To enable the entry of translation strings for a specific language:

1. Go to Setup > Company > General Preferences.
2. Click the **Languages** subtab.
3. Select a language that you want to be able to use for translating.

**Note:** Your “base language” does not appear in the list. That is, the language determined by your country when your account was established is not available as a language for translation. For example, if your language base language is Spanish, then you will not see it in the list, but you can see Spanish (Latin America).

4. Click **Add**.
5. Repeat steps 3 and 4 for each language you want available.
6. Click **Save**.

You can now go to Lists > Mass Update > Bulk Update Translation to enter items translations for each of these languages. For more information, see the help topics [Multi-Language Names and Descriptions](#) and [Setting Up a Site for Multiple Languages](#).

## Center Logout Pages

The Centers subtab on the General Preferences page, available at Setup > Company > General Preferences, lists all custom and standard centers available in your account. Each center can have a unique sign out page instead of using the default.

Specify the sign out page to use for each center, as required.

## Custom Preferences

The Custom Preferences subtab on the General Preferences page, available at includes preferences that can be applied as parameters for SuiteScript and SuiteBundler code. If you are not using these features, this subtab may not be available.

For information about how to set up these preferences and how they are used, see the help topic [Creating Script Parameters](#).

## Accounting Contexts

The Accounting Contexts subtab on the General Preferences page at Setup > Company > General Preferences. **is visible by default in OneWorld accounts**. If you do not have a OneWorld account, this subtab is not visible.

An accounting context can be a one-to-one relationship between a country's local GAAP (Generally Accepted Accounting Principles) reporting requirements and a statutory chart of accounts (COA). It can also be a unique relationship that meets your company's specific needs. Accounting contexts are useful when users prefer to work in a local GAAP context, rather than in the consolidated context with one centralized COA. Accounting contexts are also useful if you have Multi-Book Accounting provisioned in your account. You can set an accounting context specific for your secondary book and use it for your secondary book reports.

When one accounting context exists in your system, users can select their preferred accounting context at Home > Set Preferences. When users select an accounting context, all transactions including system-generated transactions post to the defined COA account name and number. For information about user preferences, see the help topic [Setting General Preferences](#).

An administrator or a user with the Set Up Company permission can set up accounting contexts. To set up an accounting context, enter the name and then optionally, select the language in which the account name and number should be translated. Click Add after each defined accounting context. Click Save.

**Note:** The available languages are based on the values defined on the Languages subtab. For information about the Languages subtab, see [Configuring Multiple Languages](#).

When an accounting context exists in your system, the Localization subtab on the account record enables you to enter different account names, languages, and numbers for a single account.

The account name that displays is based on the order of the following conditions:

1. If any line on the Localization subtab represents both the accounting context language **and** the user's preferred language, the account name displays in this language.
2. If there is a line only for the user's preferred language, the account name displays in this language.
3. If there is a line only for the accounting context language, the account name displays in this language.
4. If none of these conditions exist, the account name displays as defined on the account record.

The account number that displays is based on the order of the following conditions:

1. If any line on the Localization subtab represents both the accounting context language **and** the user's preferred language, the account number displays in this language.
2. If this condition does not exist, the account number displays as defined on the account record.

When viewing the detail report associated with a specific summary report, the accounting context defaults to the selection on the summary report and cannot be changed.

On transactions that display the account field, users see the name and number defined in their selected accounting context.

For information about creating an account, see the help topic [Creating Accounts](#). For information about entering account names, languages, and numbers for a single account, see the help topic [Editing an Account](#).

## Use Accounting Contexts in Account Saved Searches

If accounting contexts are defined in your system, you can use the following five columns in the Account saved search, and any saved search where the Account field (Account Fields list) is joined to the saved search:



- Accounting Context
- Language
- Localized Name
- Localized Number
- Localized Legal Name

It is important to note that these five columns contain values for **all** combinations of accounting context and language including combinations where the localized name and localized number are the same for different combinations of accounting contexts and languages. Therefore, if the Multi-Language feature is enabled, best practice is to always specify the combination of both accounting context and language in the search criteria to avoid duplicated results.

## Example

You have the following accounting contexts and languages defined in your system:

- Accounting Contexts: Czech Republic, Germany, and None (None represents the header account name and account number value.)
- Languages: Czech, German, and the system language (The system language is the same as None, which represents the header account name value.)

A user with permission to modify the 1110 Advances Paid account record defines the following rules on the Localization subtab:

- Header Account Name and Number: 1110 Advances Paid
- Legal Name: Legal Name for Advances Paid account
- Accounting Context: Czech Republic, Number: 314, Name: Zalohy
- Language: German, Name: German Name

The following table displays several applicable combinations of searchable data based on these rules for this account:

Accounting Context	Language	Localized Number	Localized Name	Localized Legal Name
null	null	1110	Advances Paid	Legal Name for Advances Paid account
null	Czech	1110	Advances Paid	Legal Name for Advances Paid account
null	German	1110	German Name	Legal Name for Advances Paid account
Czech Republic	null	314	Zalohy	Legal Name for Advances Paid account
Czech Republic	Czech	314	Zalohy	Legal Name for Advances Paid account
Czech Republic	German	314	German Name	Legal Name for Advances Paid account
Germany	null	1110	Advances Paid	Legal Name for Advances Paid account
Germany	Czech	1110	Advances Paid	Legal Name for Advances Paid account
Germany	German	1110	German Name	Legal Name for Advances Paid account

### Search Criteria 1

Your search criteria is Number set to 1110. The results you want to retrieve are Localized Number and Localized Name. This saved search returns several lines and some of them are duplicated because the Accounting Context and Language were not specified.

## Search Criteria 2

Your search criteria is Accounting Context set to Czech Republic, Language set to null, and Localized Number set to 314. The results you want to retrieve are Localized Name and Localized Number.

This saved search returns only one line with Localized Name and Localized Number because the Accounting Context and Language is clearly specified.

**Note:** Users can create saved searches that are not dependent on the values set in User Preferences. For example, if a user creates a saved search where the criterion Name is set to Advances Paid, the search results will return the Advances Paid account if the user's preferences are Language set to English and Accounting Context set to null. If the user's preferences are Language set to English and Accounting Context set to Czech Republic, this save search will not return anything because the account Name is Zalohy.

In contrast, if this user creates a saved search where the criteria Accounting Context is set to null, Language is set to null, Localized Name is set to Advances Paid, the search results will return the Advances Paid account even if the user's preference is Accounting Context set to Czech Republic. This criteria is useful when a controller wants to create a saved search that works for all accountants in local subsidiaries no matter if they have any localization in their NetSuite account.

## Date Formats

You can choose from U.S. or international formats for dates. Choose a format for dates in your account at Setup > Company > General Preferences.

After you have chosen the format for dates, that format appears on reports, forms and data-entry pages.

The table below shows the date formats available and shortcut entry examples for each.

Date Format	Shortcut Entry	Example
DD-Mon-YYYY	DD-Mon-YYYY	14-Feb-2001
	DDMonYYYY	14-Feb-2001
	DD-Mon-YY	14-Feb-1
	DDMonYY	14Feb01
DD.MM.YYYY	DD.MM.YYYY	14.02.2001
	DDMMYYYY	14022001
	DD.MM.YY	14.2.1
	DDMMYY	140201
DD/MM/YYYY	DD/MM/YYYY	14/02/2001
	DDMMYYYY	14022001
	DD/MM/YY	14/2/1
	DDMMYY	140201

Date Format	Shortcut Entry	Example
MM/DD/YYYY	MM/DD/YYYY	02/14/2001
	MMDDYYYY	02142001
	MM/DD/YY	2/14/1
	MMDDYY	021401
If you use an alternate format that does not contain punctuation, you must enter all digits, including leading zeroes, for the month, day and year.		

No matter which date format you choose, you can also click the Pick icon or link next to a date field. When you do, a calendar pops up and you can select a date.

## Number Formats

Set the Number Format and Negative Number Format preferences to determine how numbers display on the screen for transaction forms, entity forms, and search results. These formats also apply to the list pages associated with these forms and fields that can be edited inline.

You can set the number format preferences at the company, subsidiary, and user levels. This enables users to work in NetSuite with familiar number formats customary for their region and prevents errors that result from incorrectly interpreting numbers on the screen.

The Number Format preference provides the following format options for thousands separators and decimal places:

- thousands separator: comma, period, space, reverse comma
- decimal places: comma, period

The screenshot shows the 'General Preferences' dialog box with three buttons at the top: 'Save' (blue), 'Cancel', and 'Reset'. Below the buttons are three dropdown menus: 'Date Format' (set to 'MM/DD/YYYY'), 'Long Date Format' (set to 'Month DD, YYYY'), and 'Time Format' (set to 'hh:mm AM/PM'). The 'Number Format' dropdown menu is open, showing a list of options: '1,000,000.00' (highlighted), '1,000,000.00', '1.000.000,00', '1 000 000.00', '1 000 000,00', '1-000-000.00', and '1-000-000,00'. At the bottom of the dropdown, the word 'Sunday' is partially visible.

Users do not have to key in numbers with separators. Numbers are formatted according to the selected preferences upon tabbing out of a field.

The Negative Number Format preference provides two options to display negative numbers:

- minus sign: -100
- parentheses: (100)

You can set the Number Format and Negative Number Format preferences at the following levels. The default formats are 1,000,000.00 and -100.

- Company - go to Setup > Company > Preferences > General Preferences (Administrator). For instructions, see [Setting General Account Preferences](#).
- Subsidiary - go to Setup > Company > Classifications > Subsidiaries > New (Administrator) For instructions, see [Editing Subsidiary Records](#).
- User - go to Home > Set Preferences. Setting the preferences at the user level affects all roles associated with that user. For instructions, see the help topic [Setting General Preferences](#).

## Key Points for Number Format Preferences

- Number format preferences do not apply to exports, Web services, SuiteScript, and CSV imports.
- Currency format settings apply to amounts on reports and printed transactions.
- Values with a currency symbol, such as €123,45 or \$123.45, render according to the currency format, not the number format preference.
- On the screen, foreign currency amounts render in the format for the currency. Base currency amounts displayed in columns on transactions forms and subtabs follow the number format preferences.
- The user preference setting for number format overrides the subsidiary and company format settings.
- Number format preferences do not apply to custom fields created before 2012.1, unless you explicitly enable the Apply Formatting preference. This preference also enables you to prevent custom fields created after 2012.1 from using number formatting. For details, see the help topic [Setting Display Options for Custom Fields](#).

## Renaming Records and Transactions

You can change the names of your records and transactions from the NetSuite default names to names that fit the terminology of your company on the Rename Records/Transactions page. On this page, you can also change the names of account types used in NetSuite. For screenshots of the different areas of this page, see [Sections of the Rename Records/Transactions Page](#).

By changing the names of your records and transactions, your employees do not have to change their terms to fit NetSuite terms. Instead, NetSuite changes to fit the terms your employees are accustomed to using.

When you change the names of records or transactions, those names change in most places they appear in NetSuite to your preferred term. You can always return to the Rename Records/Transactions page to change them to the default name or to another term.

## Notes on the Rename Records/Transaction Page

Keep the following important details in mind when renaming records or transactions on this page.

- Name changes made in the Rename Records/Transactions page apply to the Language preference you currently have set at Home > Set Preferences only, not to every language. You need to reset your Language preference to each language that your account uses and repeat the renaming process. If you do not rename records and transactions with a language set as the preference, users in your account will continue to see the original Record/Transaction names when they set that language as their preference.
- Field labels for records and transactions on previously created custom forms do not change when you make changes on the Rename Records/Transactions page. You will need to manually edit field labels on custom forms.
- Name changes are applied to standard NetSuite element names (standard records, transactions, and page names), but not to elements you have customized. In the example in step 3 of the following procedure, the standard entity record named “Customer” is renamed “Client”. In this account, you could also have a custom center tab named “Customer”. The name change will not be applied to this custom element.

### To change the names of records or transactions:

1. Go to Setup > Company > Rename Records/Transactions.
2. On the **Rename Records/Transactions** page, the default names for records are autofilled in the fields.
3. In the fields at the top half of the page, edit the names of relationship records to better suit your company.  
For example, in the **Name for Customer** field, you can change **Customer** to **Client**.
4. Click the **Transaction Names** subtab.
  - In the **Name** column, you can rename your transactions. For example, in the **Name** column of the **Cash Sale** row, you can change **Cash Sale** to **Sales Receipt**.
  - In the **Abbreviation** column, change the abbreviation of these transactions to match the new name. For example, in the **Cash Sale** row, change **RCPT** to **SALERCPT**.

Transaction abbreviations often show in lists of transactions, such as the **Transactions** subtab on relationship records, in the audit trail and on registers.
5. Click the **Account Type Names** subtab.  
In the **Name** column, you can change the names of your accounts in NetSuite.
6. When you have finished renaming records, transactions, and accounts, click **Save**.
7. If different languages are used in your account, go to Home > Set Preferences, change your **Language** preference to another language used in your account, and repeat steps 1-6.
8. Continue this process for each language used in your account, until you have completed renaming in each language.

Your record, transaction, and account names are now renamed everywhere in NetSuite to your new name. Return to Setup > Company > Rename Records/Transactions to edit these names.

## Sections of the Rename Records/Transactions Page

The Setup > Company > Rename Records/Transactions page includes the following sections:

- [Body \(Record Names\)](#)
- [Transaction Names Subtab](#)
- [Account Type Names](#)

## Body (Record Names)

In the body of the Rename Records/Transactions page, you can change the names of standard NetSuite non-transactional record types.

**Rename Records/Transactions**

Save Cancel Reset

NAME FOR CUSTOMER *	NAME FOR PROSPECT *	NAME FOR PHONE CALL *
Customer	Prospect	Phone Call
NAME FOR VENDOR *	NAME FOR PARTNER *	NAME FOR PROJECT *
Vendor	Partner	Project
NAME FOR LOCATION *	NAME FOR CASE *	NAME FOR PROJECT TEMPLATE *
Location	Case	Project Template
NAME FOR CLASS *	NAME FOR ISSUE *	NAME FOR PROJECT TASK *
Class	Issue	Project Task
NAME FOR OTHER NAME *	NAME FOR EVENT *	NAME FOR RESOURCE ALLOCATION *
Other Name	Event	Resource Allocation
NAME FOR COMPANY *	NAME FOR TASK *	NAME FOR GENERIC RESOURCE *
Company	Task	Generic Resource
NAME FOR LEAD *		
Lead		

## Transaction Names Subtab

On the Transaction Names subtab of the Rename Records/Transactions page, you can change the names and abbreviations of standard NetSuite transaction types.

Transaction Names • Account Type Names •		
TYPE ▲	NAME	ABBREVIATION
Assembly Build	Assembly Build	BUILD
Assembly Unbuild	Assembly Unbuild	UNBUILD
Bill	Bill	BILL
Bill Credit	Bill Credit	BILLCRED
Bill Payment	Bill Payment	BILLPMT
Bin Putaway Worksheet	Bin Putaway Worksheet	BINWKSHT
Bin Transfer	Bin Transfer	BINTRNFR
Blanket Purchase Order	Blanket Purchase Order	BLANKORD
Ccard Refund	Ccard Refund	CC CRED
Cash Refund	Cash Refund	RETURN
Cash Sale	Cash Sale	RCPT
Check	Check	CHK

## Account Type Names

On the Account Type Names subtab of the Rename Records/Transactions page, you can change the names of standard NetSuite account types.

Transaction Names • Account Type Names •	
Move To Top	Move To Bottom
TYPE	NAME
:: Bank	MyBank
:: Other Current Asset	Other Current Asset
:: Fixed Asset	Fixed Asset
:: Other Asset	Other Asset
:: Accounts Payable	Accounts Payable
:: Credit Card	Credit Card
:: Other Current Liability	Other Current Liability
:: Long Term Liability	Long Term Liability
:: Equity	Equity
:: Income	Income

To manage the list, you can change the order of the account type names by selecting a line and clicking Move To Top or Move To Bottom. However, the order of the list on this subtab has no effect on account type lists seen by users.

## Set Auto-Generated Numbers

The Set Up Auto-Generated Numbers page enables you to choose the record types that should be automatically numbered in the order in which they are created. On this page you can also add prefixes and suffixes to auto-generated numbers. Prefixes and suffixes are useful in determining a record, transaction, or document's type and estimated age at a glance.

For example, you may choose to enable auto-generated numbering for the customer record type in your account and prefix the number with CUST. Each time you add a new customer record, the record number increases sequentially by one. When you view your customer list, you can quickly see that CUST0025 is a newer customer than CUST0004.

When you set a record type to have auto-generated numbers, the number replaces the name that was stored in the Company Name field. Record numbers cannot be reverted back to names after auto-generated numbering has been enabled and the records have been updated.



**Note:** Auto-generated numbers are always enabled for transaction record types and document types.



**Important:** Internal IDs are assigned to records to assist with parallel processing. This means that an internal ID assigned to a new record can be significantly higher in value than the second highest number.

Internal IDs do not indicate when a record was created even though assignment of internal IDs to new records is sequential.

- [Overwrite Entity and CRM Record Type Numbers](#)
- [Auto-Generated Document Numbers](#)
- [Auto-Generated Transaction Numbers](#)
- [Reset Initial Transaction and Document Numbering Sequences](#)
- [Reporting](#)
- [Setting Up Auto-Generated Numbering](#)

## Overwrite Entity and CRM Record Type Numbers

For some entity and CRM record types, you can enable the Allow Override option to permit users to manually enter numbers other than the auto-generated numbers. Be aware that overwriting these record type numbers permits users to create duplicate numbers or numbering gaps. Use this feature with caution.

After a manual override in a number sequence, the next auto-generated number follows the higher number in the series.

- For example, the most recently created record has an auto-generated number of 53. Someone creates a record and manually assigns it number 05. The next record created is automatically assigned number 54.

- For example, if customer record number 101 is overwritten and set to 1001, auto-generated numbers begins at 1002.


Additionally, when a record number is manually overwritten with a higher value, auto-generated numbers begins at the next sequential number. Use this feature with caution.


## Auto-Generated Document Numbers


Auto-generated numbers for document types are external numbers such as the number for a vendor bill, or account based numbers such as a check number. Document numbers can also be type based, which store a document number for type based transactions. Type based numbers are available as custom columns in searches and lists.

When a document type has the Allow Override option enabled, users can unintentionally introduce duplicated document numbers and numbering gaps into your account. To prevent duplicated document type numbers and numbering gaps, you can customize transaction type records to display the Generate TranID on Save box. When this box is checked, NetSuite records the document number when the user saves the transaction record, rather than when the user opens the transaction record. This ensures that the document number is unique for the document type, as if the Allow Override option was not enabled. To display the Generate TranID on Save box on transaction type records and on standard reports, go to Customization > Forms > Transaction Forms. Locate the transaction type to be customized and then click the Customize link next to the transaction name. Click the Screen Fields subtab. In the Label column, locate Generate TranID on Save, check the Show box and then save the record.

If the Allow Override option is enabled for a specific document type and the Generate TranID on Save box is not visible in the user interface, NetSuite records the document number when the user opens the transaction record. This permits multiple instances of the same transaction record being assigned the same TranID value. For example, User One opens a transaction record assigned TranID 100. Before User One saves the transaction record, User Two opens a second instance of the same transaction record, which is assigned the same TranID 100.

 **Note:** If you attempt to save a record that has a duplicate TranID, NetSuite presents an error message. You can cancel the message and save the duplicated number.

 **Important:** For external numbering sequences such as vendor bill, the document number is unique for each vendor, which permits the same document number being assigned to more than one vendor. NetSuite prevents a vendor from having a duplicated document number on the same transaction type. This applies to all four external transaction types whether recorded through the user interface or through a CSV import: Bill (Vendor Bill), Bill Credit (Vendor Credit), Credit Card Charge (Customer Credit Card), and Credit Card Refund (CCard Refund).

 **Warning:** Updating document numbers irreversibly modifies all of the document numbers on historical transactions.

## Auto-Generated Transaction Numbers

Auto-generated numbers for transaction records are internal, gapless numbers that cannot be overwritten and are generated when the record is saved. These internal numbers are generated for each transaction type.



The Transaction Numbers subtab, formerly named Transactions subtab, at Setup > Company > Auto-Generated Numbers is not visible by default. If you must configure transaction type options, you can display the Transaction Numbers subtab. Go to Setup > Company > General Preferences and check the Show Transaction Numbering Setup box.



**Important:** If your account is new to NetSuite as of 2016.1, default prefixes are automatically assigned to each transaction type. The default prefix is the internal system name for the transaction type. For example, the default prefix for the Bill transaction type is VENDBILL. You can modify the default prefix to suit your unique requirements. You can also delete the default prefix.

Some of the configuration options specified on the former Transactions subtab now appear on the new Transaction Numbers subtab. This occurs for account-based and externally generated numbered transactions because these configuration options modified both document number and transaction number sequences. Account-based and externally generated transactions include the following:

- Bill (Vendor Bill), Externally generated
- Bill Credit (Vendor Credit), Externally generated
- Bill Payment (Vendor Payment), Account-based
- Check, Account-based
- Credit Card Charge (Customer Credit Card), Externally generated
- Credit Card Refund (CCard Refund), Externally generated
- Customer Refund, Account-based
- Paycheck, Account-based
- Paycheck Journal, Regular
- Payroll Liability Check, Account-based
- Sales Tax Payment (Tax Payment), Account-based
- Tax Liability Cheque (Tax Liability), Account-based

Configuration options specified for transaction types other than account-based or externally generated numbers were copied to the Document Numbers subtab. You can reconfigure options on the Document Numbers subtab, as required.

If you do not have auto-generated numbering set up in your account, document type numbers are configured for the beginning number, which is set to 1.

By default, internal transaction numbers do not display on transaction type records or standard reports, but you can customize any transaction type record to display this number. To display internal transaction numbers on transaction records, go to Customization > Forms > Transaction Forms. Locate the transaction type to be customized and then click the Customize link next to the transaction name. Click the Screen Fields subtab. In the Label column, locate Transaction Number, check the Show box and then save the record. For information about customizing transaction forms, see the help topic [Custom Forms](#).

Internal transaction numbers are searchable when the number is hidden or visible on the user interface.

Successful CSV transaction imports are numbered according to the internal transaction numbering sequence at the time of the import.

Copied transactions are numbered according to the internal transaction numbering sequence at the time of the import.



**Important:** In the former Transactions subtab, NetSuite permitted overwriting the internal number of transaction records where the Allow Override option was enabled for the transaction type. In these historical transactions, there may be duplicate internal numbering. In the new Transaction Numbers subtab, NetSuite prohibits overwriting transaction type numbering sequences, instead permitting the overwriting of document numbers. NetSuite does not renumber historical internal transaction numbers.

## Reset Initial Transaction and Document Numbering Sequences

In some countries, resetting an initial transaction number each fiscal year is a legal requirement. Users with the Administrator role can reset the initial record number for both transaction type numbers and document type numbers.

Be aware that resetting the initial number permits duplicate numbering in your account. In addition, if you reset the initial document number during the update of an existing transaction type record, the document number on that transaction record is not updated. Use this feature with caution. Ensure that you understand the risks associated with resetting transaction type and document type numbering sequences.

## Reporting

Auto-generated numbering is tracked by the Transaction Numbering Audit Log. For more information, see [Transaction Numbering Audit Log](#).

By default, transaction lists display only the **Document Number** field in searches and reporting. If you plan to include the **Transaction Number** field, be aware that this value is different from the value in the **Document Number** field for the following transaction types.

- \* Bill (Vendor Bill), Externally generated
- \* Bill Credit (Vendor Credit), Externally generated
- \* Bill Payment (Vendor Payment), Account-based
- \* Check, Account-based
- \* Credit Card Charge (Customer Credit Card), Externally generated
- \* Credit Card Refund (CCard Refund), Externally generated
- \* Customer Refund, Account-based
- \* Paycheck, Account-based
- \* Paycheck Journal, Regular
- \* Payroll Liability Check, Account-based
- \* Sales Tax Payment (Tax Payment), Account-based
- \* Tax Liability Cheque (Tax Liability), Account-based

For all other transaction types these two values are the same.

## Setting Up Auto-Generated Numbering

Use the steps below to set up auto-generated numbering for Entities, CRM records, and Schedules. These steps also help you configure transaction type numbers and document type numbers.

**Note:** Multi-Book Accounting has no impact on transaction numbering.

### To set up auto-generated numbering:

1. Go to Setup > Company > Auto-Generated Numbers.
2. On the **Entities**, **CRM**, and **Schedules** subtabs, check the **Enable** box for each record type you want automatically numbered from least recent to most recent.
3. For subrecords, check the **Within Parent Group** box to attach the subrecord number to the parent record number.
4. In the **Prefix** column, enter any letters or numbers that you want to appear in front of every record number of this type.

For example, you may want to have every customer record begin with **CUST** for quick identifying in a list.

Entities • Document Numbers • Transaction Numbers • CRM • Schedules •											
ENABLE	WITHIN PARENT GROUP	TYPE	PREFIX	SUFFIX	MINIMUM DIGITS	INITIAL NUMBER	CURRENT NUMBER	ALLOW OVERRIDE	UPDATE		
<input checked="" type="checkbox"/>		Customer	CUST		4	1		<input type="checkbox"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Subcustomer	U.S.					<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>		Job						<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>		Employee						<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>		Partner						<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>	Subpartner						<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>		Vendor						<input type="checkbox"/>	<input type="checkbox"/>		

5. In the **Suffix** column, enter any letters or numbers you want to appear after every record number of that type.
6. In the **Minimum Digits** column, enter the lowest number of digits you want in your auto-generated numbering code. Valid values for this field range from 0–20.  
For example, if you enter **4**, your first record is 0001.
7. In the **Initial Number** column, enter the number you want your first numbered record to be.

**Note:** Changing the initial number for an entity record type, CRM record type, or schedule record type sets the next number in the series of auto-generated numbered records. It does not change the numbering scheme.

On document type numbers and transaction type numbers, users with the Administrator role can reset the initial number. Check the **Update Initial Number** box to enable the **Initial Number** field for editing, then enter the new initial number.

**Warning:** Resetting the initial number permits duplicate numbering in your account. In addition, if you reset the initial document number during the update of an existing transaction type record, the document number on that transaction record is not updated.

8. For document type numbers, check the **Use Subsidiary** box to use the document prefix for numbering that is specified on the subsidiary record.

For transaction type numbers, check the **Use Subsidiary** box to use the transaction prefix for numbering that is specified on the subsidiary record.

Edit or create prefixes for each subsidiary at Setup > Company > Subsidiaries > New > List or Setup > Company > Subsidiaries > New.

**Note:** NetSuite uses the document or transaction prefix for numbering **only** if it is specified on the subsidiary record.

Entities •	Document Numbers •	Transaction Numbers •	CRM •	Schedules •										
TYPE #	PREFIX	SUFFIX	MINIMUM DIGITS	UPDATE INITIAL NUMBER	INITIAL NUMBER	USE SUBSIDIARY	USE LOCATION	CURRENT NUMBER	ALLOW OVERRIDE	UPDATE				
BASIC CUSTOM				<input type="checkbox"/>	1000	<input type="checkbox"/>	<input type="checkbox"/>	1000	<input type="checkbox"/>	<input type="checkbox"/>				
Cash Refund				<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>				
Cash Sale	CASH		6	<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1	<input type="checkbox"/>	<input type="checkbox"/>				
Commission				<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>				

**Note:** The **Use Subsidiary** column appears only in NetSuite OneWorld accounts.

9. For document type numbers, check the **Use Location** box to use the document prefix for numbering that is specified on the location record.

For transaction type numbers, check the **Use Location** box to use the transaction prefix for numbering that is specified on the location record.

Edit or create prefixes for each location at Setup > Company > Locations > New > List or Setup > Company > Locations > New.

**Note:** NetSuite uses the document or transaction prefix for numbering **ONLY** if it is specified on the location record.

10. On the **Entities**, **Document Numbers**, and **CRM** subtabs, check the **Allow Override** box to be able to enter your own name or number on records.

Checking this box clears the **Auto** box on records.


If you do not check this box, you cannot edit the numbers on records that serve as the record name.


The following document number types cannot be overwritten:


- Bill (Vendor Bill), Externally referenced
- Bill Credit (Vendor Credit), Externally referenced
- Bill Payment (Vendor Payment), Account-based
- Check, Account-based
- Credit Card Charge (Customer Credit Card), Externally referenced
- Credit Card Refund (CCard Refund), Externally referenced
- Customer Refund, Account-based
- Paycheck, Account-based
- Payroll Liability Check, Account-based
- Sales Tax Payment (Tax Payment), Account-based
- Tax Liability Cheque (Tax Liability), Account-based


11. Check the **Update** box to assign a number to all existing records of that type, starting with the next available number or the number you enter in the **Initial Number** column, whichever is higher.

When your existing records are numbered, the former name moves to the **Company Name** field on that record. If the **Company Name** field is already filled, the former name displays next to the new number.


 **Warning:** Updating document numbers irreversibly modifies all of the document numbers on historical transactions.

 **Important:** The **Update** column is used to auto-generate numbers for records that have not been previously numbered. If you change the initial number for a record type and then check the **Update** box, auto-generated numbering assigns the new number to the next record created but does not renumber existing records.

 **Note:** On existing employee records that are numbered, the former name moves to the **First Name**, **Middle Initial**, and **Last Name** fields.


 **Note:** On document type numbers and transaction type numbers, the **Update** box is disabled if you have checked the **Use Location** box or the **Use Subsidiary** box.

12. Click **Save**.

 **Important:** The **Reset** button clears unsaved data entered on the form or record in the current browser window. It does not reset auto-generated numbers and it does not impact data that has been saved to the database. The **Reset** button does not refresh the record to display data saved on the record since you first loaded the page. For more information, see the help topic [Using Buttons in NetSuite](#).

## Records and Transactions Available for Auto-Numbering

All record, document type, and transaction type numbers are tracked in the Transaction Numbering Audit Log.

 **Note:** Multi-Book Accounting has no impact on transaction numbering.

## Entities

On the Entities subtab, you can replace the names of the following record types with numbers:

Customer	Subcustomer
Project	Employee
Partner	Subpartner
Vendor	

## Document Numbers



**Important:** For existing customers, configuration options specified on the Transactions subtab prior to 2015.2 were copied to the new Document Numbers subtab. You can reconfigure options on the Document Numbers subtab, as required. If the Transaction Numbers subtab is visible, you can configure options there, as required. To make the Transaction Numbers subtab visible, go to Setup > Company > General Preferences. Check the Show Transaction Numbering Setup box and then save your change.

For new customers, document type numbers are not configured, except for the beginning number, which is set to 1.

Some document types listed on the Document Numbers subtab may not be available if the related features are not enabled in your account.

Auto-generated numbers for document types are external numbers such as the number for a vendor bill, or account based numbers such as a check number. Document numbers can also be type based, which store a document number for type based transactions. Type based numbers are available as custom columns in searches and lists.

When a document type has the Allow Override option enabled, users can unintentionally introduce duplicated document numbers and numbering gaps into your account. To prevent duplicated document type numbers and numbering gaps, you can customize transaction type records to display the Generate TranID on Save check box. When this box is checked, NetSuite records the document number when the user saves the transaction record, rather than when the user opens the transaction record. This ensures that the document number is unique for the document type, as if the Allow Override option was not enabled. To display the Generate TranID on Save box on transaction type records and on standard reports, go to Customization > Forms > Transaction Forms. Locate the transaction type to be customized and then click the Customize link next to the transaction name. Click the Screen Fields subtab. In the Label column, locate Generate TranID on Save, check the Show box and then save the record.

If the Allow Override option is enabled for a specific document type and the Generate TranID on Save box is not visible in the user interface, NetSuite records the document number when the user opens the transaction record. This permits multiple instances of the same transaction record being assigned the same TranID value. For example, User One opens a transaction record assigned TranID 100. Before User One saves the transaction record, User Two opens a second instance of the same transaction record, which is assigned the same TranID 100.



**Important:** For external numbering sequences such as vendor bill, the document number is unique for each vendor, which permits the same document number being assigned to more than one vendor. NetSuite prevents a vendor from having a duplicated document number on the same transaction type. This applies to all four external transaction types whether recorded through the user interface or through a CSV import: Bill (Vendor Bill), Bill Credit (Vendor Credit), Credit Card Charge (Customer Credit Card), and Credit Card Refund (CCard Refund).



**Warning:** Updating document numbers irreversibly modifies all of the document numbers on historical transactions.

You can place letters in front of or after the numbers of the following document types:

Assembly Build	Assembly Unbuild
Bin Putaway Worksheet	Bin Transfer
Blanket Purchase Order	Cash Refund

Cash Sale	Commission
Credit Memo	Currency Revaluation
Custom	Customer Deposit
Deposit	Deposit Application
Estimate	Expense Report
Finance Charge	Inventory Adjustment
 <b>Note:</b> This numbering sequence is shared with Invoice.	
Inventory Cost Revaluation	Inventory Count
Inventory Distribution	Inventory Transfer
Inventory Worksheet	Invoice
 <b>Note:</b> This numbering sequence is shared with Finance Charge.	
Item Fulfillment	Item Receipt
Journal	Opportunity
Paycheck Journal	Payment (Customer)
Payroll Adjustment (Year-to-Date)	Purchase Contract
Purchase Order	Request For Quote
Requisition	Return Authorization
Revenue Commitment	Revenue Commitment Reversal
Revenue Contract	Sales Order
Statement Charge	Store Pickup Fulfillment
Tegata Payable	Tegata Receivable
Transfer	Transfer Order
Vendor Request For Quote	Vendor Return Authorization
Work Order	Work Order Close
Work Order Completion	Work Order Issue

## Transaction Numbers

Some transaction types listed on the Transaction Numbers subtab may not be available if the related features are not enabled in your account.

Auto-generated numbers for transaction records are internal, gapless numbers that cannot be overwritten and are generated when the record is saved. These internal numbers are generated for each transaction type.

The Transaction Numbers subtab, formerly named Transactions subtab, at Setup > Company > Auto-Generated Numbers is invisible by default. If you must configure transaction type options, you can

display the Transaction Numbers subtab. Go to Setup > Company > General Preferences and check the Show Transaction Numbering Setup box.

Some of the configuration options specified on the former Transactions subtab now appear on the new Transaction Numbers subtab. This occurs for account-based and externally generated numbered transactions because these configuration options modified both document number and transaction number sequences. Account-based and externally generated transactions include the following:

- Bill (Vendor Bill), Externally generated
- Bill Credit (Vendor Credit), Externally generated
- Bill Payment (Vendor Payment), Account-based
- Check, Account-based
- Credit Card Charge (Customer Credit Card), Externally generated
- Credit Card Refund (CCard Refund), Externally generated
- Customer Refund, Account-based
- Paycheck, Account-based
- Paycheck Journal, Regular
- Payroll Liability Check, Account-based
- Sales Tax Payment (Tax Payment), Account-based
- Tax Liability Cheque (Tax Liability), Account-based

Configuration options specified for transaction types other than account-based or externally generated numbers were copied to the Document Numbers subtab. You can reconfigure options on the Document Numbers subtab, as required.

If you do not have auto-generated numbering set up in your account, document type numbers are configured for the beginning number, which is set to 1.

By default, internal transaction numbers do not display on transaction type records or standard reports, but you can customize any transaction type record to display this number. To display internal transaction numbers on transaction records, go to Customization > Forms > Transaction Forms. Locate the transaction type to be customized and then click the Customize link next to the transaction name. Click the Screen Fields subtab. In the Label column, locate Transaction Number, check the Show box and then save the record. For information about customizing transaction forms, see the help topic [Custom Forms](#).

Internal transaction numbers are searchable when the number is hidden or visible on the user interface.

Successful CSV transaction imports are numbered according to the internal transaction numbering sequence at the time the import.

Copied transactions are numbered according to the internal transaction numbering sequence at the time of the import.



**Important:** In the former Transactions subtab, NetSuite permitted overwriting the internal number of transaction records where the Allow Override option was enabled for the transaction type. In these historical transactions, there may be duplicate internal numbering. In the new Transaction Numbers subtab, NetSuite prohibits overwriting transaction type numbering sequences, instead permitting the overwriting of document numbers. NetSuite does not renumber historical internal transaction numbers.

If the Use Deletion Reason feature is enabled in your account, users must provide a reason for deleting transaction type records. For more information about the feature, see [Recording a Reason for Deleting a Transaction](#).



You can place letters in front of or after the numbers of the following transaction types:

Assembly Build	Assembly Unbuild
Bill (Vendor Bill)	Bill Credit (Vendor Credit)
Bill Payment (Vendor Payment)	Bin Putaway Worksheet
Bin Transfer	Blanket Purchase Order
CCard Refund (Credit Card Refund)	Cash Refund
Cash Sale	Check
Commission	Credit Card (Customer Credit Card Charge)
Credit Memo	Currency Revaluation
Custom	Customer Deposit
Customer Refund	Deposit
Deposit Application	Estimate
Expense Report	Finance Charge
<div>  <b>Note:</b> This numbering sequence is shared with Invoice.         </div>	
Fixed Asset Accrual	Inventory Adjustment
Inventory Cost Revaluation	Inventory Count
Inventory Distribution	Inventory Transfer
Inventory Worksheet	Invoice
<div>  <b>Note:</b> This numbering sequence is shared with Finance Charge.         </div>	
Item Fulfillment	Item Receipt
Journal	Opportunity
Paycheck	Paycheck Journal
Payment (Customer)	Payroll Adjustment (Year-to-Date)
Payroll Liability Check	Purchase Contract
Purchase Order	Request For Quote
Requisition	Return Authorization
Revenue Commitment	Revenue Commitment Reversal
Revenue Contract	Sales Order
Sales Tax Payment (Tax Payment)	Statement Charge
Store Pickup Fulfillment	Tax Liability Cheque (Tax Liability)
Tegata Payable	Tegata Receivable
Transfer	Transfer Order
Vendor Request For Quote	Vendor Return Authorization

Work Order	Work Order Close
Work Order Completion	Work Order Issue

Account-based transaction types such as Check, where the numbering sequence is dependent upon a particular account, and transaction types where the numbers are used for external reference such as Vendor Bill, display an additional read-only, auto-generated number in the Transaction Number field.

The following list provides the transaction types where the numbering sequences are either account-based or externally referenced:

- Bill (Vendor Bill), Externally referenced
- Bill Credit (Vendor Credit), Externally referenced
- Bill Payment (Vendor Payment), Account-based
- Check, Account-based
- Credit Card Charge (Customer Credit Card), Externally referenced
- Credit Card Refund (CCard Refund), Externally referenced
- Customer Refund, Account-based
- Paycheck, Account-based
- Payroll Liability Check, Account-based
- Sales Tax Payment (Tax Payment), Account-based
- Tax Liability Cheque (Tax Liability), Account-based

**Note:** The **Transaction Number** field is visible by default on standard NetSuite forms and not visible by default on customized forms. You can, however, customize a form to display this field.

By default, transaction lists display only the **Number** field in searches and reporting. If you plan to include the new **Transaction Number** field, be aware that this value is different from the value in the **Number** field for the account-based and externally referenced transaction types listed above. For all other transaction types, these two values will be the same.

**Important:** If you copy an externally referenced transaction such as Vendor Bill, the reference number is not copied. This is to avoid duplicate numbers in the system.

**Warning:** You cannot auto-generate numbers for journals if you enable the Always Allow Per-line Classifications on Journals preference.

## CRM

On the CRM subtab, you can replace the names of the following records with numbers:

Campaign	Issue
Solution	Support Case

## Schedules

On the Schedules subtab, you can replace the names of the following records with numbers:

Amortization Schedule	Revenue Recognition Schedule
-----------------------	------------------------------

## Transaction Numbering Audit Log

The Transaction Numbering Audit Log provides a complete list of every internal transaction number including the numbers that were assigned to transactions that have been deleted or failed to be created. Transactions such as these include cash sales that fail due to problems with credit card processing. For more information about internal transaction numbers, see [Auto-Generated Transaction Numbers](#).

Administrators and other users with the Lists type permission **Access to transaction numbering audit log** can view this audit log at Transactions > Management > Transaction Numbering Audit Log.

This audit log includes the transaction type, number, date and time the transaction number was assigned, and the creator of the transaction. The subsidiary and location for the transactions display if you base your auto-generated numbering on those criteria.

If a transaction is deleted, the date and time it was deleted and the person who deleted it are listed. If a transaction failed to be created, the reason displays in the Message column.

If the Use Deletion Reason feature is enabled in your account, the log also provides the reason a user deleted a transaction record, and any related memo. For more information about the feature, see [Recording a Reason for Deleting a Transaction](#).

## Setting Up States, Provinces, and Counties

At Setup > Company > States/Provinces/Counties, you can:

- View lists of system-provided states and provinces for supported countries
- Add and edit custom states, provinces, and counties
- Set up lists of custom states, provinces, and counties for supported countries
- Print lists of states, provinces, and counties available for use in NetSuite records

To view a list of available states, provinces, and counties, expand the Filters and select a country from the Country list. Only countries with lists of system-provided or custom (or both) states, provinces, or counties are available for selection.

**States/Provinces/Counties**

New

**FILTERS**

Country

- United States
- Australia
- Canada
- China
- Japan
- Mexico
- United Kingdom (GB)
- United States


STATE	SHORT NAME
Alabama	AL
Alaska	AK
Arizona	AZ
Arkansas	AR
Armed Forces Americas	AA
Armed Forces Europe	AE
Armed Forces Pacific	AP

System names do not have an **Edit** link, because system states and provinces are not editable. Custom states, provinces, and counties that you have added do have an Edit link. You can click an Edit link to make changes.

To add a state, province, or county to be used on NetSuite records, click the New button. On the New State/Province/County page, select a country from the list, enter a full name and a short name (abbreviation) for the state, province, or county you want to add, and click Save.

To print a list of states, provinces, and counties for a country, select the country from the list and click the Print button.

You can set up lists for supported countries that do not have system-provided states, provinces, and counties.

 **Note:** For information about working with state values in web services, see the help topic [Setting State Values in Web Services](#).

### To set up a list of states, provinces, and counties for a supported country:

1. Go to Setup > Company > States/Provinces/Counties > New.
2. On the New State/Province/County page, select the country, and enter a full name and a short name (abbreviation) for the state, province, or county you want to add.
3. Click **Save**. The States/Provinces/Counties refreshes with the new list you created.  
You can now select the country and view its list. Click the **Edit** link next to the state, province, or county to make changes.
4. Repeat Steps 2–3 to add more custom states, provinces, and counties.

## Supported Countries

At Setup > Company > Countries, you can:

- View a list of countries available for use in NetSuite records
- Click the Print button to print the list of supported countries
- Click a country name link to review its address template and the script used to start mapping programs when users click Map links next to addresses on NetSuite pages.
- Click an Edit link for a country to modify its address template or mapping program script. (if you have associated permissions)

If you are referencing countries in your customizations and integrations built on the SuiteCloud Platform, be aware of the following:

- Web services integrations reference countries using country enumerations that are specific to SuiteTalk web services. For a list of these enumerations, see the help topic [Country Enumerations](#).
- CSV imports reference countries using country names, or labels, as listed in [Country Names for CSV Import](#).
- SuiteScripts generally reference countries using ISO country codes, which are not maintained by NetSuite. Some SuiteScript APIs may also reference country names.
- SuiteAnalytics Connect integrations reference countries using ISO country codes.

## Setting Printing and Fax Preferences

The Printing & Fax Preferences page is where you set up preferences for printing forms, and set up the fax service. Preferences set on these pages affect all users in your NetSuite account.

**Note:** Use the Web Site Setup page to set preferences for sending email from your website. For more information, see the help topic [Web Site Email Preferences](#).

## Printing and Fax Preferences

You must register with eFax® or Faxaway® to use NetSuite for faxing. Visit [www.efax.com](http://www.efax.com) or [www.faxaway.com](http://www.faxaway.com) to register before setting your fax preferences.

### To set your printing and faxing preferences:

1. Go to Setup > Company > Printing & Fax Preferences.
2. Click the name of each subtab to view instructions for setting printing and fax preferences.
  - Printing
  - Fax



## Printing

### General

Field	Description
Save Toner When Printing	Check the Save Toner When Printing box to choose a form style that saves ink or toner.

## Transactions

Field	Description
Customers Default to Print Transactions	Check the Customers Default to Transactions box as appropriate on the Print subtab. Default to deliver customer transactions by printing, by email, by fax, or by a combination of the three. The delivery preferences you define will default on all new customer records you create. Later, you can change the settings on individual customer records as needed by checking or clearing the appropriate boxes.
Vendors Default to Print Transactions	Check the Vendors Default to Transactions box as appropriate on the Print subtab. Default to deliver vendor transactions by printing, by email, by fax, or by a combination of the three. The delivery preferences you define will default on all new vendor records you create. Later, you can change the settings on individual vendor records as needed by checking or clearing the appropriate boxes.
Print Return Form with Packing Slip	Check the Print Return Form with Packing Slip box to print a return form every time you print a packing slip.
Print Remittance Form With Invoices & Statements	Check the Print Remittance Form With Invoices & Statements box to include a remittance form on invoices and statements. The remittance form details payment information the customer needs to make a payment, including the invoice number and statement amount due, the name to make checks payable to and the address to mail the payment to.
Print Transaction Forms Landscape	Check the Print Transaction Forms Landscape box to print transaction forms in landscape format.


Field	Description
	 <b>Note:</b> To utilize this preference, you must use a standard transaction PDF layout. Use either a standard transaction form with a standard transaction PDF layout or use a custom transaction form associated with a standard PDF layout.
Print Separate Voucher for Bill Payments	Remittance information for payments against many bills may not fit on a single check voucher. In such a case, you can print a separate voucher page that includes all of the remittance advice. Then, you can send this expanded voucher page to the vendor along with the check. When you print a separate voucher, no bills are listed on the voucher part of the check. The actual check voucher indicates that the remittance advice is on a separate page.
Print Accounts on Vouchers	Check the Print Accounts on Vouchers box to print the name of the account used on checks.
Print Discount and Shipping Lines in Columns	Check the Print Discount and Shipping Lines in Columns box to show discount and shipping items with descriptions as line-items in transaction columns. If you clear this box, the footer of the transaction shows only a shipping-item name and the total shipping and handling cost.
Print Business Number on Forms	Check the Print Business Number on Forms box if you want your Federal ID or EIN printed in the header of your transaction forms.
Use Location Address on Forms	Check the Use Location Address on Forms box if you want to print the address and logo of the location identified in the body of a transaction.
	 <b>Note:</b> This does not apply to locations identified by line-items on transactions.  The address and logo for each location is identified on the location record. This preference does not apply to printing statements.

## Advanced PDF/HTML Printing

By default the preferred transaction PDF basic layout or transaction HTML basic layout is used to format printed item detail statements, item labels, and mailing labels. If the Advanced PDF/HTML Templates feature is enabled in your account, you can use an advanced template instead. For information about advanced printing, see the help topic [Advanced PDF/HTML Templates](#). For information about transaction layouts, see the help topic [Customizing Transaction Form PDF Layouts](#).

Field	Description
Use for Item Detail Statements	Check to use the preferred advanced template to format printed item detail statements.
Use for Item Labels	Check to use the preferred advanced template to format printed item labels.
Use for Mailing Labels	Check to use the preferred advanced template to format printed mailing labels.


## Check Printing

 **Note:** These preferences do not affect the position of layout elements on the check form.

Field	Description
Default Check Type	In the Default Check Type field, select the type of checks you use:

Field	Description
	<ul style="list-style-type: none"> <li>■ Select <b>Standard</b> for checks printed without a voucher, three to an 8.5 by 11-inch sheet.</li> <li>■ Select <b>Voucher</b> for checks printed at the top of an 8.5 by 11-inch sheet, with voucher information printed on a bottom stub.</li> </ul> <p>One check prints per sheet.</p>
Font	In the Font field, select the type font to use when printing checks. Print checks at Transactions > Management > Print Checks and Forms.
Font Size	In the Font Size field, enter the font size to use when printing checks.

## PDFs

 **Note:** To set preferences on reports (such as fonts and format) to generate PDFs, see the help topic [Reporting Preferences on the Set Preferences Page](#).

Field	Description
Use Logo Image DPI When Printing	Check the Use Logo Image DPI When Printing box to print logos in PDFs at a higher resolution for clarity.
Logo Scaling Factor	In the Logo Scaling Factor field, enter a number to control the size of a logo when printing a PDF. For example, enter <b>1</b> to size it at 100% and <b>0.8</b> to size it at 80%.
Add Extra Space Between Items	Check the Add Extra Space Between Items box if you want to add space between line items on PDF transactions. This space is added only to line items and is in addition to your selected line spacing settings.
Line Spacing	In the Line Spacing field, select how you want the lines on your PDF forms to be spaced. This does not affect HTML forms.
Extend Columns to Bottom of Page	Check the Extend Columns to Bottom of Page box if you want columns on PDF forms to extend to the bottom of the page, whether or not there is an entire page of data within the column. Totals are shown directly beneath the last line of data. If you do not turn on this preference, data on the form is totaled at the bottom of the page.
Form Size Measurements	Select whether you want to enter measurements for PDF layout elements in Imperial (English) or metric units.

## Template Folders

Field	Description
Letter	In the Letter field, select the file cabinet folder you want to store your letter templates in by default. This field appears only if you have enabled the Mail Merge feature.
PDF	In the PDF field, select the file cabinet folder you want to store your PDF templates in by default. This field appears only if you have enabled the Mail Merge feature.

## Messages

Field	Description
Sales Form Disclaimer	Enter a disclaimer to appear at the bottom of your sales forms. Some examples of sales forms include invoices, sales orders and credit memos.
Purchase Form Disclaimer	Enter a disclaimer to appear at the bottom of your purchase orders.
Statement Disclaimer	Enter a disclaimer to appear at the bottom of your customer statements.
Payment Receipt Disclaimer	Enter a disclaimer to appear at the bottom of payment receipts.
Packing Slip Message	Enter a message to appear at the bottom of your packing slips.
Return Policy	Enter your return policy to appear on return forms.
Remittance Slip Message	Enter a message to appear at the bottom of your remittance slips.

## Fax

You must register with eFax® or Faxaway® to use NetSuite for faxing. Visit [www.efax.com](http://www.efax.com) or [www.faxaway.com](http://www.faxaway.com) to register before setting your fax preferences.

**Note:** Free eFax accounts do not function with NetSuite. To use eFax with NetSuite, you must set up a pay account with eFax.

Field	Description
Customers Default to Fax Transactions	Check the Customers Default to Transactions box as appropriate on the Fax subtab. Default to deliver customer transactions by printing, by email, by fax, or by a combination of the three. The delivery preferences you define will default on all new customer records you create. Later, you can change the settings on individual customer records as needed by checking or clearing the appropriate boxes.
Vendors Default to Fax Transactions	Check the Vendors Default to Transactions box as appropriate on the Fax subtab. Default to deliver vendor transactions by printing, by email, by fax, or by a combination of the three. The delivery preferences you define will default on all new vendor records you create. Later, you can change the settings on individual vendor records as needed by checking or clearing the appropriate boxes.
Send Faxes Using	After you have registered for a fax service, select the fax service you have registered with.
Registered Email Address	Enter the email address you used to set up your fax service.
Mode	Select standard or fine as the quality of your fax. This only applies if you registered with eFax.
Send Cover Page	Check this box to send a cover page with your fax. This only applies if you registered with eFax.
Send Confirmation Email	Check this box to receive an e-mail message containing a copy of the fax you sent.
Fax Template Folder	Select the file cabinet folder you want to store your fax templates in by default.
Prepend a '1' to Number When Sending a Fax	To add a 1 to the beginning of a fax number when dialing, check this box.



## Setting Email Preferences

The Email Preferences page is where you set up global email preferences for your company. Preferences set on these pages affect all users in your NetSuite account.

**Note:** Use the Set Up Web Site page to set preferences for sending email from your website. For more information, see the help topic [Web Site Email Preferences](#).

### To set your email preferences:


1. Go to Setup > Company > Email > Email Preferences.
2. Complete the required fields as detailed in the following sections.
3. Click **Save**.

### General

Field	Description
Global BCC List (Separate Addresses with Commas)	In this field, list email addresses to which you want to send blind copies of outbound email messages, including emailed transaction forms, individually sent email, email merges, campaign email, and system response email. Separate multiple addresses with commas. To enter BCC email addresses intended for outbound messages from the Web store, see the help topic <a href="#">Web Site Email Preferences</a> .
Global Footer	In this field, enter text to be included at the bottom of each outbound email message, other than transactions, including emailed transaction forms, individually sent email, email merges, campaign email, and system response email. This text can meet legal requirements and serve as a disclaimer. <div> <p><b>Note:</b> This email uses HTML based on your setting in the <b>Email Using HTML</b> field at Home &gt; Set Preferences on the Transactions subtab under Printing.</p> <p>To enter content intended for outbound messages from the Web store, see the help topic <a href="#">Web Site Email Preferences</a>.</p> </div>
Default Mail Merge Domain	Select the campaign email domain you want selected by default on your email and templates. A campaign domain is required if you send more than 10,000 bulk email per month. You can create new campaign email domains. For Site Builder, go to Setup > Site Builder > Setup Tasks > Set Up Web Site or for SuiteCommerce Advanced, go to Setup > SuiteCommerce Advanced > Set Up Web Site. Click the Domains subtab.
Enable Email Alerts for WS and CSV Imports	To improve performance and avoid unnecessary email, by default, saved search email alerts are not sent for updates made by CSV imports or web services integrations. Check this box to cause email alerts to be sent for CSV imports and Web services integrations.
Remove Email Addresses From Bounced Email Address list After	Select the number of days delay before email addresses that returned a bounce message are removed from the Bounced Email Address list. Email addresses on this list are not sent email from NetSuite during this period. This includes all types of email, including individual and bulk email messages through mail merge or marketing campaigns.

### Transactions

Click the **Transactions** subtab to set email preferences for your transactions.

Field	Description
Customers Default to Email Transactions	Check this box to deliver customer transactions by printing, by email, by fax, or by a combination of the three. The delivery preferences you define default on all new customer records you create. Later, you can change the settings on individual customer records as needed by checking or clearing the appropriate boxes.
Vendors Default to Email Transactions	Check this box to deliver vendor transactions by printing, by email, by fax, or by a combination of the three. The delivery preferences you define default on all new vendor records you create. Later, you can change the settings on individual vendor records as needed by checking or clearing the appropriate boxes.
Send to all Administrators	<p>Check this box to send every employee with the Administrator role a copy of each transaction form emailed to customers or vendors.</p> <p>Security-sensitive emails are always sent to the actual owner of the email address. For example, password reset emails do not obey preferences that override routing rules (such as the Send to all Administrators preference).</p> <p>Examples of security-sensitive emails include:</p> <ul style="list-style-type: none"> <li>■ Reset Password</li> <li>■ Change Password</li> <li>■ Change Email Address</li> <li>■ Security Questions (Setup or Update)</li> <li>■ Two-Factor Authentication Setup</li> <li>■ One-Time Password</li> </ul>
CC (Separate Addresses with Commas)	<p>In this field, list email addresses to which you want to send copies of emailed transaction forms.</p> <p>Separate multiple addresses with commas or semicolons.</p> <p>You can email copies of forms to all Administrators, all Administrators and those you specify in the CC field, or only those you specify in the CC field.</p>
From Address for Emailed Forms	<p>In this field, select the email address to show in the From field of email you send with NetSuite:</p> <ul style="list-style-type: none"> <li>■ <b>Company Return Email Address</b> – Email is sent from the address you enter in the Return Email Address field at Setup &gt; Company &gt; Company Information</li> <li>■ <b>Subsidiary Return Email Address</b> – Email forms generated in NetSuite are sent using the email address defined in the Return Email Address field at Setup &gt; Company &gt; Classifications &gt; Subsidiaries. This option is useful when you have many subsidiaries and you send forms to your customers and vendors using email. You can use this setting to be certain that customers or vendors reply using an email address from the appropriate subsidiary and the information is delivered where it belongs.</li> </ul> <div style="border: 1px solid #0070C0; padding: 5px; margin: 10px 0;"> <p> <b>Note:</b> This option is available only in NetSuite OneWorld accounts.</p> </div> <ul style="list-style-type: none"> <li>■ <b>User Email Address</b> – Email is sent from the address you enter in the From Email Address field at Home &gt; Set Preferences. If you do not enter an email address here, email is sent from your login email address.</li> </ul>
Use Popup for Main Transaction Email Button	<p>Check this box if you want to view and modify the email you send when you click the <b>Email</b> button from a transaction.</p> <p>With this preference enabled, when you click the <b>Email</b> button on a transaction, an email form opens, allowing you to modify the recipients and email text.</p> <p>If this preference is disabled, when you click the <b>Email</b> button on a transaction, the transaction email is sent immediately.</p>

## Templates

Click the **Templates** subtab to set preferences for your email templates.

Field	Description
Template Folder	In this field, select the file cabinet folder you want to store your mail templates in by default.
User Access Email Template	In this field, select the template to use when notifying an employee that they have been given access to your account. To create additional templates to go in this dropdown list, go to Setup > Company > Email > Email System Templates, then click <b>New Template</b> .
Customer Center Email Template	In this field, select the template to use when notifying customers that they have been given access to the Customer Center. To create additional templates to go in this dropdown list, go to Setup > Company > Email > System Email Templates and click <b>New Template</b> .
Partner Center Email Template	In this field, select the template to use when notifying partners that they have been given access to the Partner Center or Advanced Partner Center. To create additional templates to go in this dropdown list, go to Setup > Company > Email > System Email Templates, then click <b>New Template</b> .
Webstore Template Folder	Select which file cabinet folder to store templates used by the Web store for outbound email messages.

## Domain Keys

By setting up your domain keys, DKIM headers are applied to outgoing email messages sent from your NetSuite account. This code header contains domain key information to authenticate the email with the receiving server but does not add any text to your messages.

For information on Domain Keys, see the help topic [DomainKeys Identified Mail \(DKIM\)](#).

Field	Description
Email Address to Receive Test Response	In this field, enter the email address where you want the results of the <b>Send Test Email to DKIM Reflector</b> to be sent. By default, the field contains the return email address found on the Company Information page.
Domain Selector	In this field, enter where the public key is located in the DNS entry of the domain. Do not include the <code>._domainkey</code> suffix that you include when setting up your domain with your domain provider. This is the same domain selector you enter when setting up the domain with your domain provider. For example, if you are using GoDaddy.com for your domain hosting, enter the TXT name you entered as the Host in the TXT (Text) section of the Total DNS Control Panel.
Domain Name	In this field, enter the domain name where the public key is stored.
Active	Check this box if the selected domain key is active. Inactive keys are ignored by NetSuite when sending email.
Private Key	In this field, enter the private domain keys used for signing in one of the following ways: <ul style="list-style-type: none"> <li>Enter them manually.</li> <li>Click the <b>Generate Key Pair</b> button to have NetSuite generate it for you.</li> </ul>
Public Key	In this field, enter the public domain keys used for signing in one of the following ways: <ul style="list-style-type: none"> <li>Enter them manually.</li> <li>Click the <b>Generate Key Pair</b> button to have NetSuite generate it for you.</li> </ul>

Field	Description
Generate Key Pair	Click this button to generate your domain keys. After you click this button, the Private Key and Public Key fields display your generated keys.
Generated DNS Entry	After generating or entering your domain keys, click this button to display the complete DNS entry for your domain. You can paste this DNS entry into the domain settings with your domain provider.
Verify DNS Entry	Click this button to verify the presence of your public key in DNS. The results are shown in a popup window. For information, see the help topic <a href="#">DKIM Setup Verification</a> .
Send Test Email to DKIM Reflector	Click this button for a more extensive test of your DKIM setup. NetSuite generates and email using your domain, and sends it to the DKIM reflector. A report is sent to the address shown in the <b>Email Address to Receive Test Response</b> field. For information, see the help topic <a href="#">DKIM Setup Verification</a> .

## SMTP Server Settings

Click the **SMTP Server Settings** tab to set preferences for the routing of email messages from your SMTP server.

Field	Description
Email Address for Notification	In this field, enter the email address used to receive notifications about 3rd party SMTP failures.
Interval Between Notifications (Minutes)	In this field, enter the shortest time 3rd party SMTP failure notifications can be sent after each other. The default interval is 30 minutes.

## Sandbox and Release Preview Email Preferences

Click the **Sandbox and Release Preview Email Preferences** tab to set preferences for the routing of email messages from your sandbox and release preview accounts.



**Important:** NetSuite recommends choosing the **Send Email To** option for both the Sandbox and Release Preview accounts.

There are exceptions to the email routing rules you specify. Security-sensitive emails will be always sent to the actual owner of the email address. For example, password reset emails do not obey preferences that override routing rules.

Examples of security-sensitive emails include:

- Reset Password
- Change Password
- Change Email Address
- Security Questions (Setup or Update)
- Two-Factor Authentication Setup
- One-Time Password

Sandbox and Release Preview

SANDBOX OPTIONS

☒ SEND EMAIL TO (SEPARATE ADDRESSES WITH COMMAS)

☐ SEND EMAIL TO LOGGED IN USER  
☐ DO NOT SEND EMAILS

RELEASE PREVIEW OPTIONS

☒ SEND EMAIL TO (SEPARATE ADDRESSES WITH COMMAS)

☐ SEND EMAIL TO LOGGED IN USER  
☐ DO NOT SEND EMAILS

Option	Description
Send Email To (NetSuite recommends this option.)	<p>Choose this option to ensure email messages are delivered to specific addresses.</p> <ul style="list-style-type: none"> <li>Enter the email address or email addresses to which to deliver email messages. Separate each email address entered with a comma.</li> <li>Choose this option when testing your web store in your Sandbox or in your Release Preview accounts. This option ensures web store generated email messages are routed to the desired recipient.</li> </ul>
Send Email to Logged In User	<p>Choose this option to route email messages to the user logged in to the NetSuite UI. If you select this option, be aware of the following behaviors:</p> <ul style="list-style-type: none"> <li>Email messages initiated by an error in a scheduled script follow the notification settings in the script record.</li> <li>Email messages generated from web stores will not be sent to the user logged in to the NetSuite UI. For example, an order notification email message would be sent to the shopper's email address, not the logged in user's email address. To prevent this, choose the <b>Send Email To</b> option instead.</li> </ul>
Do Not Send Emails	Choose this option if you do not want any email messages sent.

## Third Party SMTP Configuration for Bulk Email

You can choose to set up a third party SMTP server for sending bulk email. This setup permits you to use your own infrastructure and maintain control over all aspects of your outgoing bulk email communications from NetSuite. Supported message types include:

- Marketing campaigns
- Bulk merges
- Sales campaigns

When the validation process is successful, the system automatically checks the **Validated for Bulk** box.

**Note:** After a server has been validated for bulk and is active, it will appear as an option in the **Default SMTP for Bulk** field in **Email Preferences**, see Setup > Company > Email > Email Preferences.

For information about spam, see [Email Spam Guidelines](#).

## Email Spam Guidelines

Email campaigns can only be successful if the intended recipients receive the email. There are several best practices that can help you ensure that email is not marked as spam. For more information, see the following:

- [Email Best Practices](#)
- [Optimizing Email Campaigns](#)
- [Creating DMARC-compliant messaging in NetSuite](#)
- [DomainKeys Identified Mail \(DKIM\)](#)


You can also improve your domain's reputation as a non-spammer by preventing spam on both incoming and outgoing mail. Some sources of spam messages going out are a result of spam messages coming in. Therefore, preventing bad emails from coming in will also prevent you from sending out spam.

Consider the case capture address that you have set up. If you have a dedicated custom case capture address, you can perform some spam filtering using an external spam filter service. Bots can get case capture email addresses and send spam messages to those email addresses.

These spam messages can result in your domain being blacklisted by major mail providers because of the volume of email being sent out. For more information about case capture email addresses, see [Updates for Email Case Capture](#).

For example, set up a branded case capture address such as [support@cases.mycompany.com](mailto:support@cases.mycompany.com). Modify your MX DNS record for cases.mycompany.com to redirect all email traffic for this domain to your spam filter service provider. Filtered, clean traffic is sent to your SMTP server as configured on the spam filter side. Your server then redirects the branded capture case email address to the NetSuite case capture address.

Another best practice that can help prevent receiving spam is to keep your group email addresses private as much as possible (that is, your [xxx@case.netsuite.com](mailto:xxx@case.netsuite.com) and [xxx@messages.netsuite.com](mailto:xxx@messages.netsuite.com) email addresses). Minimize the number of attached users, and include only the users that should be involved in the communication. Leakage of group email addresses to a spammer can result into opening a spam distribution channel.

 **Note:** For a spam distribution channel attack, NetSuite has protection for the reply-to-case scenario only. For more information, see the help topic [Receiving Customer Responses to Cases](#). Other communications (transactions and messages) cannot be protected the same way, so circulating email addresses privately is essential.

## Emails Sent from NetSuite

Emails sent from NetSuite are different, depending on where they are sent from, due to the templates and mechanism of sending. For example, standard email footers and the sending domain are specified in a different way on a campaign email vs. a saved search email alert. Consequently, email sent from different sources might behave differently against a specified spam filter.

To optimize email delivery, ensure DMARC compliance by using DKIM keys for every email domain that your organization uses.

## Setting Up Duplicate Detection

After you enable the Duplicate Detection feature at Setup > Company > Enable Features, you need to set criteria to use when searching for duplicates before records can be flagged. By default, NetSuite searches for duplicates by email address.

**Note:** Merging records also merges the records' transaction histories. The original data, such as entity name, is retained to preserve a transaction's history. You should restrict the ability to perform merges to specific roles or to the NetSuite administrator. This is particularly important where audit requirements discourage merging transaction records.

## Duplicate Detection Preferences

You can change how NetSuite searches for duplicates on the Duplicate Detection page. You can have NetSuite search for duplicates among customer, contact, partner, or vendor records and search for matching information in certain fields.

To prevent you from merging records that are not duplicates, you can only merge records if they have the same tax registration number or if both records do not have tax registration numbers entered. If you use NetSuite OneWorld, records with different subsidiaries cannot be merged.

### To set up Duplicate Detection:

1. Go to Setup > Company > Company Management > Duplicate Detection.

**Note:** You may have to scroll the Company menu to see the Company Management section.


2. Check the box next to each type of record you would like use duplicate detection with.

For example, check the **Detect Customer Duplicates** box to be alerted of possible duplicate customer records.

There are four types of records you can detect duplicates for:

- Customer
- Vendor
- Partner
- Contact

- For each type of record, in the **Fields to Match On** box, select the fields from respective record type you want to use when searching for similar information.

Depending on your settings in Home > Set Preferences, you may see all fields listed in the form or you may have to click the Select Multiple icon , and select your fields from there.

For a record of type Customer, selecting the field **Company Name**, makes the system search for duplicate matches in the **Company Name** field in the Customer Form.

Records must have matching information in **all** of the fields you select to be returned as possible duplicates.

For example, if you check the **Detect Customer Duplicated** box and then select phone and email in the **Fields to Match On** field, customers must have a matching phone number **and** a matching email address to be considered duplicates.

You can base duplicate detection criteria on custom fields. On the Set Up Duplicate Detection page, the list of fields for each entity type includes [To create or modify custom entity fields](#): you



have created for those record types. Check the **Store Value** box when creating a custom entity field to make it available as criteria in duplicate detection.

4. If you want to exclude specific email domains from Email (domain only) duplicate detection, click the **Exclude Domains** subtab, and enter the domains you want to exclude. Press **Enter** after each domain. Enter these excluded domains without the top-level domain (.com, .net, etc.). For example, to exclude Gmail email addresses, you would enter **gmail**.

Click anywhere on the list, press **Enter** and type the domain to be included without the dot com or dot net ending.

5. On the **Other Preferences** tab, check the **Show Duplicate Warning Popup on Records** if you want to present a popup warning when a user clicks **Save** when the cursor is in a duplicate criteria field.

Normally, users are warned of possible duplicates when they click from a duplicate criteria field on a record to another field. Sometimes the cursor is still in a duplicate criteria field when the user clicks **Save**, and this standard warning is not presented. Enabling this preference allows users to still be notified.

6. Choose how you would like to resolve duplicate records that have conflicting login access.

If two duplicate records each have login access, but the records have different email addresses, they are considered to have conflicting login access. The following options are available:

- **Manually** - Duplicate records with conflicting login access are not merged. You must manually remove the login access of one of the records before they can be merged.

- **By deleting the duplicates' access** - When merging records, the login access of duplicate records is deleted when it is merged into the master record.

7. Click **Save**.

When you click **Save**, NetSuite begins searching for duplicate records based on your criteria.

**Note:** The initial search can take a significant amount of time based on the number of customer and contact records you have in your account. You will not see duplicate alerts or be able to merge records until this initial search is complete.

After the search is complete, possible duplicate records are flagged with a notice and a link to a page where you can decide how to manage the duplicates. For more information, see the help topic [Merging or Deleting Duplicate Records](#).

You can also go to **Lists > Mass Update > Mass Duplicate Record Merge** to search for all possible duplicate contact and customer records based on the criteria you have set.

## Duplicate Entity Management Permission

Access to the Manage Duplicates page is controlled by the Duplicate Entity Management permission.

### To limit a role's ability to perform merges:

1. Go to **Setup > Users/Roles > Manage Roles**.
2. Click **Customize** or **Edit** for a role.
3. On the **Permissions** tab, click **Lists**.
4. Add the **Duplicate Entity Management** permission to the role.
5. Select **View** to hide the **Merge** button from users with this role.

## Duplicate Record Notification

Users are notified of potential duplicates in three ways:

- When you open a record that has potential duplicates, a notice is shown at the top of the page with a link to potential duplicates.
- When you are creating a new record and enter matching data in fields that are set up as duplicate criteria, a warning is shown at the top of the page with a link to the potential duplicates. If you have permission to view those records, you can click a link to open those matching records.
- When you add a record from a list by using Quick Add or you use the Inline Editing feature to make changes to a record that would make it a duplicate, you also receive a popup warning.

These notifications can help reduce the number of duplicate records created in your NetSuite account.

**Note:** For OneWorld accounts, cross subsidiary records are not treated as duplicates. For example, two entities belonging to different subsidiaries will not be listed as duplicates on the Manage Duplicates Page.

Certain words or phrases are skipped over when NetSuite searches for duplicates. For a list of these words, see the help topic [Words Excluded from Duplicate Detection Matching](#).

## NetSuite Account Information

The Setup > Company > NetSuite Account Information menu can assist you with maintaining your account.

**Billing Questions** – Opens the Contact Support Online page. You are encouraged to search the help center and review the FAQs before filling in the fields required to contact support. For more information, see the help topic [NetSuite Support](#).

**View Billing Terms** — Opens the Billing Terms page, which describes the billing process and procedures for your NetSuite account.

**View Billing Information** — Opens a Billing Information page, which shows installed components, add-on modules, add on bundles, provisioning history, and component usage.

**NetSuite Support Login** — Opens the Allow NetSuite Support Login. Select the duration to allow NetSuite to access your data for investigating your cases.

**Close Account** – Opens the Contact Support Online page.

**Outlook Sync Configurations** — Change the Outlook sync configuration, if required. For more information, see the help topic [NetSuite for Outlook](#).

## Using System Alerts

A System Alert notifies administrators of problems NetSuite encounters when processing a transaction and advises how to correct the problem. Only Administrators have access to system alerts.

System alerts appear in the Reminders portlet on the Home tab after you have activated the reminder.

### To activate the System Alerts reminder:

1. Click the **Personalize Dashboard** link in the Settings portlet or the **Personalize** link in the top right corner of the Home page.
2. In the **Add Content** panel, click or drag and drop the **Reminders** item.
3. In the **Reminders** portlet, click the **Set Up** link.
4. Check the **NetSuite System Alerts to Acknowledge** box.
5. Click **Save**.

To view a system alert, click the reminder in the Reminders portlet on the Home page. System alerts also can be accessed at Setup > Company > System Alerts.

The AMT system alert notifies you that an automatic memorized transaction has failed to post because it does not have a location reference. AMT alerts appear as a system alert in the Reminders portlet of the Home page.

### To view a system alert:

1. Go to Setup > Company > Company Management > System Alerts.

The System Alerts page opens. The type, date, and name of each alert is shown.

To also show system alerts that have been acknowledged, click the **Show acknowledged alerts** box.

2. On the System Alerts page, click the name of the system alert in the **Name** column. The system alert record opens and shows these fields:
  - **Type** – the type of alert
  - **Date/Time** – the date and time of the alert
  - **Name** – the name of the alert
  - **Acknowledged** – if the alert has been acknowledged
  - **Description** – a description of the alert
  - **User email** – the user email address
  - **Document** – the document type and number
  - **Resolution** – the suggestion resolution for the error
3. Read the resolution to determine what steps to take to correct the transaction error.
4. Check the **Acknowledged** box to mark the alert acknowledged.  
After an alert is marked acknowledged, the related reminder no longer appears in the **Reminders** portlet.
5. Click **Save**.

A list of system alert records can be accessed at Setup > Company > System Alerts.

## Searching Bulk Processing Jobs

If you have an Administrator role, you can view the status and history of all the bulk processing jobs in your account.

Go to Setup > Company > Company Management > Bulk Processing Status List to view a list of bulk processing jobs. The columns that appear on this list include submission ID, submission status, percent complete, result, message, date created, and created by. Many of these columns are also filters so that you can narrow the list display to those processing jobs you want to view.

Available filters include the bulk processing type, submission status, result, and who created the bulk processing job. You can choose from a list of selectors to narrow the date the bulk processing job was created. You can also choose the style in which to display the list.

## Configuring Administrative Notifications

NetSuite uses in-account notifications, displayed when you log in, to provide important information.

By default, all notifications are presented to all account administrators. If one Administrator in an account acknowledges the notification, no other Administrators will see the notification when they subsequently log in. So, if there are multiple administrators for an account, they must communicate with each other about notifications the others will not see. However, you can configure in-account notifications beyond the default settings. Go to Setup > Company > Company Management > Administrative Notifications to select the users who you want to receive notifications, and to view information about when and by whom notifications have been confirmed.

You can define configuration settings separately for each of the notification types listed below:

- **Administrative Notifications** - Announce upcoming changes to feature availability in your account.



**Important:** This category also includes Login Failure notifications.


- **Billing and Renewal Notices** - Alert you to payment requirements when you purchase new features and notify you when it is time to renew your contract with NetSuite.
- **Legal Notifications** - Notify you of changes that require administrator acceptance, such as a modification to the Terms of Service (TOS).
- **Scheduled Maintenance** - Provide the date and time when scheduled maintenance tasks may affect access to your account.
- **Service Release Notifications** - Occur prior to the release of a new version of NetSuite. These notifications provide information about access to the Release Preview account, and the time-frame when your account will be upgraded.

The Administrative Notifications page is available to account administrators, and to other users with the Setup Company permission.

**Administrative Notifications**

Save Cancel Reset

Options • Confirmed Pending Confirmation				
NOTIFICATION TYPE	INCLUDE ADMINS	RECIPIENTS	SEND EMAIL	REQUIRE EACH RECIPIENT TO ACCEPT
Administrative Notifications	Yes	Amit Patel Bess Smith	Yes	Yes
Billing and Renewal Notices	Yes			Yes
Legal Notifications	Yes			Yes
Scheduled Maintenance	Yes			Yes
Service Release Notifications	Yes			Yes

- On the Options subtab, you can:
    - Designate multiple users, in addition to administrators, as notification recipients.
-  **Important:** You may be able to set users that do not have login access to NetSuite as notification recipients, but users without login access will not receive notification emails.
- Elect to send notifications by email, in addition to displaying them in the user interface.
  - Require all recipients to confirm a notification, instead of the first recipient to see it.  
For more information, see [Setting Administrative Notification Options](#).
  - On the Confirmed subtab, you can:
    - View the date and time when a recipient has confirmed that they read a notification.
    - View the name of the recipient who confirmed they read the notification.  
For more information, see [Review Notification Confirmations](#).
  - On the Pending Confirmation subtab, you can:
    - View the notifications that have yet to be confirmed.
    - View the name of the recipient who has not yet confirmed that they read the notification.  
For more information, see [Review Pending Confirmations](#).

## Setting Administrative Notification Options

### To set options for administrative notifications:

1. Go to Setup > Company > Company Management > Administrative Notifications.

2. Click the **Edit** button, then review the following columns on the **Options** subtab and make changes as desired:

- **Include Admins**

- Indicates whether all account administrators should be added to the list of recipients for the selected type of notifications.
- Default value is set to **Yes**.

- **Recipients**

- Lists the specific set of users to receive in-account notifications of the selected type.
- Default is empty.
- You can define multiple recipients for each notification type, by using the Shift or Ctrl keys and selecting from the **Recipients** list.
- Individual users and groups are available in the list..



**Note:** Only employee users, and groups made up exclusively of employee users are available, because you cannot select Customer Center, Partner Center, or Vendor Center users as recipients.

- **Send Email**

- Indicates whether email messages containing notifications should be sent to recipients, in addition to in-account messages.
- Default setting is disabled.
- Check the box to enable this option.
- If this option is enabled, email messages are sent to the complete list of recipients.



**Note:** In-account notification emails are different from email campaigns. It is possible that you might be signed up for one type, but not the other type. To find out if you are signed up for email campaigns, see the help topic [Subscription Management](#).

- **Require Each Recipient to Accept**

- Indicates whether all recipients should be required to confirm in-account notifications of this type.
- Default setting is disabled, so that after the first recipient confirms a notification of the selected type, no other users see it.
- To ensure that all selected recipients see all in-account notifications of the selected type, check the box.

3. When you are satisfied with settings, click **Save**.

## Review Notification Confirmations

You can review the **Confirmed** subtab of the notifications page for details about notifications that have been confirmed by all required recipients.

- **Notification Type** - Shows the type of notification.
- **Confirmed By** - Shows the names of users who have confirmed that they read the notification.
- **Date Confirmed** - Shows the date and time the user confirmed they read the notification.
- **Message Text** - Shows the text of the notification message.
- **Date emailed** - Shows the date when the notification was sent via email.

## Review Pending Confirmations

You can review the **Pending Confirmation** subtab for details about the notifications that have not yet been confirmed by all required recipients.

- **Notification Type** - Shows the type of notification.
- **Require Each Recipient to Accept** - Shows whether you indicated on the Options subtab, that each notification recipient was required to confirm that they read the notification.
- **Confirmed By** - Shows the names of recipients who have confirmed they read the notification.
- **Not Confirmed By** - Shows the names of those who have not yet confirmed they read the notification.
- **Message Text** - Shows the text of the notification message from NetSuite.
- **Start Date** - Shows the date when the notification message was originally posted.
- **Expiration Date** - Shows the last date the notification message will be posted.

## Managing Plug-ins

A plug-in is functionality, defined by an interface, that can be customized. After a plug-in is implemented, you can override the plug-in's default logic with logic that suits your organization's needs.

Core plug-ins are provided by NetSuite, and are typically part of a major release. A core plug-in's interface defines functions that are executed within the core NetSuite code. For more information about core plug-ins, see the help topic [Core Plug-in Overview](#).

Custom plug-ins are alternate implementations of an interface that are developed by third-party solution providers who bundle them as part of a SuiteApp. For more information about custom plug-ins, see the help topic [Custom Plug-in Overview](#).

When a plug-in's implementations are ready to be utilized, the organization's NetSuite administrator activates the implementations available to each account.

To view the plug-in implementations available in an account, go to Customization > Plug-ins > Manage Plug-ins.

The Manage Plug-in Implementations page lists the core and custom plug-in implementations that are available in the current account. To inactivate an implementation, clear the box. To activate an implementation, check the box.

Make changes as required. Then, click **Save**.

## Viewing Plug-in Implementation System Notes

To view the activity of your plug-in implementation, use the System Notes subtab.

To view plug-in implementation system notes:

1. Go to Customization > Plug-ins > Plug-in Implementations. Click **Edit** beside the implementation that you want to view.
2. Click the **System Notes** subtab.

**Note:** Previously, plug-in implementation information was listed on the History subtab, but that subtab is no longer updated. New plug-in implementation activity is captured on the System Notes subtab.

**Plug-In Implementation** ← → List

[Edit](#) [Back](#) [Configure](#) [Actions ▾](#)

TYPE: Custom GL Lines Plug-in  
 NAME: Custom GL Lines Update  
 ID: customscript\_custom\_gl\_lines  
 API VERSION: 1.0

STATUS: Testing  
 LOG LEVEL: Debug  
 EXECUTE AS ROLE: Current Role

DESCRIPTION: OWNER: McKarney, Christine  
☐ INACTIVE

[Scripts](#) [Unhandled Errors](#) [Execution Log](#) [System Notes](#)

FIELD: - All - VIEW: Custom Default

[Customize View](#)

DATE ▾	SET BY	CONTEXT	TYPE	FIELD	OLD VALUE	NEW VALUE	ROLE
1/23/2017 6:19 am	McKarney, Christine	UI	Set	Owner		McKarney, Christine	Administrator
1/23/2017 6:19 am	McKarney, Christine	UI	Set	Name		Custom GL Lines Update	Administrator
1/23/2017 6:19 am	McKarney, Christine	UI	Set	ID		CUSTOMSCRIPT_CUSTOM_GL_LINES	Administrator
1/23/2017 6:19 am	McKarney, Christine	UI	Set	Inactive		F	Administrator
1/23/2017 6:19 am	McKarney, Christine	UI	Set	Log Level		Debug	Administrator
1/23/2017 6:19 am	McKarney, Christine	UI	Set	Notify All Admins		F	Administrator

The system note for a change on a plug-in implementation record captures the following information:

- Date when the change was made
- Who made the change
- Context for the change (for example, UI)
- Type of change, for example, Edit
- Field changed
- Old value
- New value
- Role of the user who made the change (included as of 2017.2 — you have to customize the view to see the Role column)



**Important:** The current version of the Custom GL Lines Plug-in is always used. An older version of the plug-in might have been used to create a transaction, and might have generated a different result than the current version. If you attempt to update a transaction in a closed period, and the current version of the plug-in generates a different result, you cannot save the updates.

You can either open the period, or branch your plug-in implementation by the date of the plug-in version.

## SuiteCloud Plus Settings

If you are using SuiteCloud features, the purchase of a SuiteCloud Plus license can enhance performance by:



- Increasing the governance limit for concurrent web services and RESTlet requests
- Increasing the number of queues available for scheduled scripts, or the number of processors available for scheduled scripts and map/reduce scripts
- Increasing the number of queues and threads available for CSV import jobs

The purchase of multiple SuiteCloud Plus licenses further increases the supported limit for concurrent web services and RESTlet requests, the number of queues or processors for scheduled scripts and map/reduce scripts, and the number of threads per CSV import job. There is no increase in capacity for other features, only the ones listed here.

**Note:** Some accounts are not eligible to purchase more than one SuiteCloud Plus license. Contact your sales representative or account manager to discuss SuiteCloud Plus.

The following table illustrates SuiteCloud Plus support:

SuiteCloud Plus Licenses	Web Services and RESTlet Concurrent Requests	Scheduled Script Queues	Map/Reduce and Scheduled Script Processors	CSV Import Queues / Threads Per Queue	Daily ERP Transactions / Commerce Transactions	Monthly ERP Transactions / Commerce Transactions
1	Account base limit + 10	5	5	5 Queues / 2 Threads	15,000 / 1,500	150,000 / 15,000
2	Account base limit + 20	10	10	5 Queues / 5 Threads	30,000 / 3,000	300,000 / 30,000
3	Account base limit + 30	15	15	5 Queues / 10 Threads	60,000 / 6,000	600,000 / 60,000
5	Account base limit + 50	25	25	5 Queues / 10 Threads	100,000 / 10,000	1,000,000 / 100,000
10	Account base limit + 100	25	50	5 Queues / 10 Threads	300,000 / 30,000	3,000,000 / 300,000

Be aware of the following notes regarding SuiteCloud Plus support:

- SuiteCloud licensing may be offered in conjunction with service tiers. Higher daily and monthly transaction volumes are possible in specific scenarios for some tiers. For information about service tier offerings, see [this fact sheet](#).
- As of 2017.2, concurrency limits for web services and RESTlet requests apply to the combined total of both kinds of requests per account. Previously, concurrency for web services request was governed separately per user and authentication method. The account governance limit for concurrent requests is based on the service tier as well as the number of SuiteCloud Plus licenses available. Different service tiers have different base limits. The base limit is increased by 10 for each SuiteCloud Plus license. For information about account base limits per service tier, see the help topic [Web Services and RESTlet Concurrency Governance Starting From Version 2017.2](#).
- The 2017.2 SuiteCloud Processors feature supports a new system for handling map/reduce scripts and scheduled scripts. This system is based on script processors rather than queues. With this feature, even queue-based processing runs on processors on the back end. Changing your deployments to use processors instead of queues optimizes script processing. For more information about this feature, see the help topic [SuiteCloud Processors](#).

For more details about using SuiteCloud Plus, see the following help topics:

- [Web Services and RESTlet Concurrency Governance Starting From Version 2017.2](#)
- [SuiteCloud Processors – Processor Allotment Per Account](#)

- Use Multiple Threads and Multiple Queues to Run CSV Import Jobs

## Setting Up Transactions for NetSuite CRM+



**Important:** The information in this section pertains only to users of the NetSuite CRM+ product. Users of other NetSuite products can refer to [Setting Accounting Preferences](#).

In NetSuite CRM+, you can use the Set Up Transactions page to set preferences for processing your transactions.

### To set up transactions:

1. Go to Setup > Company > Set Up Transactions.
2. On the Set Up Transactions page, select the preferences you want to set up.  
See the sections below for descriptions of these preferences.  
(Preferences that appear vary depending on the features you have enabled.)
3. Click **Save**.

Descriptions of each subtab on the Set Up Transactions page follow.

## General Subtab

- **Consolidate Projects on Sales Transactions** – Check this box to consolidate projects on customer invoices. You can create invoices for one customer including multiple projects.  
You are no longer able to issue invoices to a specific project, instead you issue the invoices to the customer.
- **Maximum # of Quantity-based Price Levels** – Enter a number to set a limit for the most price levels allowed to be assigned to an item when using Quantity Pricing.
- **Allow Discounts per Price Level on Quantity Pricing Schedules** – Check this box if you want to enter different quantity discounts for each price level on quantity pricing schedules.
- **Default Estimate Expiration (in days)** – Enter the default number of days before you want quotes to expire.
- **Duplicate Number Warnings** – Choose to have everyone with access to your account receive duplicate number warnings when transactions are submitted with the same numbers. This preference overrides the individual preference set at Home > Set Preferences.  
If you clear this box, individuals can decide to have duplicate number warnings by setting the preference at Home > Set Preferences.
- **Make Departments Mandatory** – Check this box to make the Department field required on records and transactions. If you check this box, records and transactions cannot be saved without completing this field.
- **Make Classes Mandatory** – Check this box to make the Class field required on records and transactions. If you check this box, records and transactions cannot be saved without completing this field.
- **Make Locations Mandatory** – Check this box to make the Location field required on records and transactions. If you check this box, records and transactions cannot be saved without completing this field.

- **Allow Per-Line Departments** – Check this box to associate a department with individual line items on a transaction. When this preference is on, you can choose a different department for each line item on transactions.

Clear this box to select a department in the header of a transaction. When this preference is off, the department chosen in the header applies to all line items on the transaction.

- **Allow Per-Line Classes** – Check this box to associate a class with individual line items on a transaction. When this preference is on, you can choose a different class for each line item on transactions.

Clear this box to select a class in the header of a transaction. When this preference is off, the class chosen in the header applies to all line items on the transaction.

- **Allow Per-Line Locations** – Check this box to associate a location with individual line items on a transaction. When this preference is on, you can choose a different location for each line item on transactions.

Clear this box to select a location in the header of a transaction. When this preference is off, the location chosen in the header applies to all line items on the transaction.

## Reporting Subtab

Check the Include Shipping Costs in Sales and Forecast Reports to have shipping and handling costs includes in order totals for sales and forecasting reports.

## Ordering/Shipping Subtab

- **Default Shipping Method** – Select the shipping method you want to appear automatically on bills and invoices.

You can choose other shipping methods when you enter transactions.

To add choices to this list, go to Lists > New Shipping Items.

- **Default Sales Order Status** – Choose your default status for sales orders:
  - Choose **Pending Approval** if your company uses the approval process for sales orders.
  - Choose **Pending Fulfillment** if your company does not use the approval process for sales orders.

You can still choose your sales order status at the time you enter a transaction.

- **Require Re-approval on Edit of Sales Order** – Choose to require re-approval when someone edits a sales order that was previously approved.

Partially fulfilled sales orders are not affected by this preference. After a sales order is partially fulfilled, the status cannot be changed back to pending approval.

- **Send E-mail Confirmation when Sales Order Cancelled** – Check this box if you want an e-mail sent to the customer when a sales order is canceled.

- **Default Return Auth. Status** – Select **Pending Approval** if your company uses the approval process for return authorizations.

Select **Pending Fulfillment** if your company does not use the approval process for return authorizations.

You can still choose any return authorization status when you enter a transaction.

- **Charge for Shipping** – Check this box to charge shipping by weight, by percent of total order or by a flat rate.

After you check this box, go to Lists > Shipping Items > New to create shipping items.

After you create shipping items, you can select them on product invoices. Your customers can also select shipping items when making a purchase from your Web store.

- **Charge Handling Separate from Shipping** – Check this box to charge a separate handling charge in addition to shipping charges.
- **Default Item Weight in Lbs.** – Enter a default shipping weight for items without a weight set on their item records.

If you do not enter a weight here, NetSuite uses 1 pound as the default weight. Item weight is used to determine shipping cost if you charge shipping per item or use UPS real-time rates.

## Time & Expenses Subtab

- **Override Rates on Time Records** – Check this box if you want the option to lock the billable rate you enter on time records so the billable rate is not affected by any rate changes that may happen before this customer is actually invoiced.

If you check this, you can use different price levels by going to Setup > Enable Features > Customers/Sales, and checking the Use Multiple Prices box.

Clear this box if you have the rate field in time tracking and you do not want employees to see the service item rates. Then, the rate is kept in the system, but will no longer show in time tracking.

- **Combine Detail Items on Expense Report Transactions**– This preference affects detail items on expense reports.

Check this box if you want to combine line items from the same category on a single expense report submitted by an employee.

For example, if an employee enters a single expense report that contains two entries for entertainment costs, the total shows as one line item for entertainment costs on the invoice.

Clear this box to detail each expense report line item individually.

This preference does not combine expense categories from multiple expense reports submitted by the same employee.

- **Require Approvals on Time Records** – Check this box to require supervisors to approve their employees' time transactions.

If you don't check this, time transactions can be billed to customers or included in the payroll run without the approval of a supervisor.

- **Automatically Notify Supervisor** – Check this box to send supervisors e-mail messages when they need to approve expense reports and purchase requests.

If you check this, you must also check either Use Expense Reports, Enable Purchase Requests or both at Setup > Enable Features.

## Tax Subtab

- **Tax Code Lists Include** – Choose what you want to appear in the Tax field on sales transactions:

- ☐ Tax Groups Only
- ☐ Tax Groups and Tax Items
- ☐ Tax Items Only

You can create Tax Groups at Lists > Accounting > Tax Groups > New. You can create tax items at Lists > Accounting > Tax Items > New.

The Tax Code Lists Include preference does not apply to journals.

## The Setup Page for NetSuite CRM+ Users



**Important:** The information in this section pertains only to users of the NetSuite CRM+ product. Users of other NetSuite products can refer to [The Setup Page](#).

The Setup page is where you manage the administrative details of your NetSuite CRM+ account. Set up your NetSuite CRM+ account by entering company information, enabling features and setting your preferences for processing, storing, and accessing information.

It is best to enter this information as soon as possible after your NetSuite CRM+ account is activated so that information and data you enter is processed correctly.

The links that show depend on the features you have enabled and the role you are using. Features are enabled by an administrator at Setup > Company > Enable Features.

The Setup page includes the following categories:

- **Company** – This category contains links to records for establishing a company address and contacts, enabling features and setting preferences, and viewing your account billing terms and information.
- **Accounting** – This category contains links to set up expense categories, tax information, other accounting lists, and employee-related lists.
- **Sales Force Automation** – This category contains links to set up your sales force automation, including customer statuses, sales rules, territories, and commissions.
- **Marketing** – Set up marketing campaigns and online customer forms.
- **Support** – This category contains links to set up customer support management, including support case email, case types, case origins, case territories, online case forms, escalation rules and assignment.
- **Web Site** – This category contains links to customize item and category layouts for your website, or customize the colors in your site.
- **Import/Export** – This category contains links to transfer your data in and out of NetSuite CRM+ or set up an XML import for information exchange between applications.
- **Users/Roles** – This category contains links to edit user accounts and roles or view the audit trail.
- **Integration** – Set Up XML Import and web services.

You can also click **New** next to a setup link to create a new record of that type.

## Using Telephony Integration

NetSuite provides two options for integrating NetSuite with a telephone system. Each requires different technology for implementation:

- **Telephony Application Programming Interface (TAPI)** – for placing outbound calls with NetSuite. With TAPI you can click on the phone icon next to a phone number and your phone system will automatically dial the number. TAPI only works on Windows operating systems (not Mac or Linux). For more information, see [Setting Up TAPI Telephony Integration](#).
- Use **Computer Telephony Integration (CTI)** – for receiving and routing inbound calls. As calls come in, the CTI application queries customer information in NetSuite and presents it to the sales or support representative in a browser window using Screen Population technology. The representative has the required information on the screen when speaking with the customer. For more information, see [Setting Up CTI Telephony Integration](#).

To integrate your NetSuite account with either TAPI or CTI technology, the account administrator must first enable the Telephony Integration feature at Setup > Company > Enable Features, on the SuiteCloud subtab. Then, each user who plans to use Telephony Integration must go to Home > Set Preferences and follow the directions provided on the Telephony subtab.

For instructions on making calls automatically from NetSuite records, see the help topic [Making Calls From NetSuite](#).

## Setting Up TAPI Telephony Integration

Telephony Application Programming Interface (TAPI) must be set up individually on each user's PC. You must have a TAPI compliant phone and software such as Artisoft's® TeleVantage.

To set up TAPI integration, the account administrator must first enable the Telephony Integration feature at Home > Set Preferences on the Telephony subtab. After downloading the driver, enter the name of the TAPI enabled phone.

**Note:** Two versions of TAPI are available, TAPI 2.x and TAPI 3.x. NetSuite supports both TAPI versions.

### To set up telephony integration with a TAPI device:

1. Go to Home > Set Preferences.
2. On the **Telephony** subtab, in the **Telephony Option** field, select **TAPI Device**.
3. Follow the on-screen instructions to download the `ExceleTelForNetSuiteApplications.zip` file, which contains the executable file needed to install the required drivers for Telephony Integration.

**Set Preferences** More

**Save** **Cancel** **Reset**

General Appearance Transactions Analytics Activities Alerts **Telephony** Restrict View Custom Preferences

TELEPHONY OPTION  
TAPI Device

TAPI DEVICE

CTI URL

PREFIX TO DIAL OUT

**FOR TAPI ONLY:**  
MAKE SURE YOU HAVE A TAPI-ENABLED PHONE OR HAVE TAPI-ENABLED YOUR TELEPHONY CLIENT.  
FOR EXAMPLE, IF YOU USE TELEVANTAGE BY ARTISOFT®, FOLLOW THE PRODUCT'S DIRECTIONS TO SET IT UP FOR TAPI USE WITH YOUR COMPUTER AND PHONE.  
CLICK [HERE](#) TO DOWNLOAD AND INSTALL THE REQUIRED DRIVERS. THESE DRIVERS ARE NEEDED TO COMPLETE SETUP OF OUTBOUND DIALING FROM NETSUITE.  
CONFIGURE YOUR TAPI DEVICE NAME IN THE FIELD ABOVE, AND SET ANY DIALING RULES.

4. In the **TAPI Device** field, enter the device that controls communication with your phone. If you do not know the name of your TAPI device, you can use a sample program at [www.excelel.com](http://www.excelel.com) to find this information.
5. In the **Prefix to Dial Out** field, enter any numbers that must be dialed before dialing a phone number in your phone system. For example, you may need to dial 9 or 1 before a number.
6. Click **Save**.

If you have trouble locating the name of your TAPI device or receive an error message that it could not be found, try the following troubleshooting tips:

- If the name of your TAPI device ends with extension.tsp, try leaving out this extension when entering the name in NetSuite.
- The TAPI Device field is case-sensitive and must match your device name exactly.
- Download a sample program [here](#) to test dialing from your phone. From the exceleTel Web page, click the EXE link to download the etQuickDial program.

When the program has downloaded, open the program and view all TAPI-enabled devices on your computer in the Active field. Select the device you are using, and check the Active box. Then enter a phone number to dial and click Dial to make sure the call is initiated from your device correctly.

To learn how to initiate and end calls, see the help topic [Making Calls From NetSuite](#).


## Setting Up CTI Telephony Integration

To use Computer Telephony Integration (CTI), you must set up an account with one of our partners, [Contactual](#) or [Five9](#). Software provided by these partners uses VoIP to work with your NetSuite account to provide click-to-call for out bound calls and Screen Population (Screen Pop) technology for incoming calls.

To set up your account for CTI, an account administrator must go to Setup > Company > Enable Features. On the SuiteCloud subtab, check the boxes next to Telephony Integration and Web Services.

### To set up telephony integration with CTI:

1. Go to Home > Set Preferences, and click the Telephony subtab.
2. In the **Telephony Option** field, select **CTI**.
3. In the **CTI URL** field, enter the URL corresponding to the partner you have chosen:
  - **Contactual** – <http://www.contactual.com/c2d.php?phone={phone}>
  - **Five9** – <http://localhost:9999/agentServlet?cmd=makeCall&numberToCall={phone}>
4. Click **Save**.

 **Note:** See Contactual or Five9's documentation for more information on setting up partner software to work with NetSuite.

To learn how to initiate and end calls, see the help topic [Making Calls From NetSuite](#).

# Classifications in NetSuite

- [Classifications Overview](#)
- [Departments and Classes Overview](#)
- [Locations Overview](#)
- [Using Per-Line Classifications](#)

## Classifications Overview

Departments, Classes, and Locations are classifications that you can use to identify and categorize records in your NetSuite account. You can also define classifications for your organization's needs by creating custom segments. Classifications enable you to better organize data and preserve accuracy.

To use each classification, you must enable the feature and then set up records. After you have set up classification records, you can use them to identify other records in your NetSuite account. For example, you can enable the Departments feature and then set up a record for each department. You can select a department on each employee record or select a location on each sales order. You can identify employees by department and then run financial reports by location.

To create additional custom classification fields similar to class, department, and location, you use the Custom Segments feature. You can create an unlimited number of custom segments and add them to specific record types. For more information, see the help topic [Custom Segments](#).

See the topics below to get started using classifications:

- [Departments and Classes Overview](#)
- [Custom Segments Overview](#)
- [Locations Overview](#)

If you use NetSuite OneWorld, subsidiaries are the primary classification used to organize your NetSuite records. Departments, classes, locations, and custom segments can be used in addition to subsidiaries. If you use these classifications, you must associate them with a subsidiary. This association enables you to select the department, class, location, or custom segment on the record or transaction related to that subsidiary. For more information about using subsidiaries, see [Subsidiaries Overview](#) and [Setting Up Subsidiaries](#).

In addition, if you plan to enable the Intercompany Time and Expense feature for NetSuite OneWorld, you must determine a strategy for handling classifications on intercompany time and expenses. You can either make classifications non-mandatory for journal entries, or set up global classifications that are available to all subsidiaries. Without a defined strategy, errors may occur for automated intercompany adjustments. For information about using this feature, see the help topic [Enabling Intercompany Time and Expenses](#).

## Departments and Classes Overview

Departments and classes are categories that you create to track records such as financials, transactions, and employees.

Departments are listed first on transactions, and are useful when designating transactions and employees as part of an internal team. For example, you can create a department for each team of



employees dedicated to a certain area of business, and then track income and expenses by each department over any time period.

Classes are useful for wider segments within your business. For example, you can create a department for your sales team, and create classes to track information on sales transactions such as new customers and repeat customers. Sales orders would then indicate whether the transaction was created for a new or repeat customer. This is useful in tracking where income and expenses are generated.

To set up departments, go to Setup > Company > Classifications > Departments > New.

To set up classes, go to Setup > Company > Classifications > Classes > New.

After you have set up departments and classes, you can select them on forms and records.

## Creating Classes

Classes are categories that you can create to track records such as financials, transactions, and employees. For example, you own a janitorial service and you want to track income and expenses separately for household and commercial accounts. You set up a class for each account type and track the financial performance of each class over any time period.

To enable classes, go to Setup > Company > Enable Features. On the Company subtab, check the Classes box and then click Save.

### To create a class record:

1. Go to Setup > Company > Classifications > Classes > New.
2. Enter up to 31 alphanumeric characters for the name of the class.
3. If this class is a subclass of another, in the **Subclass of** field, select the parent class.
4. If you use NetSuite OneWorld, in the **Subsidiary** field, select one or multiple subsidiaries.  
To select multiple subsidiaries, hold down Ctrl and click each subsidiary.  
A subsidiary must be associated with a class for the class to be selected on a transaction or record related to that subsidiary.
5. If you use NetSuite OneWorld, check the **Include Children** box to associate the class with all the child subsidiaries of each subsidiary selected in the **Subsidiary** field.
6. Check the **Class is Inactive** box to inactivate this class record.

Inactive classes do not appear in lists of classes on records and transactions.



**Note:** To inactivate classes from the Classes list at Setup > Company > Classifications > Classes, check the **Show Inactives** box, check one or more boxes in the **Inactive** column, and then click **Submit**.

7. Click **Save**.

You can restrict access to transaction, employee, partner, and optionally item records based on their assigned class values. You can also limit the classes that users can assign to these records. Class restrictions can be defined per user role and then applied to all users logged in with that role. For more information, see [Restricting Access to Records by Class](#).

You also can apply class restrictions to custom records, if the custom record type includes a Class field. You can add this field directly from the Class record by clicking the New Field button. For more information, see the help topic [Applying Role-Based Restrictions to Custom Records](#).

## Modifying and Deleting Classes

At any time you can edit an existing class. Any change you make overwrites historical transactions. For example, if you change the name of the class NorthEast to North East, all historical transactions for that class appear as North East.

You can delete a class only if there are no dependent transactions. If there are any historical transactions, you cannot delete the class.

### To modify a class record:

1. Go to Setup > Company > Classifications > Classes.
2. Click the **Edit** link to the left of the class you want to modify.
3. On the Class page, modify the class as needed.
4. Click **Save**.

### To delete a class record:

1. Go to Setup > Company > Classifications > Classes.
2. Click the **Edit** link to the left of the class you want to delete.
3. On the Class page, in the **Actions** menu, click **Delete**.
4. Click **OK** to confirm the deletion.

## Restricting Access to Records by Class

If your account has the Classes feature enabled, you can restrict access to transaction, employee, partner, and optionally item records based on their assigned class values. You can also limit the classes that users can assign to these records. Class restrictions can be defined per user role and then applied to all users logged in with that role.



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

The following settings for the Class Restrictions field on the Role page define class-related restrictions for transaction and customer 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.

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

Check the **Apply to Items** box to apply the class restrictions defined here to item records, in addition to transaction and customer records.

To set up a role to include these restrictions, go to Setup > Users/Roles > Manage Roles. Click a Customize or Edit link, or click the New button.



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



**Important:** If you are using the Advanced Employee Permissions feature, restrictions set on the Role page are only applicable to the Employees and Employee Administration permissions. The Employee Public and Employee Confidential permissions ignore the restrictions set on this page. For more information, see the help topic [Setting Employee Access for Advanced Employee Permissions](#).

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](#).

## Creating Departments

Departments are categories that you can create to separate and track records such as financials, transactions, and employees. For example, you can create a department for each team of employees dedicated to a certain area of business, and then track income and expenses by each department over any time period.

To enable Departments, go to Setup > Company > Enable Features. On the Company subtab, check the Departments box and then click Save.

### To create a department record:

1. Go to Setup > Company > Classifications > Departments > New.
2. Enter up to 31 alphanumeric characters for the name of the department.
3. If this department is a subdepartment of another, in the **Subdepartment of** field, select the parent department.
4. If you use NetSuite OneWorld, in the **Subsidiary** field, select one or multiple subsidiaries.  
To select multiple subsidiaries, hold down Ctrl and click each subsidiary.  
A subsidiary must be associated with a department for the department to be selected on a transaction or record related to that subsidiary.
5. If you use NetSuite OneWorld, check the **Include Children** box to associate the department with all the child subsidiaries of each subsidiary selected in the **Subsidiary** field.
6. Check the **Department is Inactive** box to inactivate this department record.  
Inactive departments do not appear in lists of departments on records and transactions.



**Note:** To inactivate departments from the Departments list at Setup > Company > Classifications > Departments, check the **Show Inactives** box, check one or more boxes in the **Inactive** column, and then click **Submit**.

7. Click **Save**.

You can restrict access to transaction, employee, partner, and optionally item records based on their assigned department values. You can also limit the departments that users can assign to these records.

Department restrictions can be defined per user role and then applied to all users logged in with that role. For more information, see [Restricting Access to Records by Department](#).

You also can apply department restrictions to custom records, if the custom record type includes a Department field. You can add this field directly from the Department record by clicking the New Field button. For more information, see the help topic [Applying Role-Based Restrictions to Custom Records](#).

## Modifying and Deleting Departments

At any time you can edit an existing department. Any change you make overwrites historical transactions. For example, if you change the name of the department NorthEast to North East, all historical transactions for that department appear as North East.

You can delete a department only if there are no dependent transactions. If there are any historical transactions, you cannot delete the department.

### To modify a department record:

1. Go to Setup > Company > Classifications > Departments.
2. Click the **Edit** link to the left of the department you want to modify.
3. On the Department page, modify the department as needed.
4. Click **Save**.

### To delete a department record:

1. Go to Setup > Company > Classifications > Departments.
2. Click the **Edit** link to the left of the department you want to delete.
3. On the Department page, in the **Actions** menu, click **Delete**.
4. Click **OK** to confirm the deletion.

## Restricting Access to Records by Department

If your account has the Departments feature enabled, you can restrict access to transaction, employee, partner, and optionally item records based on their assigned department values. You can also limit the departments that users can assign to these records. Department restrictions can be defined per user role and then applied to all users logged in with that role.



**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.

The following settings for the Department Restrictions field on the Role page define department-related restrictions for transaction and customer 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.

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

Check the **Apply to Items** box to apply the department restrictions defined here to item records, in addition to transaction and customer records.

To set up a role to include these restrictions, go to Setup > Users/Roles > Manage Roles. Click a Customize or Edit link, or click the New button.



**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.



**Important:** If you are using the Advanced Employee Permissions feature, restrictions set on the Role page are only applicable to the Employees and Employee Administration permissions. The Employee Public and Employee Confidential permissions ignore the restrictions set on this page. For more information, see the help topic [Setting Employee Access for Advanced Employee Permissions](#).

You can also apply role-based, department restrictions to custom records. For more information, see the help topic [Applying Role-Based Restrictions to Custom Records](#).

## Converting Classes to Departments

Classes and departments are categories you create to track and classify your transactions. When you generate a transaction, departments are always listed first. If you are using classes to represent departments, you can convert them to departments and then create new classes to further detail and categorize your business.

For example, you currently have a class for your sales department, but you want to create classes for inside sales and outside sales. If you convert your sales department class to a department, you can create new classes that categorize the different areas of the sales department.



**Warning:** The conversion process overrides existing departments, deletes all class information, and is **irreversible**.

### To convert classes to departments:

1. Go to Setup > Company > Convert Classes to Departments.
2. To convert your classes to departments, click **Save**.
3. To view your new departments, go to Setup > Company > Classifications > Departments.

## Converting Classes to Locations

You can use the Locations feature to track inventory, employees, and transactions for multiple company locations. If you were previously using classes for this purpose, you can convert all your class information to location information.

When you use this feature, all class are converted to locations, including historical transactions. On financial reports that show classes or locations, values that previously appeared on class are now displayed on location.



**Warning:** The conversion process overrides existing locations, deletes all class information, and is irreversible.

### To convert classes to locations:

1. Go to Setup > Company > Classifications > Convert Classes.
2. To convert your classes to locations, click **Save**.
3. To view your new locations, go to Setup > Company > Classifications > Locations.

## Custom Segments Overview

The Custom Segments feature lets you create custom classification fields similar to class and department. You can create an unlimited number of custom segments, define possible values for each segment, and add the segments to specific record types. People working in NetSuite can then use the segments to classify records appropriately.

You can configure segments to display on the GL Impact page. Also, standard NetSuite reports can be customized to use custom segments as filters and columns. In financial reports, custom segments can be added as a horizontal dimension. The functionality of custom segments enhances your ability to categorize data and meet your organization's unique reporting and analysis needs.

To enable custom segments, go to Setup > Company > Enable Features. On the SuiteCloud subtab, check the Custom Segments box, and then click Save.

To create a custom segment record, see the help topic [Creating a Custom Segment](#).

## Locations Overview

The Locations feature enables you to track information about employees and transactions for multiple offices or warehouses. For example, you can create locations for the corporate office and all of the sales offices, or for warehouses in several states. You can associate transactions and employees with each location, and then filter report data by location.

To enable the Locations feature, go to Setup > Company > Enable Features. On the Company subtab, check the Locations box and then click Save.

To track data by location, you must enter a record for each location you want to track. Then, you can associate employees and transactions with a location record. For more information, see [Creating Locations](#).

You can use the Locations feature to do the following:

- **Associate transactions with a location.**

Sales and purchases can be grouped by location, as well as bank transactions like checks, deposits, and credit card purchases.

You can search transactions associated with a location and filter reports to show data specific to each location. For more information, see [Associating a Transaction with a Location](#) and [Searching for a Transaction by Location](#).

- **Associate employees with a location.**

Choose a location on the employee's record to associate them with a location. By customizing employee roles at Setup > Users/Roles > Manage Roles, you can restrict employee access to data for only their location. For example, you can restrict access for warehouse personnel who handle item receipts or fulfillments at a single location. For more information, see the help topic [Associating an Employee with a Location](#).

- **Assign fulfillment locations to sales order lines automatically.**

If the Automatic Location Assignment feature is enabled, you can use location records to represent your fulfillment locations and assign those locations to sales order lines automatically. NetSuite assigns locations to sales orders based on the customer shipping address, the fulfillment locations in your organization, and one or more rules that define the assignment criteria (such as the location type or the distance to the shipping address). For more information, see the help topic [Assigning Fulfillment Locations Automatically](#).

The Automatic Location Assignment feature is part of the Advanced Order Management module – contact your account representative for more information.



**Important:** To associate items with a location, you must enable the Multi-Location Inventory feature. Before you enable this feature, it is recommended that you read the help topic [Multi-Location Inventory](#) to determine if this feature is appropriate for your company. After you have enabled the Multi-Location Inventory feature and distributed items, you cannot disable the feature without first contacting Customer Support. Note that the Multi-Location Inventory feature is required for NetSuite OneWorld using the Inventory feature.

## Creating Locations

You can create a location record for each of your company's locations. Then you can track employees and transactions by location.



**Important:** NetSuite permits you to create up to 100 location records in your NetSuite account. If you require more than the maximum of 100 locations, you must contact Customer Support to submit a location increase request for further evaluation of your business requirements. If your request is approved, you are required to sign a disclaimer regarding this request. Contact NetSuite Customer Support for details.



**Warning:** We do not recommend using locations to identify areas within your warehouse such as a bin, shelf, or dock. Using locations for this purpose creates difficulties with fulfillments, LIFO and FIFO costing, and NetSuite reporting.

### To create a location record:

1. Go to Setup > Company > Classifications > Locations > New.
2. Enter up to 31 alphanumeric characters for the name of the location.  
This name appears on forms and reports that require you to choose a location. For example, you might name one location Georgia Warehouse and another California Warehouse.
3. If this location is a sublocation of another, in the **Sublocation of** field, select the parent location.
4. If you use NetSuite OneWorld, in the **Subsidiary** field, select one or multiple subsidiaries.  
To select multiple subsidiaries, hold down Ctrl and click each subsidiary.  
A subsidiary must be associated with a location for the location to be selected on a transaction or record related to that subsidiary.

NetSuite OneWorld using the Inventory feature must associate each location with a single subsidiary. NetSuite OneWorld not using this feature can associate each location with no subsidiary, one subsidiary, or multiple subsidiaries. For information about working with subsidiaries, see [Subsidiaries Overview](#) and [Setting Up Subsidiaries](#).

5. If you use NetSuite OneWorld, check the **Include Children** box to associate the location with all the child subsidiaries of each subsidiary selected in the **Subsidiary** field.



**Important:** The **Include Children** box is not available in NetSuite OneWorld with the Inventory feature enabled.

6. Check the **Location is Inactive** box to inactivate this location record.

Inactive locations do not appear in lists of locations on records and transactions.



**Note:** To inactivate locations from the Locations list at Setup > Company > Classifications > Locations, check the **Show Inactives** box, check one or more boxes in the **Inactive** column, and then click **Submit**.

7. Select the kind of location: Store, Warehouse, or Undefined.

The location type is one of the criteria that the Automatic Location Assignment feature uses when determining the ideal fulfillment location. You can set the location to Undefined to represent locations that are neither a store nor a warehouse.

8. Select the time zone for the location.
9. If you want to use location-specific document and transaction numbering, in the **Document Number Prefix**, **Transaction Number Prefix**, or both fields, enter up to eight alphanumeric characters to be a prefix for autogenerated numbers.

This prefix indicates that document numbers and transaction numbers are associated with this location.



**Note:** You must set up location-specific transaction numbering on the Set Up Auto-Generated Numbers page at Setup > Company > Auto-Generated Numbers. On the Document Numbers subtab of this page, check the **Use Location** box next to each type of transaction that you want use location-specific numbering.

10. Select a location-specific logo to display on printed and emailed transaction forms.

To upload a logo, go to Documents > Files > Images > New. Check the **Available Without Login** box.



**Note:** Logos must be in JPG or GIF format. For your logo to be printed on standard forms, the logo must be no more than 200 pixels wide and 60 pixels high.

11. Check the **Make Inventory Available** box if inventory at this location can be stocked and can be committed on sales or fulfillments.

Clear this box if inventory at this location can be stocked, but cannot be committed on sales or fulfillments.



**Note:** To track inventory items by location, you must enable the **Multi-Location Inventory** feature. For more information, see the help topic [Multi-Location Inventory](#). The Multi-Location Inventory feature is required for NetSuite OneWorld using the Inventory feature.

12. Check the **Make Inventory Available in Web Store** box if you want on-hand inventory stored at the location to be included in the total quantity available that is displayed in your Web store.



**Note:** On existing location records, when you check this box or clear it and then click Save, the Locations in Queue page displays the locations that are currently processing.

13. If you use the Multi-Location Inventory and Advanced Bin Management features, and want to use bins to track inventory at this location, check the **Use Bins** box.

For more information, see the help topic [Bin Management By Location](#).

14. Check the **Include in Supply Planning** box to include this location in supply planning calculations. When the Plan Through Distribution Network preference is enabled, NetSuite completes supply planning calculations including only locations that have this setting enabled.

**Note:** This option is available only when the **Demand Planning** feature is enabled.

15. Check the **Include in Control Tower** box to include this location when generating snapshots. For more information, read the help topic [Supply Chain Control Tower](#).

**Note:** This option is available only when the **Supply Chain Control Tower** feature is enabled.

16. Enter address information for the location.

**Note:** In NetSuite OneWorld, the Country, Addressee, and State fields are filled in automatically with information from the subsidiary. Change the address information as required.

17. Click **Save**.

You can restrict access to transaction, employee, partner, and optionally item records based on their assigned location values. You can also limit the locations that users can assign to these records. Location restrictions can be defined per user role and then applied to all users logged in with that role. For more information, see [Restricting Access to Records by Location](#).

You also can apply location restrictions to custom records, if the custom record type includes a Location field. You can add this field directly from the Location record by clicking the New Field button. For more information, see the help topic [Applying Role-Based Restrictions to Custom Records](#).

## Modifying and Deleting Locations

At any time you can edit an existing location. Any change you make overwrites historical transactions. For example, if you change the name of the location NorthEast to North East, all historical transactions for that location appear as North East.

You can delete a location only if there are no dependent transactions. If there are any historical transactions, you cannot delete the location.

### To modify a location record:

1. Go to Setup > Company > Classifications > Locations.
2. Click the **Edit** link to the left of the location you want to modify.
3. On the Location page, modify the location as needed.
4. Click **Save**.

### To delete a location record:

1. Go to Setup > Company > Classifications > Locations.

2. Click the **Edit** link to the left of the location you want to delete.
3. On the Location page, in the **Actions** menu, click **Delete**.
4. Click **OK** to confirm the deletion.

## Making a Location Inactive

If you no longer track information for a location, you can make the location inactive to prevent it from displaying in lists of locations on records and transactions.

### To inactivate a location:

1. Go to Setup > Company > Classifications > Locations.
2. Click **Edit** next to the name of the location record you want to inactivate.
3. Check the **Location is Inactive** box.



**Note:** If you inactivate a main location record, child location records are not automatically inactivated.

4. Click **Save**.

To inactivate locations from the Locations list at Setup > Company > Classifications > Locations, check the **Show Inactives** box, check one or more boxes in the **Inactive** column and then click **Submit**.

## Associating a Transaction with a Location

When you associate transactions with a location, you can create and fulfill sales orders by location, create and receive purchase orders by locations, and search transactions by locations. You can also filter reports to obtain an accurate representation of sales, purchases, and employee data for each company location. To filter reports by location, choose a location in the footer of the report.

The Location field is mandatory for inventory transactions when Locations is enabled.

### To associate a transaction with a location:

1. Click the link for the transaction you want to create.
2. On the transaction page, in the **Location** field, select a location from the list.
3. Fill in additional transaction data as needed.
4. Click **Save**.

## Searching for a Transaction by Location

The Locations feature enables you to track information about employees and transactions for multiple offices or warehouses. For example, you can create locations for the corporate office and all of the sales offices, or for warehouses in several states. You can limit employee access to company information, and monitor sales or purchasing volumes per location. You can filter reports to display data for one or all locations.

To enable the Locations feature, go to Setup > Company > Enable Features. On the Company subtab, check the Locations box and then click Save.

You can associate an employee with a location by choosing a location on the employee's record. Employee roles can be customized to access only data that is relevant to their location. For example, you can restrict access for warehouse personnel who handle item receipts or fulfillments at a single location. To customize roles, go to Setup > Users/Roles > Manage Roles.

You can classify transactions by location to precisely track data. For example, you can choose which location processes each sales and purchase transaction.

After transactions have been associated with a location, you can then search transactions by location.

### To search for a transaction by location:

1. Go to Transactions > Management > Search Transactions.
2. On the Search Transactions page, in the **Locations** field, choose:
  - **any of** – finds transactions associated with chosen locations
  - **none of** – finds transactions not associated with chosen locations
3. In the text box beneath the **Locations** field, choose the locations to include (**any of**) or exclude (**none of**) in your search.  
To select multiple locations, press and hold Ctrl and then click each location.
4. Select or enter additional criteria in other fields to further narrow your search.
5. Click **Submit**.

When you have finished, the Search Results page appears listing the transactions that meet the criteria of your search. To view a transaction on the list, click the date next to the transaction. When the transaction opens, you can edit it or create a new transaction.

## Restricting Access to Records by Location

If your account has the Locations feature enabled, you can restrict access to transaction, employee, partner, and optionally item records based on their assigned location values. You can also limit the locations that users can assign to these records. Location restrictions can be defined per user role and then applied to all users logged in with that role.



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

The following settings for the Location Restrictions field on the Role page define location-related restrictions for transaction and customer 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.

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

Check the **Apply to Items** box to apply the location restrictions defined here to item records, in addition to transaction and customer records.

To set up a role to include these restrictions, go to Setup > Users/Roles > Manage Roles. Click a Customize or Edit link, or click the New button.



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



**Important:** If you are using the Advanced Employee Permissions feature, restrictions set on the Role page are only applicable to the Employees and Employee Administration permissions. The Employee Public and Employee Confidential permissions ignore the restrictions set on this page. For more information, see the help topic [Setting Employee Access for Advanced Employee Permissions](#).

You can also apply role-based, location restrictions to custom records. For more information, see the help topic [Applying Role-Based Restrictions to Custom Records](#).

## Using Per-Line Classifications

If you enable classifications such as departments, classes, locations, and custom segments, a field for the classification shows in the header of transaction forms. When a classification is selected in a transaction header, all lines on that transaction are associated with the selected classification. For example, if you choose the location East Coast in the Location field on a sales order, all lines on that sales order are associated with the East Coast.

You can also choose to use per-line classifications that enable you to select a classification on each transaction line. Per-line classifications can be used either instead of header classifications or in addition to them.

### Per-Line Classifications Only

If you use per-line classifications instead of header classifications, a classification field shows for each transaction line but does not show in the header. For example, if you have the Locations feature enabled, a Location field shows on each transaction line. You can choose the location East Coast on one line and choose West Coast on another line.

The items on each line are associated with individual locations, but the entire transaction is not associated with a location. For example, on an invoice, line one is associated with East Coast and line two is associated with West Coast, but the Accounts Receivable line is associated with no location.

### Per-Line Classifications with Header Classifications

If you use per-line classes, departments, locations, or custom segments, you can customize transaction forms to identify the classification at both the header and line level at the same time.

For example, if you have enabled both the Locations feature and the Allow Per-Line Locations preference, then a Location field displays on each transaction line **and** in the form header. You can choose the location East Coast on one line and choose West Coast on another line. Then, you can choose the location United States in the transaction header and the Accounts Receivable line is associated with the United States.


These classifications can be useful if you identify legal entities or geographical segments by location and wish to report separate balance sheets and income statements by those segments. From the previous example, a sales order can post line items to the correct locations (East and West Coast), whereas the header location provides a correct income statement to be run for United States transaction totals. For example:

Location: United States

Sublocation: East Coast

Sublocation: West Coast

When you use a form customized to show a class, department, location, or custom segment at both the header and line level, both fields are required. If either the line or header field is not filled, both fields are cleared unless they are mandatory. If you have also enabled a preference to make classes, departments, locations, or custom segments mandatory, the selection is mandatory at both the header and line level.

 **Note:** Transaction lines for tax and shipping use the class selected in the transaction header, if any.

The following preferences can be set at Setup > Accounting > Accounting Preferences:

- **Make Departments Mandatory**
- **Make Classes Mandatory**
- **Make Locations Mandatory**
- **Allow Per-Line Departments**
- **Allow Per-Line Classes**
- **Always Allow Per-Line Classifications on Journals**  
For only journal entries, this preference overrides any other **Allow Per-Line** preferences you have set.
- **Allow Non-Balancing Classifications on Journals**
- **Allow Empty Classifications on Journals**

For more information on these preferences, see the help topic [Setting Accounting Preferences](#).

To specify that a custom segment is mandatory, check the Mandatory box on the Validation & Defaulting subtab on the Custom Segment configuration page.

For more information on how to customize a form to identify a classification at both the header and line level, see [Customizing Forms for Per-Line and Header Classifications](#).

## Customizing Forms for Per-Line and Header Classifications

If you have enabled preferences to use per-line classes, departments, locations, or custom segments, you can customize transaction forms to identify the classification at both the header and line level at the same time.

To customize a form to identify a classification at both the header and line level, open a new transaction and click **Customize**. Then follow the steps below to choose which fields appear on the form and whether they are mandatory.

1. Enter a name for the custom form.
2. On the subtab **Screen Fields > Main**:
  - **Show** column – Check the box next to **Class**, **Department**, or **Location** to use the fields in the transaction header.
  - **Mandatory** column – Check the box next to **Class**, **Department**, or **Location** to require the header field to be completed on this form.
3. On the subtab **Screen Fields > Columns**, check the box in the **Show** column next to **Class**, **Department**, or **Location** to use the fields on individual transaction lines.
4. Complete other fields as necessary.
5. Click **Save**.

The classification fields you have indicated are available for use when you use the customized form.

# Getting Started with NetSuite OneWorld

You can use NetSuite OneWorld to manage multiple areas of your multinational, multicompany business including financials, customers, e-commerce, Services Resource Planning (SRP), business intelligence, and tax and compliance management.

## Global Enterprise Resource Planning (ERP)

To manage financials, NetSuite OneWorld enables you to adjust for currency, taxation, and legal compliance differences at the local level, with regional and global business consolidation and roll-up, providing worldwide business visibility in real time.

## Global Customer Relationship Management (CRM)

To manage customers, NetSuite OneWorld enables you to manage a complex multinational sales organization that requires multiple languages and currencies. It provides global visibility to every aspect of CRM including quotas, forecasts, sales, customers, partners, support cases, issues, leads, and campaigns.

## Global E-commerce

To manage e-commerce, NetSuite OneWorld enables you to conduct web business around the globe with multi-language, multi-currency, multi-country, and multi-brand web stores that can be run and managed from a single NetSuite account.

## Global Services Resource Planning (SRP)

With SRP, NetSuite OneWorld streamlines the complete services lifecycle from marketing to project management, service delivery, billing, and revenue management, helping you drive repeat business from existing clients.

## Global Business Intelligence

To manage business intelligence, NetSuite OneWorld provides real-time visibility across your entire enterprise, enabling unprecedented access to financial, customer, and business data worldwide. It provides multiple levels of consolidated reporting, and enterprise-wide key performance indicators (KPIs) display in real time on dashboards.

## Global Tax and Compliance Management

Growing regulatory challenges, compliance risk, financial penalties, and more frequent system-based tax audits burden businesses with ever more complex tax compliance requirements. The NetSuite OneWorld tax and compliance management capabilities provide a robust foundation for transparency, automation, simplicity, and controls in the management of your global tax and compliance responsibilities.

To get started with NetSuite OneWorld, see the following:

- [NetSuite OneWorld Overview](#)
- [Setting Up OneWorld](#)
- [Consolidated Reporting in OneWorld](#)
- [Working with OneWorld ERP Accounting](#)
- [Working with OneWorld CRM](#)
- [Working with OneWorld and SuiteCommerce](#)

## NetSuite OneWorld Overview

NetSuite OneWorld supports global, multi-subsidiary organizations. With NetSuite OneWorld, an organization can use a single NetSuite account to manage records and transactions for multiple legal

entities, or subsidiaries, conducting business across multiple tax jurisdictions, or nexuses, involving multiple currencies.

NetSuite OneWorld organizes both domestic and international subsidiaries into a single hierarchical structure. Each subsidiary is treated as a distinct legal entity for taxation and regulation purposes, and is associated with a specific nexus and a specific base currency. This base currency is the currency in which the subsidiary manages its financials. Subsidiary-specific data is available for reporting, and data for multiple subsidiaries can be rolled up into consolidated reports in the currency of a parent subsidiary.

NetSuite OneWorld supports local and foreign currencies for transactions with foreign companies and between subsidiaries. Consolidated reports including aggregated financial statements provide foreign currency translation and consolidation for all child subsidiaries of a selected parent subsidiary.

## NetSuite OneWorld Capabilities

With NetSuite OneWorld, you can manage inter-related business processes across multiple subsidiaries. Some of the capabilities that NetSuite OneWorld provides include:

- **Accounting and Financial Consolidation**  
Each subsidiary completes transactions in its own base currency. Subsidiaries share inventory items and have unique items. Using a single chart of accounts as well as subsidiary-specific accounts you prepare consolidated and subsidiary financial statements in the appropriate currencies. You can also enter intercompany journal entries and eliminate profits for transactions among subsidiaries.
- **Tax and Regulatory Compliance**  
Each subsidiary has one or more locations unique to that subsidiary, enabling you to administer location-based tax and regulatory requirements.
- **Customer Relationship Management**  
With NetSuite OneWorld you can manage your sales organization and customer relationships. Sales quotas and forecasts span subsidiaries and sales organizations. Sales people can sell and be commissioned across subsidiaries. Marketing campaigns and the leads obtained could be shared by one or more subsidiaries.
- **Shared or Unique Web Stores**  
Subsidiaries can have dedicated or shared Web stores with unique items.
- **SuiteCloud**  
SuiteCloud supports NetSuite OneWorld with SuiteTalk (Web Services), SuiteScript, SuiteBuilder (customization), and SuiteAnalytics Connect.
- **Reporting and Search**  
NetSuite OneWorld supports reporting in the base currency of each subsidiary, its parent subsidiary, and the top-level, root-parent subsidiary. Financial statements, dashboards, and [Key Performance Indicators Overview](#) can display consolidated roll-ups and side-by-side comparisons of subsidiaries.

## Who Should Use NetSuite OneWorld?

Although most companies can adapt the capabilities of NetSuite OneWorld to meet the requirements of their particular business operations and structure, NetSuite OneWorld provides the most value to organizations with the following characteristics:

- Subsidiaries exist as separate legal entities, particularly foreign subsidiaries.
- The top-level, or root-parent subsidiary, owns 100% of all subsidiaries. Affiliates, franchisees, joint ventures, and similar shared-ownership entities require more specialized accounting treatment. For more information, see [Setting Up OneWorld](#) and [NetSuite Company Settings](#).



- All subsidiaries have similar business processes. For example, a wholesale distribution company with similar operations in multiple countries can take advantage of company-level preferences. For more information, see [Set Company Preferences](#).
- All subsidiaries generally use the same chart of accounts and fiscal periods. However, a company could set up country-specific accounts to meet statutory or internal reporting requirements. For more information, see the help topics [Working with the Chart of Accounts](#) and [Working with Accounting Periods](#).

## Implementing NetSuite OneWorld

A new NetSuite implementation can be set up to use NetSuite OneWorld, and an existing account can be upgraded to use NetSuite OneWorld. Any edition of NetSuite can be upgraded. This is a one-time upgrade to your NetSuite implementation that cannot be reversed.

If you are interested in NetSuite OneWorld, contact your account representative.

Through a well-planned and careful implementation coordinated by NetSuite Professional Services, you can take full advantage of the benefits of NetSuite OneWorld features and confidently complete a successful NetSuite OneWorld implementation.

## Setting Up OneWorld

You must complete the following steps to set up NetSuite OneWorld.

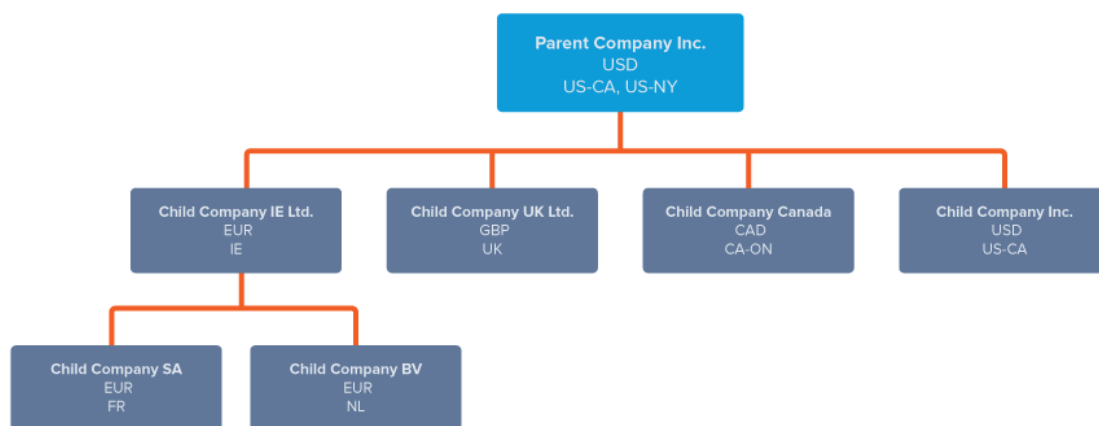
1. Ensure that you have a thorough understanding of how subsidiaries including elimination subsidiaries are organized in NetSuite OneWorld. See [Subsidiaries Overview](#) and [Elimination Subsidiaries Overview](#).
2. Plan your subsidiary hierarchy and create a visual representation of this structure. See [Planning Your Subsidiary Hierarchy](#).
3. Ensure that currencies to be used by subsidiaries are set up in your account.  
For an overview of how multiple currencies are used in NetSuite OneWorld, see [Multiple Currencies in OneWorld](#).  
For details about setting up currencies and exchange rates, see the help topics [Creating Currency Records](#) and [Setting Currency Exchange Rates](#).
4. Ensure that tax jurisdictions (nexuses) to be used by subsidiaries and related tax items are set up in your account.
  - For an overview of how nexuses are used in NetSuite OneWorld, see [Nexuses and Taxes in OneWorld](#).
  - For details about setting up taxes, see the help topic [Enabling and Setting Up Taxation Features](#).
5. Create subsidiary records, starting from the top-level or root subsidiary, and working your way down through child and grandchild subsidiaries.
  - You can create both subsidiaries representing legal entities and elimination subsidiaries. For instructions, see [Creating Subsidiary Records](#).
  - After you have saved each subsidiary record, you can edit its nexuses and preferences as necessary. See [Editing Subsidiary Records](#).
  - You can delete a subsidiary if there are no associated transactions or records. See [Deleting Subsidiary Records](#).
6. Complete the following as necessary:
  - [Setting Up Accounts in OneWorld](#)

- Setting Up Automated Intercompany Management
- Setting Up Payroll in OneWorld
- Setting Up Inventory in OneWorld
- Setting Up Multiple Vendors in OneWorld
- Associating Subsidiaries with Entities
- Associating Subsidiaries with Items
- Associating Subsidiaries with Shipping Items
- Controlling Employee Access to Subsidiaries
- Locking Transactions by Subsidiary

## Subsidiaries Overview

NetSuite OneWorld enables you to manage data for a hierarchical structure of separate legal entities, or subsidiaries. This structure is organized as a tree that rolls up to a root, or top-level parent subsidiary. The root subsidiary is the highest-level subsidiary in your account, and all other subsidiaries are below it in the hierarchy. If an implementation that is upgraded to NetSuite OneWorld has preexisting data, this data is used for the root subsidiary.

**Note:** You can purchase two different types of subsidiaries for NetSuite OneWorld. If you have subsidiaries to which you book journal entries only for reconciliation purposes, you can purchase general ledger only subsidiaries. Purchase operating subsidiaries for those where you record transactions. Contact your NetSuite account representative for pricing information.



Each subsidiary represents a separate company within your global organization. Subsidiaries can be international or domestic. When you create a subsidiary record in NetSuite, the country you define for its address determines the NetSuite edition and tax nexus associated with that subsidiary.

In addition to the subsidiaries representing your organization's separate legal entities, you must create elimination subsidiaries for use in balancing consolidated financials. Each NetSuite OneWorld transaction generally posts to a single subsidiary, with the exception of transactions between two subsidiaries. Intercompany transactions include intercompany sales and purchases, intercompany inventory transfers, and intercompany journal entries. Because intercompany transactions post to two subsidiaries, the revenues and expenses associated with them must be eliminated at the consolidated level to maintain balanced financials. Elimination journal entries, associated with elimination subsidiaries, are used to maintain this balance. For more information, see [Elimination Subsidiaries Overview](#).

You can create up to 124 subsidiary records in addition to the root subsidiary, for a total of 125.

**Note:** License fees for subsidiaries do not include charges for elimination subsidiaries, and elimination subsidiaries do **not** count toward the maximum of 125 subsidiaries. Inactive subsidiaries also do not count toward the maximum.

## Elimination Subsidiaries Overview

When related companies within a consolidated company transact, keeping correct books may require eliminating the revenue or expenses for subsidiaries at the consolidated level to remove the effect of investment in subsidiaries.

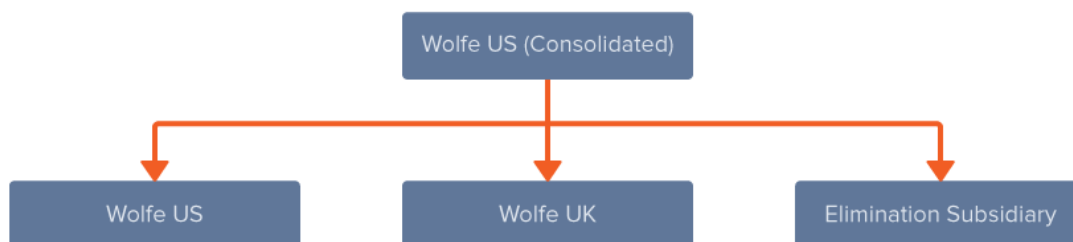
For example, intercompany transaction balances may require elimination for the following reasons:

- Sales between subsidiaries
- Inventory transfers between subsidiaries
- Loans between subsidiaries

You use elimination subsidiaries to post journal entries that balance consolidated books. These journal entries, called elimination journal entries, reverse the impact of the intercompany transactions. Each elimination journal entry is posted to an elimination subsidiary. Note that **ONLY** journal entries post to elimination subsidiaries. No other transactions post to elimination subsidiaries. See the help topic [Elimination Journal Entries](#).

Create an elimination subsidiary for any subsidiary that has child subsidiaries and create it as a child of the parent subsidiary. Set the currency to the same currency as the base currency of the parent subsidiary. An elimination subsidiary cannot be a parent.

The following illustration shows a sample subsidiary hierarchy that includes an elimination subsidiary.



You create elimination subsidiaries in the same manner that you create other subsidiaries except that you check the Elimination box on the subsidiary record. For more information, see [Creating Subsidiary Records](#).

License fees for subsidiaries do not include charges for elimination subsidiaries, and elimination subsidiaries do not count toward the maximum of 125 subsidiaries.

Note the following about elimination subsidiaries and transactions:

- An elimination subsidiary must use the same base currency as their direct parent subsidiary.
- When using consolidated exchange rates, an elimination subsidiary must use a consolidated exchange rate of 1 to its direct parent subsidiary.
- An elimination subsidiary can be selected **only** for journal entries, not for other transactions.
- A journal entry that is associated with an elimination subsidiary is a normal journal entry, not an intercompany journal entry. It posts to a single subsidiary, which is an elimination subsidiary. For more information about journal entries in NetSuite OneWorld, see the help topic [Making Journal Entries in OneWorld](#).

- Elimination transactions post only to the elimination subsidiary and do not affect the general ledger of non-elimination subsidiaries.
- Elimination journal entries can be generated automatically if you enable the Automated Intercompany Management feature. For more information, see [Automated Intercompany Management Overview](#).
- An elimination subsidiary cannot be selected on a bank account record or a credit card account record.
- An elimination subsidiary cannot be selected on item records.

## Planning Your Subsidiary Hierarchy

Before you create subsidiary records in NetSuite you should plan the structure of your organization's subsidiaries because for each subsidiary record you create you must define its parent. As you create subsidiaries, a hierarchical structure is automatically defined. This hierarchy is very difficult to modify after it is defined.

**Note:** You can purchase two different types of subsidiaries for NetSuite OneWorld. If you have subsidiaries to which you book journal entries only for reconciliation purposes, you can purchase general ledger only subsidiaries. Purchase operating subsidiaries for those where you record transactions. Contact your NetSuite account representative for pricing information.

It is recommended that you diagram the parent-child relationships in your subsidiary hierarchy, starting at the top with the root subsidiary. This visual representation can help you consider how you want to organize and consolidate data, for both accounting and reporting purposes.

As you diagram your subsidiary hierarchy, it is a good idea to record the country, base currency, and tax nexuses for each subsidiary. A base currency is the currency in which a subsidiary manages its financials. After a base currency is defined and saved on a subsidiary record, it cannot be changed. A nexus is a tax jurisdiction. Nexuses can be added and changed on subsidiary records. The country entered on a subsidiary record automatically determines the first tax nexus and NetSuite edition associated with that subsidiary.

After you have diagrammed a hierarchy of subsidiaries representing all legal entities in your organization, you should include one elimination subsidiary as a child of each parent subsidiary. The elimination subsidiary should use the same base currency.

The subsidiary hierarchy diagram can serve as a roadmap for setting up subsidiaries. You can refer to the base currency listed for each subsidiary to ensure that all necessary currencies are set up in NetSuite. See [Multiple Currencies in OneWorld](#). You can refer to the country listed for each subsidiary to ensure that all required tax nexuses are set up in NetSuite and linked to the appropriate country. See [Nexuses and Taxes in OneWorld](#). Use your diagram to reference the order in which to create subsidiary records, in top-down order, beginning with the root. Be aware that you cannot change the subsidiary after you create and save a subsidiary record. See [Creating Subsidiary Records](#).

If you enable the GL Audit Numbering feature, you can apply gapless numbering sequences to all general ledger posting transactions. These numbering sequences enable companies to meet international auditing requirements. The feature also enables you to specify that a subsidiary's transactions are locked to the general ledger. This option permits NetSuite to automatically generate journal entries (copy and adjustment) when changes are made to a transaction that posted to the general ledger. For more information, see the help topics [Using GL Audit Numbering](#) and [Using GL Impact Locking](#).

## Multiple Currencies in OneWorld

The NetSuite Multiple Currencies feature provides support for transactions with customers and vendors that use currencies other than the currency in which your company manages its financials. The

currency used to manage your company's financials is called the base currency, and other currencies used by customers and vendors are referred to as foreign currencies.

The Multiple Currencies feature is required for NetSuite OneWorld. With NetSuite OneWorld, each subsidiary can have a separate base currency. The base currency is used to manage the subsidiary's financials. A subsidiary's base currency cannot be changed after the subsidiary record has been saved.

As you are planning your subsidiary hierarchy, you must determine the base currency of your root subsidiary, then the base currencies of all of your other subsidiaries. All subsidiary base currencies as well as any other currencies in which transactions are recorded should be set up in NetSuite. See the help topic [Creating Currency Records](#).

When a transaction is entered for a subsidiary, the currency defined on the customer's or vendor's NetSuite record determines the currency used to present the transaction amounts. If a customer or vendor has a currency different from the subsidiary, the transaction must use two currencies, the foreign currency used by the customer or vendor and the base currency used by the subsidiary.

Currency exchange rates are used to convert foreign currencies to base currencies, providing default rates for transactions in currencies other than the base currency. Exchange rates are expressed in terms of base currency units per foreign currency units. You must set up a Currency Exchange Rates list in NetSuite. See the help topic [Setting Currency Exchange Rates](#). You can enable the Currency Exchange Rate Integration feature to automatically update currency exchange rates on a nightly basis. See the help topic [Using the Currency Exchange Rate Integration Feature](#).

Consolidated reports use a separate Consolidated Exchange Rates table to translate child subsidiaries' amounts to roll up into consolidated parent subsidiary amounts. See [Consolidated Reporting in OneWorld](#) and [Using Consolidated Exchange Rates](#). Reports that include budget as well as actual amounts such as some financial statements can use a separate Budget Exchange Rates table for translation of budget amounts. See the help topics [Working with OneWorld Financial Statements](#) and [Running Subsidiary-Specific Budget Reports](#).

Over time, variances in exchange rates can affect the value of foreign currency transactions. NetSuite automatically calculates and posts exchange rate variance amounts for transactions that close during each accounting period. See the help topic [Accounting for Fluctuation in Exchange Rates](#). In addition, before you close each period you are required to revalue open balances to account for variances. See the help topic [Revaluing Open Currency Balances](#).

## Nexuses and Taxes in OneWorld

A nexus is a tax jurisdiction. Nexuses are part of the NetSuite Advanced Taxes feature, which is required for NetSuite OneWorld. Each subsidiary must be associated with at least one nexus. The first nexus is automatically assigned to a subsidiary based on the country entered for the subsidiary's address. A subsidiary can have more than one nexus. A nexus and its related tax items can be shared by multiple subsidiaries.

After you save a subsidiary record, a Nexuses subtab is available where you can add or remove nexuses. See [Editing Subsidiary Records](#).




**Important:** For U.S. subsidiaries, a state nexus is required. For Canada subsidiaries, a province nexus is required.

It is best to create and set up taxes for nexuses before creating subsidiary records. You can create a nexus at Setup > Accounting > Nexuses > New. See the help topic [Creating Tax Nexuses](#). You set up taxes for nexuses at Setup > Accounting > Taxes > Set Up Taxes. When you create a subsidiary, if a nexus does not yet exist for the subsidiary's country, it is automatically created when the subsidiary record is saved. However, all that is created for the nexus is a name and description. It still must be set up at Setup > Accounting > Taxes > Set Up Taxes.

You should understand and set up the following tax features and items to set up tax nexuses:

- **Advanced Taxes Feature** - This feature provides management of taxes for multiple tax jurisdictions and must be enabled in NetSuite OneWorld. See the help topic [Enabling Advanced Taxes](#).
- **Tax Agency Vendors** - These vendors represent taxing authorities to whom you pay collected taxes. The system automatically creates a tax agency vendor when you create a tax nexus. For more information, see the help topic [Setting Up Tax Agencies as Vendors](#).  
Multiple subsidiaries can pay taxes to the same tax agency. When you set up a new subsidiary that shares a tax nexus with an existing subsidiary, a copy of the preferred tax vendor for that nexus is created and associated with the new subsidiary. The copy is necessary because you cannot share a vendor tax agency with multiple subsidiaries. You CAN, however, share non tax agency vendors with multiple subsidiaries. For more information, see [Assigning Subsidiaries to a Vendor](#).
- **Tax Control Accounts** - These are Other Current Liability Accounts that you can set up in your General Ledger to post and track tax collection and payments. See the help topic [Tax Control Accounts Overview](#).
- **Tax Types** - These types provide categories used to link each tax code or tax group to a tax control account. Available tax types depend upon the country selected for the tax code. See the help topic [Tax Types Overview](#).
- **Tax Codes and Tax Groups** - A tax code represents a tax collected from customers in a specific geographic area and paid on their behalf to a taxing authority, based on a specific percentage rate. You can create tax groups that combine taxes for all tax jurisdictions relevant to a transaction. See the help topics [Tax Codes Overview](#) and [Tax Groups Overview](#).
- **Tax Schedules** - Tax schedules allow different calculations of taxes on items, for different nexuses. When you enable the Advanced Taxes feature, the system creates tax schedules for each tax code. See the help topic [Creating Tax Schedules](#).
- **Tax Reporting Periods** - (Editions other than US and Canada) You can set up these periods to track tax reporting separately from accounting periods. In NetSuite OneWorld, the same tax reporting periods apply across all subsidiaries that use the feature. See the help topic [Setting Up Tax Periods](#).

 **Note:** Available tax items and features vary for different NetSuite editions. See [NetSuite Editions Overview](#).

## NetSuite Editions Overview

The following localized editions of NetSuite are available. Each edition has differences in the user interface and feature capabilities.

Subsidiaries within a single NetSuite OneWorld implementation may use different NetSuite editions. When you create a subsidiary record in NetSuite, the country you define for its address determines the NetSuite edition.

- NetSuite (US)
- NetSuite Australia (AU)
- NetSuite Canada (CA)
- NetSuite Japan (JP)
- NetSuite UK (UK)
- NetSuite International (XX) (This edition is not country-specific, and is used for countries that do not have a localized edition. You can customize tax functions, using the Advanced Taxes feature, for specific countries.

An important difference among editions is their different handling of taxes, as shown in the following table:

	US Edition	Australia Edition	Canada Edition	Japan Edition	UK Edition	Internat'l Edition	NetSuite OneWorld
<b>Precoded Tax?</b>	Requires state tax import	YES	YES	YES	YES	NO	Based on Subsidiary Edition
<b>Type of Tax</b>	Sales Tax	GST	GST, PST	Consumption Tax	VAT	N/A	Based on Subsidiary Edition
<b>Tax Reporting Periods?</b>	NO	YES	NO	YES	YES	YES	YES, One Set Across All Subs, unless you enable Multiple Calendars. See the help topic <a href="#">Enabling Multiple Calendars</a> .
<b>Foreign Trade Setting?</b>	NO	YES	NO	YES	YES	YES	Based on Subsidiary Edition

## Setting Up Subsidiaries

Before you begin setting up subsidiaries for NetSuite OneWorld, ensure you review the following help topics:

- [Subsidiaries Overview](#)
- [Elimination Subsidiaries Overview](#)
- [Planning Your Subsidiary Hierarchy](#)
- [Multiple Currencies in OneWorld](#)
- [Nexuses and Taxes in OneWorld](#)

You must create a record for each subsidiary including elimination subsidiaries. After you have created and saved a subsidiary record, you can edit tax nexuses and preferences on that record. See the following help topics:

- [Creating Subsidiary Records](#)
- [Editing Subsidiary Records](#)
- [Deleting Subsidiary Records](#)
- [Adding or Removing Nexuses from a Subsidiary](#)

After you create subsidiaries for NetSuite OneWorld, you can then associate subsidiaries with customers, employees, vendors, partners, items, and shipping items. For information and guidelines, see the following help topics:

- [Associating Subsidiaries with Entities](#)
- [Associating Subsidiaries with Items](#)
- [Associating Subsidiaries with Shipping Items](#)

## Creating Subsidiary Records

Create a subsidiary record for each legal entity in your organization, and a separate elimination subsidiary record as a child of each parent subsidiary. Oracle recommends that you create subsidiary records in a top-down fashion, beginning with the root subsidiary, then all of its child subsidiaries, then the next level of subsidiaries, and so on. This order is recommended because you must define the parent for each child subsidiary in the Subsubsidiary of field on the subsidiary record.



**Note:** You can purchase two different types of subsidiaries for NetSuite OneWorld. If you have subsidiaries to which you book journal entries only for reconciliation purposes, you can purchase general ledger only subsidiaries. Purchase operating subsidiaries for those where you record transactions. Contact your NetSuite account representative for pricing information.

**Important:** If an implementation upgraded to NetSuite OneWorld has preexisting data, this data is used for the root subsidiary.

Be aware that the following values cannot be changed after you have saved a subsidiary record:

- Subsubsidiary of (the parent subsidiary)
- Elimination
- Currency
- Edition
- Country

Also be aware that you cannot delete the subsidiary where the ID is equal to 1.

You can create up to 124 subsidiary records, in addition to the root subsidiary, for a total of 125. License fees for subsidiaries do not include charges for elimination subsidiaries, and elimination subsidiaries do not count toward the maximum of 125 subsidiaries. Inactive subsidiaries also do not count toward the maximum.

You can lock transactions by subsidiary based on the country of the subsidiary to comply with country-specific accounting regulations. See [Locking Transactions by Subsidiary](#).

**Important:** To benefit from the automatic tax code provisioning feature, you must first install the [International Tax Reports](#) in your account before creating subsidiaries. In NetSuite OneWorld implementations that have the International Tax Reports SuiteApp, when you add a new subsidiary country the system creates the nexus for it and, at the same time, creates the VAT/GST tax codes for that nexus. Therefore, **you must have the International Tax Reports SuiteApp already installed before you add the subsidiary.** (Without the International Tax Reports SuiteApp, when you create a subsidiary country, NetSuite also adds its nexus, but provides only a few default tax codes.) For more information, see the help topic [Automatic Tax Code Provisioning](#).

**Note:** You can add custom fields and user event scripts to subsidiary records. Customizing subsidiary records enables you to add fields and business logic that are specific to the countries or regions in which your business operates. Go to Customization > Lists, Records, & Fields > Other Custom Fields. Select Subsidiary as the Record Type. Complete the fields as required and then save the custom field. For more information, see the help topic [Creating a Custom Field](#).

### To create a subsidiary record:

1. Go to Setup > Company > Subsidiaries > New.
2. Enter up to 83 alphanumeric characters for the name of the subsidiary.
3. Select the parent subsidiary in the **Subsubsidiary of** field.  
This value cannot be changed after you save the subsidiary record.
4. Check the **Subsidiary is Inactive** box if this subsidiary is no longer active or used in your account.  
Inactivated subsidiaries no longer show in the **Subsidiary** field on records and transactions unless they are currently attached to a record. Websites of inactive subsidiaries are no longer available online.



5. Check the **Always Display Subsidiary Name** box to display only the subsidiary name with your role in the upper right corner of a page. In addition, when logging in to an external account, such as an employee center, vendor center, or customer center, the dashboard displays only the logo of the subsidiary, not the parent company logo.

Clear this box to display both the parent and the subsidiary name in your account.

6. In the **Subsidiary Logo (Forms)** field, select the logo image to be used on all forms by this subsidiary.

Click **New** to upload a logo. Logos must be in JPG or GIF format.



**Note:** The logo selected in this field does not affect pages in your account. The logo displayed on pages is determined by the selection in the **Subsidiary Logo (Pages)** field.

7. In the **Subsidiary Logo (Pages)** field, select the logo image to be displayed on all pages for this subsidiary.

Click **New** to upload a logo. Logos must be in JPG or GIF format.



**Note:** The logo selected in this field does not affect printed forms. The logo on printed forms is determined by the selection in the **Subsidiary Logo (Forms)** field.

8. Enter the URL of this subsidiary's website.
9. If autogenerated numbering is enabled in your account and you want to use subsidiary-specific numbering for documents, enter a prefix to signify this subsidiary in document numbers.

You can enter up to 8 alphanumeric characters.

You must also enable subsidiary-specific transaction numbering at Setup > Company > Auto-Generated Numbers. For more information, see [Using Subsidiary-Specific Transaction Auto-Numbering](#).

10. Enter the legal name of this subsidiary as it appears on tax documents.
11. Enter a return email address.

You can specify that email forms generated in NetSuite are sent using this email address. This is useful when you have many subsidiaries and you want customers or vendors to reply using an email address from the appropriate subsidiary. For information about setting email preferences, see [Setting Email Preferences](#).

12. Enter a fax number.
13. Check the **Elimination** box if this subsidiary record is to be used for only intercompany journal entries that reverse transactions between subsidiaries.

This value cannot be changed after you save the subsidiary record.

If you need information about elimination subsidiaries, see [Elimination Subsidiaries Overview](#).

If you need information about intercompany journal entries, see the help topic [Intercompany Journal Entries](#).

14. If this subsidiary uses multiple languages, select the default language for NetSuite users in this subsidiary.

You can enable multiple languages in the International section on the Company subtab at Setup > Company > Enable Features.

Individual users can choose their language at Home > Set Preferences.

15. If this subsidiary uses multiple calendars, select the calendars to roll up accounting and tax periods.

The fiscal calendar determines the start date for the accounting year.

The tax fiscal calendar determines the start date for the tax year.

You can enable multiple calendars in the Advanced Features section on the **Accounting** subtab at Setup > Company > Enable Features.

16. Select the base currency used by this subsidiary.

This value can be the same as or different from the base currency of the parent. This value cannot be changed after you save the subsidiary record.

Elimination subsidiaries default to the base currency of the parent subsidiary.



**Important:** If adding a new subsidiary exceeds the number of purchased country licenses, an error message appears prompting you to inactivate an existing subsidiary or contact your account manager to purchase additional licenses.



**Note:** The NetSuite Edition used by the subsidiary is automatically populated based on the country entered for the subsidiary address. The following subsidiaries are available:

- AU - NetSuite Australia
- CA - NetSuite Canada
- XX - NetSuite International (This edition is not country-specific. It is used for countries that do not have their own edition. The underlying tax engine needs to be customized for each country.)
- JP - NetSuite Japan
- UK - NetSuite UK
- US - NetSuite US

17. Check the **GL Impact Locking** box to permit NetSuite to automatically generate journal entries (copy and adjustment) when changes are made to a transaction that posted to the general ledger.

When this box is checked, transactions that post to the general ledger display the GL Impact subtab. This subtab records the general ledger impact of this transaction and any modifications.

You can check and clear this box, as required.



**Note:** This option is visible in NetSuite OneWorld and only when the GL Audit Numbering feature is enabled. For more information, see the help topics [Using GL Audit Numbering](#) and [Using GL Impact Locking](#).

18. Enter the appropriate tax identification numbers for this subsidiary.

The fields that display depend on the country entered for the address.

19. Enter the name or department that should be notified of shipment or return arrivals.


20. Enter the name or department that should appear on shipping labels and return addresses.

After you save the subsidiary record you can enter the address for shipping and returns.

21. If your account has the EU Mini One Stop Shop feature enabled:

- a. Check the **MOSS Applies** box if the Mini One Stop Shop (MOSS) VAT scheme applies to this subsidiary.
- b. In the **MOSS Nexus** field, select the EU member state (tax nexus) where you are registered for MOSS VAT returns.

22. To enter the general business address and phone number for this subsidiary, click the **Edit** link next to the **Address** field to display an address popup.

 **Note:** The address form displayed in the popup may vary according to the country where the subsidiary is located, and depends on the custom address forms defined in your account. For more information, see the help topic [Customizing Address Forms](#).

- The country entered here determines the first tax nexus and the NetSuite edition for the subsidiary.
- This address is shown, instead of the company address entered at Setup > Company > Setup Tasks > Company Information, on printed transaction forms for customers or vendors.
- Click the **Override** box to edit the default address in the **Address** field.

23. Click **Save**.

After you have saved a subsidiary record for the first time, you can return to the record to edit most of the fields you defined as well as additional fields on Shipping Address, Return Address, Nexuses, Preferences, Translation, and System Notes subtabs. For more information, see [Editing Subsidiary Records](#).

If the Intercompany Time and Expense feature is enabled in your account, an Intercompany Account is automatically associated with a subsidiary after qualifying transactions are created in the system such as a journal to eliminate Time and Expense. This account is determined by the subsidiary's base currency. It is used to offset the transfer of charges from intercompany time and expenses from this subsidiary to another. For more information, see the help topics [Enabling Intercompany Time and Expenses](#) and [Intercompany Clearing Account](#).

## Editing Subsidiary Records

After you have saved a subsidiary record for the first time, you can edit most of the values you entered for it. Also, additional subtabs are available for you to do the following:

- Define the subsidiary's address as it should appear on shipping labels
- Define the address that should appear as a return address
- Add or remove tax nexuses associated with the subsidiary
- Set preferences for system email templates, date, time, phone number formats, time zone, default payable account, default advance account, check layout, and CSV files formatting
- Define alternate subsidiary names to display in other languages
- View the date and time fields were modified and by whom

Be aware that you cannot delete the subsidiary where the ID is equal to 1.



**Important:** The following values cannot be edited after you have saved a subsidiary record: **Subsidiarity of, Elimination, Currency, Edition, and Country.**

If you have not yet entered transactions for a subsidiary, you can change the base currency by performing the following tasks:

# Delete the nexus.

# Delete the subsidiaries related to that nexus.

# Recreate the nexus.

# Recreate the subsidiaries using the correct currency and then re-associate them with the nexus.

For subsidiary planning information, see [Planning Your Subsidiary Hierarchy](#).



**Note:** You can add custom fields and user event scripts to subsidiary records. Customizing subsidiary records enables you to add fields and business logic that are specific to the countries or regions in which your business operates. Go to Customization > Lists, Records, & Fields > Other Custom Fields. Select Subsidiary as the Record Type. Complete the fields as required and then save the custom field. For more information, see the help topic [Creating a Custom Field](#).

### To edit a subsidiary record:

1. Go to Setup > Company > Subsidiaries and then click **List**.
2. Click the **Edit** link next to a subsidiary.
3. Edit the main fields as required.
4. To define the address to be displayed for the subsidiary on shipping labels, click the **Addresses** subtab, and click the **Edit** link for the **Shipping Address** field.  
The address you enter here is used instead of the shipping address set at Setup > Company > Setup Tasks > Company Information.
5. To define the address to be displayed for the subsidiary as a return address, click the **Addresses** subtab, and click the **Edit** link next to the **Return Address** field.  
The address you enter here is used instead of the return address set at Setup > Company > Setup Tasks > Company Information.
6. To add or remove tax nexuses associated with the subsidiary, click the **Nexuses** subtab. See [Adding or Removing Nexuses from a Subsidiary](#).
7. To set preferences for the subsidiary, click the **Preferences** subtab.
  1. Select the type of check you print by default for this subsidiary.
  2. Select the email templates you want used to send email to employees, customers, and partners when you grant them access to your NetSuite account.  
For more information, see the help topic [Working with Email Templates](#).
  3. Select the date, time, and number formats used by this subsidiary.
  4. Choose the format used for phone numbers in this subsidiary.
  5. Select the time zone for this subsidiary.
  6. Select the first day of the week for this subsidiary.
  7. Select the alphabetical order to use for search results.
  8. Select how you want time transactions rounded for this subsidiary.
  9. Select a default payable account for expense reports for this subsidiary.

10. Select a default account for advances to apply on expense reports for this subsidiary.
11. Choose the check layout used when printing checks for this subsidiary.
12. Choose how this subsidiary contacts NetSuite Support.
13. Choose how this subsidiary is contacted by NetSuite Support.
14. Set the formatting preferences for CSV data to be imported by the Import Assistant.

With NetSuite OneWorld, most company preferences are shared by all subsidiaries in the global organization. This includes all of the preferences set on the Setup tab that are not set specifically on subsidiary records. Classes, departments, and locations are shared globally and can be linked to specific subsidiaries and their children. For more information, see [Set Company Preferences](#).

The subsidiary-specific preferences set on this page take precedence over company preferences in the event that they conflict. Any user preferences set at Home > Set Preferences take precedence over subsidiary-specific and company preferences. For more information, see the help topic [Setting Personal Preferences](#).

8. If you have enabled auto generated numbering by subsidiary for specific transactions, click the **Numbers** subtab to specify the initial number for each transaction type.



**Note:** To enable auto-generated numbering by subsidiary for specific transactions, go to Setup > Company > Auto-Generated Numbers. Click the **Transactions** subtab and then check the **Use Subsidiary** box for any transaction that should use the subsidiary's numbering. For more information, see [Using Subsidiary-Specific Transaction Auto-Numbering](#).

9. Click **Save**.

## Deleting Subsidiary Records

You can delete subsidiaries that have been created and saved, and those that do not have transactions or records. For information about deleting transactions, see the help topic [Voiding, Deleting, or Closing Transactions](#).

You can also delete a subsidiary if the only action you have performed is to add tax agency addresses.

Be aware that you cannot delete the subsidiary where the ID is equal to 1.

### To delete an existing subsidiary record:

1. Go to Setup > Company > Subsidiaries and then click **List**.
2. Click the **Edit** link next to a subsidiary record that you want to delete.
3. From the Subsidiary page, under **Actions**, click **Delete**.
4. At the prompt to confirm the action, click **OK**.

## Adding or Removing Nexuses from a Subsidiary

Add a nexus to a subsidiary if the subsidiary has a valid registration to collect tax in that nexus (tax jurisdiction).

Remove a nexus from a subsidiary only if the subsidiary does not have any transactions associated with the nexus. If you try to remove a nexus from a subsidiary that has transactions associated with the nexus, the system displays an error message containing a list of those transactions. To remove the nexus from the subsidiary, you must delete or modify those transactions. You can click each transaction in the error message to view the transaction record.

For information about nexuses, see [Nexuses and Taxes in OneWorld](#).

### To add or remove nexuses from a subsidiary:

1. Go to Setup > Company > Subsidiaries and then click **List**.
2. Click the **Edit** link next to a subsidiary.
3. Click the **Nexuses** subtab.
4. To add a nexus:
  - a. Select a nexus from the list on an empty row.
  - b. Click **Add**.

Only nexuses that have been created in NetSuite are listed here.

5. To remove a nexus:
  - a. Click the row for the nexus.
  - b. Click **Remove**.
6. Click **Save**.

For information about nexuses, see [Nexuses and Taxes in OneWorld](#).

## Locking Transactions by Subsidiary



**Important:** Please contact NetSuite Support to request access to the Transaction Locking SuiteApp. Alternatively, the GL Impact Locking option locks transactions if your company or your subsidiary is located in a country where the general ledger impact of a transaction must be locked to the general ledger and must not be changed. For more information, see the help topic [Using GL Impact Locking](#).



**Note:** This feature requires Transaction Locking SuiteApp (Bundle ID 8791).

In certain countries, accounting regulations require you to have a system in place to lock transactions to prevent anyone from making changes to them. In NetSuite, you can do this by installing the Transaction Locking SuiteApp (Bundle ID 8791), which is available at no cost from the NetSuite bundle repository.

The Transaction Locking SuiteApp locks transactions by hiding the Edit and Delete buttons from the following transaction records:

- Invoice
- Cash Sale
- Credit Memo
- Vendor Bill
- Vendor Credit
- Journal
- Vendor Payment
- Customer Payment
- Customer Refund
- Customer Deposit
- Cash Refund

This transaction locking affects transaction records only in subsidiaries set up for the following countries:

- Austria
- Brazil
- Denmark
- Germany
- Israel
- Sweden
- Switzerland
- Czech Republic



**Warning:** After you install this SuiteApp, all roles lose access to the Edit and Delete buttons on those transaction records.

### To install the Transaction Locking SuiteApp:

1. Go to Customization > SuiteBundler > Search & Install Bundles.
2. On the Install Bundle page, enter the following search criteria:  
**Location** : Repository  
**Availability** : Public  
**Keywords** : Transaction Locking, or the bundle ID 8791
3. Click **Search**.
4. On the search result page, click **Transaction Locking**.
5. Click **Install**.
6. Review the Preview Bundle Install page.
7. Click **Install Bundle**.

For more information, see the help topic [Installing a Bundle](#).

## Using Subsidiary-Specific Transaction Auto-Numbering

With NetSuite OneWorld, each subsidiary can use individual numbering sequences for transactions. For example, transactions associated with Subsidiary A can use the numbering prefix SubA.

Numbering transactions by subsidiary can be useful so users with access to only one subsidiary do not encounter numbering gaps for transactions because they cannot see transactions for another subsidiary. Also, some countries require unique numbering without gaps for each legal entity.





**Note:** A transaction inherits its subsidiary from its entity (customer or vendor). See [Associating Subsidiaries with Entities](#).

### To set up or update auto numbering for a subsidiary:

1. Go to Setup > Company > Subsidiaries and then click **List**.
2. Click **Edit** next to the subsidiary record.
3. In the **Transaction Prefix** field, enter the prefix.  
 For example, for Subsidiary A, enter **SubA**.

4. If you have enabled auto-generated numbering by subsidiary for specific transactions, click the **Numbers** subtab to specify the initial number for each transaction type.


 **Note:** To enable auto-generated numbering by subsidiary for specific transactions, go to Setup > Company > Auto-Generated Numbers. Click the **Transactions** subtab and then check the **Use Subsidiary** box for any transaction that should use the subsidiary's numbering.

 **Important:** If you choose to auto-number by subsidiary, you cannot auto-number by location.

5. Click **Save**.

## Setting Up Accounts in OneWorld

If you use NetSuite OneWorld, you can associate an account with one or more specific subsidiaries, which limits availability of the account to the selected subsidiaries only.

 **Note:** Bank accounts and credit card accounts are restricted to one subsidiary. When you create a bank account or credit card account, you can select only one subsidiary for the account.


Also, each account is assigned two exchange rate types: a general rate type that is used for the income statement, balance sheet, and other general purposes, and a cash flow rate type that is used for the cash flow statement. Choices of rate types are Current, Average, or Historical.

Go to Setup > Accounting > Manage G/L > Chart of Accounts and click an **Edit** link for an account to set up an account record as follows:

1. In the **General Rate Type** field, select **Current**, **Average**, or **Historical** to determine which consolidated rate to use in all cases except Cash Flow. For example, the General rate is used for financial statements and general reports.
2. In the **Cash Flow Rate Type** field, select **Current**, **Average**, or **Historical** to determine which consolidated rate to use. For example, Long-term assets use the Historical rate type and the balance sheet uses the Current rate type on the cash flow statement.
3. If necessary, select one or more subsidiaries in the **Subsidiaries** field.
  - If the root subsidiary is selected and the **Include Children** box is checked, then all subsidiaries can access the account.
  - If one or more subsidiaries are selected, then the account can only be selected for records and transactions associated with those subsidiaries.

For more details about rate types, see the help topic [Consolidated Exchange Rate Types](#).

For more information about setting up accounts, see the help topic [Creating Accounts](#).

 **Note:** If the **Intercompany Time and Expense** feature is enabled in your account, an intercompany clearing account is automatically created when there is an associated transaction. For more information, see the help topic [Intercompany Clearing Account](#).

## Setting Up Payroll in OneWorld

When using NetSuite OneWorld, you can run payroll only for U.S. subsidiaries. You must designate a subsidiary each time you set up payroll preferences, update payroll information, or create a payroll.



The Subsidiary list on these pages includes only subsidiaries with valid U.S. addresses, based on zip code. Also, each subsidiary must have the following:

- Unique Employer Identification Number (EIN) from the U.S. Internal Revenue Service (IRS).
- Unique NetSuite vendor record per tax agency

For example, if your organization includes two subsidiaries located in California, you would need to set up two differently named NetSuite vendor records for the IRS, and two differently named vendor records for the California Franchise Tax Board.

Only employees assigned to a U.S. subsidiary designated to process payroll can be included in payroll processing. Employees assigned to subsidiaries other than the one designated for payroll cannot be processed for payroll. See the following help topics for more information:

- [Setting Payroll Preferences](#)
- [Updating Payroll Information](#)
- [Generating Payroll Transactions](#)
- [Advanced Taxes](#)

## Setting Up Inventory in OneWorld

In NetSuite OneWorld, the Inventory feature functions the same as the Multi-Location Inventory feature. If you enable Inventory, Multi-Location Inventory is automatically enabled. For information about this feature, see the help topic [Multi-Location Inventory](#).

After enabling the Inventory feature for NetSuite OneWorld, you must associate each location with only one subsidiary. When you do not use the Inventory feature, you have the option to associate each location with no subsidiary, one subsidiary, or multiple subsidiaries.

In implementations that are not enabled for NetSuite OneWorld, you can enter initial quantities on hand in each location when you create an item record. However, in NetSuite OneWorld, you cannot enter initial quantities on hand when you create an item record. You must first create the item record, and then afterward, you must enter an inventory adjustment to specify the initial quantities in each location. See the help topics [Creating Item Records](#) and [Adjusting Inventory](#) for more details.

## Importing Inventory Data into OneWorld

When you are importing inventory data into your implementation, NetSuite does not support importing historical data that is dated prior to the date of the NetSuite OneWorld upgrade. Doing so may cause inaccuracies in your inventory data. Import only data that is dated later than the NetSuite OneWorld upgrade and initial Multi-Location Inventory distribution to maintain accurate inventory information.

## Setting Up Multiple Vendors in OneWorld

If you use the Drop Shipments & Special Orders feature in NetSuite OneWorld, you are required to use the Multiple Vendors feature.

When you use Multiple Vendors, on each item record you must specify a preferred vendor for each subsidiary to be able to drop ship or special order items for that subsidiary.

When using the Order Items form, if a preferred vendor is associated with the subsidiary, it defaults on the form for each line.

When viewing the item list, the preferred vendor associated with the root subsidiary (highest-level parent) shows by default.

If an item has a preferred vendor, the purchase price is shown on the item record in the root subsidiary's preferred vendor currency.

For more information about vendor records, see the help topic [Vendor Records Overview](#).

## Using Logos in OneWorld

When you set up subsidiaries in NetSuite OneWorld, you can choose the logo that displays for each subsidiary when viewing pages or printing out transactions. Each subsidiary can use an individual logo to distinguish itself from the others.

To use the subsidiary logo and address from the transaction record when printing, use advanced templates. For more information, see the help topic [Advanced PDF/HTML Templates](#). If you print transactions using basic layouts, the logo and address are sourced from the vendor's primary subsidiary.

On each subsidiary record, use the following fields to determine which logos are displayed on pages and printed on transactions.

### To set up subsidiary logos:

1. Go to Setup > Company > Subsidiaries, click **List**, and then click the **Edit** link for a subsidiary.
  - In the **Subsidiary Logo (Forms)** field, select the logo image to be used on all forms by this subsidiary.  
Click **New** to upload a logo. Logos must be in JPG or GIF format.  
The logo selected in this field does not affect pages in your account. The logo displayed on pages is determined by the selection in the **Subsidiary Logo (Pages)** field.
  - In the **Subsidiary Logo (Pages)** field, select the logo image to be displayed on all pages for this subsidiary.  
Click **New** to upload a logo. Logos must be in JPG or GIF format.  
The logo selected in this field does not affect printed forms. The logo on printed forms is determined by the selection in the **Subsidiary Logo (Forms)** field.
2. Go to Setup > Company > Setup Tasks > Company Information.
3. In the **Display Logo Internally** field, check the box to display the logo selected in the **Subsidiary Logo (Pages)** field when someone logs in to an internal center. The logo shows on all pages of your NetSuite account next to the Oracle | NetSuite logo.  
External centers in your NetSuite account are the Partner Center, Vendor Center, and Customer Center and they display the logo selected in the **Company Logo (Pages)** field. All other internal centers display the logo selected at **Subsidiary Logo (Pages)** when the preference to display the logo is enabled on the Company Information page.
4. Go to Home > Set Preferences.
5. On the **Analytics** subtab, when you enable the preferences to **Print Company Logo** and **Display Report Title on Screen**, then the logo selected in the **Subsidiary Logo (Forms)** field displays on reports you view or print.

If these logo options are not configured for the subsidiary of an entity who logs in, NetSuite checks each parent subsidiary in hierarchical order to find a subsidiary with the logo settings configured. If no subsidiary has logo settings configured, NetSuite pages display logos based on the company settings at Setup > Company > Setup Tasks > Company Information.

## Associating Subsidiaries with Entities

In NetSuite OneWorld, you must assign a subsidiary to each entity record before you can enter transactions for the entity. A transaction inherits its subsidiary from its entity. Other records referenced on the transaction, such as items or departments, are limited by values associated with that subsidiary.

This requirement applies to the following records:


- Employees - See [Assigning a Subsidiary to an Employee](#)
- Vendors - See [Assigning Subsidiaries to a Vendor](#)
- Partners - See [Assigning a Subsidiary to a Partner](#)
- Customers - See [Assigning Subsidiaries to a Customer](#)

To assign an entity to a subsidiary, open the record, and select a subsidiary in the Subsidiary field. When you select a subsidiary, the fields on the form change to reflect the address format, tax fields and other information appropriate to the subsidiary.

Employee and partner entities can be assigned to a single subsidiary. If these entities have relationships with multiple subsidiaries, you must create a record for each subsidiary relationship. Vendor and customer entities can be assigned a primary and multiple secondary subsidiaries.

You can assign entities from one subsidiary to an entity associated with a different subsidiary in some cases. For example, associating entities with different subsidiaries is acceptable in these cases:

- Contacts on Customer, Partner, Vendor, Group, Competitor, and Project records
- Employees and Contacts on Group records
- Employees on Project records

 **Note:** After a transaction has posted for the entity, you cannot change the primary subsidiary selected on the entity record.

For more information associating subsidiaries with entities, see the following help topics:

- [Customers](#)
- [Adding a Vendor Record](#)
- [Entering Address Information for an Employee](#)
- [Creating a Partner Record](#)
- [Enabling Intercompany Time and Expenses](#)

## Assigning a Subsidiary to an Employee

After you define a subsidiary on an employee record, by default that employee can only access records associated with that subsidiary. To give an employee access to other subsidiaries' records, you can set up subsidiary access for the employee's assigned role. See [Controlling Employee Access to Subsidiaries](#).

### To assign a subsidiary to an employee:

1. Go to Lists > Employees > Employees, and click the **Edit** link next to an employee.
2. Click the **Info** subtab, select from the **Subsidiary** list, and click **Save**.

## Assigning Subsidiaries to a Vendor

You can assign a primary subsidiary and an unlimited number of secondary subsidiaries to a vendor record. The primary subsidiary assigned to a vendor is generally associated with any transactions involving that vendor. However, you can also associate transactions with any secondary subsidiary assigned to the vendor in the procure-to-pay workflow.

When you view a globally shared vendor record, you can see the vendor's total outstanding balance and total unbilled balance (sum of all of the assigned subsidiaries' balances) in the primary subsidiary's currency.

You can designate a credit limit for the primary subsidiary and each of the secondary subsidiaries on the vendor record. You can also associate vendors and multiple subsidiaries with items, assigning a specific item price for each subsidiary purchasing from the vendor.

For tax agency vendor records, it is important to set the subsidiary to match the subsidiary linked to the nexus using that tax agency.

You specify the tax code at the line-level on the Subsidiaries subtab. Tax code is not available in the US edition for accounts that are not OneWorld.



**Important:** You define multiple secondary subsidiaries through the user interface and SuiteScript. To use SuiteScript to define secondary subsidiaries on a vendor record, use the [Vendor-Subsidiary Relationship](#) record type. You cannot define secondary subsidiaries through CSV import.

If you have enabled the Multi-Subsidiary Customer feature, you can share a vendor record that is also paired with a customer record. Such pairings display on the Relationships subtab on the vendor record.

To use the subsidiary logo and address from the transaction record when printing, use advanced templates. For more information, see the help topic [Advanced PDF/HTML Templates](#). If you print transactions using basic layouts, the logo and address are sourced from the vendor's primary subsidiary.

## Vendor Searches for Multi-Subsidiary Vendors

When you create vendor searches and vendor saved searches, you can obtain results for all of the secondary subsidiaries assigned to the globally shared vendor. On the Available Filters subtab, select Subsidiary Fields and then choose the fields to include as filters. On the Results > Columns subtab, select Subsidiary Fields and then choose the fields to display as columns in the results. For information about simple searches, see the help topic [Defining a Simple Search](#). For information about saved searches, see the help topic [Saved Searches](#).

## Multi-Subsidiary Vendor Customer Entities

If you have enabled the Multi-Subsidiary Customer feature, you create a multi-subsubsidiary customer record from a multi-subsubsidiary vendor record. This vendor customer relationship produces a single entity, which is useful when you want to use one entity to represent both a customer and a vendor.



**Note:** The vendor and customer records must share the same primary subsidiary to create a multi-subsubsidiary vendor customer relationship.

For information about creating relationships between record types, see the help topic [Records as Multiple Types](#).

## Transactions Available for Multi-Subsidiary Vendors

Refer to the following table to learn how you can use multi-subsidiary vendors with core transactions.

Task	What You Can Do	Help Topic Links
Allocation Schedules	Specify that the source account and destination account belong to any of the vendors to which the selected subsidiaries are assigned	<a href="#">Creating Expense Allocation Schedules</a> <a href="#">Creating Intercompany Allocation Schedules</a>
Bill Purchase Orders	View all unbilled purchase orders associated with the subsidiaries assigned to the selected vendor Bill any or all purchase orders that share the same subsidiary and currency	<a href="#">Billing Purchase Orders</a>
Checks	Change the subsidiary from the primary subsidiary to a secondary subsidiary Confirm the prompt to change the bank account, if required	<a href="#">Writing Checks</a>
Company Credit Card	Select any subsidiary assigned to the selected entity in the Vendor field Confirm the prompt to change Nexus, if required	<a href="#">Entering Company Credit Card Charges</a>
Deposits	For Other Deposits, choose from all of the vendors assigned to the subsidiary associated with the selected bank account	<a href="#">Making Deposits</a>
Drop Shipment	Create a sales order for an assigned secondary subsidiary that includes an item marked for drop ship and NetSuite automatically creates a purchase order based on the preferred vendor for that drop shipped item	<a href="#">Drop Shipment and Special Order Purchases</a> <a href="#">Mark an Item for Drop Shipment</a>
Item Pricing	Specify a different item price per subsidiary for the same item record	<a href="#">Associating Vendors with Items</a> <a href="#">Associating Multiple Vendors with an Item</a> <a href="#">Entering Purchasing/Inventory Information on Items</a> and then see the help topic <a href="#">Vendors</a>
Journal Entries	Make general, statistical, intercompany, book specific general, and book specific intercompany journal entries for any of the vendors to which a selected subsidiary is assigned	<a href="#">Making Journal Entries</a> <a href="#">Making Statistical Journal Entries</a> <a href="#">Intercompany Journal Entries</a> <a href="#">Advanced Intercompany Journal Entries</a> <a href="#">Journal Entries in Multi-Book Accounting</a>
Nexuses	Change the default subsidiary to a secondary subsidiary and NetSuite automatically changes the tax nexus to the nexus associated with the selected secondary subsidiary	<a href="#">Nexuses and Subsidiaries</a> <a href="#">Nexuses and Taxes in OneWorld</a> <a href="#">Setting Up Vendors as Sales Tax Agencies</a>
Order Requisitions	Create purchase orders for requisitions, selecting a subsidiary and any shared vendor to which that subsidiary is assigned	<a href="#">Order Requisitions</a>
Purchase Orders and Intercompany Purchase Orders	Select any subsidiary assigned to the selected entity in the Vendor field At the Items line level, select any vendor assigned to the subsidiary associated with the selected entity	<a href="#">Entering a Purchase Order</a>
Reconciliation	For New Charges on bank statements, selecting a shared vendor payee enables you to enter line	<a href="#">Reconciling Bank Statements</a>

	<p>items for all of the vendor's open transactions and the open transactions belonging to the selected subsidiary</p> <p>For New Deposits on bank statements, selecting a shared vendor payor enables you to enter deposits for the vendor and the selected subsidiary</p> <p>For New Charges on credit card statements, selecting a shared vendor payor enables you to enter charges for the vendor and the selected subsidiary</p> <p>For New Credits on credit card statements, selecting a shared vendor payee enables you to enter credits for the vendor and the selected subsidiary</p>	<a href="#">Reconciling Credit Card Statements</a>
Requisitions (Administrator)	Select the subsidiary associated with the requisition At the Items line level, select any vendor assigned to the selected subsidiary	<a href="#">Entering a Requisition</a>
Tegatas	Change the default primary subsidiary to any of the secondary subsidiaries assigned to a shared vendor	<a href="#">Using Tegatas</a>
Vendor Bill Variances	Post item records that belong to the combination of the selected vendor and assigned subsidiary	<a href="#">Posting Vendor Bill Variances</a>
Vendor Bills	Select any subsidiary associated with a vendor bill	<a href="#">Vendor Bills</a>
Vendor Blanket Purchase Order	Select any assigned subsidiary to associate with a vendor blanket purchase order	<a href="#">Blanket Purchase Orders</a> <a href="#">Creating a Blanket Purchase Order</a>
Vendor Credit	Associate a vendor credit with any of the subsidiaries assigned to a shared vendor	<a href="#">To entering a vendor credit manually:</a> <a href="#">Creating a Vendor Credit Directly from a Vendor Bill</a> <a href="#">Creating a Vendor Credit Directly from a Vendor Return</a> <a href="#">Crediting an Authorized Vendor Return</a>
Vendor Payments	Associate a vendor payment with a vendor bill from an assigned subsidiary	<a href="#">Vendor Payments Overview</a> <a href="#">Pay Bills to a Single Vendor</a>
Vendor Purchase Contract	Select any assigned subsidiary to associate with a vendor purchase contract	<a href="#">Creating Purchase Contracts Using Purchase Contracts on Purchase Orders</a>
Vendor Return Authorization	<p>Select the vendor who should receive the return authorization</p> <p>Change the subsidiary where the vendor return is authorized</p>	<a href="#">Entering a Vendor Return Authorization</a>

## Assigning a Subsidiary to a Partner

The subsidiary you assign to a partner limits the records that the partner can access to those associated with that subsidiary.

### To assign a subsidiary to a partner:

1. Go to Lists > Relationships > Partners, and click the **Edit** link next to a partner.
2. Select from the **Subsidiary** list and click **Save**.

## Assigning Subsidiaries to a Customer

The Multi-Subsidiary Customer feature permits you to share customer and sub-customer records with multiple subsidiaries, and then select those subsidiaries on core transactions. The primary subsidiary

assigned to a customer is generally associated with any transactions involving that customer. However, you can also associate transactions with any secondary subsidiary assigned to the customer. The subsidiary you select on transactions persists throughout the transaction workflow. For example, when you select a subsidiary on a sales order, that subsidiary appears on the invoice.

The Multi-Subsidiary Customer feature enables you to save a multi-subsidiary customer as a multi-subsidiary vendor to create a single entity. It is useful when you want to have one entity represent both a customer and a vendor. You can also view a multi-subsidiary customer's hierarchy (primary subsidiary, any assigned secondary subsidiary, and any subcustomer).



**Note:** In the customer hierarchy, users can view only those subsidiaries to which they are granted access.

The Multi-Subsidiary Customer feature also enables you to view the following:

- Customer balance information on the customer record
- Secondary subsidiary information on core reports
- Customer Statement by currency and by subsidiary

When a lead or contact is generated from an online form, the country associated with the form is matched to the country of the subsidiary, and that subsidiary is associated with the new record. If multiple subsidiaries are related to a country or no country is entered, the root subsidiary is the primary subsidiary with the new entity.



**Note:** If you use the Accept Payment Through Top Level Customer preference, parent customers and their sub-customers must be associated with the same subsidiaries and must both use the same currencies.



**Important:** You can define multiple secondary subsidiaries through the user interface and SuiteScript. To define secondary subsidiaries in SuiteScript, use the [Customer-Subsidiary Relationship](#) record type. You cannot define secondary subsidiaries through CSV import.

If you have shared multiple subsidiaries with a vendor record, you can share a customer record that is also paired with a vendor record. Such pairings display on the Relationships subtab on the customer record.

To use the subsidiary logo and address from the transaction record when printing, use advanced templates. For more information, see the help topic [Advanced PDF/HTML Templates](#). If you print transactions using basic layouts, the logo and address are sourced from the customer's primary subsidiary.

## Multi-Subsidiary Customer Feature Limitations

Following are limitations in the Multi-Subsidiary Customer feature:

- Incompatible Features:
  - SuiteBilling (formerly Advanced Subscription Billing)
  - Billing Accounts
  - Consolidated Payments
  - Intercompany Time and Expenses

- Mini EU One Stop Shop (MOSS)



**Important:** Incompatible features cannot be enabled when the Multi-Subsidiary Customer feature is enabled. The Multi-Subsidiary Customer feature cannot be enabled when incompatible features are enabled.

- **Unsupported Functionality:**
  - Credit Limit per Subsidiary
  - Customer Center (supports data related to the primary subsidiary only)
  - Customer Dashboard
  - User preference restriction per subsidiary
  - My Account connected to SuiteCommerce
- **Limited Functionality:**
  - Communication subtab on the customer record  
Messages, Activities, Files, and User Notes added to the customer record are available only for the primary subsidiary.
- **Tax Limitations:**
  - All tax information from the customer record is defaulted only to the primary subsidiary and ignored when a secondary subsidiary is selected.
  - On the Financial subtab on the customer record, the Tax Rounding fields are applied to all of the subsidiaries to which the customer is assigned.
  - On the Financial subtab on the customer record, the value in the Tax Item field is the default for the primary subsidiary only. For a customer with a default tax item, the tax engine attempts to return that tax item and does not perform an additional tax lookup. However when a secondary subsidiary is selected, the default tax item is ignored and a tax lookup is performed.
  - The PST Exempt and Taxable fields on the customer record are inverse to each other even though both fields are never visible on the record at the same time. When you set one field to True, the other field is automatically set to False.



**Note:** The PST Exempt (Taxable) field is visible on the customer record only when the customer falls under a Canadian (U.S.) nexus.

- **Unsupported Transactions:**
  - Issue Tegata
  - Pay Tegata
- **Technical Limitations:**  
To ensure that dynamic mode scripts and workflows perform as expected, the selected entity or customer (depending on the transaction) determines the default subsidiary.

## Best Practices for Using the Multi-Subsidiary Customer Feature

Following are best practices for using the Multi-Subsidiary Customer feature:

- If you use anonymous customers with Web Store workflows, assign only one subsidiary to the anonymous customer record.
- Set up tax rounding at the Nexus level rather than for individual customers with multiple different subsidiaries. For details, see the help topic [Setting Tax Preferences](#).



## Enable the Multi-Subsidiary Customer Feature

Administrators can enable the Multi-Subsidiary Customer feature on the Enable Features page. If you choose to stop using the Multi-Subsidiary Customer features, you must perform specific tasks before you can clear the feature check box.

### To enable the Multi-Subsidiary Customer feature:

1. Go to Setup > Company > Enable Features (Administrator) > Company subtab.
2. In the ERP General section, check the **Multi-Subsidiary Customer** box and click **Save**.



**Important:** You cannot enable the **Multi-Subsidiary Customer** feature if any incompatible feature or functionality is enabled. See the Incompatible Features list in [Multi-Subsidiary Customer Feature Limitations](#).

### To stop using the Multi-Subsidiary Customer feature:

1. Reverse or delete all transactions related to customers and their secondary subsidiaries.
2. Remove all secondary subsidiaries from customer records.
3. Go to Setup > Company > Enable Features (Administrator) > Company subtab.
4. In the ERP General section, clear the **Multi-Subsidiary Customer** box and click **Save**.

## Customer Balances for Assigned Subsidiaries

You can view the basic customer balances for each subsidiary assigned to that customer. Balance and Unbilled Orders fields are located on the Subsidiaries subtab on the customer record. Subsidiary transactions are recalculated from the subsidiary's transaction currency into the customer's primary currency. Recalculation is performed using the Direct method, which retrieves daily foreign exchange rates directly from the rate provider. The currency label of the customer's primary currency appears near the Balance and Unbilled Orders fields.

For example, you have a customer where the primary subsidiary is in Canada. Two secondary subsidiaries, one in the U.S. and one in Germany are assigned to this customer. The respective subsidiary currencies are CAN as the primary currency, and USD and euro as secondary subsidiary currencies. There is an invoice for the U.S. subsidiary for 1000 euro. Based on the daily foreign exchange rate, it posts as 1200 USD in the U.S. subsidiary. The value in the Balance field on the customer record is 1500 CAN (1000 euro translated into CAN through a 1.5 Direct rate).

- **Balance** – The value in the Balance field represents the total customer balance for the subsidiary. An approved customer invoice in an open status increases the value in the Balance field, whereas a customer payment decreases the value in the Balance field. A customer credit also decreases the value in the Balance field, whereas a cash sale does not alter the value in the Balance field.
- **Unbilled Orders** – The value in the Unbilled Orders field represents the sum of the orders not yet billed for the subsidiary. The tax on a sales order increases the value in the Unbilled Orders field because the tax does not have to be approved. When the sales order becomes a customer invoice, the tax value in the Unbilled Orders field is moved into the Balance field.
- **Deposit Balance** – The value in the Deposit Balance field represents the unapplied deposit amount from a customer deposit transaction.

The customer balance information on the Financials subtab appears in the customer's primary currency. For information about the Financials subtab, see the help topic [Entering Customer Financial Information](#).

## Customer Searches for Multi-Subsidiary Customers

When you create customer searches and customer saved searches, you can obtain results for all of the secondary subsidiaries assigned to the globally shared customer. On the Available Filters subtab, select Subsidiary Fields, then choose the fields to include as filters. On the Results > Columns subtab, select Subsidiary Fields, then choose the fields to display as columns in the results. For information about simple searches, see the help topic [Defining a Simple Search](#). For information about saved searches, see the help topic [Saved Searches](#).

**Note:** Before you publish a saved search to Webshop, you should validate the results by clicking any linked data content. The default Webshop user is not restricted from viewing subsidiary data, and may have access to unintended or irrelevant data. You must adjust user permissions to restrict data viewing.

## Multi-Subsidiary Customer Vendor Entities

The Multi-Subsidiary Customer feature enables you to create a multi-subsidiary vendor record from a multi-subsidiary customer record. This customer vendor relationship produces a single entity, which is useful when you want to use one entity to represent both a customer and a vendor on core transactions.

**Note:** The customer and vendor records must share the same primary subsidiary to create a multi-subsidiary customer vendor relationship.

For information about creating relationships between record types, see the help topic [Records as Multiple Types](#).

## Multi-Subsidiary Customer Hierarchy

The Multi-Subsidiary Customer feature enables you to view a multi-subsidiary customer's hierarchy (primary subsidiary, any assigned secondary subsidiary, and any subcustomer). The customer hierarchy is located on the Customers list page at Lists > Relationships > Customers.

**Note:** In the customer hierarchy, users can view only those subsidiaries to which they are granted access.


## Transactions Available for Multi-Subsidiary Customers


Refer to the following table to learn how you can use the Multi-Subsidiary Customer feature with core transactions.

Task	What You Can Do	Help Topic Links
Amortization	Supports Multi-Subsidiary Customer	<a href="#">Amortization Feature Overview</a>
Cash Refund	Select any subsidiary assigned to the customer record The account is selectable and dependent on the currency The subsidiary cannot be changed after the transaction is saved If the refund is created from the Cash Sale, the subsidiary selection remains the same through the transaction workflow	<a href="#">Refunding a Cash Sale</a>
Cash Sale	Select any subsidiary assigned to the customer record	<a href="#">Entering a Cash Sale</a>

	Confirm the prompt to change Nexus, if required The subsidiary cannot be changed after the transaction is saved	
Checks	Change the subsidiary from the primary subsidiary to a secondary subsidiary Confirm the prompt to change the bank account, if required	<a href="#">Writing Checks</a>
Commission (Employee)	To associate a sales transaction with a multi-subsidiary customer, create a commission schedule for each subsidiary at Lists > Commissions > Employee Schedules > New Include the commission schedule in the commission plan assigned to the employee	<a href="#">Creating an Employee Commission Schedule</a> <a href="#">Creating an Employee Commission Plan</a>
Commission (Partner)	Partner has been configured in NetSuite to receive commission Commission plan with a commission schedule is assigned to the partner Sales transactions relevant to the commission plan and commission schedule are associated with the partner through the Entity field in the header of the sales transaction record	<a href="#">Creating a Partner Commission Plan</a> <a href="#">Assigning Partners to a Commission Plan</a> <a href="#">Partner Commission Schedules</a>
Company Credit Card	Select any subsidiary assigned to the selected entity in the Vendor field Confirm the prompt to change Nexus, if required	<a href="#">Entering Company Credit Card Charges</a>
Credit Card Refund	Select any subsidiary assigned to the customer record The subsidiary cannot be changed after the transaction is saved	<a href="#">Refunding an Open Balance</a>
Custom Transaction	Custom Transactions is enabled at Setup > Company > Enable Features > SuiteCloud in the SuiteGL section Custom transactions have been configured at Customization > Lists, Records & Field > Transaction Types > New Configure transaction type to include subsidiary and entity On the custom transaction, associate the entity with the selected subsidiary	<a href="#">Custom Transactions</a>
Customer Charge (Statement Charge)	Select any subsidiary assigned to the customer record The subsidiary cannot be changed after the transaction is saved	<a href="#">Statement Charges</a>
Customer Credit Memo	Select any subsidiary assigned to the customer record Confirm the prompt to change Nexus, if required The subsidiary cannot be changed after the transaction is saved	<a href="#">Issuing a Customer Credit Memo</a>

Customer Deposit	Select any subsidiary assigned to the customer record The subsidiary cannot be changed after the transaction is saved	<a href="#">Recording a Customer Deposit</a>
Customer Payment	Select any subsidiary assigned to the customer record The subsidiary cannot be changed after the transaction is saved	<a href="#">Applying a Payment on the Customer Payment Page</a>
Customer Refund	Select any subsidiary assigned to the customer record The account is selectable and dependent on the currency The A/R account is associated with the selected subsidiary The subsidiary cannot be changed after the transaction is saved	<a href="#">Refunding an Open Balance</a>
Deposits	For Other Deposits, choose from all of the customers assigned to the subsidiary associated with the selected bank account	<a href="#">Making Deposits</a>
Estimate	Select any subsidiary assigned to the customer record The subsidiary cannot be changed after the transaction is saved	<a href="#">Preparing an Estimate</a>
Expense Report	At the Expenses line level, select any customer assigned to the subsidiary associated with the selected employee	<a href="#">Entering an Expense Report</a>
Fulfillment Request	The subsidiary is derived from the Sales Order	<a href="#">Creating Fulfillment Requests</a>
Gift Certificate	Click the New Gift Certificates button at Lists > Accounting > Gift Certificates	<a href="#">Gift Certificates</a>
Invoice	Select any subsidiary assigned to the customer record The subsidiary cannot be changed after the transaction is saved If the Invoice was generated from a Sales Order, the subsidiary cannot be changed	<a href="#">Creating an Invoice</a>
Item Fulfillment	The subsidiary is specified on the Sales Order and cannot be changed	<a href="#">Fulfilling Orders</a>
Journal Entries	Make general, statistical, intercompany, book-specific general, and book-specific intercompany journal entries for any of the customers to which a selected subsidiary is assigned	<a href="#">Making Journal Entries</a> <a href="#">Making Statistical Journal Entries</a> <a href="#">Intercompany Journal Entries</a> <a href="#">Advanced Intercompany Journal Entries</a> <a href="#">Journal Entries in Multi-Book Accounting</a>
Opportunity	Select any subsidiary assigned to the customer record The subsidiary cannot be changed after the transaction is saved	<a href="#">Creating an Opportunity Record</a>
Purchase Orders and	Select any subsidiary assigned to the selected entity in the Vendor field	<a href="#">Entering a Purchase Order</a>

Intercompany Purchase Orders	At the Items line level, select any customer assigned to the subsidiary associated with the selected entity	
Reconciliation	<p>For New Charges on bank statements, selecting a shared customer payee enables you to enter line items for all of the customer's open transactions and the open transactions belonging to the selected subsidiary</p> <p>For New Deposits on bank statements, selecting a shared customer payor enables you to enter deposits for the customer and the selected subsidiary</p> <p>For New Charges on credit card statements, selecting a shared customer payor enables you to enter charges for the customer and the selected subsidiary</p> <p>For New Credits on credit card statements, selecting a shared customer payee enables you to enter credits for the customer and the selected subsidiary</p>	<a href="#">Reconciling Bank Statements</a> <a href="#">Reconciling Credit Card Statements</a>
Requisitions	<p>Select the subsidiary associated with the requisition</p> <p>At the Items line level, select any customer assigned to the selected subsidiary</p>	<a href="#">Entering a Requisition</a>
Return Authorization	<p>Select any subsidiary assigned to the customer record</p> <p>The subsidiary cannot be changed after the transactions is saved</p> <div data-bbox="435 1186 802 1440">  <b>Note:</b> Return Authorizations can also be created from the Sales Order or Invoice. In these two cases, the subsidiary value is copied from the transaction that created the Return Authorization. </div>	<a href="#">Entering a Standalone Return Authorization</a> <a href="#">Entering a Linked Return Authorization</a>
Revenue Arrangement	<p>The revenue arrangement is listed on the transaction's Related Records subtab</p> <p>Revenue arrangements are created for the following types of transactions after the transaction is approved:</p> <ul style="list-style-type: none"> <li>■ Sales Orders</li> <li>■ Invoices</li> <li>■ Cash Sales</li> <li>■ Cash Refunds</li> <li>■ Return Authorizations</li> <li>■ Credit Memos</li> </ul>	<a href="#">Revenue Arrangement Management</a> <a href="#">Creating Sales Orders</a> <a href="#">Creating an Invoice</a> <a href="#">Entering a Cash Sale</a> <a href="#">Refunding a Cash Sale</a> <a href="#">Entering a Standalone Return Authorization</a> <a href="#">Entering a Linked Return Authorization</a> <a href="#">Issuing a Customer Credit Memo</a>

Revenue Commitment and Revenue Commitment Reversal	Supports Multi-Subsidiary Customer	<a href="#">Using the Generate Revenue Commitment Page Using the Generate Revenue Commitment Reversals Page</a>
Revenue Recognition	Supports Multi-Subsidiary Customer	<a href="#">Using Revenue Recognition</a>
Sales Order	<p>Select any subsidiary assigned to the customer record</p> <p>Confirm the prompt to change Nexus, if required</p> <p>The subsidiary cannot be changed after the transaction is saved</p>	<p><a href="#">Creating Sales Orders</a></p> <ul style="list-style-type: none"> <li>■ Drop Shipment from Sales Order - An approved sales order that contains a drop shipment item automatically generates a purchase order for the item. Vendor ships item to the selected customer. <a href="#">Selling a Drop Ship Item</a></li> <li>■ Drop Shipment Intercompany Sales Order - Warehouse subsidiary generates an intercompany sales order at Transactions &gt; Sales &gt; Manage Intercompany Sales Orders (Administrator). Warehouse subsidiary fulfills the order and sends the item to the customer. <a href="#">Intercompany Inventory Drop Ship</a></li> <li>■ Intercompany Sales Order (Transactions &gt; Sales &gt; Manage Intercompany Sales Orders) - Create an intercompany purchase order. Select a customer and a currency to display the unlinked intercompany purchase order that can be paired with the sales order for this customer. Select any subsidiary assigned to the customer record. <a href="#">Managing Intercompany Orders</a></li> <li>■ Special Order Purchase - An approved sales order that contains a special order item automatically generates a purchase order for the item. The sales order is fulfilled only when the special order item is received by the vendor. The vendor then ships the item to the customer. <a href="#">Drop Shipment and Special Order Purchases</a></li> <li>■ Store Pickup - Store Pickup enables you to create Store Pickup Fulfillment transactions from an existing sales order. Store Pickup Fulfillment transactions permit customers to pick up their orders from a retail location at a later time or date. When Store Pickup Fulfillment transactions exist, the navigation path is Transaction &gt; Sales &gt; Manage Store Pickup. On the Store Pickup Fulfillment transaction, the subsidiary defaults to the subsidiary selected on the sales order.</li> </ul> <div style="border: 1px solid #ccc; background-color: #fff9c4; padding: 10px; margin-top: 10px;">  <b>Important:</b> The Store Pickup feature requires Advanced Order Management. <a href="#">Store Pickup</a> </div>
Sales Order Revenue Forecasting	Supports Multi-Subsidiary Customer	<a href="#">Using Sales Order Revenue Forecasting</a>
Vendor Bills	Select any subsidiary associated with a Vendor Bill	<a href="#">Vendor Bills</a>

	At the Items line level, select any customer assigned to the selected subsidiary	
Vendor Credit	Select the vendor who should receive the credit Change the subsidiary associated with the credit At the Items line level, select any customer assigned to the selected subsidiary	<a href="#">Entering a Vendor Credit Manually</a>
Vendor Return Authorization	Select the vendor who should receive the return authorization Change the subsidiary where the vendor return is authorized At the Items line level, select any customer assigned to the selected subsidiary	<a href="#">Entering a Vendor Return Authorization</a>
VSOE	Supports Multi-Subsidiary Customer	<a href="#">Using the VSOE Feature</a>
Work Order	Select the customer and any assigned subsidiary associated with the work order	<a href="#">Entering an Individual Work Order</a>

## Associating Subsidiaries with Items

With NetSuite OneWorld, fields are added to item records that permit items to be shared by several subsidiaries.

In the Subsidiary field, you can select one or multiple subsidiaries. To select multiple subsidiaries, press and hold the Ctrl key and selecting each subsidiary.

You can also check the Include Children box to share the item with all the sub-subsidiaries associated with each subsidiary selected in the Subsidiary field.

**Note:** When sharing items across subsidiaries, all of the options selected on the item record must be compatible across subsidiaries. For example, when entering an inventory item to be shared across subsidiaries, you should select Income and Asset accounts on the item record that are also shared across the same subsidiaries.

A subsidiary must be associated with an item in order for the item to be added to a transaction related to that subsidiary. For example, you enter a sales order and select a customer associated with the Wolfe US subsidiary on the transaction. When you select an item to add to the sales order, only items associated with Wolfe US can be added to the sales order.

When creating a Gift Certificate item record, the Income Account and the Liability Account fields show a list of accounts that is restricted based on the subsidiary selected. If multiple subsidiaries are selected, only accounts common to all selected subsidiaries are displayed.

In NetSuite implementations that are not enabled for NetSuite OneWorld, you can enter initial quantities on hand in each location when you create an item record. However, in NetSuite OneWorld, you cannot enter initial quantities on hand when you create an item record. You must first create the item record, and then afterwards, you must enter an inventory adjustment to specify the initial quantities in each location.

## Associating Subsidiaries with Shipping Items

In NetSuite OneWorld, you assign a shipping item to a subsidiary so it can be used for transactions. You can associate only one subsidiary with a shipping item, but you can create multiple shipping items for the same shipping service. This enables you to use the shipping services of a carrier across multiple subsidiaries, and at the same time, respecting currencies and posting to the appropriate subsidiary accounts.

Shipping items for the same service have a unique Ship Name but share the same Display/Code name so you can utilize the real-time rates and shipping label integration features associated with the carrier.

For example, you have two subsidiaries, one for your operations in the United States and one for operations in Canada. You use UPS Ground service for shipping needs in both subsidiaries. Create a shipping item for each subsidiary with a Ship Name that identifies the subsidiary where it is to be used:

	US Subsidiary	Canada Subsidiary
Ship Name	UPS Ground - US	UPS Ground - CA
Display Name /Code	UPS Ground	UPS Ground
Subsidiaries	US	Canada

When you select a customer on a transaction, only shipping items for the subsidiary attached to that customer display in the list for Shipping Method.

In the Web store, if a shopper has not registered before and does not have a customer record, he or she can choose shipping items associated with the subsidiary website being viewed. When a registered customer logs in to your Web store, the shopper can only see shipping items associated with the customer's record. A shopper in Canada sees only shipping items associated with the Canadian subsidiary.

### To associate a subsidiary with a shipping item:

Follow the instructions for creating a shipping item at [Creating Shipping Items](#), which include a step to select the subsidiary for the shipping item. You can select only one subsidiary for a shipping item.

#### To create multiple shipping items for the same shipping service:

1. Edit an existing shipping item at Lists > Accounting > Shipping Items. Click **Edit** next to the shipping item you want to modify.  
Create a new shipping item at Lists > Accounting > Shipping Items > New.
2. In the **Ship Name** field, enter an internal name for the shipping item. To identify the shipping item by subsidiary, include the subsidiary in the name, for example, **UPS Ground - U.S.**
3. The **Display Name/Code** defaults from the shipping service you select as the real-time rate on the **Shipping Rate** subtab. This is the shipping method name as it appears to customers visiting your Web store, on printed invoices, and in centers such as the Customer Center. You cannot modify the **Display Name/Code**.
4. In the **Subsidiaries** field, select the subsidiary you want to offer this shipping item in.
5. Click **Save**.

For information about shipping items, see the help topic [Shipping Items](#).



## Controlling Employee Access to Subsidiaries

By default, an employee has access to data only for the subsidiary assigned on the employee record. See [Assigning a Subsidiary to an Employee](#).

You can allow an employee access to data for additional subsidiaries by customizing the Subsidiaries field for the employee's assigned role at Setup > Users/Roles > User Management > Manage Roles. The Subsidiaries field is a multi-select list.

The Role page also includes an Allow Cross-Subsidiary Record Viewing box that can be checked to permit users logged in with that role to see data from subsidiaries other than those selected in the Role page's Subsidiaries list.

**Note:** Users with the Book Record Restriction option enabled override permissions granted by the Allow Cross-Subsidiary Record Viewing option.

The specific records and transactions that employees can view and edit for accessible subsidiaries are limited by the complete set of permissions defined for their assigned roles. For example, employees of the U.S. subsidiary by default would only be able to view and edit data for the U.S. subsidiary. If you customize the U.S. Controller role to select the U.S. subsidiary, Mexico subsidiary, and Canada subsidiary in the Subsidiaries list, then employees assigned the U.S. Controller role could view and edit data for all three of these subsidiaries. Also, if you checked the Allow Cross-Subsidiary Record Viewing box for the U.S. Controller role, employees assigned this role could view data for all subsidiaries other than the three selected ones.

**Note:** If an employee has access to all active subsidiaries, but not to one or more inactive subsidiaries, the employee is considered to have access to all subsidiaries.

The following choices are dependent on the subsidiaries selected for the user's assigned role, or if none are selected there, on the subsidiary assigned to the employee record:

- Available subsidiaries in the Subsidiary field when the user creates new entity and item records
  - See [Associating Subsidiaries with Entities](#) and [Associating Subsidiaries with Items](#).
- Available entities when the user creates new transactions
  - Generally, users can create transactions only for entities associated with subsidiaries to which they have access.
  - Time and expense entry forms are exceptions to this general rule, in that they permit creation of transactions for customers or projects associated with other subsidiaries as long as they are not billable.
- Available subsidiaries in Subsidiary Context list when the user runs reports
- Available classes, departments, and locations in footer filters on reports

A user can restrict the records displayed in NetSuite to those for a single subsidiary by setting preferences on the Restrict View subtab of Home > Set Preferences. See [Restricting Your Subsidiary View](#).



**Important:** To generate automated intercompany adjustments for expenses, supported by the Intercompany Time and Expense feature, a user must have access to all subsidiaries. For information about this capability, see the help topic [Enabling Intercompany Time and Expenses](#).

## Restricting Your Subsidiary View



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

If you are assigned a role with access to multiple subsidiaries, sometimes you may want to limit the data with which you are working in NetSuite, to records from a selected parent subsidiary and its child subsidiaries, or even to records from only a single subsidiary.

For many reports, you can select a subsidiary after you run the report, by selecting from a Subsidiary Context list in the footer of the results page. These reports support consolidation, or rollup of subsidiary results. See [Subsidiary Context for Reports](#). However, for some reports that do not support consolidation, you must set your user preferences to restrict your view to a single subsidiary before you can run the report.

You can restrict the data shown in the current login session including the user interface, searches, and reports, on the Restrict View subtab at Home > Set Preferences.

To restrict the view to a parent subsidiary and its children, select the parent subsidiary from the Subsidiary list and check the Include Sub-Subsidiaries box.

To restrict the view to a single subsidiary, select it from the Subsidiary list and **do not** check the Include Sub-Subsidiaries box.

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

The view restrictions you set here apply only to the current login session for current role. The next time you log in with this role, your normal settings are applied.



**Note:** If you select your root subsidiary in the Subsidiary list, all subsidiaries are included. Therefore, You need not check the Include Sub-Subsidiaries box.

For more information about restricting subsidiary viewing, see the following help topics:

- [Assigning Roles to an Employee](#)
- [Customizing or Creating NetSuite Roles](#)
- [Setting Preferences for Restricting Views](#)
- [Controlling Employee Access to Subsidiaries](#)
- [Consolidated Reporting in OneWorld](#)

## Working with Subsidiary Navigator

Subsidiary Navigator enables you to limit the information displayed on your dashboard, searches, and reports to a specific subsidiary or group of subsidiaries. The portlet contains a chart from which you can select the subsidiary whose records you want to display. Choosing a subsidiary is equivalent to setting the Restrict View to a subsidiary option in Home > Set Preferences.

**Note:** Subsidiary Navigator works only for NetSuite OneWorld.

Read the following help topics to learn more about Subsidiary Navigator:

- [Installing Subsidiary Navigator](#)
- [Using Subsidiary Navigator](#)

## Installing Subsidiary Navigator

### Prerequisites

Before you install Subsidiary Navigator, make sure that the following NetSuite features are enabled:

- Client SuiteScript
- Server SuiteScript
- Subsidiary

### Installation

Subsidiary Navigator is available for installation as a SuiteApp:

- Name – Subsidiary Navigator
- Bundle ID – 44281
- Location – Production (Account ID 3802169)

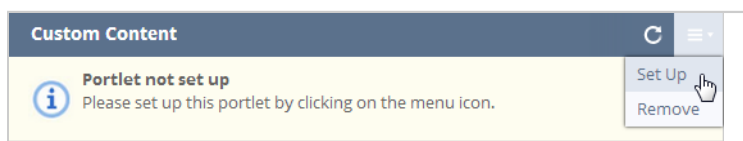
Subsidiary Navigator is a managed SuiteApp and is automatically updated whenever there are changes. These issue fixes and enhancements are available after the SuiteApp is updated in your account.

For information on installing SuiteApps, see the help topic [Installing a Bundle](#).

## Using Subsidiary Navigator

### Setting Up Subsidiary Navigator

1. From your dashboard, click **Personalize**.
2. You can set up Subsidiary Navigator as a Dashboard SuiteApp or as a custom portlet.
  - To set up Subsidiary Navigator as a dashboard SuiteApp, go to the Dashboard SuiteApps section, and then click the Subsidiary Navigator icon.  
The Subsidiary Navigator portlet will be added to the dashboard. Note that Dashboard SuiteApps are available only from the home page dashboard.
  - To set up Subsidiary Navigator as a custom portlet:
    1. Go to the Standard Content section, and then click the Custom Portlet icon.  
A custom portlet will be added to the dashboard.
    2. On the **Custom Portlet**, click the **Set Up** link.



The **Custom Content** pop-up opens.

3. On the **Source** field, select **Subsidiary Navigator** from the list.
4. Click **Save**.

## Changing Subsidiary Navigator Display Settings

### To change display settings for Subsidiary Navigator:

1. On the Subsidiary Navigator portlet, click **Settings** on the upper left corner.
2. Set values for the following:
  - **Enable Tooltip** – Click to enable or disable the company information tooltip for each subsidiary. When you point your mouse on a subsidiary, the tooltip displays the country, currency, and address of the subsidiary.
  - **Show Logo** – You can choose to display or hide the company logos on the Subsidiary Navigator portlet. Check the box to display subsidiary logos on the current user's account. Click the slider to show or hide company logos for all users on this account.

**Note:** The **Enable Tooltip** setting and the **Show Logo** slider option is available only on the Administrator's account.

Changes to these settings are applied immediately. Click anywhere outside the settings area to hide the settings.

## Restricting Access Using the Subsidiary Navigator

You can restrict your view to a particular subsidiary or group of subsidiaries. You can do this in one of two ways:

- Click a subsidiary from the portlet.
- Click the **Change Subsidiary** link below the centers tabs.

The selected subsidiary and all of the sub-subsidiaries are highlighted. Portlets on the dashboard update automatically to show records for the selected subsidiaries.

**Subsidiary Navigator**

Settings Help

```

graph TD
    PC[PC Parent Company] --> AM[A AMERICAS]
    PC --> APAC[A APAC]
    PC --> EMEA[E EMEA]
    AM --> C[California]
    AM --> M[Mexico]
    AM --> NY[New York]
    AM --> P[Peru]
    APAC --> AU[A Australia]
    APAC --> J[Japan]
    APAC --> S[Singapore]
    EMEA --> G[Germany]
    EMEA --> U[UAE]
    EMEA --> UK[United Kingdom]
  
```

**Opportunities**

TOTAL: 3 VIEW Opportunities without ... week (per subsidiar) QUICK SORT

NEW	EDIT   VIEW	TITLE	CUSTOMER	SUBSIDIARY
	Edit   View		26 DG Holdings	Parent Company : APAC : Australia
	Edit   View		26 DG Holdings	Parent Company : APAC : Australia
	Edit   View		27 MD Solutions	Parent Company : APAC : Singapore

**Note:** The settings apply for the duration of your current session. Normal settings are restored on the next login.

When logged in using a custom role, the Subsidiary Navigator Portlet displays the subsidiaries assigned for that particular role.

Below is an example of the subsidiaries selected for a custom role:

**Role**

Save Cancel Reset Change ID Actions

NAME \*  
APAC Sales

ID  
customrole1005

CENTER TYPE  
Sales Center

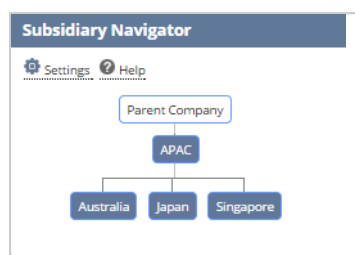
SUBSIDIARIES

- Parent Company
- Parent Company : APAC
- Parent Company : APAC : Australia
- Parent Company : APAC : Japan

No subsidiary selection causes role to restrict by subsidiary of user.

☐ DO NOT RESTRICT EMPLOYEE FIELDS  
☐ ALLOW CROSS-SUBSIDIARY RECORD VIEWING  
☐ RESTRICT TIME AND EXPENSES  
☒ SALES ROLE  
☐ SUPPORT ROLE  
☐ WEB SERVICES ONLY ROLE  
☐ SINGLE SIGN-ON ONLY  
☐ INACTIVE

For this example, the Subsidiary Navigator displays the selected sub-subsidiaries and the parent subsidiary only.



**Note:** Users need access to more than one subsidiary for Subsidiary Navigator to work.

If a custom role has no subsidiary selected for it, the restriction defaults to the subsidiary of the user.

If a custom role only has sub-subsidiaries selected for it, the Subsidiary Navigator displays the sub-subsidiaries, its parent subsidiary, and any other subsidiaries that connect it to the root subsidiary. Users can click the parent subsidiary but doing so does not affect the behavior of the portlets on the dashboard. The portlets only display records for the sub-subsidiaries selected for the role.

**Important:** If a custom role has the **Allow Cross-Subsidiary Record Viewing** option enabled, clicking a subsidiary node in the Subsidiary Navigator portlet displays all relevant records including those which the role is not granted access. Users with the role may open all displayed records but are not able to edit those to which access is not granted.

## Consolidated Reporting in OneWorld

With NetSuite OneWorld, you can view data consolidated from multiple subsidiaries on many reports.



**Important:** Some reports do not support consolidation and can return results for only one subsidiary at a time. Before you can run one of these reports, you must set your user preferences to restrict your view to a single subsidiary, at Home > Set Preferences on the Restrict View subtab.

If a report can show consolidated information, the Subsidiary Context field in the footer of the report includes options appended with (Consolidated) such as in the report titled HEADQUARTERS (Consolidated). When you select a consolidated subsidiary on a report, data is displayed for the selected subsidiary and for all of its child subsidiaries including elimination subsidiaries. For example, if you choose Subsidiary Context HEADQUARTERS (Consolidated), the report displays consolidated data for the UK and all of its child subsidiaries, Germany, Ireland, and Italy.

When you select an option that is not consolidated, data is displayed for only the single selected subsidiary. For example, selecting Subsidiary Context UK displays only the UK subsidiary data, or selecting Subsidiary Context Germany displays only the German subsidiary data.

If NetSuite Professional Services has provisioned Multi-Book Accounting in your account, you can run consolidated reporting on any accounting book enabled for consolidation.

For more description and examples of the Subsidiary Context filter, see [Subsidiary Context for Reports](#).

When data is displayed for a single subsidiary, the base currency of that subsidiary is used for amounts. When consolidated data is displayed for multiple related subsidiaries, the base currency of the parent is used for amounts. Consolidated reports use the Consolidated Exchange Rates table to translate child subsidiaries' amounts to roll up into consolidated parent subsidiary amounts. See the help topic [Using Consolidated Exchange Rates](#). Reports that include budget as well as actual amounts such as some financial statements, can use a separate Budget Exchange Rates table for translation of budget amounts. See the help topic [Running Subsidiary-Specific Budget Reports](#).

Financial statements have other specialized capabilities in NetSuite OneWorld, including subsidiary-specific layouts. See the help topic [Working with OneWorld Financial Statements](#). Consolidated balance sheet and cash flow statement reports use a special account called Cumulative Translation Adjustment (CTA) to achieve balance when there is more than one currency. This account is necessary because the rate types of accounts may differ, resulting in different rates being used that can cause an imbalance. The CTA is also used wherever consolidation across accounts with different rate types occurs such as the consolidated trial balance. For more information, see the help topic [Understanding Cumulative Translation Adjustment \(CTA\)](#).

## Subsidiary Context for Reports

If you have access to multiple subsidiaries, you can view the data for all subsidiaries at one time or for individual subsidiaries by using the Subsidiary Context footer filter on reports that support consolidation of results across subsidiaries.

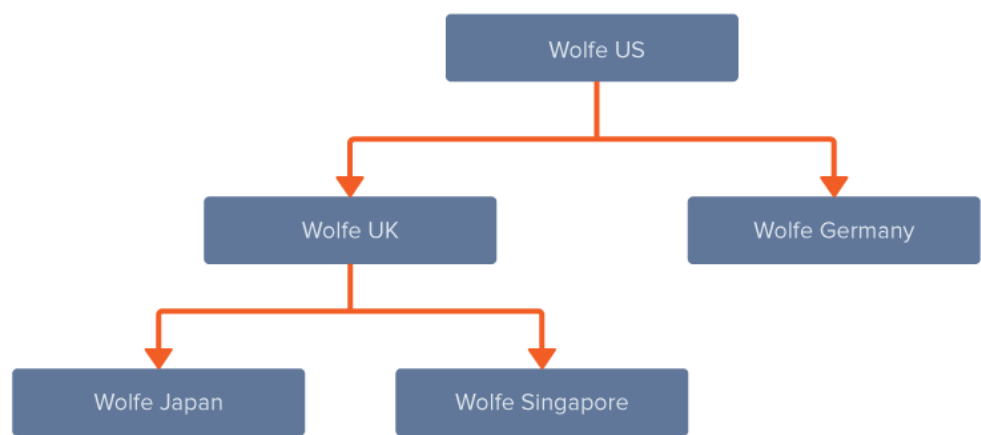
If your account has been provisioned for Multi-Book Accounting, you can run consolidated reports for any accounting book enabled for consolidation. Use the Accounting Book list to choose the primary or secondary accounting book that correlates with the selected subsidiary context.



**Important:** Some reports do not support consolidation and can return results for only one subsidiary at a time. These reports do not include the Subsidiary Context filter. Before you can run one of these reports, you must set your user preferences to restrict your view to a single subsidiary, at Home > Set Preferences on the Restrict View subtab.

Selecting a subsidiary filters the report data to display only data from the selected subsidiary. Note that elimination subsidiaries are available as options. In the case of consolidated subsidiaries, data is shown for all child subsidiaries of the consolidated parent subsidiary including elimination subsidiaries.

For example, if a company has the following subsidiary hierarchy:



The Subsidiary Context filter on reports would be organized as follows:

- Wolfe US (Consolidated)
- Wolfe US
- Wolfe Germany
- Wolfe UK (Consolidated)
- Wolfe UK
- Wolfe Japan
- Wolfe Singapore

A virtual consolidated node is inserted for each parent. By selecting the consolidated node you get a summary of all transactions associated with the child subsidiaries underneath the node including elimination subsidiaries, if any.

When using a role that is restricted to certain subsidiaries, you are provided a different view based on your level of access.

Using the hierarchy from the example above, if you had access to only the Japan subsidiary, you would see the following choices in the Subsidiary Context filter on reports:

- Wolfe US (Context)
- Wolfe UK (Context)
- Wolfe Japan

You would see the following for each selection:

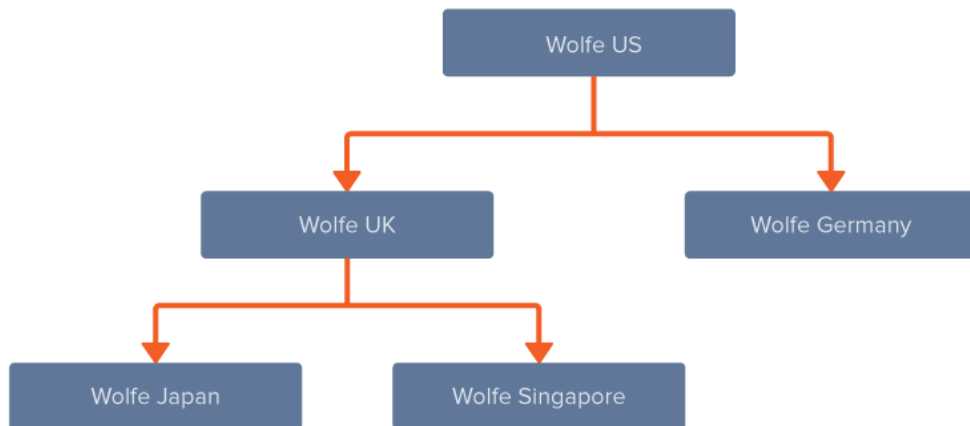
Selection	Transactions Included	Currency Shown	Financial Statement Layout
Wolfe US (Context)	Wolfe Japan	US dollar	Wolfe US
Wolfe UK (Context)	Wolfe Japan	British pound (GBP)	Wolfe UK
Wolfe Japan	Wolfe Japan	Japanese yen	Wolfe Japan

Because this role has access that is restricted to a single subsidiary, no consolidated data is included. However, you can still see the data in Wolfe Japan as it would appear in the currencies and layouts of parent subsidiaries.

## Displaying Currency for Multiple Subsidiary Search Results

When viewing search results for multiple subsidiaries, the results shown are converted by the consolidated rate table into the currency of the lowest common parent (LCP).

For example, a business hierarchy looks like this:



If a user with access to the Singapore and Japan subsidiaries ran a search, the user would see all currency amounts displayed in UK pounds since Wolfe UK is the LCA for these subsidiaries. If the user had access to Japan and Germany, currency amounts would show in US dollars.

Individual users can choose to limit the data they see to a single subsidiary at Home > Set Preferences > Restrict View. For more information, see [Restricting Your Subsidiary View](#).



**Important:** You can select the type of exchange rate applied to an advanced search or saved search of transactions, by choosing a Consolidated Exchange Rate option for search results. See the help topic [Selecting Exchange Rate Types for Transaction Searches](#).

## Working with OneWorld ERP Accounting

See the following help topics for details about how NetSuite OneWorld affects accounting, ERP functions:

- [Defining Subsidiaries for OneWorld Transactions](#)
- [Making Journal Entries in OneWorld](#)
- [Locking Accounting Periods in NetSuite OneWorld](#)
- [Enabling Intercompany Time and Expenses](#)
- [Creating Intercompany Allocation Schedules](#)
- [Working with Subsidiary Budgets in OneWorld](#)
- [Working with Project Management in OneWorld](#)
- [Intercompany Inventory Transfers - Non-Arm's Length](#)



- [Cost Estimate Types in NetSuite OneWorld](#)

## Working with OneWorld CRM

NetSuite OneWorld enables you to run your global sales force within a single NetSuite account.

Each customer, or other entity, is associated with a single subsidiary, enabling you to track forecasts and quotas on a subsidiary basis.

For more information on specific tasks, see the following:

- [Using Consolidated Quotas and Forecasts in OneWorld](#)
- [Working with Employee and Partner Commissions in OneWorld](#)
- [Setting Subsidiaries on Online Forms in OneWorld](#)

## Using Consolidated Quotas and Forecasts in OneWorld

With the NetSuite OneWorld upgrade, you can track sales totals across subsidiaries, enabling you to set quotas and analyze the sales forecasts for your global organization.

### Using Consolidated Quotas

When establishing a sales quota, you must select a subsidiary or a consolidated subsidiary. This determines which sales count towards the quota.

To create a quota, go to Transactions > Quota/Forecast > Establish Quotas, and select a sales rep. In the Subsidiary field, select the subsidiary or consolidated subsidiary you want to base this quota on.

If you select a consolidated subsidiary, sales made by this sales rep for the parent subsidiary and all of its child subsidiaries are counted toward the quota. If you select a single subsidiary, only the sales made for that subsidiary count toward the quota.

### Consolidated Sales Forecasting

When sales reps save their forecasts, they can choose which subsidiaries they are saving their forecasts for.

If you select a subsidiary, the sales forecast represents the rep's forecast for the parent subsidiary and all of its child subsidiaries. The sales rep's quota for that subsidiary is shown in the Quota field.

## Working with Employee and Partner Commissions in OneWorld

With NetSuite OneWorld, employees and partners can earn commission for sales made for any subsidiary.

Commission schedules have a subsidiary field. Commission plans can include any commission schedules regardless of the subsidiary chosen on those schedules.

If you are basing a commission schedule on quota, you must have a quota entered for the selected subsidiary.

Any transactions made for the selected subsidiary, or for any subsidiaries beneath it in the subsidiary hierarchy are used to calculate commissions for sales reps assigned to the commission schedule. Commission schedule amounts are entered in the base currency of the selected subsidiary. The consolidated exchange rates table is used to calculate values for transactions for other subsidiaries with different base currencies.

If the employee or partner makes a sale on behalf of a subsidiary other than the one they are assigned to (that is, the subsidiary selected on the employee or vendor record), the commission is generated according to the following:

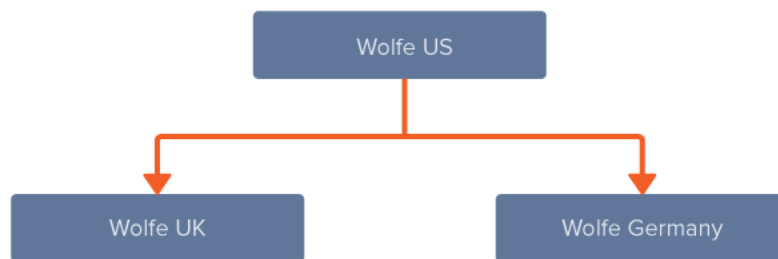
- If you have a commission schedule in the currency of one subsidiary, and a sales rep makes a sale on behalf of one of the child subsidiaries, the commission calculation is converted to the sales rep's currency by using the consolidated exchange rate table.
- The commission calculation is performed based on the currency of the subsidiary assigned to the commission schedule. All values on reports and Kips display the commission in that currency even if the currency assigned to the partner or employee's subsidiary is different
- The commission transaction that is generated is always in the base currency of the subsidiary assigned to the employee or partner (on the partner's vendor record). If necessary, a commission created for a schedule assigned to another subsidiary is converted from the exchange rates on the transaction to the currency of the employee or partner.
- After commission is authorized or approved, the commission expense and payable always impact the books of the subsidiary assigned to the employee or partner. This is true even if the transaction that generated the commission is related to a different subsidiary than that of the employee or partner or if the commission schedule is assigned to another subsidiary.

Sales reps from different subsidiaries can be assigned to sales managers from the same or other subsidiaries. The sales for subordinate sales reps roll up to the sales manager by using the consolidated exchange rates between the subsidiaries for the period in which the sales transaction is booked.

## Using Consolidated Exchange Rates with Commissions

When commission amounts are converted to the base currency of the employee or partner's subsidiary, the exchange rates at Lists > Accounting > Consolidated Exchange Rates are used.

For example, if a company had the following subsidiary hierarchy:



Three invoices qualify for commission:

Transaction	Subsidiary	Currency	Commission Amount
Invoice 1	US	USD	\$100
Invoice 2	UK	GBP	£100

Transaction	Subsidiary	Currency	Commission Amount
Invoice 3	Germany	euro	€100

The estimated commission reports, commission plan and commission transaction show the commission amounts converted to the US dollar according to the exchange rates in the consolidated rate table for the period in which each transaction was booked:

Amount	Exchange Rate	USD Amount
\$100	US to US: 1	\$100
£100	UK to US: 2	\$200
€100	EURO to US: .5	\$50

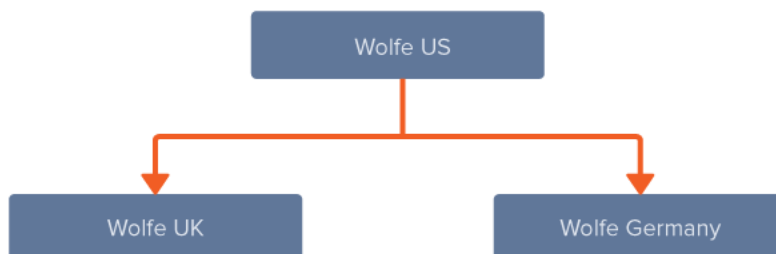
**Note:** The exchange rates used for commission calculations are stored, and if the rate on the consolidated rate table changes, the schedule must be recalculated to reflect the change.

Using this same example, if a quota was set for this sales rep and associated with the US subsidiary, the quota would include sales made on behalf of the US and both of its child subsidiaries.

## Using Quota-Based Commission Schedules in OneWorld

When you create a quota-based schedule for a subsidiary that has child subsidiaries, the transactions from those child subsidiaries are reflected in the quota amount used for commission.

For example, if your company has the following subsidiary hierarchy:



If you establish a quota for the US parent subsidiary and for Wolfe UK:

- Sales made on behalf of the US, UK or Germany subsidiaries are included toward the US quota.
- The UK quota would only include sales made on behalf of the UK subsidiary.

Following this example, a rep is assigned a commission plan with a schedule that is associated with the US subsidiary. This schedule pays 10% of all sales exceeding quota.

The rep has a quota of \$3000 for this period, and he makes the following sales:

Transaction	Subsidiary	Currency	Amount	Rate	Amount in USD
Invoice 1	US	USD	\$1000	US to US: 1	\$1000
Invoice 2	UK	GBP	£1000	UK to US: 2	\$2000
Invoice 3	CAN	CAD	\$1000	CAN to US: .5	\$500

The rep exceeded his quota by \$500 and receives a commission payout equal to 10% of \$500, or \$50 USD.

**Note:** If changes are made to the consolidated exchange rates, the commission schedule must be recalculated.

## Authorizing Commissions in OneWorld

The Authorize Commission page has a subsidiary list that filters the list based on the subsidiary of the employee or partner.

The accounts that are selected on this page must be accessible to the chosen subsidiary.

When authorizing commission in bulk, the currency rate that is used is the most recent transaction currency in the currency rate table for each respective currency. For example, if a Canadian rep is earning commission on a US commission schedule, the schedule generates the commission transaction in US dollars. This ultimately needs to be posted to the Canadian subsidiary's books in Canadian dollars. The rate used for this conversion is based on the rate stored in the consolidated exchange rate table.

The currency rates used during authorization are the most recent exchange rates in the currency exchange rate table at Lists > Accounting > Currency Exchange Rates.

The By Transaction and By Period subtabs on the individual commission pages now include the following columns:

- **Currency** – This is the currency of the commission transaction (which is the same as the currency of the subsidiary assigned to the employee or partner).
- **Subsidiary** – This is the subsidiary to which the commission transaction is posted.
- **Exchange Rate** – This column shows only for partner commission. This determines the rate from the base currency of the subsidiary assigned to the partner to the partner's transaction currency.

For example, assume that you have a partner that is paid in Canadian dollars assigned to a UK subsidiary who sells on behalf of a US subsidiary. The commission schedule would be in US dollars. The exchange rate on each line of the commission transaction would use a rate to convert the amount from USD to GBP, and the exchange rate in the header would convert the amount from GBP to the partner's currency, CAD.

For more information about employee and partner commissions in NetSuite OneWorld, see the following help topics:

- [Commissions](#)
- [Partner Commissions & Royalties](#)
- [NetSuite OneWorld Overview](#)
- [Using Consolidated Exchange Rates](#)

## Setting Subsidiaries on Online Forms in OneWorld

With NetSuite OneWorld, online forms include the Subsidiary field.

The Subsidiary field is always considered when determining if the records created by a form is a duplicate. You cannot clear the box in the Search column for this field. This field is also hidden by default.

If a customer fills out an online form and the information matches a customer record for another subsidiary, a new record is created. A customer is only considered a duplicate if there is another matching customer record with the same subsidiary as the one selected on the online form.

You can set the subsidiary on an online form in the following ways:

- Add the Subsidiary field to the form, and allow those that fill out the form to select a subsidiary.
- Pass the subsidiary through the URL with the **&subsidiary** parameter. This enables you to hide the field on the form.
- Set the default subsidiary on the Set Up Workflow subtab of the online form record in the Default Subsidiary field.
- Select the subsidiary that is included in the visitor ID of the person submitting the form. The visitor ID is tracked in the cookie that is issued when someone visits your website.

If more than one method is utilized, the subsidiary is selected in the following order of precedence:

1. The subsidiary manually selected in the Subsidiary field.
2. The subsidiary set by the URL's parameter.
3. The subsidiary in the visitor ID (cookie).
4. The default subsidiary set in the Default Subsidiary field on the Set Up Workflow subtab of the online form.

If you use online customer forms to create contact records, the contact is assigned the subsidiary associated with the customer record it is tied to.

## Working with OneWorld and SuiteCommerce

When you use SuiteCommerce in a NetSuite OneWorld account, you can associate multiple subsidiaries to a Site Builder or to a SuiteCommerce Advanced website. In Site Builder each subsidiary has its own version or view of the website. Website visitors can choose the subsidiary site they want to view from a list displayed on the site. In SuiteCommerce Advanced, the subsidiary selected as the default is the one that shows on website. For more information, read the help topic [SuiteCommerce and OneWorld](#). Read also, [Site Builder and OneWorld](#).

## Credit Card Gateways and Multiple Subsidiaries

You can associate a credit card processor with a subsidiary, so that when a shopper visits your web store, selects a subsidiary, and places an order, only that credit card processor is used. For example, the parent company Wolf Electronics US operates a website associated with subsidiaries in the UK and Japan. Each subsidiary uses a different payment gateway. On the Web Site Setup page, the Administrator or store manager can select a credit card processor for each subsidiary.

For more information about linking credit card gateways with subsidiaries for web orders, read the help topic [Selecting a Credit Card Gateway for a Subsidiary Website](#).

For more information about setting up credit card processing gateways in NetSuite, read the help topic [Setting Up Customer Credit Card Processing](#).

# Tracking Changes in NetSuite

The following topics provide information about tracking changes in NetSuite:

- [Auditing Master Data and Configuration Changes in NetSuite](#)
- [System Notes Overview](#)
- [Auditing Account Preferences](#)
- [Documenting Changes](#)
- [Audit Enablement](#)

## Auditing Master Data and Configuration Changes in NetSuite

This section provides details about NetSuite features for tracking changes, including links to a wide variety of related topics. This background about NetSuite's auditing capabilities is intended to assist you in developing a strategy to achieve your control objectives. This content will be enhanced as new information is added and as existing procedures are refined, so check back regularly for updates.

- [Tools for Auditing in NetSuite](#)
- [Auditing Changes to Enabled Features](#)
- [Auditing Changes to Configuration Settings](#)
- [Tracking Roles and Permissions](#)
- [Auditing Changes to Customization Objects](#)
- [Tracking User Logins](#)
- [Tracking Key Financial Record Audit Trails](#)

## Tools for Auditing in NetSuite

NetSuite provides system notes that track many data and configuration changes. In most cases, you can determine whether a record, or a group of configuration settings, supports system notes based on whether a System Notes subtab is available on its NetSuite page. For more information about system notes, see [System Notes Overview](#).

You can use NetSuite's search capabilities to access system notes for auditing purposes.

- A general system note search can return system notes for all record types. A system note search can be filtered by record type, so that the results include only system notes for a particular record type. See [Searching System Notes](#).
- Searches of record types that support system notes can include system notes details in results. For example, a customer search can include values for system notes fields related to customer record changes in results. This support is based on a join between system notes records and their related parent records. See the help topic [Defining an Advanced Search](#).
- System notes include a **Context** field. The context describes how the change was made. For example, users and external systems can perform updates through the user interface, web services, SuiteScript, and a variety of other methods. Each method is considered a context. See [Understanding the Context for Changes](#).

NetSuite provides predefined audit trails for many frequently used records. Audit trails are searches of system notes, with filters and results already defined.

- An audit trail link, available at the top of most list pages, can return system notes for a particular record type. See [Viewing an Audit Trail for a Record Type](#).
- The audit trail for transaction records is available at Transactions > Management > View Audit Trail. See [Using the Transaction Audit Trail](#).

Also see [Auditing Data Changes using Searches](#).

Many record types also include a History subtab where you can track updates to each record, including line-level changes.

The deleted record search type lets you retrieve details about records that have been deleted. See [Searching for Deleted Records](#).

## Auditing Changes to Enabled Features

The Enable Features page (Setup > Company > Enable Features) indicates which features are currently enabled for use in a NetSuite account. Although this page does not have a System Notes tab, it does support system notes.

You can create a system note saved search that returns system notes for the Enable Features page, by choosing the **Enable Feature** filter for the **Record Type** field of the search. You can run this search regularly to track changes to enabled features.

The Enable Features page includes a link to an Audit Trail page. It is available from the **More** link in the upper right of the page. See [Auditing Account Preferences](#).

## Auditing Changes to Configuration Settings

Changes to general configuration settings that have a financial impact are logged in system notes. Areas covered by these system notes include: company information, general preferences, accounting lists, and tax setup.

For a list of the specific pages covered, see [System Notes for Changes to Configuration and Setup Pages](#).

The Company Information page (Setup > Company > Company Information) has a System Notes subtab. Most of the other configuration pages do not have this tab. You can create a system note saved search that returns system notes for these pages, by setting a filter for the **Record Type** field of the search. For system notes for the Company Information page, choose the **Company Information** filter. For system notes for the General Preferences and Accounting Preferences pages, choose the **Company Preferences** filter. For system notes for an accounting list, set a filter that matches the name of that list.

The General Preferences and Accounting Preferences configuration pages include a link to an Audit Trail page. It is available from the **More** link in the upper right of the page. See [Auditing Account Preferences](#).

## Tracking Roles and Permissions

You can use searches to return details about role and permission assignments in your NetSuite account.

- NetSuite provides a simple role search you can use to find a particular role or set of roles, or to return a list of roles and their characteristics. For information about running simple searches, see the help topic [Defining a Simple Search](#).

- You can use the SuiteScript Search APIs to create and automate role searches. For more information see the help topic [Search APIs](#). Note that role record searches do not support the `nlapiLoadSearch(type, id)` search API.
- You can create advanced employee and role record saved searches to find information about roles and 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 the help topics [Use Searches to Audit Roles](#) and [Use Searches to Audit Permissions By Employee](#).
- A History subtab is available on the Access subtab of the Employee record, that shows changes to roles and global permissions assignments for the employee. This subtab includes date/time, user, and a description for each change.
- NetSuite provides a function you can use to quickly review the differences in permissions between roles. See the help topic [Showing Role Permission Differences](#).

## Auditing Changes to Customization Objects

See the following for tips for tracking changes to customizations in your account:

- [Custom Lists, Custom Records, and Custom Transactions](#)
- [Custom Fields](#)
- [Custom Forms](#)
- [SuiteScripts](#)
- [Plug-in Implementations](#)
- [Workflows](#)
- [Bundles](#)
- [Customized Reports and Saved Searches](#)

### Custom Lists, Custom Records, and Custom Transactions

Each custom list definition page has a History subtab and a System Notes subtab. These subtabs have mostly the same information, except the System Notes subtab includes the context for changes.

Each custom record type definition page has a History subtab and a System Notes subtab. The System Notes subtab has additional fields not included on the History subtab, and the History subtab includes Notes. You can include system notes fields in a custom record type search, by selecting them on the Results tab of the saved search definition page. You can create a system note saved search that returns system notes for a custom record type, by choosing the record type name as a filter for the **Record Type** field of the search.

Currently each custom transaction type definition page does not have a History subtab or System Notes subtab. You can include system notes fields in a custom transaction type search, by selecting them on the Results tab of the saved search definition page. (To create a search for a custom transaction type, you need to create a Transaction search and set the **Type** field to the specific custom transaction type.) You can create a system note saved search that returns system notes for all transactions, including custom transaction types, by choosing the **Transaction** filter for the **Record Type** field of the search.

### Custom Fields

Each custom field definition page, for most types of custom fields, has a History subtab and a System Notes subtab, both of which are displayed under History. These two subtabs have slightly varying fields.



System notes for fields with encrypted stored values mask old and new field values, displaying asterisks only, for security reasons.

History and system notes are supported for custom entity fields, custom item fields, custom transaction body fields, custom transaction column fields, custom transaction item option fields, and other custom fields.

History and system notes currently are not supported for custom item number fields or custom segments.

## Custom Forms

Each custom form definition page has a History subtab. For each change, this subtab lists the date/time, user, type of change, and any notes.

History is supported for custom entry forms, custom transaction forms, and custom address forms.

## SuiteScripts

As of 2016.2, script and script deployment records have a System Notes subtab. Existing script and script deployment records that already had history associated with them before 2016.2 have a History subtab and a System Notes subtab. The History subtab lists logged activity that occurred before 2016.2, and the information on this subtab is no longer updated. Any activity as of 2016.2 or later is logged on the System Notes subtab.

Each system note for a change to a script or script deployment captures the following information:

- Date when the change was made
- Who made the change
- Context for the change (for example, UI)
- Type of change, for example, Edit
- Field changed
- Old value
- New value

During script execution, a detailed script execution log is generated when either an unexpected error occurs or the `nlapiLogExecution` method is called. See the help topic [Creating Script Execution Logs](#).

NetSuite provides access to the current and past runtime statuses of all SuiteScript 1.0 scheduled scripts that have been executed in your account. See the help topic [Monitoring a Scheduled Script's Runtime Status](#). A similar page is provided for monitoring the status of SuiteScript 2.0 map/reduce scripts.

You can view a list of all record types that have user event or global client scripts associated with them in your account. See the help topic [The Scripted Records Page](#).

Change management for edits to script files can be handled outside of NetSuite, through the source control management system used by script developers.

## Plug-in Implementations

As of 2016.2, plug-in implementation records have a System Notes subtab. Existing plug-in implementation records that already had history associated with them before 2016.2 have a History

subtab and a System Notes subtab. The History subtab lists logged activity that occurred before 2016.2, and the information on this subtab is no longer updated. Any activity as of 2016.2 or later is logged on the System Notes subtab.

As of 2018.1, system notes are also logged for Custom GL Lines Plug-in configuration changes.

Each system note for a change to a plug-in implementation captures the following information:

- Date when the change was made
- Who made the change
- Context for the change (for example, UI)
- Type of change, for example, Edit
- Field changed
- Old value
- New value

## Workflows

The Workflow Manager that is used to build workflows in NetSuite includes extensive History information about changes to the workflow definition. See the help topic [Workflow Definition Page History Subtab](#). The Workflow History Record Statistics dialog provides a way to view workflow history statistics and supports the purging of history records for finished workflow instances. The record purge is logged on the Workflow Definition page History tab. When a purge completes, an email is sent to the user that initiated the purge. See the help topic [Workflow Instance and History Record Purges](#).

You can run a search to get a list of workflow instances that completed or are currently in progress for a specific workflow definition or multiple workflow definitions. See the help topic [Workflow Instance Search](#). Beginning in 2017.2, you can also run a system notes search to see if changes have been made to a workflow. You can find more detailed information about the changes indicated in system notes search results on the [Workflow Definition Page History Subtab](#).

For more detailed monitoring of what a workflow is doing, you can enable logging that tracks all actions and transitions that execute on a record for each state that a workflow enters. See the help topic [Workflow Execution Log](#). As of 2018.1, you can specify that the history records related to the workflow instance's execution be deleted from the database after the workflow finishes or is canceled. See the help topic [Workflow History Subtab](#).

As of 2017.2, you can use workflow revisions to track the nature and number of modifications made to a workflow. You can track workflow revisions on the Workflow Definition Page History subtab, and through System Notes searches with the new **Revision** column. For details about the revision changes tracked on the Workflow Definition Page History subtab, see the help topic [Workflow Definition Page History Subtab](#). For more information about workflow definition revisions, see the help topic [Workflow Revisions](#).

## Bundles

NetSuite supports tracking of all bundle installations, updates, and bundle uninstallations in your account. See the help topic [Viewing the Bundle Audit Trail](#).

For bundles that you create, the Bundle Builder supports versioning. A **Version** field is available on the Bundle Basics page when you are creating or editing a bundle. You can deprecate an out of date bundle, to indicate the version of the bundle that should replace it. See the help topic [Deprecating a Bundle](#).

## Customized Reports and Saved Searches

You can use the Analytics Audit Trail search to display audit trail data covering changes to the definitions of saved searches, custom reports, report schedules, and financial report layouts. See the help topic [Audit Trail Search](#).

Information on execution of saved searches is available via the saved search Execution Log and the Saved Searches list. See the help topic [Auditing Saved Search Execution](#).

## Tracking User Logins

You can use the Login Audit Trail to keep track of account users, when they have logged in, and from where. See the help topic [Login Audit Trail Overview](#). This specialized search includes fields to track tokens associated to users, for accounts that use token-based authentication. See the help topic [Troubleshooting Token-based Authentication \(TBA\)](#).

## Tracking Key Financial Record Audit Trails

See the following for tips for tracking changes to key financial records:

- [General Transaction Audit Trail](#)
- [Tracking Transaction Deletion](#)
- [Tracking Revenue Recognition Changes](#)
- [Tracking Changes to Items](#)
- [Tracking Changes to Journal Entries](#)
- [Tracking Changes to Projects](#)

## General Transaction Audit Trail

NetSuite stores data on each entry that a user makes to create, change, or delete a transaction. This data includes all users involved in the history of this transaction, each user's action, the user's role, the date and time of that action, whether there was an account impacted, and the amount after the change. This historical data may be referred to as system notes, an audit trail, or as history. NetSuite provides a variety of methods for you to retrieve historical details about changes made to transaction records. See the following for information:

- [Transaction System Information and Communication Subtabs](#)
- [Granting User Access to Transaction History](#)
- [Using the Transaction Audit Trail](#)
- [Viewing Transaction System Notes](#)
- [General Ledger Tracking in Transaction System Notes](#)
- [Tracking Financial Account Changes](#)
- [Line-Level Audit Trail for Transactions](#)
- [Transaction Line-Level History Window](#)

## Tracking Transaction Deletion

The deleted record search type lets you retrieve details about records that have been deleted. See [Searching for Deleted Records](#). To search for deleted transactions, choose the **Transaction** filter for the **Record Type** field of the search.

Some countries legally require that a reason is provided whenever a transaction is deleted. The Use Deletion Reason feature satisfies this requirement by making it mandatory for users to record the reason for deleting a transaction. For details, see [Recording a Reason for Deleting a Transaction](#). The field that tracks deletion reasons is available to SuiteScript and web services.

## Tracking Revenue Recognition Changes

System notes are supported for advanced revenue management records, including revenue arrangements, revenue elements, revenue recognition rules, revenue recognition plans, and advanced revenue setup records. For details, see the help topic [Change Information for Revenue Recognition Records](#).

## Tracking Changes to Items

An audit trail link is available on the Items list page. This link provides access to a simple search page where you can search for items by old value or new value, as well as by other field values.

Each item record includes a System Information subtab that provides system notes, a list of active workflows on the item, and a history of workflows executed against the item.

## Tracking Changes to Journal Entries

Each journal entry record includes a System Information subtab that provides system notes, a list of active workflows on the journal entry, and a history of workflows executed against the journal entry.

## Tracking Changes to Projects

An audit trail link is available on the Projects list page. This link provides access to a simple search page where you can search for projects by old value or new value, as well as by other field values.

Each project record includes a System Information subtab that provides system notes, a list of active workflows on the project, and a history of workflows executed against the project.

## Tracking GL Audit Numbering

The GL Audit Numbering Sequences page provides general ledger audit numbering information specific to the accounting period in which the sequence was run, even if the period is closed. As of 2018.1, each numbering sequence is saved as a separate record and the history is maintained. For details, see the help topic [Viewing GL Audit Numbering Sequences](#).

You can customize financial reports including the Trial Balance, Balance Sheet, and Income Statement to include or exclude general ledger audit numbered transactions. You can also filter transactions on reports through the GL Audit Number field. For details, see the help topic [Reports and Saved Searches](#).

## System Notes Overview

NetSuite uses System Notes to track any changes made to a record. A system note for a change on a record captures the date when the change was made, who made the change, the role of the user who made the change (included as of 2017.1), the type of change, and the old and new value in the record. System Notes cannot be edited by any system user, script or app. System notes are logged on custom records as well as standard records. Anyone with view access to a record can view the system notes for

that record. When searching system notes, you can search for certain records, use advanced search filters, create a saved search, or export the information for additional analysis.

System notes are also logged on changes to general configuration settings that have a financial impact. Setting changes that are logged include:

- Company information
- General preferences
- Enable features
- Accounting lists
- Tax setup

An audit trail is a search for system note records related to a certain record type. The Transaction Audit Trail enables you to produce a report that provides a detailed history of all transactions entered into NetSuite, or you can view system notes for multiple transactions. The audit trail provides information about the transaction, who entered the transaction, and when the transaction was created or modified. The Transaction Audit Trail report is available to the CEO, CEO (Hands Off), CFO, Full Access, and Support Administrator roles.

Perform a review of system notes and audit trails regularly. As part of an Activity Logging Review, users with appropriate permission should review items like system notes in addition to reviewing specific field changes, script changes, and expired access, and any other ongoing auditing that is required by your organization.

You can search for system notes using SuiteScript. For details, see the help topic [System Note](#).

## Viewing System Notes on Configuration Settings

To view system notes on configuration and setup pages, create a saved search. On the Standard subtab, specify the filter for system notes you want to view:

- To view system notes for enabled features, enter Record Type is Enable Features
- To view system notes for company preferences, enter Record Type is Company Preferences

On the Available Filters subtab, you can specify that the search results can be filtered by record type. For more information, see the help topic [Creating Saved Searches for System Notes](#).

## Viewing System Notes on a Record

To review changes made to a record, open the record and select System Information > System Notes. Details about every change related to the record are listed. For transactions, the System Notes subtab also shows system logs.

Use the Field dropdown list on the System Notes subtab to see changes for a certain field.

For more information, see [Auditing Master Data and Configuration Changes in NetSuite](#).

## Auditing Account Preferences


The Enable Features, General Preferences, and Accounting Preferences configuration pages include a link to an Audit Trail page.


Account administrators can use the Audit Trail to review a list of changes, including the names of changed preferences and features, who changed them, when they were changed, what the values of

the preference were before and after the changes, and whether the changed features were enabled or disabled.

### To access the Audit Trail link:

1. Go to the desired Setup page:
  - For **Enable Features**:  
access this page at Setup > Company > Enable Features.
  - For **General Preferences**:  
access this page at Setup > Company > General Preferences.
  - For **Accounting Preferences**:  
access this page at Setup > Accounting > Accounting Preferences.
2. Click **More** and select **Audit Trail** from the dropdown list.
3. If desired, filter the result list by selecting from the **Feature**, **User**, **Preference**, or **Modified by** dropdowns.

 **Note:** The General Preferences and Accounting Preferences pages support SuiteScript. If a preference has been reset through scripting, NetSuite administrators will be able to view all details regarding the change.

 **Important:** Although SuiteScript developers will be able to programmatically obtain values on the Enable Features page, SuiteScript cannot be used to set or change values.

## Documenting Changes

It is important that you design appropriate controls in your system development life cycle (SDLC) related to customizations of the NetSuite application, such as custom roles, scripts, custom records, workflows, and other customizations. Your change management process should ensure that changes are authorized, tested, approved, and documented.

You should document changes on a standard change request form. This form can be physical, but an electronic form is recommended. For example, depending on the nature of the change, the NetSuite product team maintains change documentation through issue records, production maintenance records (a custom record type created for this purpose), or feature records.

Depending on business needs, NetSuite custom records can be tailored to serve as change request forms. Ideally, whatever documentation is used, the form should contain information that can easily be completed by the requestor. The request should be tracked internally via a document repository tool, and should include an approval mechanism to move the request from stage to stage in the change management process. A benefit to using issue records or custom records within NetSuite is that you can run saved searches these records to generate a list of all changes for specific periods. Saved searches also support filtering to deliver information needed for audits or reviews. Using custom records also makes it easier to ensure that required fields are completed before tickets are closed, and that approvals are obtained before a change request moves to the next level. Fields such as attachments of test plans, or summary of test results can be required within the request.

A change request form should include information such as:

- Requestor name
- Date of change request

- Description of change request
- Reason for change
- Assignee to implement change
- Authorization to begin work to implement change

Custom forms can be combined with a workflow to ensure that approvals are routed automatically when specific steps are completed. For example, after a requestor submits the form, it can go to an authorized individual or group to approve the change. The request can then be routed to other approvers as it moves through the following steps of the process:

- Development
- Testing / Quality Assurance (QA)
- Implementation in Production

Each step along the way should be documented on the request form. This documentation provides point-in-time information on each change, identifying the account in which the code change resides, responsibility for the change, and the impact of the change.

As with any process, exceptions may occur, and when they do, the change management process needs to document how to handle these exceptions and capture appropriate evidence. It is possible, for example, that if production code breaks, a developer may be required to go directly into the production code to quickly correct the problem. That change would then be worked backwards into the other accounts, like test and development. In this example, that emergency change would be documented on the request form. It would be noted who performed the change in the production account, when it was performed and why it did not follow normal SDLC procedures. It is important to capture these details as evidence for auditors. A well-controlled program code change management process includes strong segregation-of-duties controls to ensure the right people are making the code changes and moving code to the correct accounts, only after receiving the proper approvals.

## Audit Enablement

The NetSuite application has many features that enable user entities to build and manage proper internal controls over its financial reporting. The use of NetSuite as a financial system provides the opportunity for financial process controls to exist in a single system for the organization and then extend that functionality with applications from Fastpath or FloDocs.

There are several customizations that can be done to help ensure that financial transactions are reasonably free from misstatements due to errors. These include:

- Workflows to establish dual authorization to address segregation of duties issues  
Workflows provide additional segregation of duties controls beyond logical security. For example, workflows can provide approval limits and prevent users from approving their own transactions. Workflows can be designed and built in NetSuite by organizations to meet that company's specific needs.
- Scripting  
Scripts are another way to establish controls that not built into NetSuite by default. For example: currently within NetSuite, invoices are required to be reviewed and approved by the person who created the PO and who is the business owner for the expense. This requirement enables the Accounts Payable team to determine whether the invoices from the vendors are appropriate, and to ensure that they are matched against the proper invoice. Currently, this determination is done through scripting. When the Accounts Payable team creates an invoice against a vendor and PO, an email is sent to the business owner requesting approval of the invoice for payment.

- Audit trail saved searches to monitor specific transactions

For most financial transactions in NetSuite, an audit trail is established and can be tracked and searched. Changes to roles, customizations released into the system, transactions created, as well as other common changes, can all be tracked in the system, with some exceptions. Saved search alerts can be created to identify items outside of ordinary processing. A saved search alert for any transactions initiated by personnel who would not normally be initiating such transactions is an example. A company may want to identify any POs created by Accounts Payable because they are part of the procure-to-pay process. Monitoring POs created by Accounts Payable could allow management to detect any questionable transactions, especially if the user is involved in another part of the process. Monitoring changes to credit levels, terms, and addresses are other examples of changes that can be monitored through saved searches.

- Manual controls

There are some areas in NetSuite not yet addressed by automatic control. It is important to review these items and ensure that controls outside the system are established to monitor these types of transactions.

- Audit trails for journal entries post-approval

Currently, there is no audit trail to detect when a journal entry is edited after it has been approved, or when the approver edits the entry prior to approval. Therefore, it is important to establish proper journal entry review and account reconciliations. It may also be prudent to add spending reviews for expense or disbursement accounts to check for any unusual entries. As the reviews are now the key controls, proper segregation of duties should be used for selecting the reviewer.

- Audit trails for account setup

Account setup is currently not tracked, except for the header information (user who performed an edit, date and time). This tracking does not include details of changes. It is important to establish post-setup reviews by a different person, and also to establish controls for certain significant transactions that can be impacted by changes to the setup. One example is the credit limit for customers. This feature can be turned on or off, which could allow customers to exceed their credit limits. A periodic review of customer balances against their credit limits could be used to detect whether any have exceeded their limits. Because there may be instances where the excess to the credit limit is approved, it is important to carefully design and establish how approval is obtained and documented.

- Three-way matching for PO, invoice, and receipt of goods

NetSuite does not currently support a three-way match. Consequently, it is important to establish a process to monitor purchases. Monitoring, scripting, and evidence of approval may be used to support purchase and invoice authorization. Within NetSuite, the Accounts Payable team monitors and ensures that there is a PO before any transaction is entered into with a vendor, and if this is not the case, a PO violation is reported and monitored. Invoices are approved and validated to ensure that they do not go over the PO amount. Invoices over the PO amount require another approved PO or will result in a reported PO violation. The Accounts Payable team also validates that services or goods are being received.

NetSuite is a tool designed to help its customers meet their business needs, but it is up to customers to ensure that they properly understand their requirements and figure out how they can use NetSuite to meet those requirements. The implementation of controls to enable auditing is customizable for each customer's business needs. Customers should properly understand their risks, how they want to address them, the level of controls to be put in place, and how they will monitor these controls. They also need to understand their compliance obligations, and the requirements for each of these obligations.




# Internal Controls in NetSuite

This section lists internal controls that are readily available in NetSuite. This listing is provided as a reference to assist you in building strong internal controls in your NetSuite implementation.

- Some controls do not require setup after your NetSuite account is operational. See [Standard Internal Controls](#).
- Other controls require some basic setup in the NetSuite UI before they are available. See [Internal Controls that Require Basic Configuration](#).

No customizations are required for you to utilize any of these general controls in your NetSuite implementation. Audited companies should consider taking credit for the partial or full mitigation of risks provided these internal controls.

Many internal control processes specific to your company may require the creation of some basic customizations, such as custom fields, custom records, workflows, and scripts. These types of custom solutions may be available as NetSuite Professional Services SuiteSolutions, SuiteApps, or Partner Applications. Or these solutions can be built by NetSuite developers.

 **Warning:** This content is not intended to be an all-inclusive list or to represent what a company needs to adopt to be SOX-compliant. There are many other internal controls available in NetSuite and all companies should take a risk—based approach to ensuring materially accurate financial statements. This content provides examples of internal controls utilized in our system.

## Standard Internal Controls

The following internal controls do not require any setup after your NetSuite account is operational.

- Accounts Receivable
  - Outstanding invoices are aged and added to an A/R aging report in real time.
- Financial Close
  - General ledger accounts automatically roll up into financial statement line items.
  - The financial statement consolidation process is performed on a real-time basis.
  - The general ledger is automatically configured to include all accounts with balances.
  - All transactions automatically roll up into the general ledger in real-time.
  - Transactions cannot be posted to closed periods in NetSuite.
  - Out of balance transactions are automatically rejected.
  - Transactions referencing a closed period are automatically rejected.
  - Transactions containing an invalid or inactive GL segment, for example, account or cost center, are automatically rejected.
  - CTA (cumulative translation adjustments) are automatically calculated in NetSuite.
  - FX (currency translation) related adjustments are automatically calculated in NetSuite.
  - Access to open and close the GL accounting period in NetSuite is restricted to selected users. After a GL period is closed, NetSuite subsequently does not allow posting of any GL-impacting entries to a closed period.
  - Allocation weight is dynamically calculated when an allocation journal is generated, based on the current statistical account balance.

- Elimination journal entries are automatically generated based on intercompany transactions.
- Password strength for access to NetSuite accounts is required to comply with password policy.
- Calculation is automatic for a reversing journal entry that voids checks and transactions on days or periods different from the original transaction date.
- Journal entries require approval in line with Journal Entry Approval Policy prior to posting to the general ledger.
- Transactions posted outside of a posting period can be prevented or can initiate a warning.
- Limitations can be set on the individuals who can impact the account listed on an item record.
- A gapless numbering sequence is applied to all GL-posting transactions.
- Financial Reporting
  - Financial statements are automatically generated for each separate entity in NetSuite.
  - Financial reports for each entity are automatically prepared in their local currency and are converted in real-time into headquarters currency for consolidation purposes.
- Fixed Assets
  - NetSuite automatically calculates depreciation expense.
  - The Fixed Asset Module automatically calculates and posts the depreciation expense to the asset record and to the related journal entries to the General Ledger.
- Inventory
  - NetSuite values inventory at standard cost.
  - Inventory transactions created and/or edited in closed periods can be disallowed.
- IT General Controls
  - A minimum password length is required to comply with password policy.
  - Users are required to update their passwords with a regular frequency.
  - System notes are captured on the creation of all records and are not editable by users.
  - System notes are captured on the edit of all records and are not editable by users.
  - System notes are captured on the import and export of all custom fields.
- Order to Cash
  - Items purchased in a sales order for a customer are automatically reflected in the invoice and are automatically sent to the customer by email when the **Save & Email** button on the Next Bill tab is clicked. The order status of the sales order is automatically changed to Partially Fulfilled (several invoices or installment) or Billed (single invoice).
  - For orders on an installment basis, the billing schedule in the body of a sales order for a customer is automatically populated in NetSuite and can be viewed on the History tab of the customer record. This tab indicates scheduled billing dates and amounts for each date.
  - Upon invoicing, NetSuite automatically generates an entry.
  - NetSuite prevents creation of a customer with a blank credit limit.
  - NetSuite creates invoices only after an order has been shipped.
  - NetSuite restricts changes made to item quantity, pricing, and shipping income per sales order during the invoicing process.
  - NetSuite books an entry to debit Accounts Receivable and to credit Revenue upon invoice creation.
  - NetSuite places an order on hold when the customer exceeds the assigned credit limit. There is a workflow trigger, where an increase in the credit limit, if applicable, is generated and approved by the CFO.

- When a customer exceeds their credit limit, NetSuite can enforce an automatic hold or simply initiate a warning message.
  - Orders that are entered into NetSuite, but not yet billed, can be included in customer credit limit calculations.
  - Standard grace periods for overdue invoices prior to placing a customer on hold can be set up in line with the customer credit policy.
  - Edits to previously approved sales orders are disallowed.
  - NetSuite prohibits users from making any changes to a revenue recognition schedule for a transaction after the A/R period has been closed.
- Procure to Pay
  - Records and transactions can optionally be limited by the department of the individual entering or editing them.
  - Records and transactions can optionally be limited by the class of the individual entering or editing them.
  - Records and transactions can optionally be limited by the location of the individual entering or editing them.
- Revenue
  - NetSuite does not allow revenue recognition greater than 100% of the total amount of the project.
- Time Entry
  - Time entry requires supervisor approval.
  - There is a maximum number of hours an employee can enter for a specific week in line with the HCM policy.
  - There is a maximum number of hours an employee can enter for a specific day in line with the HCM policy.
  - There is a minimum number of hours an employee can enter for a specific day in line with the HCM policy.

## Internal Controls that Require Basic Configuration

The following controls require some basic setup in the NetSuite UI.

- Accounts Receivable
  - Open receivables identified by user-defined conditions, such as large invoices or exceeding the credit limit, are automatically identified and routed for review.
- Financial Close
  - The amount of expense to be amortized per month is automatically spread based on the amortization schedule prepared by A/P.
  - NetSuite automatically allocates the expenses to different departments based on the allocation percentages.
  - Access to open and close the sub-ledgers (A/P, A/R, and Payroll) and the general ledger is restricted to approved roles.
  - Elimination journal entries are automatically generated based on intercompany drop-ship workflow transactions.
  - Intercompany accounts are automatically reconciled.

- Commissions
  - Monthly, NetSuite automatically calculates eligible commission amounts based on the plan type linked to the participant (employee or partner).
  - After a commission is approved, it is automatically posted to A/P and to the general ledger, and is auto-populated for the payroll run.
  - Commissions are calculated and processed in line with standard compensation agreements.
- Fixed Assets
  - Edit access to the Fixed Asset Module is restricted to users with approved roles only.
  - NetSuite FAM is configured to calculate monthly depreciation based on the asset's cost, depreciation method, and useful life.
- Human Resources and Payroll
  - Edit access to the Payroll folder, which contains the Payroll Worksheet, is restricted to users with approved roles.
  - NetSuite auto-populates employee hours and expenses after appropriate approvals are obtained in the system.
  - After a payroll is committed, the related payroll taxes, benefits, bonuses, and commission expenses are automatically calculated and posted to the general ledger.
- IT General Controls
  - NetSuite compares contact and customer records and provides notifications of possible duplicate records.
  - Employee access can be restricted based upon IP address.
- Order to Cash
  - A general ledger journal entry is automatically created when an authorized credit memo is created and approved.
  - A journal entry is automatically generated when a batch payment posting is created and approved.
  - After all payments from a bank batch are applied, a deposit activity is performed in NetSuite and the related journal entry is automatically generated.
  - When payment from the bank for a single activity is applied, a deposit activity is performed in NetSuite, and the related journal entry to accounts receivable is automatically generated.
  - Unbilled approved T&M hours are automatically populated in NS for invoicing.
  - NetSuite only allows fulfillment and shipment of inventory if the following conditions are met:
    - Sales order is in Pending Fulfillment or Partially Fulfilled status and is not on hold for any reason.
    - Part numbers of items being fulfilled match part numbers on the Sales order and the quantity being fulfilled does not exceed the quantity on the sales order.
    - For serialized inventory items, such as switches, each fulfilled serial number matches a serial number that exists in finished goods inventory.
  - Shipping amounts are automatically calculated and applied to transactions based on rules.
  - A 1099 or W2 is required prior to vendor approval.
- Procure to Pay
  - NetSuite automatically routes a PO for approval based on the approval policy set. Only POs that have been properly approved can be processed for invoicing.
  - Spending thresholds on POs are built into a workflow as required by governance.
  - Spending thresholds on non-PO spending are built into a workflow as required by governance.

- Use of vendors in purchase orders is restricted to pre-approved vendors.
- Updates to vendor information route automatically for review to designated approvers.
- Non-inventory purchase requests are automatically routed for approval request to the relevant reviewer/approver.
- Inventory purchase requests are automatically routed for approval request to the relevant reviewer/approver.
- A three-way match is automatically performed for POs that have lines mapped to item receivable general ledger accounts. The control is configured at the item-level. If any item quantity or price does not match, an error message is displayed, the invoice is not posted, and the invoice is placed in Pending Approval status in NetSuite.
- Expense reports are automatically routed to the employee's manager and, after approval by the manager, to A/P for review and approval. After approval by the employee manager and A/P, the expense report is marked for payment.
- Purchase requests are routed for approval based on set approval limits.
- Expense reports are routed for approval based on set approval limits.
- Revenue
  - The relative fair value allocation at the time of an invoice is applied. The allocations are based on the relative fair values for all line items in the invoice based on the BESP data contained in NetSuite.
  - On invoicing, NetSuite creates a service amortization schedule for all of the service line items on invoice.
  - NetSuite is set up to defer revenue and the related COGS per terms and conditions set out in the customer master file. These terms include: rights of return, acceptance, shipping terms, and others.
  - NetSuite automatically recognizes and defers revenue based on the Revenue Recognition Policy. (Note: The Revenue Recognition Policy must be set up in NetSuite for each item.)
  - NetSuite is configured to recognize revenue on a monthly straight-line basis, prorated daily basis for the first and last month, for subscription and support revenue based on the provisioned date, contract start and end dates, and revenue recognition schedule.

# Managing Transactions

NetSuite provides several features that enable you to record reasons for deleting transactions and view transaction history. See the following topics.

- [Recording a Reason for Deleting a Transaction](#)
- [Reviewing Transaction History](#)
- [Transaction System Information and Communication Subtabs](#)
- [Granting User Access to Transaction History](#)
- [Viewing Transaction System Notes](#)
- [Using the Transaction Audit Trail](#)
- [Tracking Financial Account Changes](#)
- [Line-Level Audit Trail for Transactions](#)
- [Transaction Line-Level History Window](#)

## Recording a Reason for Deleting a Transaction

In some countries, providing the reason why a transaction was deleted is a legal requirement. The Use Deletion Reason feature satisfies this requirement by making it mandatory for users to record the reason for deleting a transaction.

### How to Enable the Feature

To enable the Use Deletion Reason feature, go to Setup > Company > Enable Features > Company subtab > ERP General section. Check the box and then click Save.

### Transaction Types Impacted by the Feature

All of the transactions listed at Setup > Company > Auto-Generated Numbers on the Transaction Numbers subtab are impacted by the Use Deletion Reason feature. When this feature is enabled, users must provide a reason for deleting a transaction record. The Transaction Numbering Audit Log provides a list of the deleted transactions, their transaction number, the date on which the transaction was deleted, and by whom. It also provides the reason the user deleted the transaction record and any related memo. For a list of transactions on the Transactions subtab, see [Records and Transactions Available for Auto-Numbering](#). For information about the Transaction Numbering Audit Log, see [Transaction Numbering Audit Log](#).

### Deletion Reasons: Standard and Unique

The Use Deletion Reason feature includes two standard deletion reasons: Original Document Damaged and Other. These deletion reasons are available throughout your NetSuite account. If users choose the standard deletion reason Original Document Damaged, writing a memo is optional. If users choose the standard deletion reason Other, writing a memo is required. When reversal journal entries are deleted by removing the reversal date on the original journal entry, the deletion reason code is Other with the memo, Reversal date removed.

Users with the Administrator role or access to Accounting Lists can create and modify deletion reasons. To create, modify, inactivate, and choose display languages for a unique deletion reason, go to Setup > Accounting > Accounting Lists > New and click Transaction Deletion Reason. Complete the fields, as required and then save the record. For more information about accounting lists, see the help topic [Setting Up Accounting Lists](#).

**Note:** Transaction deletion reasons must be unique to avoid duplication, and cannot exceed 30 characters. The name is case sensitive. Therefore, the transaction deletion reason **MY CODE** is unique from the transaction deletion reason **my code**.

### Account Changes Due to Disabling the Feature

You can disable the feature at any time. Transactions to be deleted will no longer require a deletion reason. Deletion reasons will not be accessible from Accounting Lists. The Transaction Numbering Audit Log will continue to provide the deleted transactions and transaction numbers, deletion date, user performing the deletion, reason for deletion, and any related memo.

## Reviewing Transaction History

There may be times when you have questions about a transaction such as:

- When was it created, and by whom?
- Have there been any changes to it?
- Did someone void or delete it, and when?

NetSuite stores data on each entry that a user makes to create, change, or delete a transaction. This data includes all users involved in the history of this transaction, each user's action, the date and time of that action, if there was an account impacted, and the amount after the change.

This historical data may be referred to as system notes, an audit trail, or as history. NetSuite provides a variety of methods for you to retrieve historical details about changes made to transaction records. See the following topics for information:

- [Transaction System Information and Communication Subtabs](#)
- [Granting User Access to Transaction History](#)
- [Viewing Transaction System Notes](#)
- [General Ledger Tracking in Transaction System Notes](#)
- [Using the Transaction Audit Trail](#)
- [Tracking Financial Account Changes](#)
- [Line-Level Audit Trail for Transactions](#)
- [Transaction Line-Level History Window](#)

NetSuite also provides a more general system note search function that retrieves details about other types of records in addition to transactions. For information about this function, see [Searching System Notes](#).

## Transaction System Information and Communication Subtabs

The following subtabs can be used to track tasks and information or send messages associated with transactions you enter in NetSuite:

- **System Information subtab**

On the System Information subtab, you can find system notes which track the date and time of each update to the transaction. System notes also track each user who made changes to the transaction. For more information, see [Viewing Transaction System Notes](#).

If you use the SuiteFlow feature, you can also see the Active Workflows and Workflow History subtabs. For more information, see the help topic [Viewing Workflow Activity](#).

#### ■ Communication subtab

Use the Communication subtab to create and send messages to your customer. You can add the message as an HTML or PDF attachment or embed the transaction within the body of the message.

The Communication subtab tracks all related email and faxes sent and received.

When creating some transactions, you can create and add tasks, events and phone calls associated with the transaction from the Communication subtab. After you save the transaction, this information is combined on an Activities subtab. This enables you to track meetings and conference calls you schedule in the process of finalizing a sale.

To use transaction subtabs, go to the Transactions tab and click the type of transaction you want to use. On the transaction form, click the System Information or Communication subtab. Not all transaction records have a System Information or Communication subtab.

Notes:

- The System Information subtab is available on most transaction records. However, some records available from the Transactions menu are not classified by the system as transactions and do not provide the System Information subtab, including Amortization Schedules, Budgets, Commissions, Partner Commissions, Paychecks, and Quotas.
- The Communication subtab is not included on all transaction records.

## Granting User Access to Transaction History

The Financial History permission is required for users to view transaction history. Some roles have this permission by default, such as accounting clerks and sales administrators. To review permissions for standard roles, see the help topic [Standard Roles Permissions Table](#).

An administrator or a user with the Full Access role can provide other users with access to transaction histories by customizing their roles to include the Financial History permission. For example, support reps can be allowed to see the sales transactions that customers inquire about.

### To create a custom role with transaction history access:

1. Go to Setup > Users/Roles > User Management > 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 role name will be available in employee records on the **Access** subtab.
4. On the **Permissions** subtab, click the **Lists** subtab.
5. In the **Permission** column, select **Financial History**.
6. In the **Level** column, select **View**.
7. Click **Add**.
8. Click **Save**.

Now, employees with the new customized role can view the Transaction History subtab on customer records and click the links to view those transactions.

To assign employees this custom role, go to Lists > Employees > Employees, and click Edit beside the employee you want to assign the role. Click the Access subtab. Select the new role in the Role field, and click Add/Edit. Click Save.





**Important:** If the Global Permissions feature is enabled, the Financial History permission also can be added on a per-employee basis. For information, see the help topic [Using the Global Permissions Feature](#).

## Viewing Transaction System Notes

To review changes made to an individual transaction, on that transaction record's System Information subtab, click the System Notes subtab. System notes are details stored about each change.

By default, system notes for all transaction fields are listed. Select from the Field dropdown list to list only changes for one selected field.

On the System Notes subtab, you can view past details related to the transaction, including system logs. System notes list each change made to the transaction, with the following information:

- **Date/Time** – when each change was made to the transaction. The date/time is shown in the company timezone.
- **Set by** – the user that made each change.
  - Some changes are made by the system, for example, fields where values are auto-populated.
- **Field** – the field where each change was made.
  - If you are using the Accounting feature, system notes include general ledger impact of changes with an entry of Impact in this column. For information, see the help topic [General Ledger Tracking in Transaction System Notes](#).
- **Type** – the type of each change.
- **Old Value/New Value** – the data in the field before it was edited and the new information entered for each change.
- **Role** — role of the user that made the change (included as of 2017.1 — you have to customize the view to see the Role column)

Note the following:

- The setting for Log System Notes on Updates Only at Setup > Company > General Preferences determines whether system notes are generated when a transaction is created. This preference was introduced in Version 2012 Release 2. By default, it is enabled for new accounts as of that release or later, and disabled for accounts that existed before that release.
- Click the Customize View button to define criteria for filtering system notes and/or to change the displayed results columns. Clicking this button opens a Saved System Note Search definition page. After you have defined this type of search, you can select it from the View dropdown list for an alternate system notes display. For information about creating this type of search, see the help topic [Creating Saved Searches for System Notes](#).
- System notes on the System Information subtab relate to each transaction as a whole. Line-level system notes also are available from History links for individual items, expenses, and journal line items on transactions. For more information, see [Line-Level Audit Trail for Transactions](#).
- To view system notes for multiple transactions, filtered by field values, go to Transactions > Management > View Audit Trail. For more information, see [Using the Transaction Audit Trail](#).

## Using the Transaction Audit Trail

The Transaction Audit Trail enables you to produce a report that provides a detailed history of all transactions entered into NetSuite. The audit trail provides information about the transaction, who entered the transaction, and when the transaction was created or modified.

To view the Transaction Audit Trail, go to Transactions > Management > View Audit Trail. In the NetSuite U.K. edition, go to Transactions > Other.

## View Audit Trail Page

On the View Audit Trail page, you can filter the report to limit audit trail results to a manageable number or to focus on a group of specific transactions. Filters can be based on:

- User(s) who entered transaction edits
- Action taken for the transactions: create, change, or delete
- Transactions date range, either relative (such as last month) or absolute
- Amount of transactions, defined as an exact number or a range
- Type(s) of transactions
- Account(s) affected by transactions
- Entity or entities involved in transaction, defined by name  
Can be customers, employees, partners, vendors, or other entities

## Audit Results Page

Select the desired filter options and then click Submit to open the Audit Results page. This list includes the following columns of data:

- Date and time that the transaction change was executed
- Name of the user who made the change
- The action taken: create, change, or delete
- Type of transaction
- Internal ID
- Transaction number
- Posting date of transaction change.
- Account affected
- Amount

By default, the Audit Results page sorts transactions by their system-generated Internal ID. Click the text at the top of any column to sort the list using that attribute.

The page displays a one-line summary for each transaction. Click on a transaction's link in the Date/Time column to view details and GL Impact for that transaction.

For more information about audit results data, see [Tracking Financial Account Changes](#).

## Other Ways to View System Notes

- You can view system notes for an individual transaction on the transaction record. Click the System Information subtab, then the System Notes subtab. For more information, see [Viewing Transaction System Notes](#).
- Line-level system notes are available from History links next to individual items, expenses, and journal line items on transactions. For more information, see [Line-Level Audit Trail for Transactions](#).

- To view system notes for multiple transactions, filtered by field values, go to Transactions > Management > View Audit Trail. For more information, see [Using the Transaction Audit Trail](#).
- A system note search is available at Reports > New Search. The system note search includes system notes for records other than transactions, provides different filter fields from the transaction audit trail, and offers additional functionality including the ability to export data, advanced search filters and results options, and the creation of saved searches. For more information, see [Searching System Notes](#).

## Tracking Financial Account Changes

You can use the audit trail function to search for changes made to your financial accounts.

### To use the Audit Trail:

1. Go to Transactions > Management > View Audit Trail ( Administrator ).
2. Select criteria to quickly find the information you seek.  
For example, which user performed the action, between which dates the transactions were changed, or which account the transactions affected. You can select more than one user, action, transaction type, account, or name by pressing the Ctrl key and selecting with your mouse.
3. Click **Submit**.

When the Audit Results page appears, there are 8 columns that contain information:


- **Date/Time** – This is the date and time your data was saved.  
All times are expressed in Pacific Standard Time (PST). When Daylight Savings Time is in effect, all times are expressed in Pacific Daylight Time (PDT).  
If you import data or load sample data, all the dates and times of existing transactions appear as the date and time your data was loaded.
- **Username** – This is the name of the person who created, changed, or deleted the transaction.  
If your company memorizes transactions, the name of the user who created these transactions appears.
- **Action** – This is what was done to the transaction. This can be CREATE, CHANGE, or DELETE.  
If you void a transaction, CHANGE appears.
- **Type** – This is the type of transaction that was created, changed, or deleted.
- **Number** – This is the number specific to each transaction. For example, invoice number 18 or check number 1400.
- **Post Date** – This is the date your transaction was posted to the account.
- **Account** – This is the financial account that is affected by the transaction. For example, if you create an invoice, Accounts Receivable appears in the Account column.  
If no account was affected, the corresponding field in this column is blank.
- **Amount** – This is the total amount of the transaction.  
Deleted and voided transactions have zero in this column. Zero also appears in this column next to changed transactions if you made a change that didn't affect the original amount.

Click any date in the **Date/Time** column to view the details of a transaction. When the Audit Results page appears with the particular transaction you selected, click **View**. The details for this transaction appears. If you want to make changes, click **Edit**, enter your changes, and then click Save.

## Line-Level Audit Trail for Transactions

The audit trail for transactions includes the ability to track updates to individual line items. You can view the audit trail for individual line items directly from each transaction record's listings for items, expenses, and journal line items.

On a transaction record, each line item includes a **History** link that you can click to open a new window displaying all updates to that particular line item. This link is visible to users with Notes Tab permission.


 **Note:** The line-level audit trail does not track the initial creation or deletion of line items. Only updates to existing line items are tracked.

## Export Line-Level System Notes Data

This History window includes buttons you can click to export line-level history data as a CSV or XLS file. For more information about the History window's contents, see [Transaction Line-Level History Window](#).

## Include Line-Level System Notes in Saved Searches

To review the history of multiple line items at one time, create a transaction saved search that includes one or more Line System Notes fields in its results. You can also use Line System Notes fields as transaction saved search filters to return only selected line-item history data.

 **Note:** In a past release, NetSuite introduced a new company preference, Log System Notes on Update Only. (See [Setting General Account Preferences](#).) Before you enable this option in an account that existed before that release, you should first review any saved searches containing system notes fields, as these searches may use data from record creation system notes. If your account includes searches that rely on record creation system notes, you can either revise the searches before enabling the Log System Notes on Update Only option, or you can leave this option disabled.

For example, a case search may use record creation system notes fields to retrieve dates when cases were first escalated. To make this search work with the Log System Notes on Update Only option enabled, this search would need to be edited to use expressions and to return values for cases' Date Created field if the escalation date was not available through record update system notes fields.

## Other Ways to View System Notes

You can retrieve transaction system notes other than line-level in the following ways:

- You can view each transaction's header-level system notes on the transaction record's History subtab, System Notes subtab. For more information, see [Viewing Transaction System Notes](#).
- To view system notes for multiple transactions, filtered by field values, go to Transactions > Management > View Audit Trail. For more information, see [Using the Transaction Audit Trail](#).
- A system note search is available at Reports > New Search. The system note search includes system notes for records other than transactions and provides different filter fields from the transaction audit trail. It also offers additional functionality including the ability to export data, advanced search filters and results options, and the creation of saved searches. For more information, see [Searching System Notes](#).

## Transaction Line-Level History Window

The history window that appears when you click a History link for a transaction line item includes the following columns:

- action that occurred to update the transaction line item
- date and time of the action
- specific field altered (if applicable)
- transaction line number
- new value of the line item after the action
- old value of the line item before the action
- posting date of the transaction
- transaction type
- username of the user performing the action

The following fields are tracked in the History window:

- All custom fields
- Alt.Sales
- Amortization Residual
- Amount
- Billable
- Billing Schedule
- Class
- Closed
- Commit
- Create PO
- Customer
- Delay Rev. Rec.
- Department
- Item
- Cost Category
- License Code
- Location
- Memo
- PO Rate
- PO Vendor
- Price Level
- Quantity
- Rate
- Restock
- Revenue Recognition End Date
- Revenue Recognition Schedule

- Revenue Recognition Start Date
- Revenue Recognition Term in Months
- Tax
- Units



**Note:** The line-level audit trail does not track the initial creation or deletion of line items. Only updates to existing line items are tracked.

# Auditing Data Changes using Searches

To monitor changes made to NetSuite data, you can search system notes records.

You can use the following tools to access system notes records:

- A general system notes search can return system notes for all record types. A system notes search can be filtered by record type, so that the results include only system notes for a particular record type. See [Searching System Notes](#).
- Searches of record types that support system notes can include system notes details in results. For example, a customer search can include values for system notes fields related to customer record changes in results. This support is based on a join between system notes records and their related parent records. See the help topic [Defining an Advanced Search](#).
- An audit trail link, available at the top of most list pages, can return system notes for a particular record type. See [Viewing an Audit Trail for a Record Type](#).
- The audit trail for transaction records is available at Transactions > Management > View Audit Trail. See [Using the Transaction Audit Trail](#).
- System notes are not created by the execution of saved searches, because they do not change data. However, each saved search has a log listing the users who have run or exported the search. This log shows who has used the search in the past 60 days, with the dates and times of each execution. You can also see an audit trail about changes made to each saved search. See the help topic [Audit Trail for Saved Searches, Reports and Schedules](#).

**Known Limitations:** If you search for System Notes Fields and you elect to use Type = Change as a filter, NetSuite will return all results having type Change, Set or Unset as these are all internally considered a change. As a workaround, you can also use the following formula: Formula (text): is change: {systemnotes.type}.

Additionally, the Deleted Record search type lets you retrieve details about records that have been deleted. For information about searching for deleted records, see [Searching for Deleted Records](#).

## Searching System Notes

Each system note record stores details about a specific change made to a NetSuite record.

NetSuite provides a system note search that you can use to retrieve system notes data. To use this search, go to Reports > New Search and click System Note.

- Use a simple search to retrieve system notes data filtered by: the user(s) who entered the changes, role of the user who entered the changes, the date and time of the changes, the type of change, the field(s) changed, the value before the changes, the context for the change, and the value after the changes. For information, see the help topic [Defining a Simple Search](#).
- Use an advanced search to retrieve system notes based on more advanced filtering and results display options. For information about the capabilities available, see the help topic [Defining an Advanced Search](#).
- Use a saved search to take advantage of additional functionality such as emailing search results, and of course, the ability to quickly rerun the search. For information, see the help topic [Defining a Saved Search](#).

System notes fields also are available to be used as filters and displayed as results for other record types' advanced and saved searches, including the following: contact, customer, employee, issue, item, project, opportunity, partner, transaction, and vendor.

## More about System Notes

- System Notes for existing records are never purged. The only time system notes are ever deleted is when the record containing the system notes is deleted.
- There is a company preference, Log System Notes on Update Only, that enables you to view log system notes when updates occur. See [Setting General Account Preferences](#).



**Important:** Before you enable this option in an account that existed before that release, you should first review any saved searches containing system notes fields, as these searches may use data from record creation system notes. If your account includes searches that rely on record creation system notes, you can either revise the searches before enabling the Log System Notes on Update Only option, or you can leave this option disabled.

For example, a case search may use record creation system notes fields to retrieve dates when cases were first escalated. To make this search work with the Log System Notes on Update Only option enabled, this search would need to be edited to use expressions and to return values for cases' Date Created field if the escalation date was not available through record update system notes fields.

## System Notes for Changes to Configuration and Setup Pages

System notes log changes made to enabled features, company information, and account-level preferences.

The following configuration and setup page changes are captured in system notes:

- Company Information (Setup > Company > Company Information)
- Enable Features (Setup > Company > General Preferences)
- General Preferences (Setup > Company > Enable Features)
- Expense Categories (Setup > Accounting > Expense Categories)
- Accounting Lists: Payment Method (Setup > Accounting > Accounting Lists)
- Accounting Lists: Term (Setup > Accounting > Accounting Lists)
- Accounting Lists: Cost Category (Setup > Accounting > Accounting Lists)
- Accounting Lists: Budget Category (Setup > Accounting > Accounting Lists)
- Accounting Lists: Subscription Term (Setup > Accounting > Accounting Lists)
- Accounting Preferences (Setup > Accounting > Accounting Preferences)
- Location Costing Groups (Setup > Accounting > Setup Tasks > Location Costing Groups)
- Nexuses (Setup > Accounting > Nexuses)
- Tax Types (Setup > Accounting > Tax Types)
- Tax Codes (Setup > Accounting > Tax Codes)
- Tax Groups (Setup > Accounting > Tax Groups)

Account administrators can use searches to find system notes that were generated on configuration and setup pages. For example, you can create a saved search that shows system notes on features that were enabled.

You can also filter the search results based on record type.



## Other Methods for Viewing System Notes

NetSuite provides a variety of other methods that you can use to retrieve system notes for particular record types.

- The audit trail function enables you to retrieve filtered sets of system notes for a selected record type. For information about using the audit trail, see [Viewing an Audit Trail for a Record Type](#) and [Using the Transaction Audit Trail](#).
- Each individual transaction record includes a System Notes subtab on the History subtab where you can view system notes for that transaction. See [Viewing Transaction System Notes](#). History for individual line items also may be available from transaction records. See [Line-Level Audit Trail for Transactions](#).
- Each individual record of a type other than transaction, such as Employee or Customer, includes a System Notes subtab on the General subtab where you can view system notes for that record.

## Viewing an Audit Trail for a Record Type

You can view an audit trail to see a list of changes made to a selected record type, such as Employee or Customer. An audit trail is a search for system note records related to a selected record type.

An Audit Trail link is available from most record type list pages. (These list pages usually are available from the Lists tab.) When you click an Audit Trail link on a list page, an Audit Trail page opens. On this page, you can define field values as filters, to limit results to more relevant data of a manageable size.

### To search a record's audit trail:

1. Go to the list for the record type you want to search.  
For example, to search for changes on customer records, go to Lists > Customers.
2. In the header of the list, click **Audit Trail**.

The screenshot shows the NetSuite interface for the 'Customers' list. At the top right, there are links for 'List', 'Search', and 'Audit Trail'. The 'Audit Trail' link is highlighted with a red rectangle. Below these links are buttons for 'View' (set to 'Custom General'), 'Edit View', 'New Customer', and 'Add'. A 'FILTERS' section contains dropdowns for 'Sales Rep' (set to '- All -') and 'Stage' (set to 'Customer'). Below the filters is a toolbar with icons for document, print, and other actions, along with a 'Show Inactives' checkbox, an 'Edit' button with a green checkmark, a 'Quick Sort' dropdown, and a 'Total: 42' indicator. The main table lists customer records with columns for 'NEW', 'EDIT | VIEW', 'INTERNAL ID', 'NAME', 'DUPLICATE', 'SALES REP', 'PARTNER', and 'BILLING ADDRESS 1'. Two records are visible: 'Acme Inc.' with ID 366 and 'Widgets Ltd.' with ID 365.

NEW	EDIT   VIEW	INTERNAL ID	NAME	DUPLICATE	SALES REP	PARTNER	BILLING ADDRESS 1
	Edit   View	366	Acme Inc.				
	Edit   View	365	Widgets Ltd.				

3. On the Audit Trail page, set the criteria for your search.

You can search system notes by:

- The user ID of the person who made change.
- The date and time the change was made.
- The type of change (for example, whether the field was set for the first time or updated from a previous value).
- The field changed.
- The value before the change.
- The value after the change.
- The context for the change. For more information on context, see [Understanding the Context for Changes](#).

4. Click **Submit**.

Note the following:

- The audit trail for transaction records is available at Transactions > Management > View Audit Trail. For more information, see [Using the Transaction Audit Trail](#).
- A system note search that is more general than the audit trail function is available at Reports > New Search. The system note search includes system notes for multiple record types, and offers additional functionality, including the ability to export data, advanced search filters and results options, and the creation of saved searches. For more information, see [Searching System Notes](#).

## Searching for Deleted Records

When a record is deleted, NetSuite retains some data about it. You can retrieve this data by using the Deleted Record search type. To use this search type, go to Reports > New Search and click Deleted Record.

You can retrieve the following data:





- The date and time the record was deleted.
- The name of the user who deleted the record.
- The context for the record's deletion. For more information on context, see [Understanding the Context for Changes](#).
- The record's type.
- The record's name. Note that the values the system returns for this column vary depending on the record type. For some record types, such as entities and items, this column reflects the value of the record's Name field. For other record types, the Name column may include a more general label.
- Optionally, the record's external ID.

You can also use most of these fields as search criteria. The only exception is external ID.

The following screenshot shows results typical of a Deleted Record search.

Deleted Record Search: Results

[Return To Criteria](#)[Save This Search](#)



7/25/2014 — 5/12/2014 < > Total: 1912

DATE DELETED x	DELETED BY	CONTEXT	RECORD TYPE	NAME
7/23/2014 4:00 pm	Smith, John	Web Services	Inventory Part	Basic Widget
7/23/2014 3:57 pm	Smith, John	Web Store	Contact	21 Williams, Susan
7/23/2014 3:57 pm	Smith, John	Web Store	Employee	21 Williams, Susan
7/23/2014 3:28 pm	Jane Johnson	UI	Message	
7/23/2014 3:28 pm	Jane Johnson	UI	Case	please review customer order #101
7/23/2014 2:23 pm	Smith, John	Web Services	Case	test for emailing employees

As with other search types, you can use a simple search, an advanced search, or a saved search, as follows:

- **Simple search** – The most basic approach. For more information, see the help topic [Defining a Simple Search](#).
- **Advanced search** – Lets you select the fields that should be returned and specify how results should be sorted. For more information, see the help topic [Defining an Advanced Search](#).
- **Saved search** – Lets you save your search criteria and rerun the search later. For more information, see the help topic [Defining a Saved Search](#).

**Note:** By default, the Deleted Record search type is available to only those users with the Administrators or Full Access role. However, you can grant other roles access using the Deleted Record search permission. Users who have this permission will see results about any type of record that was deleted, even if they do not have permission to create or modify that record type.

You can run deleted records searches in SuiteScript. You can view a record in the SuiteScript Records Browser to determine whether it supports this type of search. For details, see the help topic [Deleted Record Search](#).

The retrieval of deleted records in web services is a bit different. You can use the `getDeleted` operation rather than running a search. For a complete list of supported record types for this operation, refer to the DeletedRecordType enumeration in the `coreTypes` xsd.

## Understanding the Context for Changes

When viewing data about records, you can view the context for each change. The context describes how the change was made. For example, users and external systems can perform updates through the

user interface, Web services, SuiteScript, and a variety of other methods. Each method is considered a context. For a full list of contexts, see [Available Context Values](#).

You can view context data in any of the following ways:

- Each change to a record is typically recorded in a system notes record. This record describes the context for the change, among other details. For help navigating to system notes records and using the System Notes search type, see [Searching System Notes](#). For help finding system notes data using the Audit Trail feature, see [Viewing an Audit Trail for a Record Type](#).
- When a record is deleted, you can typically view the context for the record's deletion. You do this using the Deleted Record search type. For more information about this search type, see [Searching for Deleted Records](#).

**Note:** Context was introduced in Version 2014 Releases 2. Prior to this release, context data was not collected. For that reason, it is not possible to show the context for changes made before your account was upgraded to Version 2014 Release 2.

## Available Context Values

The following table summarizes possible context values.

**Important:** For further details about how the system assigns context values, see [Usage Notes](#).

Context	Change Initiated Through	Corresponding Help Topic
Bulk Processing	Any of the pages in the user interface that let you mark multiple records for simultaneous processing. Such pages include the Authorize Commissions page (at Transactions > Commissions > Authorize Employee Commissions) and the Mark Work Orders Built page (at Transactions > Manufacturing > Mark Work Orders Built).	
Campaign Response	A campaign response	<a href="#">Tracking Campaign Responses</a>
CSV	The CSV Import Assistant	<a href="#">CSV Imports Overview</a>
Mass Update	The utility at Lists > Mass Update > Mass Updates	<a href="#">Mass Changes or Updates</a>
Mobile	The mobile interface. However, not all changes initiated through the mobile interface have this context label. For details, see <a href="#">Some Contexts Occur Within Other Contexts</a> .	
Scheduled Workflow	A workflow configured to run at a specific time or interval. See also <a href="#">Workflow</a> .	<a href="#">Initiating a Workflow on a Schedule</a>
Script (Bundle Installation)	A specialized script that performs processing as part of a bundle installation, update, or uninstall	<a href="#">Bundle Installation Scripts</a>
Script (Client)	A script that runs in the browser	<a href="#">Client Scripts</a>

Context	Change Initiated Through	Corresponding Help Topic
Script (Mass Update)	A script that initiates a Mass Update	<a href="#">Mass Update Scripts</a>
Script (Portlet)	A script rendered in the NetSuite dashboard	<a href="#">Portlet Scripts</a>
Script (RESTlet)	A script invoked by an HTTP request to a system-generated URL	<a href="#">RESTlets</a>
Script (Scheduled)	A script configured to run at a specific time or interval	<a href="#">Scheduled Scripts</a>
Script (SSP Application)	A script implemented using the SuiteScript Server Pages feature	<a href="#">SSP Application Overview</a>
Script (Suitelet)	A script that operates in a request-response model using extensions of the SuiteScript API	<a href="#">Suitelets</a>
Script (User Event)	A script triggered by an action performed on a record	<a href="#">User Event Scripts</a>
Script (Workflow Action)	A script invoked as a custom action from a workflow state	<a href="#">Workflow Action Scripts</a>
UI	The user interface. However, not all changes initiated through the user interface have this context label. For details, see <a href="#">Some Contexts Occur Within Other Contexts</a> .	
Web Services	A SuiteTalk (Web Services) SOAP request	<a href="#">SuiteTalk Platform Overview</a>
Web Store	A SuiteCommerce website	<a href="#">SuiteCommerce Overview</a>
Workflow	A SuiteFlow workflow that occurs asynchronously. Examples include workflows initiated by <code>nlapiInitiateWorkflowAsync</code> and workflows invoked because they are subscribed to other records. If a workflow is triggered synchronously, by an event, the resulting changes generally share the same context as the triggering event. For examples, see <a href="#">Related Changes May Share a Single Context</a> . Changes made by scheduled workflows have a context of Scheduled Workflow.	<a href="#">nlapiInitiateWorkflowAsync(recordType, id, workflowId, initialValues); Subscribe To Record Action</a>

## Usage Notes

Be aware of the following conditions.

### Some Contexts Occur Within Other Contexts

The list of available context values includes some contexts that occur within other contexts. For example, one context is UI, but other contexts are specific parts of the UI. In these cases, the system uses the more specific label. For example:

- All CSV imports are initiated through the user interface, but a change made by the Import Assistant is labeled CSV, not UI.
- If a user conducts a Mass Update from a mobile device, the context listed is Mass Update, not Mobile.

## Related Changes May Share a Single Context

Note that if one change triggers another change, generally the system lists the same context for both changes, even if they occurred in different ways. The context listed is the context for the change that triggered the series of events.

The reason for this behavior is as follows: The system does not save a context value for each discrete field change. Rather, the system logs a context value for each operation, such as each save operation, which may include many field changes. However, a System Notes record is created for each field change, and each field change must list a context value. For this reason, if one change directly triggers a sequence of events resulting in subsequent changes, the system lists the same context for all changes.

The following hypothetical cases illustrate this concept:

- A scheduled workflow runs, changing Field A on a particular record. If that scheduled workflow triggers a SuiteScript that makes a change to Field B, the context for both changes is Scheduled Workflow.
- A user edits a record. The user's actions trigger a workflow that makes other changes to the record. All changes have the same context, which is UI.
- The CSV Import Assistant is used to import a record. Some aspect of the new record triggers a workflow, which makes changes to the newly imported record. The context for all changes is CSV Import.

# Avoiding Duplicates

The topics listed below can help you avoid unintended duplicate entries in NetSuite.

- [Avoiding Duplicate Transaction Numbers](#)
- [Duplicate Transaction Number Warnings](#)
- [Using Auto-Generated Numbering for Transactions](#)
- [Avoiding Duplicate Processing of Memorized Transactions](#)



**Important:** On a transaction, use caution when you click the Submit button. If you click Submit more than one time, multiple transactions may be created.

## Avoiding Duplicate Transaction Numbers

NetSuite provides a number of methods you can use to avoid the entry of duplicate transaction numbers.

- Set a user-level preference to receive a warning when a duplicate transaction number is entered. Go to Home > Set Preferences. On the Transactions subtab, check the Duplicate Number Warnings box.
- Set an account-level preference to receive a warning when a duplicate transaction number is entered. For information, see [Duplicate Transaction Number Warnings](#).
- Use auto-generated numbering for transactions. For information, see [Using Auto-Generated Numbering for Transactions](#).





**Important:** If auto-generated numbering is enabled in a OneWorld account, subsidiary-specific prefixes for transaction numbers can be defined in subsidiary records. This ensures that each subsidiary's transactions has its own numbering sequence. See [Using Subsidiary-Specific Transaction Auto-Numbering](#).

## Duplicate Transaction Number Warnings

An administrator can set up an account so that all users are alerted when they attempt to save transaction records with duplicate transaction numbers.

To enable this warning, an administrator can go to Setup > Accounting > Preferences > Accounting Preferences. On the Items/Transactions subtab in the Other Transaction Preferences section, check the Duplicate Number Warnings box. When this box is checked, each user in your NetSuite account receives a message when attempting to save a transaction record with the same number as another record of the same type. When the warning is displayed, a user can enter a different transaction number before attempting to save again.

 **Note:** Users who have not checked the Duplicate Number Warnings box at Home > Set Preferences on the Transactions subtab will receive this warning. To prevent the warning from appearing for these users, an administrator must check the Allow Override box for Duplicate Number Warnings at Setup > Company > General Preferences.

 **Important:** On a transaction, use caution when you click the Submit button. If you click Submit more than one time, multiple transactions may be created.


## Using Auto-Generated Numbering for Transactions


When enabled, the auto-generated numbering feature prevents assigning duplicate numbers to transactions in NetSuite. This ensures that the number cannot be edited and cannot be duplicated. Auto-generated numbering for transactions is enabled by default and cannot be disabled. For information about this feature, see [Set Auto-Generated Numbers](#).


### To have transaction numbers generated when forms are saved:

1. An administrator can go to Setup > Company > Auto-Generated Numbers.
2. Click the **Transactions** subtab.
3. To ensure that no duplicate transaction numbers are used, clear the box in the **Allow Override** column for each transaction.
4. Click **Save**.

When you create a transaction, the number field reads **To be generated**. When you return to the transaction, the generated number shows in this field. For example, if you create an invoice, the Invoice # field reads **To be generated**. When you save the invoice, a number is assigned. If you return to the invoice at Transactions > Sales > Create Invoices > List, you can view the number for the invoice.

 **Warning:** You cannot auto-generate numbers for journals if you enable the Always Allow Per-line Classifications on Journals preference.

 **Warning:** You should never override auto-generated numbers to delete any part of a default prefix or suffix on transaction numbers. Doing this may corrupt data used in transaction searches.

 **Important:** If auto-generated numbering is enabled in a OneWorld account, subsidiary-specific prefixes for transaction numbers can be defined in subsidiary records. This ensures that each subsidiary's transactions has its own numbering sequence. See [Using Subsidiary-Specific Transaction Auto-Numbering](#).

## Avoiding Duplicate Processing of Memorized Transactions

You can avoid duplicate processing of memorized transactions in a bulk update by customizing a Memorized Transaction Search form:



1. Go to Transactions > Management > Enter Memorized Transactions > List ( Administrator ).
2. In the header, click **Search**.
3. On the Memorized Transaction Search page, click **Personalize Search**.
4. On the custom search form, enter a search title.
5. Click the **Results** subtab.
6. Select **Being Processed** for the result column.

Results Available Filter

Use this tab to indicate columns to be included in the search results as well as sort order.

Sort By

Next Date ☐ Descending

Remove All Add Multiple

* FIELD
Next Date
Name
Enter
Type
Amount
Frequency
Remaining
Action
Being Processed

7. Click **Add**.
8. Click **Save**.

When you view the results of this search, the Being Processed column displays Yes or No to indicate if a memorized transaction is being processed as part of a bulk update. If the column displays Yes for a transaction and you select the transaction for processing, it is possible to duplicate processing. Best practice is to avoid processing transactions that display Yes in the Being Processed column.

If you do submit a memorized transaction that is currently in a processing state, NetSuite displays an error message on the Processed Orders page and the memorized transaction is not processed.

# Data Center Moves Reference Documentation

Review the following sections to understand the areas that might be impacted when your production account is scheduled for a move to a different data center:

- [Understanding Multiple Data Centers](#)
- [Product Features to Verify for Data Center Moves](#)
- [Understanding NetSuite URLs and Data Centers](#)
- [FAQ: Data Center Moves](#)

For details about the specific tasks that you need to review and complete if your production account is scheduled for a data center move, see [Account Mobility Tasks](#).

## Understanding Multiple Data Centers

NetSuite customer accounts have been hosted in multiple data centers since 2012. Support for more than one data center means that multiple domains, or URLs, are supported for access to NetSuite. URLs for access vary according to the data center where the account is hosted. It is important to be aware of the impact of a change to your account's data center. For details about how URLs map to different data centers, see [Understanding NetSuite URLs and Data Centers](#). To help you attain the goal of a data center agnostic account, the 2017.2 release introduces account-specific domains for web services, rest, and External Catalog (WSDK) sites. For more information on these options, see [URLs for Account-Specific Domains](#).

Your goal should be to set up your account to be as data center agnostic as possible. An account is data center agnostic when its processes, including customizations and integrations, can function properly running in any data center. You can make progress toward the goal of a data center agnostic account by limiting dependencies on hard-coded URLs.

To get a better understanding of the impact of multiple data centers, see:

- [Understanding the Impact on the NetSuite User Interface](#)
- [Understanding the Product Features that May be Impacted by a Data Center Move](#)
- [Dynamic Discovery of URLs for Web Services and RESTlet Clients](#)
- [Testing in Release Preview](#)
- [Preparing Your Account for Moving to a Different Data Center](#)

For help with preparing for a data center move, see:

- [Account Mobility Tasks](#)
- [Product Features to Verify for Data Center Moves](#)
- [FAQ: Data Center Moves](#)

## Understanding the Impact on the NetSuite User Interface

Support for multiple domains does not impact how you log in to the NetSuite user interface (UI) from a browser. All NetSuite users can enter the `system.netsuite.com` URL in a browser and are automatically redirected to the data center hosting their account.

Follow these best practices for creating links and references to NetSuite objects and records to ensure that they are not data center specific.

- Use NetSuite shortcuts rather than creating bookmarks in your browser. For more information on creating shortcuts in NetSuite, see the help topic [Shortcuts Portlet](#).
- Use relative links to reference objects in NetSuite rather than absolute links. For an example of relative (NetSuite-hosted) and absolute (externally hosted) URLs, see the help topic [RESTlet URL and Domain](#).

## Understanding the Product Features that May be Impacted by a Data Center Move

When a production account is moved to a different data center, URL references in your web services integrations, SuiteScripts, single sign-on configurations, customizations, SuiteAnalytics Connect settings, web store settings, email campaign settings, and email case capture settings might need to be adjusted to use the correct URL for the new data center.

If your production account is scheduled to be moved to a different data center, you must replace hard-coded URLs with dynamically discovered URLs, wherever possible, before the move. Some hard-coded URLs cannot be made dynamic; you must modify these URLs to map to the data center where your production account is scheduled to be moved. Review the Account Mobility Tasks page in the NetSuite UI to see what specific product areas need to be addressed in your production account. Users with an Administrator role or a System Administrator role can access the Account Mobility Tasks page at Setup > Company > Company Management > Account Mobility Tasks. For more information, see [Account Mobility Tasks](#) in the NetSuite Help Center.

## Dynamic Discovery of URLs for Web Services and RESTlet Clients

An external client that sends requests to a NetSuite account must use the correct domain name for that account. That is, a web services request sent to a NetSuite account must be sent to the correct web services domain for that account. A request to a RESTlet must be sent to a URL that includes the correct RESTlet domain for the account where the RESTlet is deployed.

The following alternatives are designed for these use cases:

- The SuiteTalk (Web Services) operation [getDataCenterUrls](#) is available in the 2012.2 and later endpoints. You can send a [getDataCenterUrls](#) request to any NetSuite web services domain name (such as [webservices.na1.netsuite.com](#) or any variant). This operation lets you retrieve the correct web services domain name for the specified NetSuite account.
- The [REST roles Service](#) is a standalone service available for web services requests that use the 2012.1 or an earlier endpoint. It is also useful for external applications that call RESTlets. You can send a request to any instance of the roles service (such as [https://rest.na1.netsuite.com/rest/roles](#) or any variant) and retrieve the correct web services and RESTlet domain names for any NetSuite account to which you have login permission.
- You can also use the [DataCenterUrls REST Service](#) to dynamically discover the correct domains.
- For a NetSuite account that calls a RESTlet deployed in another NetSuite account, consider a solution that includes deployment of a version 2.0 SuiteScript. You can use the [url.resolveDomain\(options\)](#) to retrieve the RESTlet domain for any NetSuite account.

For links to web services code samples that use the roles service, see the help topic [Effects of Accounts' Host Data Center on URLs](#).

**Note:** For information about the correct URLs to use for web services and RESTlet client access in sandbox and Release Preview accounts, see [Understanding NetSuite URLs and Data Centers](#). See also [URLs for Account-Specific Domains](#).

## Testing in Release Preview

Testing in your Release Preview account, when it is available, can be helpful in identifying potential problems. If you encounter difficulties when testing in Release Preview, it might indicate that your processes are tied to a specific data center. Testing in Release Preview is not a foolproof method of finding all potential problems, but it could help to raise awareness in certain areas. For example, URLs could be hard-coded with data center specific identifiers, or some processes might not be using dynamic discovery methods.

For more information on testing in Release Preview, see the following topics:

- [The New Release Process](#)
- [Release Preview Test Plan](#)
- [ReleasePreviewTestPlan\\_Template.xls](#)

## Preparing Your Account for Moving to a Different Data Center

If your production account is selected to move to a different data center, you will need to perform certain tasks before the move and other tasks soon after the move is complete. The Account Mobility Tasks page in the NetSuite UI provides the information you should need to make your preparations and to ensure your production account operates efficiently after the move.

Users with an Administrator role or a System Administrator role can access the Account Mobility Tasks page at Setup > Company > Company Management > Account Mobility Tasks. You can use the Account Mobility Task page to help you track your progress as you prepare to move. After the move, continue to use the page to ensure you complete all final tasks.

See the [Account Mobility Tasks](#) section in the NetSuite Help Center for more information.

See also:

- [Product Features to Verify for Data Center Moves](#)
- [FAQ: Data Center Moves](#)

## Product Features to Verify for Data Center Moves

The following resources are available in the NetSuite Help Center and SuiteAnswers to help you ensure your production account and integrations are not bound to a specific data center.



- [Changes to make before your scheduled move](#)
- [Changes to make after your scheduled move](#)

Testing in your Release Preview account, when it is available, can be helpful in identifying potential problems. If you encounter difficulties when testing in Release Preview, it might indicate that your processes are tied to a specific data center. Testing in Release Preview is not a foolproof method of finding all potential problems, but it could help to raise awareness in certain areas. For example, URLs could be hard-coded with data center specific identifiers, or some processes might not be using dynamic discovery methods.

For more information on testing in Release Preview, see the following topics:

- [The New Release Process](#)
- [Release Preview Test Plan](#)
- [ReleasePreviewTestPlan\\_Template.xls](#)

## Changes to make before your scheduled move

Product Feature	Summary of Concern	Relevant Help Topics
<p>Web Stores and Email Campaigns Your production account might be affected if:</p> <ul style="list-style-type: none"> <li>■ If you have an active website hosted on Site Builder (the original web store product) or Suite Commerce Advanced (the platform-based web store product).</li> <li>■ If you have custom domains setup for email campaigns or secure checkout domains.</li> </ul>	<p>NetSuite implemented a data center agnostic CNAME(Alias) feature in 2014. Domain records might require to updating before your production account is moved to a different data center.</p> <div>  <b>Note:</b> If you are using an A record for your secure website domain you must update the IP address for the shopping domain rather than the CNAME(Alias) after your account has been moved to a different data center.         </div> <div>  <b>Important:</b> No downtime on existing websites or impact to other functions is expected as the result of this change.         </div>	<p>If you have domains that require DNS record updates, the Account Mobility Tasks page will show you what you need to do. For more information, see <a href="#">Verify Domain Names</a> in the <a href="#">Account Mobility Tasks</a> section of the NetSuite Help Center.</p>
Web service integrations	Web service integrations must dynamically determine the correct URL for NetSuite access.	<p>See <a href="#">Verify Active Web Services Integrations</a> in the <a href="#">Account Mobility Tasks</a> section of the NetSuite Help Center. See also:</p> <ul style="list-style-type: none"> <li>■ <a href="#">Dynamic Discovery of URLs for Web Services and RESTlet Clients</a></li> <li>■ <a href="#">URLs for Account-Specific Domains</a></li> </ul>
SuiteScript (including RESTlets)	Verify that your SuiteScript code, including RESTlets, and other integrations do not contain hard-coded references to specific domains and URLs.	<p>See <a href="#">Verify Potential Script Problems</a> in the <a href="#">Account Mobility Tasks</a> section of the NetSuite Help Center. If you have an integration that calls a RESTlet from outside of the NetSuite account where it is deployed, see also:</p> <ul style="list-style-type: none"> <li>■ <a href="#">Dynamic Discovery of URLs for Web Services and RESTlet Clients</a></li> <li>■ <a href="#">URLs for Account-Specific Domains</a></li> </ul>
Integrated clients	Integrated clients that access NetSuite need to incorporate logic	See <a href="#">Dynamic Discovery of URLs for Web Services and</a>

Product Feature	Summary of Concern	Relevant Help Topics
	that determines the correct URL, so that these clients will work as desired. NetSuite provides tools to support dynamic discovery of URLs for integrated clients.	<a href="#">RESTlet Clients</a> . See also <a href="#">URLs for Account-Specific Domains</a>
SuiteSignOn (Outbound Single Sign-on)	SuiteSignOn integration code dynamically populates the dc and env parameters for NetSuite access, to ensure that integrations work for NetSuite accounts on all data centers. After the move, the dc and env parameters are automatically updated to reflect your new data center location, you do not need to do anything in NetSuite to make that happen. However, you must verify that external applications are using these parameters, and are able to handle the change that occurs due to the move. Ensure that the external applications have not hard-coded information that is exchanged in the handshake.	See <a href="#">Verify SuiteSignOn (Outbound Single Sign-on)</a> in the <a href="#">Account Mobility Tasks</a> section of the NetSuite Help Center. See also <a href="#">Mappings of dc and env URL Parameter Values</a> .
CRM Forms	If you have scripts that create NetSuite records by posting data directly to CRM forms without first performing a GET method to retrieve the data (also called screen scraping) you need to make changes.	See <a href="#">Modify Scripts that Post Directly to CRM Forms</a> in the <a href="#">Account Mobility Tasks</a> section of the NetSuite Help Center.
Shortcuts (in the NetSuite Shortcuts portlet), bookmarks (in your browser), or hard-coded links in customizations such as custom fields or tabs.	Verify that your customizations do not contain hard-coded references to URLs.	See <a href="#">Locate and Remove Any Hard-coded References to NetSuite Sites</a> in the <a href="#">Account Mobility Tasks</a> section of the NetSuite Help Center. See also <a href="#">Understanding the Impact on the NetSuite User Interface</a> for best practices.

## Changes to make after your scheduled move

Product Feature	Summary of Concern	Relevant Help Topics
Website Domains and Email Hosting	If you are using an A record for your secure website domain you must update the IP address for the shopping domain after your account has been moved to a different data center.	See the <a href="#">Website Domains and Email Hosting</a> topic in the NetSuite Help Center for directions on how to update the IP address for the shopping domain on your domain provider's website.
Sandbox task for customers moved from the sandbox domain to the NetSuite domain.	Administrators must refresh the sandbox account on the sandbox domain. Before the refreshed sandbox is up and running on the NetSuite domain, they must inform sandbox users that the method of accessing the sandbox will change. When logged into the production account, users access a sandbox account on the NetSuite domain by changing roles to a sandbox role.	See the following topics in the NetSuite Help Center: <ul style="list-style-type: none"> <li>■ <a href="#">Move A Sandbox from North America to the European Union</a></li> <li>■ <a href="#">About Sandbox Accounts on the NetSuite Domain</a></li> </ul>

Product Feature	Summary of Concern	Relevant Help Topics
		<ul style="list-style-type: none"> <li>■ <a href="#">Login for Sandbox Accounts on the NetSuite Domain</a></li> </ul>
SuiteAnalytics Connect <ul style="list-style-type: none"> <li>■ ODBC</li> <li>■ JDBC</li> <li>■ ADO.NET</li> </ul>	If the SuiteAnalytics Connect feature is enabled in your NetSuite account, and your production account is moved to a different data center, users will need to make updates to the data sources to map to the new data center.	See <a href="#">Update SuiteAnalytics Connect Data Sources in the Account Mobility Tasks</a> section of the NetSuite Help Center. See also: <ul style="list-style-type: none"> <li>■ <a href="#">Accessing the Connect Service Using an ODBC Driver.</a></li> <li>■ <a href="#">Accessing the Connect Service Using a JDBC Driver.</a></li> <li>■ <a href="#">Accessing the Connect Service Using an ADO.NET Data Provider.</a></li> </ul>
Email Case Capture	Customers much change the NetSuite Address used for case capture in their email infrastructure settings.	See <a href="#">Updates for Email Case Capture in the Account Mobility Tasks</a> section of the NetSuite Help Center. See also <a href="#">Using Email Case Capture</a> if you wish to review the initial setup instructions for case capture.
SAML Single Sign-on	The SAML Service Provider (SP) metadata differs for each data center. The person responsible for managing your SAML setup must update the NetSuite SP metadata to reflect the new data center.	See <a href="#">Update SAML Single Sign-on in the Account Mobility Tasks</a> section of the NetSuite Help Center. Also, refer to your IDP documentation for specific information on how to make the update.
Inbound Single Sign-on	Depending on your implementation of Inbound Single Sign-on, you might need to make changes to two parameters after your production account is moved to a different data center: <ul style="list-style-type: none"> <li>■ If you are using the <code>landingurl</code> parameter in your implementation of Inbound Single Sign-on, and if the URL contains <code>netsuite.com</code>, you must update the URL to include the appropriate data center identifier after the move.</li> <li>■ Before the move, if you were using the <code>d</code> (domain) parameter as recommended in requests for web store access, update it as appropriate to reflect the domain of your new data center.</li> </ul>	See <a href="#">Update Inbound Single Sign-on in the Account Mobility Tasks</a> section of the NetSuite Help Center. See also <a href="#">Tables of Single Sign-on Redirect URL Parameters and Web Store Access Only Parameters.</a>
Email Capture Plug-ins	If you have implemented one or more Email Capture Plug-ins in your production account, each Email Capture Plug-in has a unique, dedicated email address. This address is usually mapped to an alias in your company's email infrastructure. You must update the email capture address in your email infrastructure. In some cases, email is sent from outside sources - people or applications - directly to the email capture	See <a href="#">Update Email Capture Plug-ins in the Account Mobility Tasks</a> section of the NetSuite Help Center.

Product Feature	Summary of Concern	Relevant Help Topics
	address. You must inform these outside sources of the change to the email capture address.	
Warehouse Management System SuiteApp	If you are using the Warehouse Management System SuiteApp in your production account, after a move to a different data center, you must update the configuration file for the NetSuite Carrier Integrator Application and the NSWMS Print Driver. The URL for the web services endpoint must be changed to reflect your new data center.	See <a href="#">Update the NetSuite Carrier Integrator Application and the NSWMS Print Driver</a> in the <a href="#">Account Mobility Tasks</a> section of the NetSuite Help Center.

## Understanding NetSuite URLs and Data Centers

You should always follow the best practice of ensuring that your NetSuite production account and related integrations are data center agnostic. Never hard-code URLs or other identifiers to specify a particular data center. (See [Understanding Multiple Data Centers](#) for more information.)

NetSuite accounts are sometimes moved from one data center to another to achieve optimal cloud resource utilization. Prior to NetSuite 2017.2, the URLs used to access NetSuite have always been data center-specific, meaning they change after an account is moved to a different data center.

As of 2017.2, account-specific domains are supported for SuiteTalk (web services), RESTlets, and External Catalog (WSDK) shopping sites. These account-specific domains are unique to your account because they contain your account ID as part of the domain name. These domains do not change when your account is moved to a different data center.



**Important:** If you receive an error, use the `c` parameter in your request for the data center URL, and specify your account ID. The `c` (version) parameter ensures that your request is routed correctly according to your version and that you receive the correct response.



**Note:** Account-specific domains are not generated for test drives. Test drives are accounts where the account ID that begins with TSTDRV.

See the following topics for more information:

- [URLs for Data Center-Specific Domains](#)
- [URLs for Account-Specific Domains](#)

## URLs for Data Center-Specific Domains

There are occasions when you might need to know the identifiers for an account located in a particular data center, or you might want a better understanding of data center-specific NetSuite URLs.



**Tip:** To identify the data center where your account is hosted, log in to your NetSuite account. The URL for the data center where your account is hosted is displayed in the browser's address bar. Compare that URL with the data center URLs in the table in the [NetSuite Domain URLs](#) section below to identify the hosting data center for that account. Sandbox and Release Preview accounts are hosted in a different data center than your production account is hosted.

You should consider using [URLs for Account-Specific Domains](#) whenever possible.












See the following for more information:

- [NetSuite Domain URLs](#)
- [Format of a Data Center-Specific NetSuite URL](#)
- [Other Data Center-Specific NetSuite URLs](#)

## NetSuite Domain URLs


See the following table for examples of data center-specific URLs.

Data Center ID (dc parameter)	Data Center Name	Location ID (in URLs)	URLs
001	NA West		<p>This data center hosts Release Preview accounts and sandbox accounts on the NetSuite domain associated with production accounts hosted in North American data centers. The following URLs apply.</p> <p>system.netsuite.com forms.netsuite.com odbcserver.netsuite.com checkout.netsuite.com</p> <div>  <b>Note:</b> For web services, rest, and External Catalog (WSDK) site URLs, see <a href="#">URLs for Account-Specific Domains</a>.         </div> <div>  <b>Important:</b> If your account is located in a North American data center and you have not yet refreshed your sandbox after January 11, 2018, your sandbox account is on the sandbox domain instead of the NetSuite domain, and you must use different URLs to access it. For more information, see <a href="#">Alternate URLs</a>.         </div>
002	NA East	na1	<p>system.na1.netsuite.com forms.na1.netsuite.com odbcserver.na1.netsuite.com checkout.na1.netsuite.com</p> <div>  <b>Note:</b> For web services, rest, and External Catalog (WSDK) site URLs, see <a href="#">URLs for Account-Specific Domains</a>.         </div>
003	NA Northwest	na2	<p>system.na2.netsuite.com forms.na2.netsuite.com odbcserver.na2.netsuite.com checkout.na2.netsuite.com</p> <div>  <b>Note:</b> For web services, rest, and External Catalog (WSDK) site URLs, see <a href="#">URLs for Account-Specific Domains</a>.         </div>
008	NA Central	na3	<p>system.na3.netsuite.com forms.na3.netsuite.com odbcserver.na3.netsuite.com checkout.na3.netsuite.com</p>

Data Center ID (dc parameter)	Data Center Name	Location ID (in URLs)	URLs
			 <b>Note:</b> For web services, rest, and External Catalog (WSDK) site URLs, see <a href="#">URLs for Account-Specific Domains</a> .
016	EU Central	eu2	 <b>Note:</b> This data center hosts production accounts in the European Union.  system.eu2.netsuite.com forms.eu2.netsuite.com odbcservice.eu2.netsuite.com checkout.eu2.netsuite.com   <b>Note:</b> For web services, rest, and External Catalog (WSDK) site URLs, see <a href="#">URLs for Account-Specific Domains</a> .
018	EU West	eu1	 <b>Note:</b> This data center hosts sandbox and release preview accounts associated with production accounts hosted in European Union data centers.  system.eu1.netsuite.com forms.eu1.netsuite.com odbcservice.eu1.netsuite.com checkout.eu1.netsuite.com   <b>Note:</b> For web services, rest, and External Catalog (WSDK) site URLs, see <a href="#">URLs for Account-Specific Domains</a> .

## Alternate URLs

If your sandbox account is located in a North American data center and you have not yet refreshed your sandbox after January 11, 2018, your sandbox account is on the sandbox domain instead of the NetSuite domain, and you must use the following URLs to access it.

Data Center ID (dc parameter)	Data Center Name	Location ID (in URLs)	URLs
001	NA West		If you access your sandbox account through the sandbox domain, the following URLs apply. system.sandbox.netsuite.com forms.sandbox.netsuite.com odbcservice.sandbox.netsuite.com checkout.sandbox.netsuite.com   <b>Note:</b> For web services, rest, and External Catalog (WSDK) site URLs, see <a href="#">URLs for Account-Specific Domains</a> .


For more information about transitioning sandbox accounts from the sandbox domain to the NetSuite domain, see [Sandbox Pre-transition Checklist](#).

## Format of a Data Center-Specific NetSuite URL

For web services, rest, and External Catalog (WSDK) site URLs, consider using account-specific URLs rather than data center-specific URLs. See [URLs for Account-Specific Domains](#).

Data center-specific NetSuite URLs are strings made up of the following parameters:

```
<ServiceType>.<LocationId>.<AccountType>.netsuite.com.
```


 **Note:** Production account URLs do not use the <AccountType> parameter.

■ **ServiceType** examples:

- `system` is used for UI access.
- `webservices` is used for a web services call.
- `rest` is used for a RESTlet, or calls to a NetSuite RESTful service, such as the roles service, `getDataCenterUrls`, or `issuetoken`.
- `odbcserver` is used for an ODBC call.
- `forms` is used for forms hosted online, used in SuiteScript, usually in Suitelets.

■ **LocationId** examples:

- There is no location ID for the NA West data center.
- `na1` indicates NA East.
- `na2` indicates NA Northwest.
- `na3` indicates NA Central.
- `eu1` indicates EU West.
- `eu2` indicates EU Central.

 **Note:** As the use of NetSuite grows and we add new data centers, the list of possible location identifiers will also continue to grow.

■ **AccountType** examples:

- Accounts that are accessed from the NetSuite domain (`system.netsuite.com`) do not contain an <AccountType> parameter in the URL. The account type is shown for each role on the Choose Role page in the Account Type column.
- `sandbox` in the URL indicates a sandbox account that is accessed from the `system.sandbox.netsuite` domain.
- `beta` in the URL indicates a release preview account in a North American data center.

More about location identifiers and specific types of accounts:

- Most data center-specific URLs include a <LocationId> parameter, for example: `na1`, `na2`, `na3`, `eu1`, or `eu2`. However, the URL for the NA West data center does not contain a <LocationId> parameter.
- Sandbox URLs on the NetSuite domain in European data centers contain the <LocationId> `eu1` and do not contain an <AccountType> parameter.
- Release Preview and sandbox accounts on the NetSuite domain in North American data centers do not include a <LocationId> or an <AccountType> parameter.
- URLs for sandboxes on the sandbox domain do not include a <LocationId>. They contain the <AccountType> parameter `sandbox`.

## Other Data Center-Specific NetSuite URLs

For information on other NetSuite URLs, see the following topics:

- For information on constructing website shopping URLs, see the help topic [Website URL Parameters](#).
- For information on SuiteScript Debugger URLs, see the help topics [Before Using the SuiteScript Debugger](#), [On Demand Debugging](#), or [Deployed Debugging](#).

## URLs for Account-Specific Domains

As of 2017.2, account-specific domains are supported for SuiteTalk (web services), RESTlets, and External Catalog (WSDK) shopping sites. These account-specific domains are unique to your account because they contain your account ID as part of the domain name. These domains do not change when your account is moved to a different data center.

See the following for more information:

- [Format of Account-Specific Domains](#)
- [Format of Sandbox Account-Specific Domains](#)
- [Dynamic Discovery of Account-Specific Domain URLs](#)
- [Support for Data Center-Specific Domains Continues](#)

## Format of Account-Specific Domains

The format of an account-specific domain name is: `<account ID>.<service>.netsuite.com`. For example, if your account ID is 123456, your account-specific domains would be:

- 123456.suitetalk.api.netsuite.com
- 123456.restlets.api.netsuite.com
- 123456.shop.netsuite.com

This format contrasts with the format for data center-specific domains. (See [Format of a Data Center-Specific NetSuite URL](#) to compare the formats.)

## Format of Sandbox Account-Specific Domains

See the following examples of account-specific domains for sandboxes.



**Important:** When a sandbox account ID contains an underscore and a sandbox identifier, the underscore is transformed into a hyphen in the generated account-specific domain.

If you access your sandbox from the `system.netsuite.com` domain, the account-specific sandbox domains would be:

- 123456-sb1.suitetalk.api.netsuite.com
- 123456-sb1.restlets.api.netsuite.com
- 123456-sb1.shop.netsuite.com

**Note:** In the example above, the sandbox account ID is 123456\_SB1. If you have more than one sandbox on the `system.netsuite.com` domain, each sandbox has a unique identifier, such as `_SB2`, `_SB3`, `_SB4`, and so on. In the generated account-specific domain URL, the underscore is transformed into a hyphen.

If you access your sandbox from the `system.sandbox.netsuite.com` domain, the account-specific sandbox domains would be:

- For a primary sandbox:
  - `123456.suitetalk.api.sandbox.netsuite.com`
  - `123456.restlets.api.sandbox.netsuite.com`
  - `123456.shop.sandbox.netsuite.com`
- For a secondary sandbox:
  - `123456-sb2.suitetalk.api.sandbox.netsuite.com`
  - `123456-sb2.restlets.api.sandbox.netsuite.com`
  - `123456-sb2.shop.sandbox.netsuite.com`

**Note:** In the example above, the sandbox account ID is 123456\_SB2. If you have more than one secondary sandbox, be aware that each has a unique identifier, such as `_SB2`, `_SB3`, `_SB4`, and so on. In the generated account-specific domain URL, the underscore is transformed into a hyphen.

## Dynamic Discovery of Account-Specific Domain URLs

Account-specific domains are generated for the following account types:

- Production accounts
- Sandbox accounts
- Release preview accounts

**Important:** Account-specific domains are not generated for test drives. Test drives are accounts where the account ID begins with TSTDVR.

The traditionally recommended best practice for account mobility is to use dynamic discovery of domains for access to NetSuite. Currently supported dynamic discovery methods include:

- Web services `getDataCenterUrls` operation
- REST `dataCenterUrls` Service (This service is new in 2017.2. See *New REST Service to Get URLs Without Authentication*.)
- The REST roles Service
- SuiteScript 2.0 `url.resolveDomain(options)` Method

As of 2017.2, these methods return account-specific domains for web services, RESTlets, and the WSDK shopping sites. They continue to return the data center-specific values for other types of domains, as they did prior to 2017.2.

- For account-specific web services and RESTlet domain discovery, you can use the web services `getDataCenterUrls` operation, the REST `dataCenterUrls` service, or the REST roles service.
- For account-specific External Catalog site domain discovery, you can use the SuiteScript `url.resolveDomain(options)` method.

## Support for Data Center-Specific Domains Continues

The data center-specific domains supported before 2017.2 will continue to be supported. Web services and RESTlet integrations referencing these domains will continue to function as they did before 2017.2. A request sent using a data center-specific domain and a request sent using the corresponding account-specific domain provide the same results.

If you already use dynamic discovery of domains in your web services calls and RESTlet requests, you do not need to make any changes. However, if you are using hard-coded domains, it is recommended that you replace these hard-coded domains with strings that use the new account-specific domain format.

The account-specific shopping domain is intended for use only by customers with External Catalog sites. If your shopping site is not an External Catalog site, you do not need to make any changes. If you do have an External Catalog site, you can use your account-specific domain in links from your site back to NetSuite. You would also need to use your account-specific domain in the HTML and URLs used to query items.

# Account Mobility Tasks

Users with an Administrator role or a System Administrator role can access the Account Mobility Tasks page at Setup > Company > Company Management > Account Mobility Tasks. The following topics describe the main Account Mobility Tasks page, and the individual task pages specific to features that will be affected when an account is moved to a different data center.

## ■ About the Account Mobility Tasks Page

### □ Pre Move Tasks

See the following sections for specific information about tasks that must be completed before your account is moved to a different data center:

- Verify Domain Names
- Verify Potential Script Problems
- Verify Active Web Services Integrations
- Verify SuiteSignOn (Outbound Single Sign-on)
- Modify Scripts that Post Directly to CRM Forms
- Verify Domains in WSDK Links and Scripts
- Locate and Remove Any Hard-coded References to NetSuite Sites

### □ Post Move Tasks

See the following sections for specific information about tasks that must be completed after your account is moved to a different data center:

- Move A Sandbox from North America to the European Union
- Update SuiteAnalytics Connect Data Sources
- Updates for Email Case Capture
- Update SAML Single Sign-on
- Update Inbound Single Sign-on
- Update Email Capture Plug-ins
- Update the NetSuite Carrier Integrator Application and the NSWMS Print Driver

For information about other things to take into consideration when preparing your account for a move to a different data center, see the following topics:


- Understanding Multiple Data Centers
- Product Features to Verify for Data Center Moves
- FAQ: Data Center Moves

## About the Account Mobility Tasks Page

The Account Mobility Tasks page shows all the tasks you need to review and complete when your account is scheduled for a data center move. You can use this page to track your progress in completing the required tasks. You can also use this page to ensure you are following the recommended best practices and to ensure your account is not tied to a specific data center.

Items in the Pre Move and Post Move task lists can vary depending on the features that are enabled and active in your account. The main Account Mobility Tasks page displays only features and the tasks as appropriate for your account. When your account is scheduled to move to a different data center,

a banner is displayed across the top of the page indicating your move date. Click on a link in the task column to go to an information page for that task.

 **Note:** If the table is blank, then there are no outstanding tasks to perform.

There are three status icons for tasks: Not Started, In Progress, and Completed. All tasks initially display the Not Started status and the status fields will not become active until your move date has been assigned. Before a move date is assigned, you can use the pages to identify and begin work on updating any issues identified. However, the status will not change to In Progress and you will not be able to mark a task as completed until after your move date has been assigned.

## Pre Move Tasks


You must complete the Pre-Move Tasks well before the date your account is scheduled for a move to a different data center. For more information on each pre-move task, see the following topics:

- [Verify Domain Names](#)
- [Verify Potential Script Problems](#)
- [Verify Active Web Services Integrations](#)
- [Verify SuiteSignOn \(Outbound Single Sign-on\)](#)
- [Modify Scripts that Post Directly to CRM Forms](#)
- [Verify Domains in WSDK Links and Scripts](#)
- [Locate and Remove Any Hard-coded References to NetSuite Sites](#)

## Verify Domain Names

If you see this task on your Pre Move Task List, Site Builder or Suite Commerce Advanced features are enabled in your account. Click the link in the Task column to open the page detailing what must be done to complete this task.


The table lists all the domains registered with NetSuite in your account. You must perform any updates for this task outside of NetSuite, with your domain name provider, not in the NetSuite UI. Visit your domain provider's website, or contact your domain provider for details.


 **Note:** If you have a campaign email domain, that domain will also be listed in this table. You must update your DNS records to point your email domain name to the hosting servers at NetSuite using CNAME(Alias) records.


### To verify and update domain names:

1. Note the status for each row in the Domain Name column. Go to the first row where the status is Not Started or In Progress (that is, the row does not display the green Completed icon).
2. Update the DNS CNAME(Alias) record with your domain provider so that it reflects the Expected Record Value.
3. The Current Record Value will automatically be updated when the new information in the DNS record is propagated to all DNS servers. The time can vary from 15 minutes to two hours. If the Current Record Value does not update after two hours has elapsed, there might be a problem with the CNAME(Alias) record. Verify with your domain provider that the changes made to the record are correct.
4. The status of this task will automatically be updated to **Completed** when the **Current Record Value** matches the **Expected Record Value**.



 **Note:** On the main Account Mobility Tasks page, the **Completed By** column will display the name **System**.

 **Important:** If using an A record in DNS, you must update the shopping IP address as a post move task. For steps, see the help topic [Website Domains and Email Hosting](#).

 **Note:** If you need help completing this task, contact NetSuite Customer Support.


## Verify Potential Script Problems

If you see this task on your Pre Move Task List, there are active scripts in your NetSuite account that appear to have hard-coded URLs. Click the link in the Task column to open the page detailing what must be done to complete this task.


The table lists all the scripts in your account that have been identified as potentially containing an instance of a hard-coded URL. Each row contains details to help you identify the script in question.

### To verify potential script problems:

1. For each script listed, verify that it is using dynamic discovery methods to determine the correct data center. Scripts should not contain hard-coded URLs to a specific data center. For information about dynamically discovering data center URLs, see the help topic [DataCenterUrls REST Service](#).


 **Note:** Only the first instance of a potential problem is shown. There may be multiple instances of a problem in the script identified. You must review the entire script and resolve all problems in the script.

2. If you find hard-coded URLs, replace them with logic that dynamically determines the URLs. For best results, use SuiteScript 2.0's [N/url Module](#), which includes methods such as [url.resolveDomain\(options\)](#), [url.resolveRecord\(options\)](#), and [url.resolveScript\(options\)](#). These methods let you dynamically generate links.
3. When you have reviewed all your scripts, click **Task Completed**.
4. Click **OK** on the confirmation message, or click **Cancel** if you are not finished with this task.

 **Note:** If you need help completing this task, contact NetSuite Customer Support.

## Verify Active Web Services Integrations

If you see this task on your Pre Move Task List, the Web Services feature is enabled in your NetSuite account. Click the link in the Task column to open the page detailing what must be done to complete this task.

 **Note:** In 2017.2, account-specific domains are available for web services. For more information, see [URLs for Account-Specific Domains](#).

The table lists all the active web services integrations in your account. The table includes the web services version (the endpoint), the IP address, and the count (the number of times the web services integration has been used in the last 30 days).

**Note:** The table lists the active web service integrations. It does not indicate whether data center identifiers have been hard-coded. You must review each one in the list and verify it is using a dynamic discovery method for the data center.

### To verify active web services integrations:

1. For each integration listed, verify it is using a dynamic discovery method, such as `getDataCenterUrls`. Ensure that the integration includes logic for determining the correct web services URL for the data center associated with your NetSuite account. This logic should be used for every request except the initial `getDataCenterUrls` call.



**Important:** All web services integrations **must** include logic to dynamically discover the correct URL. If the `getDataCenterUrls` operation is not included in the endpoint you are using, use the roles REST service or the `DataCenterUrls` REST service to obtain the correct URL.

- The SOAP-based API, `getDataCenterUrls`, is available in 2012.2 and later web services endpoints.
  - The [REST roles Service](#) is available for use with RESTlets and for web services users who have not upgraded to the 2012.2 or later endpoint.
  - [DataCenterUrls REST Service](#) is available in version 2017.2.
2. When you have reviewed all your web services integrations, and made updates as required, click **Task Completed**.
  3. Click **OK** on the confirmation message, or click **Cancel** if you are not finished with this task.



**Note:** If you need help completing this task, contact NetSuite Customer Support.

## Verify SuiteSignOn (Outbound Single Sign-on)

If you see this task on your Pre Move Task List, the SuiteSignOn (outbound single sign-on) feature is enabled in your NetSuite account. Click the link in the Task column to open the page detailing what must be done to complete this task.

SuiteSignOn integration code dynamically populates the `dc` and `env` parameters for NetSuite access, to ensure that integrations work for NetSuite accounts on all data centers. After the move, the `dc` and `env` parameters are automatically updated to reflect your new data center location, you do not need to do anything in NetSuite to make that happen. However, you must verify that external applications are using these parameters, and are able to handle the change that occurs due to the move. Ensure that the external applications have not hard-coded information that is exchanged in the handshake.

For more information about these parameters, see the help topic [Mappings of dc and env URL Parameter Values](#). See also the [SuiteSignOn Sequence Diagram and Connection Details](#) to understand the interactions between NetSuite and external applications.

### To verify SuiteSignOn code:

1. For each of your SuiteSignOn (outbound single sign-on) integrations, verify that the external applications to which these integrations connect are able to parse the `dc` and `env` parameters that are passed to them.



**Important:** If you do not own the external application, contact the owner of the external application to ensure they can handle the change that will occur after your move.

2. When you have reviewed all your SuiteSignOn integrations, and contacted the owners of the external applications as necessary, click **Task Completed**.
3. Click **OK** on the confirmation message, or click **Cancel** if you are not finished with this task.



**Note:** If you need help completing this task, contact NetSuite Customer Support.

See the help topic [Outbound Single Sign-on \(SuiteSignOn\)](#) for more information about this feature.

## Modify Scripts that Post Directly to CRM Forms

If you see this task on your Pre Move Task List, it indicates that you have scripts that create NetSuite records by posting data directly to CRM forms without first performing a GET method to retrieve the data. There are scripts in your account that are posting directly to CRM forms using an API or another method that does not perform a GET, only a POST. Creating records using only the POST method is known as screen scraping. Screen scraping will no longer work after your account is moved to a different data center, as the data to be posted will be lost.

To prevent this data loss, before the move, you must modify your scripts to use the `nlapiCreateRecord` function to create cases, create leads, create custom records, or request applications.

### To locate and modify scripts that are posting directly to CRM forms:

1. Review each row in the table. Each row displays the following information:
  - a. an IP address
  - b. the count (the number of times the external form has been posted to in your account in the last 30 days)
  - c. the external form to which data is being directly posted

Use this information to locate each script that must be modified.

2. Modify each script to use the appropriate SuiteScript method to create the records. In SuiteScript 2.0, use `record.create(options)`. In SuiteScript 1.0, use `nlapiCreateRecord(type, initializeValues)`.



**Note:** If you need help completing this task, contact NetSuite Customer Support.

## Verify Domains in WSDK Links and Scripts

If you see this task on your Pre Move Task List, the WSDK feature is enabled in your account. You should verify the domains used in your external WSDK links and scripts. In some cases, you must change the domains used in your external links and scripts. Click the link in the Task column to open the page detailing what must be done to complete this task.



**Note:** Customers who use a custom shopping domain or a custom checkout domain in their WSDK links and scripts do not need to make any changes for this task.

Customers currently using the standard `shopping.netsuite.com` domain or its variations (`shopping.na1.netsuite.com`, `shopping.na2.netsuite.com`, `shopping.eu2.netsuite.com`, and

shopping.eu1.netsuite.com), should take action before their account is moved to a different data center. These customers are strongly advised to replace data center-specific domains (for example, shopping.netsuite.com) in WSDK links and scripts with a domain that is not bound to a specific data center.

You have two options. You must select and implement one of these options to avoid possible performance degradation after your account is moved.

- **Account-specific domain option:** 2017.1 introduced account-specific domains in the form <accountID>.shop.netsuite.com. View these domains for your account at Setup > Site Builder > Preview Web Site. Modify the references in your external links and scripts to use your account-specific domains before the move.
- **Custom domain option:** As an alternative to using the account-specific domains, you can use a custom domain or a custom checkout domain. You can use a custom domain that you create and register with a third party, and then point back to NetSuite. To use a custom domain, ensure that you have configured a primary website's domain correctly in NetSuite. This domain is different from the domain you use for your External Catalog website. For more information about configuring domains, read the help topic [Point Domain Names at NetSuite](#).

You can perform a search and replace operation on your website files to change occurrences of the shopping.netsuite.com domain to the new NetSuite account-specific domain or a custom domain.



**Important:** Be consistent in how you use domain names throughout all your WSDK links and scripts.

For example, do not add items to the cart with the <accountID>.shop.netsuite.com domain and then get the cart total through the site's primary domain or the shopping.netsuite.com domain.

### To modify domain names in links and scripts:

The domain names to change are in the links and scripts used in your WSDK sites hosted outside for NetSuite. No matter which option you choose, the procedure to modify the domain names in your external links and scripts is the same.

1. Find your files hosted outside of NetSuite which contain WSDK links and scripts.
2. Open the files in file editor.
3. Search and replace all occurrences of the shopping.netsuite.com domain with either the account-specific or the custom domain in all of the website files that you use for links and scripts.
4. If you choose to use the account-specific domain, you can view it by following these steps:
  - a. Go to Setup > Site Builder > Preview Web Site.
  - b. Click **Links from your site back into NetSuite** or **HTML and URLs for querying items**.



**Note:** If you need help completing this task, contact NetSuite Customer Support.

For information on custom domains and best practices, see the help topic [External Catalog Site \(WSDK\) Overview](#).

## Locate and Remove Any Hard-coded References to NetSuite Sites



**Important:** This task cannot be listed on the Account Mobility Tasks page, as it concerns your company's IT infrastructure, such as your company's internal network or DNS server. NetSuite has no visibility into your company's IT infrastructure, therefore, we cannot tell whether your company has hard-coded IP addresses or URLs configured in your systems.

As a best practice, NetSuite always recommends against hard-coding IP addresses and URLs. See [Understanding NetSuite IP Addresses](#). If your company has any hard-coded NetSuite-related IP addresses or URLs in your internal systems, you must remove them before the move. NetSuite recommends using account-specific domains. For details, see [URLs for Account-Specific Domains](#).

Verify with your IT department that there are no hard-coded IP addresses or URLs for NetSuite-related sites (for example, for your NetSuite-hosted website or web store) in your company's network infrastructure.

If you determine that NetSuite-related IP addresses or URLs have been hard-coded in your company's infrastructure, remove them before the move, or users within your company's network will experience degraded performance until they are removed.

## Post Move Tasks

See the following sections for more information on the tasks you must perform soon after your account has been moved to a new data center.

- [Update SuiteAnalytics Connect Data Sources](#)
- [Updates for Email Case Capture](#)
- [Update SAML Single Sign-on](#)
- [Update Inbound Single Sign-on](#)
- [Update Email Capture Plug-ins](#)
- [Update the NetSuite Carrier Integrator Application and the NSWMS Print Driver](#)

## Move A Sandbox from North America to the European Union



**Important:** This task is not shown on the Account Mobility Tasks page. This task is for Administrators of sandboxes associated with a production account that has been moved to a European Union (EU) data center. Administrators should refresh their sandboxes as soon as possible after the move of the production account has been completed.

When a production account is moved to a different data center, the associated sandboxes are not moved. Users can continue to access and use their sandboxes from the sandbox domain (`system.sandbox.netsuite.com`).

However, for customers whose production account has been moved from a data center in North America (NA) to a European Union (EU) data center, Administrators must do the following:

- Refresh the sandbox.

- Inform users that the way they access the sandbox has changed. They will access the sandbox from the `system.netsuite.com` domain.



**Important:** This post move task to refresh associated sandboxes only applies to customers whose production account has been moved to an EU data center.

## Refreshing a Sandbox to Move It

Refreshing the sandbox moves the sandbox from a data center in North America (NA) to a data center in the European Union (EU). Refreshing the sandbox also changes the domain used for access. After the refresh is complete, users will access the sandbox from the `system.netsuite.com` domain, the same domain they use to access the production account. See [About Sandbox Accounts on the NetSuite Domain](#) for more information.

### To refresh the sandbox:

1. Ensure your sandbox users are ready for a refresh.
2. Log in to your production account.
3. Go to Setup > Company > Sandbox Accounts.
4. Select **Administrator Only** or **All Users**.
5. Click **Refresh Sandbox**.  
The sandbox will be offline and unavailable for use until the refresh is complete.
6. Click **Submit** on the Confirmation page.
7. When the refresh is complete, ensure users are aware of the new way to access the sandbox.
8. Repeat this procedure for each sandbox associated with this production account.



**Note:** If you need help completing this task, contact NetSuite Customer Support.

If you need more information about the sandbox refresh process, see [Refreshing Sandbox Accounts](#) and [Using the Sandbox Accounts Page](#).

## Refreshing a Sandbox After the Move

Once a sandbox account is on the NetSuite domain, the steps to refresh the sandbox, is slightly different.

### To refresh a sandbox on the NetSuite domain:

1. Ensure your sandbox users are ready for a refresh.
2. Log in to your production account.
3. Go to Setup > Company > Sandbox Accounts.
4. Select **Administrator Only** or **All Users**.
5. Click **Refresh Sandbox**.
6. Click **OK** on the Confirmation page.
7. When the new copy of the sandbox is ready, go to the Sandbox Accounts page and select the **Activate Sandbox** button.

8. Click **OK** on the Confirmation popup, to acknowledge that the current sandbox data and configuration will be completely replaced with a new copy from your production account.

## Accessing a Sandbox on the NetSuite Domain

After the refresh is complete, the Administrator must inform sandbox users that the way to access the sandbox has changed. They must use the `https://system.netsuite.com` domain, the same domain they use to access the production account. When logged into their production account, users access their sandbox by changing roles to a sandbox role. For more information, see [Login for Sandbox Accounts on the NetSuite Domain](#).



**Important:** After a sandbox that is accessed from the `system.sandbox.netsuite.com` domain has been refreshed, and the refresh completes, it is accessed from the `system.netsuite.com` domain. Users will no longer be able to access the sandbox from the `system.sandbox.netsuite.com` domain.

## Update SuiteAnalytics Connect Data Sources

If you see this task on your Post Move Task List, the SuiteAnalytics Connect feature is enabled in your NetSuite account.

After a move to a different data center, the host server settings must be updated. If the configuration is not updated, account users may encounter connection problems accessing data through the Connect driver (ODBC, JDBC, or ADO.NET). Users must update the host server settings for their Connect driver to map to the new data center. Users should download the most current version of the appropriate Connect driver, and install it on their computers.

### To update SuiteAnalytics Connect data sources:

1. Each user of the SuiteAnalytics Connect feature must download the latest version of the appropriate Connect driver (ODBC, JDBC, or ADO.NET).
2. Each user must update the host server settings on their computer with the appropriate configuration for their account reflecting the new data center location. There are two ways to complete this step:
  - a. Download and install the installation bundle (for example, the ODBC installation bundle) that contains an .ini file with the current Service Host URL.
  - b. Update the configuration of the Service Host URL on their computer. To view the configuration information for the Service Host, from the NetSuite Home page, click **Set Up SuiteAnalytics Connect** from the Settings portlet, and then click **Your Configuration**.
3. When all SuiteAnalytics Connect users in your account have completed these steps, click **Task Complete**.
4. Click **OK** on the confirmation message, or click **Cancel** if you are not finished with this task.



**Note:** If you need help completing this task, contact NetSuite Customer Support.

## Updates for Email Case Capture

If you see this task on your Post Move Task List, the Email Case Capture feature is enabled in your NetSuite account. As a part of the move process, NetSuite updates the **NetSuite Address** and the **NetSuite Inbound Email Address** fields. The NetSuite Address is located on the Inbound Email tab at Setup > Support > Preferences > Support Preferences. To locate the NetSuite addresses attached to

a case profile, go to Setup > Support > Case Profiles and click View to see the NetSuite Inbound Email Address.

**Note:** There can be many separate case profile in an account, each with a unique **NetSuite Inbound Email Address**.

After your data center move is complete, the system administrator in your company needs to update all instances where the NetSuite Address or NetSuite Inbound Email Address is used in your email system.

For more information about the setup for Email Case Capture, see the help topic [Using Email Case Capture](#).

### To update the NetSuite Address for Email Case Capture:

1. In the NetSuite UI, locate the **NetSuite Address** field on the Inbound Email tab at Setup > Support > Preferences > Support Preferences. A user with an Administrator role can view this information if your system administrator does not have the necessary permissions.

**Note:** The **NetSuite Address** field includes the company ID and a randomly generated series of characters called a hash, in the following format:  
`cases.<companyid>.<hash>@cases.netsuite.com.`  
 Before the move, the NetSuite Address is similar to this example:  
`cases.ACCT123456.c84fedc3e6@cases.netsuite.com.`  
 After the move, the address could look like:  
`cases.ACCT123456.c84fedc3e6@cases.na1.netsuite.com.`  
 A data center identifier (for example, .na1. or .na2.) has been added to the NetSuite Address.

2. Update all instances of the **NetSuite Address** in your company's email system, Domain Name Server (DNS), or mail routing infrastructure. For example, for Email Case Capture, the NetSuite Address is mapped to your Contact address for support.
  - a. Verify the User you created for your support address is pointing to the address you set up for your customers to contact you.
  - b. Wherever the Contact address (for example, support@netsuite.com) is configured in your system, update the mapping in your system to reflect the new NetSuite Address found in step 1.
3. Update the mapping or routing rules in your system to reflect the new **NetSuite Address**.
4. After the system administrator has updated all instances of the **NetSuite Address** in your email system, and updated the mapping or routing rules in your system, click **Task Complete**.
5. Click **OK** on the confirmation message, or click **Cancel** if you are not finished with this task.

**Note:** If you need help completing this task, contact NetSuite Customer Support.

**Important:** If you do not update your email system after the move is complete, you risk slow performance in email delivery and in case capture generated by email.

### To make updates to the NetSuite Address attached to a case profile:

1. Go to Setup > Support > Case Profiles to locate the **NetSuite Inbound Email Address** for each case profile in your account.



**Note:** The **NetSuite Inbound Email Address** field includes the company ID and a randomly generated series of characters called a hash, in the following format:  
`cases.<companyid>_<subnumber>.<hash>@cases.netsuite.com.`

Before the move, the NetSuite Inbound Email Address is similar to this example:  
`cases.ACCT123456_14.c84fedc3e6@cases.netsuite.com.`

After the move, the address could look like:  
`cases.ACCT123456_14.c84fedc3e6@cases.na1.netsuite.com.`

A data center identifier (for example, `.na1.` or `.na2.`) has been added to the **NetSuite Inbound Email Address**.

2. Click **View** on the desired profile.
3. Copy the **NetSuite Inbound Email Address** for this case profile.
4. In the email system for each case profile:
  - a. Verify the User you created for your support address is pointing to the address you set up for your customers to contact you.
  - b. Wherever the **Contact** address (for example, `support@netsuite.com`) is configured in your system, update the mapping in your system to reflect the new **NetSuite Inbound Email Address** for this case profile.

**Note:** The **NetSuite Inbound Email Address** might be configured in your company's email system, DNS, or mail routing infrastructure. It is mapped to your **Contact** address for support.

- c. Update the mapping or routing rules in your system to reflect the new **NetSuite Inbound Email Address**.
5. After the system administrator has updated all instances of the **NetSuite Inbound Email Address** in your email system, and updated the mapping or routing rules in your system, click **Task Complete**.
6. Click **OK** on the confirmation message, or click **Cancel** if you are not finished with this task.

**Note:** If you need help completing this task, contact NetSuite Customer Support.

## Update SAML Single Sign-on

If you see this task on your Post Move Task List, the SAML Single Sign-on feature is enabled in your NetSuite account. The SAML Service Provider (SP) metadata differs for each data center. It is very important that you upload the SP metadata file from your new data center to your IDP.

**Warning:** If you do not make the required changes, after the move, the login operation might fail, and the single log out function will fail.

### To make updates for SAML Single Sign-on:

1. The person responsible for managing your SAML setup must update the NetSuite SP metadata to reflect the new data center. The link to the NetSuite Service Provider Metadata file is on the SAML Setup page. See the help topic [Complete the SAML Setup Page](#) for more information.

**Note:** Refer to your IDP documentation for specific information on how to make the update.

2. After updating the NetSuite SP metadata as appropriate for your new data center, click **Task Complete**.
3. Click **OK** on the confirmation message, or click **Cancel** if you are not finished with this task.

**Note:** If you need help completing this task, contact NetSuite Customer Support.

## Update Inbound Single Sign-on

If you see this task on your Post Move Task List, the Inbound Single Sign-on feature is enabled in your NetSuite account. Depending on your implementation of Inbound Single Sign-on, there are several data center specific parameters that can be affected by the move, and might need to be updated in your account.

### The landingurl Parameter

If you are using the `landingurl` parameter in your implementation of Inbound Single Sign-on, and if the URL contains `netsuite.com`, you must update the URL to include the appropriate data center identifier after the move.

For example, if your account was previously hosted in the NA West data center, the `landingURL` parameter could have contained `checkout.netsuite.com` or `system.netsuite.com`. If your account was moved to the NA Northwest data center, you would update these to `checkout.na2.netsuite.com` or `system.na2.netsuite.com`.

After your account is moved, update your `landingurl` parameter absolute URLs to ensure they are pointing to the correct data center. For more information on the correct data center identifiers to use, see [Understanding NetSuite URLs and Data Centers](#).

### Web Store Access Parameters


NetSuite has always required that Inbound Single Sign-on requests for web store access to a NetSuite-hosted checkout domain include the `c` parameter (the NetSuite company ID) and the site ID to be routed correctly.

NetSuite also recommends including the domain (`d`) parameter in Inbound Single Sign-on requests for web store access to NetSuite-hosted checkout domains.


After your account is moved to a different data center, these Inbound Single Sign-on requests will automatically be redirected to the correct data center. However, if you notice degraded performance after the move, add (as recommended) or update the `d` parameter in your Inbound Single Sign-on requests for web store access to reflect the domain of your new data center.

#### To update Inbound Single Sign-on requests:

1. If you are using the `landingurl` parameter in your implementation of Inbound Single Sign-on, and if the URL contains `netsuite.com`, update the URL to include the appropriate data center identifier after the move.
2. Investigate Inbound Single Sign-on requests for web store access that contain `netsuite.com`:

 **Note:** These steps do not apply to web stores with custom checkout domains.


- a. If you were already using the `d` parameter before the move, update it as appropriate to reflect the domain of your new data center.
- b. If you are not using the `d` parameter and notice degraded performance after the move (for example, the requests time-out), add the appropriate `d` parameter for your new data center.
3. After you have verified that the recommended and required parameters are included in your Inbound Single Sign-on requests for web store access, click **Task Complete**.
4. Click **OK** on the confirmation message, or click **Cancel** if you are not finished with this task.

 **Note:** If you need help completing this task, contact NetSuite Customer Support.

See the [Web Store Access Only Parameters](#) table for the more information about the checkout URLs.

For more information on all available Inbound Single Sign-on parameters, see [Tables of Single Sign-on Redirect URL Parameters](#).

## Update Email Capture Plug-ins

 **Important:** This task is not currently listed on the Account Mobility Tasks page, but you must make changes for this feature after your account is moved to a different data center.

If you have implemented one or more Email Capture Plug-ins in your account, you must make some changes after your account is moved to a different data center. Each Email Capture Plug-in has a unique, dedicated email address. The Email Capture address is usually mapped to an alias in your company's email infrastructure. (An alias email address is a human-readable email address used by your customers.) The Email Capture Plug-in address looks similar to this example: `emails.123456.233.c84fedc3e6@emails.netsuite.com`

Emails sent to the alias email address are forwarded to the Email Capture Plug-in address.

For example, your customer sends an email to `Plug-in1@MyCompany.com` and the mapping in your email infrastructure forwards the email to `emails.123456.c84fedc3e6@emails.netsuite.com` (the Email Capture Plug-in address).

### To update an Email Capture Plug-in:

Only a user with an Administrator role can access the Manage Plug-ins page.

1. Go to Customization > Plug-ins > Manage Plug-ins.
2. Locate the Email Capture Plug-in email address for the first implementation of the Plug-in in your account listed on the Manage page.

**Note:** The email address for each Email Capture Plug-in includes the company ID and a randomly generated series of characters called a hash, in the following format:  
`emails.<companyid>.<plug-inID>.<hash>@emails.netsuite.com.`

Before the move, the email address looked similar to this example:

`emails.123456.233.c84fedc3e6@emails.netsuite.com.`

After the move, the address might look like this:

`emails.123456.233.c84fedc3e6@emails.na1.netsuite.com.`

3. In your email infrastructure, update the domain portion (for example, `@emails.netsuite.com`) of the Email Capture Plug-in email address to reflect your new data center location.

**Note:** A data center identifier (for example, `.na1.` or `.na2.`) has been added to the domain portion (`@emails.netsuite.com`) of the email address. The data center identifier differs depending on which data center your account is moved to.

For more information about data center identifiers, see [Understanding NetSuite URLs and Data Centers](#).

4. Repeat this procedure for each implementation of the Email Capture Plug-in in your account.

**Note:** If you need help completing this task, contact NetSuite Customer Support.

**Important:** In some cases, the email capture address is not mapped in your email infrastructure. Instead, email is sent from outside sources - people or applications - directly to the email capture address. In these cases, you must inform these outside sources of the change to the domain portion of the email capture address.

## Update the NetSuite Carrier Integrator Application and the NSWMS Print Driver

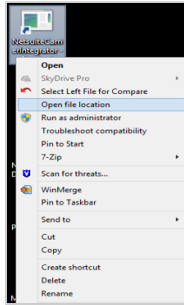
**Important:** This task is not currently listed on the Account Mobility Tasks page, but if you are using the Warehouse Management System SuiteApp in your account, you must make changes after your account is moved to a different data center.

If you are using the Warehouse Management System SuiteApp in your account, after a move to a different data center, you must update the configuration file for the NetSuite Carrier Integrator Application and the NSWMS Print Driver. The URL for the web services endpoint must be changed to reflect your new data center.

Identify all shipping stations in the warehouse, and all the print servers where the NetSuite Carrier Integrator application or the NSWMS print driver is configured. If the NetSuite Carrier Integrator application is running, close the application and complete the following procedure.

### To update the NetSuite Carrier Integrator configuration file:

1. Locate the shortcut icon for the NetSuite Carrier Integrator application on the desktop. Right-click, and select **Open file location**.



The installation folder of the NetSuite Carrier Integrator application displays.

Name	Date modified	Type	Size
DataEncryption.dll	05-08-2014 02:20 ...	Application extens...	6 KB
NetsuiteCarrierIntegrator	01-12-2014 04:36 ...	Application	3,606 KB
NetsuiteCarrierIntegrator.exe	19-05-2015 09:05 ...	CONFIG File	5 KB

2. Open the NetsuiteCarrierIntegrator.exe CONFIG file with a text editor such as Notepad, and search for `https://webservices.netsuite.com`.
3. Continue to search the file until you locate the URL for the NetSuite web services endpoint in the Application settings section of the CONFIG file.

```
<NetsuiteCarrierIntegrator.Properties.Settings>
  <setting name="NetsuiteCarrierIntegrator_iparcel_XMLSOAP" serializeAs="String">
    <value>http://www.i-parcel.com/soap/xmlsoap.aspx</value>
  </setting>
  <setting name="NetsuiteCarrierIntegrator.com.netsuite.webservices.NetsuiteService" serializeAs="String">
    <value>https://webservices.netsuite.com/services/NetsuitePort_2013_1c</value>
  </setting>
  <setting name="NetsuiteCarrierIntegrator_FedExShipServiceWebReference_ShipService" serializeAs="String">
    <value>https://webbeta.fedex.com:443/web-services/ships</value>
  </setting>
</NetsuiteCarrierIntegrator.Properties.Settings>
```

4. Edit the domain string in the URL to reflect the appropriate data center location.

For example, if your account was moved to the NA East data center, change `/webservices.netsuite.com/` to `/webservices.na1.netsuite.com/`.

**Note:** You are adding a data center identifier (for example, `na1` or `na2`) to the domain string `/webservices.netsuite.com/` of the URL. The data center identifier differs depending on the data center to which your account was moved. For more information about data center identifiers, see [Understanding NetSuite URLs and Data Centers](#).

**Note:** As of 2017.2, account-specific domains are supported for web services. You can edit the domain string in the following format, where 123456 is your account ID: `123456.suitetalk.api.netsuite.com`. Data center-specific domains are still supported. For more information, see [URLs for Account-Specific Domains](#).

5. Save the CONFIG file, and start the NetSuite Carrier Integrator application.
6. Repeat this procedure on each computer (all shipping stations and all print servers) on which the NetSuite Carrier Integrator application or the NSWMS print driver is configured.

**Note:** If you need help completing this task, contact NetSuite Customer Support.

# NetSuite Account Types Overview

The [Understanding NetSuite Account Types](#) section provides summary-level descriptions of the different types of NetSuite accounts.

More in-depth descriptions are available for specialized accounts used by account administrators and developers to build and test customizations. See the following:

- [NetSuite Sandbox](#)
- [NetSuite Development Accounts](#)

## Understanding NetSuite Account Types

In addition to the live production account, NetSuite provides customers with various types of accounts to use to run their business. An account is simply a place to work.

Types of NetSuite accounts include:

- [The Production Account](#)
- [The Release Preview Account](#)
- [The Sandbox Account](#)
- [The Development Account](#)

### The Production Account

The production (or live) account is where you do the daily work necessary to run your business. Most users will spend most of their time working in the production account.

Users access their production account by opening a browser window and going to [system.netsuite.com](https://system.netsuite.com), and entering their email address and password. They will automatically be connected to their NetSuite production account in the correct data center. For more information about this, see [Understanding Multiple Data Centers](#) and [Understanding NetSuite URLs and Data Centers](#).

### The Release Preview Account

All customers with a NetSuite production account can get access to a Release Preview account when it is available. Release Preview is available twice a year, right before each NetSuite release. This account lets you test your daily business processes with the new features available in the upcoming release.

As of 2018.1, all customers access the UI for their Release Preview account from <https://system.netsuite.com>. Initially, only users with an Administrator role have access to the Release Preview account.

A user with an Administrator role must log in to NetSuite at <https://system.netsuite.com>, and change roles to the Release Preview Administrator role. An Administrator can grant access to Release Preview to other users as needed for testing.

Users can also access their Release Preview account from the New Release portlet.

See the help topics [The New Release Process](#) and the [Release Preview Test Plan](#) for more information.

## The Sandbox Account

A NetSuite sandbox is a safe and isolated account where you can develop new processes and applications. You can use a sandbox to test and train your employees in existing integrations and processes without affecting your production data. The data in the sandbox is a copy of your production data. The sandbox can be refreshed from production, bringing in new data and customizations. Each refresh overwrites the previous sandbox. You can purchase one sandbox or several sandboxes to allow for development and testing teams to have their own accounts in which to experiment. See [NetSuite Sandbox](#) for more information.

### Sandbox Accounts on the Sandbox Domain

Customers with sandbox accounts on the sandbox domain access their sandboxes by opening a browser window and going to `system.sandbox.netsuite.com`, and entering their NetSuite email address and password.

**Note:** As of 2017.2, sandbox accounts on the sandbox domain are being transitioned to the NetSuite domain. The first time a sandbox refresh is requested for a sandbox on the sandbox domain after January 11, 2018, it is automatically transitioned to the NetSuite domain.

For more information, see [FAQ: Sandbox Transition](#).

### Sandbox Accounts on the NetSuite Domain

Users of accounts in European data centers and users of accounts in North American data centers whose sandboxes have been refreshed after January 11, 2018 have sandbox accounts on the NetSuite domain. Users of sandbox accounts on the NetSuite domain access the sandbox UI from the same URL they use to access their production account. Production and sandbox roles are clearly labeled in the Account Type column on the Choose Role page. Account administrators and system administrators can modify the sandbox account name by adding a suffix to help distinguish it from other accounts. See [About Sandbox Accounts on the NetSuite Domain](#) for more information.

## The Development Account


The NetSuite development account is a place that is isolated from your production account in which teams can develop solutions. The development account provides an improved experience for developing NetSuite customizations. NetSuite development accounts never contain production data. This separation of development accounts prevents in-progress customizations from being overwritten by refreshes, as can happen in sandbox accounts, and enables controlled access to sensitive, restricted, and financial data. These lightweight accounts support rapid deployment and testing processes.

**Warning:** The development account is isolated from the production account, but not in the same way as a sandbox account. For example, invoices will be created and email will be sent from this account, so ensure that you use only test data in this account. NetSuite recommends that you do not add real customer information, such as contact information, to a development account.

Users access a development account at `system.netsuite.com`. Their role in the development account can be selected from the Choose Roles page.

The best time to begin using development accounts is at the start of a new project. It can be difficult to migrate to a development account if you are already in the middle of a development project in your

sandbox. We recommend that you finish your existing projects in your sandbox before starting new projects in your development account.

 **Note:** You need multiple development accounts if you have multiple large projects which need distinct accounts for User Acceptance Testing (UAT).

For more information about development accounts, see [NetSuite Development Accounts](#) and [SuiteApp Development Process with SuiteBundler](#).



# NetSuite Sandbox


A NetSuite sandbox is a safe and isolated test account in which you can develop and test new applications and customizations without worrying about affecting your production account. You can have one or more sandboxes provisioned for each production account. Each sandbox account has the same configuration, data, and customizations as your company's production account.

Sandbox accounts provide ideal places for:

- Testing customization elements before deployment.
- Fixing issues with existing customizations.
- Trying out third-party integration features.
- Training employees in existing and new business practices in an account identical to your production account.

Actions you take in sandbox accounts, such as transaction entries, record deletions, and form customizations, have no effect on your NetSuite production account. You can feel free to make changes in a sandbox account without altering your production data.

To help users distinguish between production roles and sandbox roles, see [Logging in to Your Sandbox Account](#).

 **Note:** For more information on acquiring one or more sandbox accounts, contact your account representative.

Review the following for more details about sandboxes:


- Some features are not fully available for testing in a sandbox account. For details, see [Features Available for Testing in a Sandbox](#).
- For information on how to log in to your sandbox, see [Logging in to Your Sandbox Account](#).
- For information about providing user access to a sandbox, see [Granting Access to Your Sandbox Account](#).
- For information about using more than one sandbox, see [Working with Multiple Sandbox Accounts](#).
- Account administrators and users with the System Administrator role can review details about the sandbox account(s) associated with a production account, and initiate the first copy of production data into newly provisioned sandbox accounts. See [Using the Sandbox Accounts Page](#).
- Sandbox accounts can be periodically refreshed from production, upon your request. See [Refreshing Sandbox Accounts](#). This task is managed through the Sandbox Accounts page in your production account.
- For details about what happens when a sandbox account expires, see [When a Sandbox Account Expires](#).
- For instructions on setting preferences for email messages coming from your sandbox account, see [Setting Preferences for Sandbox Email](#).

## About Sandbox Accounts on the NetSuite Domain

As of 2016.1, NetSuite introduced sandbox accounts to European Union (EU) data centers, where users log in using the NetSuite domain. Now, this type of sandbox is also available in North American (NA) data centers, so users who currently log in to their sandbox on the sandbox domain will be able to transition their sandbox accounts to the same domain as their production account (the NetSuite domain). After this transition, a sandbox account has a few notable differences.

- Access to all of your roles, including those in your sandbox, is from the same URL as your production account (system.netsuite.com).
- Users with roles in both production and sandboxes will see their roles labeled in the Account Type column of the Choose Role page.

DEFAULT ROLE	ROLE	COMPANY	ACCOUNT TYPE	LAST LOGIN
<input checked="" type="checkbox"/>	Administrator	MyCompany, Inc	PRODUCTION	2/11/2017 2:00 am
<input type="checkbox"/>	Administrator	MyCompany, Inc	SANDBOX	

- In the Change Roles list, all sandbox roles are identified by an  icon.
- In sandbox accounts on the NetSuite domain, Administrators have the ability to add a suffix to the sandbox Account Name for identification purposes. See [Account Name Suffix: Labeling Your Sandbox Account on the NetSuite Domain](#).
- There are a few important differences between sandboxes on the sandbox domain and sandboxes on the NetSuite domain that affect behavior and testing capabilities:
  - In sandboxes on the sandbox domain, there is a primary sandbox and there might be secondary sandboxes. Sandboxes on the NetSuite domain are not differentiated into primary and secondary sandboxes. All of these sandboxes function like secondary sandboxes. Each sandbox account has a unique identifier: the account ID of the production account is appended with \_SB1, \_SB2, \_SB3, and so on.
  - There are a few features where testing in sandboxes is limited. Review the Notes column in [Testing Features in a Sandbox](#) table for details.

## When Your Sandbox Account is Transitioned to the NetSuite Domain

The first time you refresh a sandbox, it is transitioned to the NetSuite domain. This changes the way users access the sandbox account.

After the refresh is complete, sandbox users **must** access the sandbox from the same URL that they use to access their production account (system.netsuite.com). They can use the Choose Role page, or the Change Roles list, to switch from a production role to a sandbox role.

See [Logging in to Your Sandbox Account](#) for more information.

## Account ID Numbering Conventions for Sandbox Accounts on the NetSuite Domain

In sandboxes on the sandbox domain, there is a primary sandbox and there might be a secondary sandbox, or secondary sandboxes. The account ID for the primary sandbox is the same as the account ID of the production account. Secondary sandboxes have the same account ID as the production account, appended with \_SB2, \_SB3, and so on.

In sandboxes on the NetSuite domain, there is no concept of primary or secondary sandboxes. The account ID is always the same as the account ID for your production account, appended with \_SB1, \_SB2, \_SB3, and so on.

The following table identifies how your sandbox account IDs will change after you refresh your sandbox account and it is on the NetSuite domain.

Before the refresh:	After the refresh:
<ul style="list-style-type: none"> <li>Production account ID: 345678</li> <li>Primary sandbox account ID: 345678</li> <li>Secondary sandbox account ID: 345678_SB2</li> <li>Secondary sandbox account ID: 345678_SB3</li> </ul>	<ul style="list-style-type: none"> <li>Production account ID: 345678</li> <li>Sandbox account ID: 345678_SB1</li> <li>Sandbox account ID: 345678_SB2</li> <li>Sandbox account ID: 345678_SB3</li> </ul>



**Important:** After a sandbox has been moved to the NetSuite domain, users access the sandbox from their production account by switching roles on the Choose Role page or Change Roles list.

## Account Name Suffix: Labeling Your Sandbox Account on the NetSuite Domain

In a sandbox account, administrators have the option of adding a suffix to the account name to help users differentiate between multiple sandboxes. After entering the desired text for the suffix, submit the request for a sandbox refresh (click **Copy Data to Sandbox** or **Refresh Sandbox**). The suffix is appended to the Account Name.

For example, the text in the **Account Name Suffix** field as shown in the screenshot is appended to the Account Name after the refresh request is submitted by clicking **Copy Data to Sandbox**. (You do not need to refresh both sandboxes at the same time, this is only an example.) In this example, after submitting the refresh request, the account names would change as shown in the following:

- Sandbox account ID: 123456\_SB1  
Account Name: MyCompany, Inc. - Integration Testing
- Sandbox account ID: 123456\_SB2  
Account Name: MyCompany, Inc. - Training Sandbox



**Important:** The Account Name Suffix field remains available for editing until you enter your desired text for the suffix and submit a refresh request. After submitting the refresh request, the Account Name Suffix field is no longer shown on the Sandbox Accounts page.

You can also modify the Account Name of your sandbox on the NetSuite domain by going to Setup > Company > Company Information and editing the Company Name field.




**Note:** If you modify the Company Name field, you will need to do so again after each refresh.

## Sandbox Pre-transition Checklist

As of January 12, 2018 customers have the opportunity to transition their sandbox accounts from the sandbox domain to the NetSuite domain at the time of their choosing. For details about sandbox accounts on the NetSuite domain, see [About Sandbox Accounts on the NetSuite Domain](#).

### Things to Consider Before Your Sandbox Transition

The following table describes the tasks administrators may need to complete prior to transitioning your sandbox account from the sandbox domain to the NetSuite domain. Completing these tasks ensures that your sandbox account continues to function properly after the transition.

Item	Task
If your configurations include: <ul style="list-style-type: none"> <li>■ SuiteTalk (web services)</li> <li>■ RESTlets</li> <li>■ SuiteAnalytics Connect drivers</li> </ul>	Update your integrations to point to the right URL and account ID for your sandbox requests to continue working. For details, see <a href="#">URLs for Account-Specific Domains</a> and <a href="#">URLs for Data Center-Specific Domains</a> .
If you have integration records in your primary sandbox account:	Recreate your integration records in your production account so that you do not lose them when your primary sandbox account is refreshed. For details, see the help topic <a href="#">Using Integration Records in Sandbox Accounts on the Sandbox Domain</a> .
If you use SAML SSO:	Update your SAML SSO configuration. It is possible that you may run into potential conflicts on the NetSuite domain.  <b>To identify potential conflicts on the NetSuite domain:</b> This suggestion assumes you have SAML enabled on your production account, and have access to a development account or a test drive account. <ol style="list-style-type: none"> <li>1. In an account administrator role, access your test drive account or development account.</li> <li>2. Enable the SAML feature in that account.</li> <li>3. Upload the metadata file from that account to your IdP.                If you encounter a problem resulting from a unique constraint violation, enable SAML only in your production account.</li> </ol> <div style="border: 1px solid #0070C0; padding: 10px; margin-top: 10px;"> <p> <b>Note:</b> It is also possible that the potential conflict could be with your IdP. Please see your Identity Provider's website for more information.</p> </div> <p>For more information about SAML SSO setup, see the help topic <a href="#">Complete the SAML Setup Page</a>.</p>
If you use Inbound SSO:	Update the following: <ul style="list-style-type: none"> <li>■ Update your NetSuite URL using the data center-specific domain URL. For details, see <a href="#">URLs for Data Center-Specific Domains</a>.</li> <li>■ If you are refreshing your primary sandbox account, you will need to update the account ID after the refresh is completed.</li> <li>■ Recreate your user mappings. For details, see the help topic <a href="#">Mapping Users and Roles for Inbound Single Sign-on Access to NetSuite</a>.</li> </ul>

Item	Task
	For more information about Inbound SSO, see the help topic <a href="#">Setting Up Inbound Single Sign-on</a> .

## Transitioning to the NetSuite Domain

Transitioning to the NetSuite domain results in the following:

- [New Method of Sandbox Access](#)
- [Support for Custom Secure Domains in Sandbox](#)
- [Change to Primary Sandbox Account ID](#)

It is important to know that the transition of a sandbox account to the NetSuite domain is triggered at the discretion of the account administrator. The following changes are only applied the first time the administrator requests the refresh of a sandbox account that is on the sandbox domain.

### New Method of Sandbox Access

After a sandbox account has transitioned to the NetSuite domain, there is a new method for accessing the sandbox account. Users log in to <https://system.sandbox.netsuite.com> to access a sandbox account on the sandbox domain. After the sandbox refresh, users log in to the NetSuite domain at <https://system.netsuite.com> and from the Choose Role page, choose between production and sandbox roles.

**Note:** Please inform your users that this change is coming, and explain to them how to access the sandbox from the same URL as the production account after the sandbox update takes effect.

**Important:** To ensure access to sandbox accounts for users with RSA required roles, we have transitioned these roles in those accounts from RSA 2FA authentication required to 2FA authentication required roles. On the first attempt to access the 2FA role in your sandbox account, users will be prompted to set up the 2FA by Phone or Authentication App. For details, see the help topics [2FA by Phone or Authenticator App](#) and [Designating Two-Factor Authentication Roles](#).

For details about accessing your sandbox account, see [Logging in to Your Sandbox Account](#).

### Support for Custom Secure Domains in Sandbox

The transition of a sandbox account to the NetSuite domain enables the deployment of custom secure domains to sandbox accounts. Errors stating that the domain already exists do not occur for a sandbox account in the NetSuite domain. It is possible to test and verify a custom secure domain from the user's perspective in a sandbox account on the NetSuite domain, before the secure domain is deployed to a production account.

**Note:** A unique custom secure domain must be set up for each type of account: production, sandbox, and Release Preview.

For more details, see the help topic [Secure Domains FAQ](#).

### Change to Primary Sandbox Account ID

After your primary sandbox account is transitioned to the NetSuite domain, it no longer has the same account ID as the related production account. After you refresh your primary sandbox, its account

ID is appended with \_SB1 to distinguish it from your production account, both of which reside on the NetSuite domain.



**Note:** You must update your integrations with the right sandbox account ID for your sandbox requests to continue working.

After a primary sandbox account has been transitioned to the NetSuite domain, it is no longer possible to share RSA tokens between a production account and a sandbox account. For more details, see the help topic [Working with RSA Tokens in Multiple Account Types](#).

Also, system notes are no longer be included in any refreshes. For details, see [Data That is Not Copied from Production to Sandbox](#).

## FAQ: Sandbox Transition

Upcoming changes to sandbox accounts currently on the sandbox domain will impact the user experience. For more information, see [Sandbox Pre-transition Checklist](#).

### Is there an exact date when this change will take place?

The implementation date is targeted for January 11, 2018. A sandbox refresh after this date will trigger the move to the new sandbox architecture.

### Will my sandbox account be moved to the new architecture automatically?

No. You need to initiate a refresh for your sandbox account to move to the new sandbox architecture. You should plan to refresh your account at a time that works best for you and your organization.

### Will all users who have access to my production account now see a sandbox role when they log in to the production account?

As the administrator, you decide who has access to the sandbox account. Go to the Sandbox Accounts page and under the Access After Sandbox Refresh preference, select either administrators only or all users. If the administrators only option is selected, only the administrator role is copied to the sandbox account.

### What is the difference between a sandbox on the sandbox domain and a sandbox on the NetSuite domain?

The original sandboxes offered by NetSuite were all hosted on the sandbox domain. In 2016.1, NetSuite introduced sandboxes for customers with production accounts hosted in European Union (EU) data centers, now referred to as sandbox accounts on the NetSuite domain. These sandbox accounts can be accessed by logging in at <https://system.netsuite.com> and selecting the sandbox account from the Choose Role page. Currently, all sandboxes are being transitioned to the NetSuite domain. For customers in North American (NA) data centers, the transition occurs when a sandbox is refreshed.

For more information about sandboxes, see [NetSuite Sandbox](#) and [Sandbox Pre-transition Checklist](#). See also [Features Available for Testing in a Sandbox](#).

### How can I tell what kind of sandbox I have?

There are several ways to determine what kind of sandbox you have:

- The Sandbox Accounts page. See [Using the Sandbox Accounts Page](#).
- The way you access your sandbox account. See [Logging in to Your Sandbox Account](#), and [About Sandbox Accounts on the NetSuite Domain](#).

## After the architecture change, will I be able to access my production and sandbox accounts simultaneously?

In the new architecture, you will use two different browsers to achieve simultaneous access to both production and sandbox. For more details, see [Simultaneous Access to Different Account Types](#).

## After my account is upgraded to 2018.1, will I have access to zero downtime refresh?

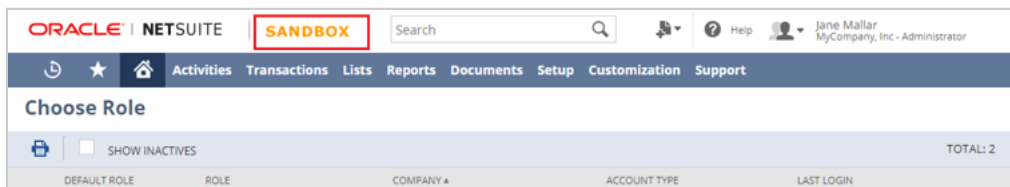
Two requirements must be met before you can access zero downtime refresh, or, the ability to use your existing sandbox during the sandbox refresh process:

1. You must be on NetSuite version 2018.1.
2. You have requested a sandbox refresh since January 12, 2018.

**Note:** If you have performed a sandbox refresh since January 12, 2018, your sandbox account is on the NetSuite domain. Your sandbox account must be on the NetSuite domain before you can access zero downtime refresh. If you have not requested a refresh since January 12, 2018, then you will need to do so to initiate the account move to the NetSuite domain.

## How can I tell if I am in my sandbox?

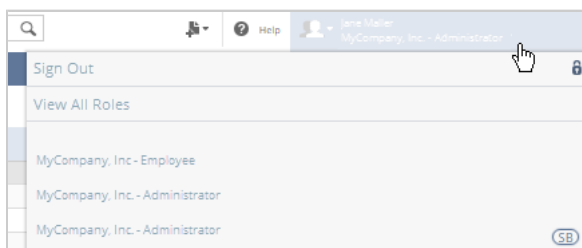
- As always, a sandbox logo is shown in the header.



- There is also an Account Type column on the Choose Role page so you can distinguish between your production and sandbox accounts. Sandbox accounts have the account type **SANDBOX**.

DEFAULT ROLE	ROLE	COMPANY	ACCOUNT TYPE	LAST LOGIN
<input checked="" type="checkbox"/>	Administrator	MyCompany, Inc	PRODUCTION	2/11/2017 2:00 am
<input type="checkbox"/>	Administrator	MyCompany, Inc	<b>SANDBOX</b>	

- From the Change Roles list it is indicated by an SB logo beside any sandbox accounts.



## How can I differentiate between my production and sandbox accounts?

To help differentiate between account types, administrators can change the name of each account to include the type by going to **Setup > Company > Company Information** and changing the **Company**

**Name.** Users can go to the Set Preferences page and color code their accounts by changing the **Color Theme** under **Appearance**.

### Does this architecture change require downtime?

No.

### After this architecture change, will users be able to continue accessing sandbox using <https://system.sandbox.netsuite.com>?

If you have not yet initiated a sandbox refresh after the implementation date, users can continue to log in at <https://system.sandbox.netsuite.com>. After the sandbox is refreshed post implementation date, users must log in to <https://system.netsuite.com>.

### Will there be changes to the refresh process?

No. For details, see [Refreshing Sandbox Accounts](#).

### Will this change affect my sandbox refresh processing time?

No.

### Will there be changes to the sandbox e-fix schedule?

Sandbox e-fixes will continue to go out one day before production e-fixes.

### Will my sandbox account ID change?

Primary sandbox account IDs will change. There will no longer be a primary sandbox that has the same account ID as the related production account. After the next refresh, the primary account ID will be appended with an \_SB1. Secondary sandbox account IDs will not change. For details, see [Change to Primary Sandbox Account ID](#).

### Will this upgrade affect my third-party account integrations?

After you refresh your primary sandbox, its account ID will be appended with \_SB1. You will need to update your integrations to point to the new account ID for your sandbox requests to continue working.

### What happens to the integration records in my primary sandbox after the change?

If you have integration records only in primary sandboxes, install the integration records in your production account before refreshing your sandbox to avoid losing full control of the integration record. You can also create a new integration record in the production account or the sandbox account after the sandbox refresh.

After the change, if you create an integration record in any sandbox, you will not be able to edit the common, not account-specific fields in the corresponding integration record installed in your production account. Similarly, if you create an integration record in your production account, you will not be able to edit the common fields in the corresponding integration record in your sandbox account.

### How do I reset user credentials for users who have different passwords for production and sandbox accounts?

After the change, users will use their production credentials to login to <https://system.netsuite.com> and then they will choose between their production and sandbox accounts in the Change Roles list.

If a user needs to reset their password, they can use the **Forgot your password?** link and follow the instructions.



### Will this change apply to all sandboxes after we refresh the first one?

This change will only happen one sandbox at a time, as a refresh is requested for each sandbox.

### Will I be able to test secure domains in my sandbox account?

Yes. For more details on what can be tested, see [Features Available for Testing in a Sandbox](#). Items previously only available in the EU will be available for testing in NA after you refresh your sandbox after the architectural change is in effect.

### What data center will my sandbox be hosted in after the upgrade? What URL do I use to log in?

For production accounts that are hosted in North American data centers, all sandboxes will be hosted in the NA West data center.

### Will SAML SSO be affected by this transition?

It is possible that you may run into potential conflicts on the NetSuite domain (system.netsuite.com). To identify potential conflicts on the NetSuite domain:

**Note:** This suggestion assumes you have SAML enabled on your production account, and have access to a development account, a test drive account, or a sandbox account that has already transitioned to the NetSuite domain.

1. In an account administrator role, access your test drive account, development account, or sandbox account.
  2. Enable the SAML feature in that account and upload the metadata file from your Identity Provider (IdP).
  3. Upload the Service Provider metadata file from that account to your IdP.
- If you encounter a problem in step 2 or 3 resulting from a unique constraint violation, enable SAML only in your production account. For more information, see the help topic [SAML SSO in Multiple NetSuite Account Types](#).

**Note:** It is also possible that the potential conflict could be with your IdP. Please see your Identity Provider's website for more information.

**Important:** This conflict is a known issue, and a solution is in development.

For more information about SAML SSO setup, see the help topic [Complete the SAML Setup Page](#).

### Will Inbound SSO be affected by this transition?

Yes. You need to do the following:

- Update your NetSuite URL using the data center-specific domain URL. For details, see [URLs for Data Center-Specific Domains](#).
- If this was formerly a primary sandbox account, update your account ID.
- Recreate your user mappings. For details, see the help topic [Mapping Users and Roles for Inbound Single Sign-on Access to NetSuite](#).

For more information about Inbound SSO, see the help topic [Setting Up Inbound Single Sign-on](#).

### Do we need to make configuration changes to sandbox for ODBC connections?

Yes.

Former NA sandbox endpoint: `odbcserver.sandbox.netsuite.com`

Endpoint for sandbox on the NetSuite domain: `odbcserver.netsuite.com`

For more information, see the help topic [Accessing the Connect Service Using an ODBC Driver](#).

### Do we need to make configuration changes to sandbox for SuiteTalk (web services) connections?

Yes. We recommend you use your account-specific domain here. For more information, see [URLs for Account-Specific Domains](#).

If you choose not to use your account-specific domain, change your sandbox endpoint as follows.

Former NA sandbox endpoint: `webservices.sandbox.netsuite.com`

Endpoint for sandbox on the NetSuite domain: `webservices.netsuite.com`

### Do we need to make configuration changes to sandbox for RESTlet connections?

Yes. We recommend you use your account-specific domain here. For more information, see [URLs for Account-Specific Domains](#).

If you choose not to use your account-specific domain, change your sandbox endpoint as follows.

Former NA sandbox endpoint: `rest.sandbox.netsuite.com`

Endpoint for sandbox on the NetSuite domain: `rest.netsuite.com`

### Will Two-Factor Authentication still work?

Yes. Two-factor authentication using your phone or an Authenticator app is shared between your production and sandbox accounts. For details, see the help topic [2FA by Phone or Authenticator App](#).

### Will my RSA token still work?

To ensure access to sandbox accounts for users with RSA required roles, we have transitioned these roles in those accounts from RSA 2FA authentication required to 2FA authentication required roles. On the first attempt to access the 2FA role in your sandbox account, users will be prompted to set up the 2FA by Phone or Authentication App. For details, see the help topics [2FA by Phone or Authenticator App](#) and [Designating Two-Factor Authentication Roles](#).

## Features Available for Testing in a Sandbox

Some features are only available in a limited form, and some features are not available for testing in a sandbox. See the [Testing Features in a Sandbox](#) table for details.


A sandbox is a copy of your production account, as of a specific date and time. As a sandbox is only a copy of the information from your production account. Some actions you perform in the sandbox do not affect information displayed in your sandbox. A few behind-the-scenes tasks that run in your production account do not run in your sandbox.





For example, billable components information is not calculated for the sandbox. In your production account, to view your Total Storage Size (MB) information, go to Setup > Company > View Billing Information. The billing information page in your sandbox displays the billing information copied from production. Therefore, the Total Storage Size (MB) information displayed in the sandbox is not changed by actions you perform in the sandbox, such as deleting custom records.




During sandbox refreshes, certain things are not copied from your production account. For more information, see [Data That is Not Copied from Production to Sandbox](#).

The following table describes functionality available for testing in your NetSuite sandbox.

## Testing Features in a Sandbox

Feature	Availability	Testing Notes
ACH Vendor Payments	Test-mode only	No actions taken (no payments sent).
Alternative Payment Methods	Test-mode only	No actions taken (no payments sent). Test mode is on for all payment processing profiles.
Bulk Merge	Yes	
Credit Card Processing	Test-mode only	No actions taken. To test your billing processes or credit card processing, use only test credit card numbers and a valid expiration date.  <div>  <b>Important:</b> See <a href="#">Credit Card Processing in Your Sandbox After a Refresh</a>. </div>
CDN Caching	Yes	See the help topic <a href="#">CDN Caching</a> for information on enabling this feature.
CTI Integration (Contactual, Five9)	Yes	
CSV Import	Yes	
Custom Records	Yes	Some security-sensitive fields on custom records (such as fields related to passwords and security questions) will display the value ENCRYPTED in a sandbox on the sandbox domain. Security-sensitive fields on custom records in a sandbox on the NetSuite domain will display the same values displayed in the production account.
Currency Exchange Rate Integration	Yes	You must manually update rates in your sandbox or refresh from production to get updated rates.
Direct Deposit	Yes	No actions taken
Electronic Funds Transfer	Test-mode only	No actions taken (no funds transferred).
Email Campaigns	Yes	Email campaigns must have fewer than 25 recipients.
Email Case Capture	Yes	
Email Notifications and Outgoing Email	Yes	See <a href="#">Setting Preferences for Sandbox Email</a> for more information.
Fax	No	
Intellesync	Yes	
Memorized Transactions	No	No actions taken.
NetSuite for Outlook	No	
Online Bill Pay	No	
Outlook Integration	No	

Feature	Availability	Testing Notes
Payroll	No	 <b>Note:</b> Updating payroll information is not supported in sandbox accounts.
PayPal Integration	Test-mode only	No actions taken.
Perquest	Yes	No actions taken.
Reports Scheduled Reports	Yes	<p>Scheduled Reports do not send emails. <b>Alert Me When Ready</b> reports do send emails (assuming a user initiates this action).</p>  <b>Note:</b> The company preference for sandbox email is evaluated after the report is executed and prepares to send email. Depending on the preference specified, the email is sent to a specific user or not sent at all. See <a href="#">Setting Preferences for Sandbox Email</a> for more information.
Saved Searches Scheduled Saved Searches	Yes	<p>Scheduled Searches and Email Alerts behave as they do in the production account.</p>  <b>Note:</b> The company preference for sandbox email is evaluated after the search is executed and prepares to send email. Depending on the preference specified, the email is sent to a specific user or not sent at all. See <a href="#">Setting Preferences for Sandbox Email</a> for more information.
Scheduled SuiteScripts	Yes	Scripts do not execute as scheduled, but can be executed manually. This task only begins running after a user has logged in to the sandbox account for the first time.
Secure Domains	Yes	<p>Customers with sandbox accounts on the NetSuite domain can deploy custom secure domains. Even after a refresh, you will no longer encounter errors that the domain already exists. You can test and verify a custom secure domain from the user's perspective, before deploying one in your production environment.</p>  <b>Note:</b> Do not attempt to reuse domains that are already deployed in your production account. You must set up a unique domain for each of your accounts: production, sandbox accounts on NetSuite domain, and Release Preview accounts on NetSuite domain. <p>See the help topic <a href="#">Prerequisites for Setting Up Secure Domains</a> for more information.</p>
Server SuiteScript	Yes	
Client SuiteScript	Yes	
SuiteAnalytics Connect (formerly ODBC)	Yes	
SuiteApps (Bundles)	Yes	See the help topic <a href="#">SuiteApps and Sandbox Accounts</a> . In particular, see the help topic <a href="#">Sandbox Refresh Impact on Bundles</a> .
SuiteFlow (Workflows)	Yes	Workflows or workflow actions will not execute as scheduled, but can be executed manually.

Feature	Availability	Testing Notes
		 <b>Note:</b> Workflow history logs from production are not copied to a sandbox. Workflow instances are not copied to a sandbox.
Telephony Integration (Basic)	Yes	
Token-based Authentication	Yes	Tokens created using the Token-based Authentication feature in your NetSuite production account are not copied to your sandbox. To test this feature, you must create tokens in that sandbox. Each time your sandbox is refreshed, you must create new tokens in that sandbox.
Two-Factor Authentication	Yes	<p>2FA Settings are shared between a production account and the sandboxes on the NetSuite domain that are associated with that production account. Users do not need to recreate their 2FA Settings for sandboxes on the NetSuite domain.</p> <div>  <b>Note:</b> To ensure access to sandbox accounts for users with RSA required roles, we have transitioned these roles in those accounts from RSA 2FA authentication required to 2FA authentication required roles. On the first attempt to access the 2FA role in your sandbox account, users will be prompted to set up the 2FA by Phone or Authenticator App. For details, see the help topics <a href="#">2FA by Phone or Authenticator App</a> and <a href="#">Designating Two-Factor Authentication Roles</a>.         </div> <p>For more information about 2FA authentication, see the help topic <a href="#">Types of Two-Factor Authentication Supported in NetSuite</a>.</p>
UPS/FedEx Integration for Shipping labels	Test-mode only	No actions taken
UPS/FedEx Integration for Rate querying	Yes	
Web Services	Yes	The SOAP requests and responses for each job can be viewed in the Web Services Usage Log. In sandboxes, requests and responses are accessible for one day. For more information, see the help topic <a href="#">Using the Web Services Usage Log</a> .
Website and Web Store	Yes	<p>Domains are not copied from your production account to your sandbox. After a sandbox refresh, you must set up domains in the sandbox. See <i>Previewing your Site on NetSuite Sandbox</i>.</p> <div>  <b>Note:</b> If you have multiple sandboxes, ensure that across all of your sandboxes, the domains are unique. An error message is generated if there are duplicate domains.         </div>

## Logging in to Your Sandbox Account

By default, new sandbox accounts are accessible only to NetSuite account administrators. If you are not an administrator and do not have access to your sandbox account, contact your NetSuite account administrator for access.

The login procedure is different for customers who log in using the same domain as their production account (the NetSuite domain) and customers who log in to their sandbox using the separate sandbox domain. With 2017.2, access to sandbox accounts on the NetSuite domain will be available to customers in North American data centers. For more details, see [Sandbox Pre-transition Checklist](#).

If you are not sure which type of access your sandbox requires, ask your account administrator. You can also log in to the `system.netsuite.com` domain. Do you see a role in sandbox? If not, log into the `system.sandbox.netsuite.com` domain. If you are not able to access your company's sandbox on that domain, it is possible you do not have a role in your company's sandbox. Ask your account administrator.

If you are prompted to update or set up your security questions, see the help topic [Setting Up Security Questions](#).

## Login for Sandbox Accounts on the Sandbox Domain

Use the following URL to log in to your sandbox account on the sandbox domain: `https://system.sandbox.netsuite.com`.

## Login for Sandbox Accounts on the NetSuite Domain

If you access your sandbox account from `https://system.netsuite.com`, you can see all of your sandbox roles when you log in to your production account. All of your roles (your production roles and your sandbox roles) are listed on the Choose Role page.

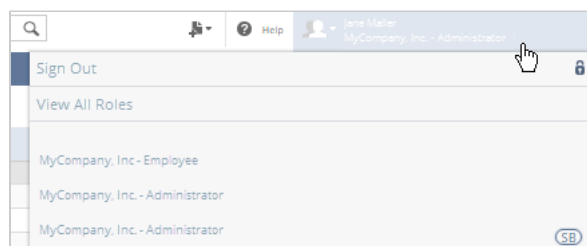
**Note:** To ensure access to sandbox accounts for users with RSA required roles, we have transitioned these roles in those accounts from RSA 2FA authentication required to 2FA authentication required roles. On the first attempt to access the 2FA role in your sandbox account, users will be prompted to set up the 2FA by Phone or Authentication App. For details, see the help topics [2FA by Phone or Authenticator App](#) and [Designating Two-Factor Authentication Roles](#).

You can identify the roles for each account in the Account Type column on the Choose Role page.



DEFAULT ROLE	ROLE	COMPANY ▲	ACCOUNT TYPE
<input type="checkbox"/>	Administrator	MyCompany, Inc.	SANDBOX
<input checked="" type="checkbox"/>	Administrator	MyCompany, Inc.	PRODUCTION

You can also determine which role is a sandbox role by looking for the SB icon in the Change Roles list.



## Simultaneous Access to Different Account Types

Some users like to have both their production and sandbox accounts open at the same time, for example, to help evaluate the effect of changes.

When you access all of your account types from separate domains, you can log in to all of your accounts at the same time using a single browser. However, when you access all of your account types from the NetSuite domain, use the following procedure to access two different account types at the same time.

The following procedure assumes that:

- You have specified a default role in your production account. If you have not already set a default role in your production account, do so now, then log out of NetSuite.
- You need two different browsers to accomplish this procedure. If necessary, see the help topic [Supported Browsers for NetSuite](#) to review your browser options.

### To Access More Than One Account Type at the Same Time

The following procedure describes how to access your production account and your sandbox account at the same time without invalidating the first session. You can use the same basic procedure to access your development account or your Release Preview account at the same time as your production account.

1. Go to <https://system.netsuite.com>.
2. Log in to NetSuite with your email address (your username) and password.  
You are logged in to your default role in your production account.
3. Switch to a role in your sandbox account.
4. Open a window using a different browser.  
For example, if you used the Google Chrome browser for the first session, use Mozilla Firefox, Microsoft Edge, or the Safari browser for the second session.  
(An alternative to using two different browsers is opening the second browser window in private or incognito mode.)
5. In the second browser window, go <https://system.netsuite.com>
6. Log in to NetSuite again using the same email address.  
Using the same email address for login ensures you are logged in to your default role in your production account again.  
You should now have two valid NetSuite sessions, one in your sandbox account, and one in your production account.

## Granting Access to Your Sandbox Account

On the Sandbox Accounts page, account administrators can select who can access the sandbox: only users with an administrator role, or all users.

### Preference for Access After Sandbox Refresh

A preference is provided on the Sandbox Accounts page to indicate who should have access to a sandbox account after it is refreshed: either administrators only or all users. If the Administrators only

option is selected, only the Administrator role is copied to the sandbox. That is, for a user with multiple roles, only the administrator role for that user is copied to the sandbox. For more information, see [Refreshing Sandbox Accounts](#). After a refresh of a sandbox account is complete, access can be added or removed as necessary for individual users in that account.

### To give sandbox access to individual users:



**Important:** Customer Center and Partner Center roles are never allowed access to sandbox accounts.

1. In the sandbox account, go to Lists > Employees > Employees (Administrator) and click **Edit** next to the name of the employee.
2. On the **Access** subtab in the employee record, clear the **Give Access** checkbox.



**Note:** Make note of the roles assigned to the user for later.

3. Click **Save**.
4. **Edit** the same employee record.
5. On the **Access** subtab, check the **Give Access** box again and enter any required information.
6. Reassign the appropriate roles to the user.
7. Click **Save**.
8. Advise the user to log out of their account and then log back in to access the sandbox account.
  - On the Choose Role page, the role is labeled Sandbox in the Account Type column.
  - In the Change Role list, the sandbox role is indicated by an SB symbol.

To give sandbox access to all users of your production account, you must go to the Sandbox Accounts page in your production account, select the **All Users** option for **Access After Sandbox Refresh**, and click **Refresh Sandbox** to request a refresh of your sandbox account.

### To remove sandbox access from individual users:

1. Log in to your sandbox account in an Administrator role.  
See [Logging in to Your Sandbox Account](#) for more information.
2. Go to Lists > Employees > Employees and select the employee record on sandbox.
3. On the **Access** subtab in the employee record, clear the **Give Access** box.
4. Click **Save**.  
The employee to whom you have removed access can no longer log in to your sandbox account.



**Important:** During the upgrade period for a new release of NetSuite, please pay attention to your scheduled upgrade date. Do not request a sandbox refresh when the upgrade date is near. A refresh will fail if it does not complete before your scheduled upgrade begins. See [Scheduled Version Upgrade Dates and Refresh Requests](#).

## Working with Multiple Sandbox Accounts

You can use sandbox accounts to test bundles that you create or test SuiteApps from third-party sources such as independent software vendors (ISVs). You can use a single sandbox account to develop



and test bundles or use multiple sandbox accounts for additional flexibility. For example, you could use one sandbox account for development and one for testing.

**Note:** When you request a sandbox refresh, the bundle definition in a sandbox is completely overwritten so that it mirrors that in the production account.

For more information, see the help topic [SuiteApps and Sandbox Accounts](#).

**Important:** If you have multiple sandboxes, for websites and web stores, ensure that across all of your sandboxes, the domains are unique. An error message is generated if there are duplicate domains.

## About Multiple Sandbox Accounts

Review the following for more details about working with multiple sandbox accounts:

- If multiple sandbox accounts are associated with a single production account, users and their assigned roles are duplicated across these accounts.
- Each user has a separate role for each sandbox account on the Choose Role page and in the Change Roles list. When logged in to a sandbox account on the sandbox domain (system.sandbox.netsuite.com), a user can switch between sandbox accounts by switching between these different roles.

**Note:** If you have a sandbox account on the NetSuite domain, your sandbox roles are accessed from the same URL (system.netsuite.com) as is used for your production account. Roles are labeled as either Production or Sandbox on the Choose Role page.

- Each sandbox account has its own unique ID. To locate your sandbox account ID, go to **Setup > Company > Company Information**. The account ID field is located near the bottom of the right column.
- To distinguish between multiple sandboxes on the sandbox domain, an administrator could change the company name (Setup > Company > Company Information) to identify each sandbox, however, this name change will be overwritten when the sandboxes are refreshed.

## Refreshing Sandbox Accounts

Each of your sandbox accounts can be refreshed from production upon your request. Refreshing a sandbox account copies all configuration, data, user passwords, and customizations from your production account into the sandbox account. Any changes you have made to the sandbox account are overwritten.

Before 2018.1, a sandbox account was taken offline when an administrator requested a refresh of the account. As of 2018.1, after a sandbox account is on the NetSuite domain, accounts are no longer taken offline when a refresh is requested.

**Note:** If you have performed a sandbox refresh since January 12, 2018, your sandbox account is on the NetSuite domain. Your sandbox account must be on the NetSuite domain in 2018.1 before you can access zero downtime refresh. If you have not requested a refresh since January 12, 2018, then you will need to do so to initiate the account move to the NetSuite domain.

Users can use the sandbox account while the new copy is being prepared. Before you activate the new sandbox, make sure to save any sandbox customization changes that have occurred since the refresh.

request. These changes must be saved outside of the sandbox account so that they are available to be added to the new sandbox after activation. Administrators receive an email notification that the refreshed sandbox is available to be activated. An administrator can activate this new sandbox by clicking a button on the Sandbox Accounts page at the time of their choosing. When the new copy of the sandbox account is activated, the previous version is deleted. All old data is replaced with a new copy of the production account data.

## Preserving Sandbox Changes

You need to ensure that users of your sandbox account understand that any changes made to a sandbox account after a refresh request are not included in the new sandbox. When a new sandbox is activated, these changes, including any edits to custom objects, are overwritten with the data from the production account.

SDF users can save all sandbox customization changes to SDF projects before the activation of the new sandbox. After activation, the updated SDF project can be deployed to the new sandbox.

If SDF is not in use, users have to save sandbox customization changes in another manner so that these changes can be available to be added to the new sandbox account after activation.

For more details, see the help topic [Sandbox Refresh Impact on Bundles](#).

## Requesting a Refresh

### To submit a sandbox refresh request:

1. Log in to the production account that is associated with the sandbox account(s) you want to refresh.



**Important:** During the upgrade period for a new release of NetSuite, please pay attention to your scheduled upgrade date. Do not request a sandbox refresh when the upgrade date is near. A refresh will fail if it does not complete before your scheduled upgrade begins. See [Scheduled Version Upgrade Dates and Refresh Requests](#).

2. Go to Setup > Company > Sandbox Accounts.
3. For each sandbox account to be refreshed, do the following:
  - a. Indicate which users should have access after the refresh occurs:
    - To allow access only to the account administrator, select the **Administrators Only** option.  
(You can give access to additional users as needed. See [Granting Access to Your Sandbox Account](#).)
    - To allow access to all existing production account users (except Customer Center users) select the **All Users** option.
  - b. Click **Refresh Sandbox**.  
Your existing sandbox will remain online so you can continue working during the refresh process.
  - c. Click **OK** on the Confirmation popup.  
Use your current sandbox account during the refresh process. You will receive an email notification when the new sandbox is ready to be activated.

- d. When the new copy of the sandbox is ready, go to the Sandbox Accounts page and select the **Activate Sandbox** button.



**Warning:** When you activate a refreshed sandbox, the new sandbox completely replaces the previous sandbox. Any changes to the sandbox account during the refresh process are not included in the newly activated sandbox. Before you activate the new sandbox, you must save any sandbox customization changes that occurred after the refresh request. These changes must be saved outside of the sandbox account so that they are available to be added to the new sandbox after activation. Account administrators should formulate a strategy for saving these changes and adding them to the new sandbox, and inform users of the processes to be used. For more information, see [Refreshing Sandbox Accounts](#).

- e. Click **OK** on the Confirmation popup, to acknowledge that the current sandbox data and configuration will be completely replaced with a new copy from your production account.



**Note:** Once your sandbox is ready for activation, you have two weeks to select the **Activate Sandbox** button. If you do not activate your new copy within the 14 days, it will be deleted.

4. You can monitor the **Refresh Status** and view the **Estimated Refresh Time (In Hours)** on the Sandbox Accounts page.

For more information, see [More About Sandbox Refresh Statuses](#).

## Using the Sandbox Accounts Page

The Sandbox Accounts page is available in production accounts, at Setup > Company > Sandbox Accounts, to account administrators and to users logged in with the System Administrator role. This page is not available to any other roles. You can use this page to review details about your sandbox accounts and to request refreshes of these accounts.



**Important:** Log in to your production account to see the Sandbox Accounts page. This page displays details about all sandbox accounts associated with the production account to which you are logged in.

General	Refresh Summary	Account Notifications
<b>ACCOUNT NAME</b> Wolfe Electronics - 123456  <b>EXPIRATION DATE</b> 10/12/2019 12:00:00 AM  <b>LAST REFRESH COMPLETED</b> 11/20/2017 12:00:00 AM  <b>LAST REFRESH REQUESTOR</b> kwolfe@wolfeelectronics.com  <b>LAST REFRESH ACTIVATED BY</b> kwolfe@wolfeelectronics.com  <b>PRODUCTION SNAPSHOT DATE</b> 11/16/2017 12:05:00 AM  <b>ACCESS AFTER SANDBOX REFRESH</b>  <input type="radio"/> ALL USERS <input checked="" type="radio"/> ADMINISTRATORS ONLY	<b>REFRESHES USED /</b> <b>REFRESHES TOTAL</b> 18/96  <b>ESTIMATED REFRESH TIME</b> <b>(IN HOURS)</b> 3  <b>DATE REFRESH REQUESTED</b> 11/16/2017 12:05:00 AM  <b>DATE REFRESH ACTIVATED</b> 11/20/2017 12:00:00 AM  <b>REFRESH STATUS</b> ✓ Complete  <input type="button" value="Refresh Sandbox"/>	To access this account, go to <a href="https://system.netsuite.com">https://system.netsuite.com</a> and select the sandbox account from the Choose Role page.

## Sandbox Accounts Page Fields

On the Sandbox Accounts page, each account is listed by the NetSuite account ID. Account status is displayed to the right of the Sandbox Account heading.

**Note:** If your sandbox account is a Premium sandbox, the name of the account in the sandbox account heading will automatically indicate this.

✓ Premium Sandbox Account: 123456		
General	Refresh Summary	Account Notifications
ACCOUNT NAME Wolfe Electronics - 123456	REFRESHES USED / REFRESHES TOTAL 18/96	To access this account, go to <a href="https://system.netsuite.com">https://system.netsuite.com</a> and select the sandbox account from the Choose Role page.
EXPIRATION DATE 10/12/2019 12:00:00 AM	ESTIMATED REFRESH TIME (IN HOURS) 3	
LAST REFRESH COMPLETED 11/20/2017 12:00:00 AM	DATE REFRESH REQUESTED 11/16/2017 12:05:00 AM	
LAST REFRESH REQUESTOR kwolfe@wolfeelectronics.com	DATE REFRESH ACTIVATED 11/20/2017 12:00:00 AM	
LAST REFRESH ACTIVATED BY kwolfe@wolfeelectronics.com	REFRESH STATUS ✓ Complete	
PRODUCTION SNAPSHOT DATE 11/16/2017 12:05:00 AM	<button>Refresh Sandbox</button>	
ACCESS AFTER SANDBOX REFRESH		
<input type="radio"/> ALL USERS <input checked="" type="radio"/> ADMINISTRATORS ONLY		

## Account Status

- **Online:** A green check
- **Offline:** An empty circle. The account is not available for use.
- **Expired:** a red X.

The account was not renewed as of the expiration date and is no longer available for use.

## General

The following information is displayed in this section:

- Sandbox Account - Name of sandbox account.
- Expiration Date - Date the sandbox account is scheduled to expire.
- Last Refresh Completed - Date when the most recent refresh of the account was completed.

**Note:** You have 14 days from this date to activate the new copy of your sandbox account.

- Last Refresh Requestor - User who requested the most recent refresh.
- Last Refresh Activated By - User who activated the most recent refresh.

- **Production Snapshot Date** - Date and time of the production snapshot used for the most recent refresh. The backup copy is taken from the night before the sandbox refresh **starts**. This date may not be the same as the date the refresh was requested or the date it was completed. (Note that the time is formatted according to the current user's Time Format preference, set at Home > Set Preferences.)
- **Access After Sandbox Refresh** - You can choose to provide default account access to all users or only to administrators after the refresh. The selection you make remains in effect for subsequent refreshes unless you change it.
  - **All Users** - If you select this option, after the refresh you can remove access from users as needed.



**Important:** Customer Center roles are not copied during sandbox refreshes. Even if you select this option to give all users access after the refresh, users assigned the Customer Center role are excluded from this access. Because of this limitation, customer login functionality does not work in sandbox after a refresh, even if it has been working in the production account. If you want to set up this functionality to work in sandbox, you can do a CSV import of customer records into the sandbox account, to set passwords and Give Access to True for customer users.

- **Administrators Only** - If you select this option, after the refresh you can add access to users as needed.



**Important:** Only the Administrator role is copied to the sandbox. That is, for a user with multiple roles, only the administrator role for that user is copied to the sandbox.

## Refresh Summary

The following information is displayed in this section:



**Note:** For all Date fields, the time is formatted according to the current user's Time Format preference, set at Home > Set Preferences.

- **Refreshes Used / Refreshes Total** - Number of refreshes used out of the total number of refreshes available. If you have multiple sandbox accounts, the refresh count is shared between all of the sandbox accounts.
- **Estimated Refresh Time** - Estimated number of hours required for the refresh to complete. (Note that this estimate is not exact.)
- **Date Refresh Requested** - Date and time when the most recent refresh was requested.
- **Date Refresh Activated** - Date and time when the most recent refresh was activated.
- **Refresh Status** - Status of the most recent refresh.
  - When a refresh fails, a popup error message displays. This message includes an error ticket number that you can provide to Customer Support to help them resolve the issue.
  - When the production account and the sandbox account are not running the same version, a red x displays, and a popup version mismatch error displays.
  - For more information, see [More About Sandbox Refresh Statuses](#).

## More About Sandbox Refresh Statuses

The following section lists the various refresh statuses that are displayed, and describes what each status means.

- **Awaiting Processing:** The refresh request has been submitted and will be processed in the order received.
- **Pending Copy to Sandbox:** This notice only appears for newly provisioned sandboxes. Administrators can choose when to initiate the copy of data from the production account to the sandbox.

**Copy Data to Sandbox:** This button only appears on the Sandbox Accounts page of newly provisioned sandboxes. Click **Copy Data to Sandbox** to initiate the copy of data from the associated production account. The sandbox status will not change to online until the copy of data is completed. (After the initial data copy to the sandbox has completed, the **Refresh Sandbox** button is displayed on the Sandbox Accounts page.)

- **Delayed:** On the Sandbox Accounts page, when the refresh status field displays Delayed, it indicates the refresh progress has stalled for some reason. When a sandbox refresh status is changed to Delayed, the Estimated Refresh Time field is blank. When the refresh resumes, the estimated refresh time is recalculated, and the new value is displayed in the Estimated Refresh Time field.
- **Refresh In Progress:** The sandbox refresh is ongoing.
- **Refresh Failed:** An error occurred during the refresh process. NetSuite Customer Support will intervene to help resolve the problem.

When a refresh fails, a popup error message displays. This message includes an error ticket number that you can provide to NetSuite Customer Support to help them resolve the issue. The Refresh Failed status can also be reported when the sandbox and the production account are running different versions of NetSuite software. This can occur during the new release period, when the production account has been upgraded, but the sandbox has not yet been upgraded to the new release.

- **Pending Sandbox Activation:** This status appears on the Sandbox Accounts page when a new sandbox copy is ready to be activated by the account administrator. To activate the new copy of the sandbox account, click **Activate Sandbox**.
- **Complete:** The sandbox refresh process is complete.



**Important:** During the upgrade period for a new release of NetSuite, please pay attention to your scheduled upgrade date. Do not request a sandbox refresh when the upgrade date is near. A refresh will fail if it does not complete before your scheduled upgrade begins. See [Scheduled Version Upgrade Dates and Refresh Requests](#).

For details on how to request a refresh, see [Refreshing Sandbox Accounts](#).



**Warning:** When you activate a refreshed sandbox, the new sandbox completely replaces the previous sandbox. Any changes to the sandbox account during the refresh process are not included in the newly activated sandbox. Before you activate the new sandbox, you must save any sandbox customization changes that occurred after the refresh request. These changes must be saved outside of the sandbox account so that they are available to be added to the new sandbox after activation. Account administrators should formulate a strategy for saving these changes and adding them to the new sandbox, and inform users of the processes to be used. For more information, see [Refreshing Sandbox Accounts](#).

For new sandbox accounts, you need to initiate the copy of data from the associated production account by clicking the Copy Data to Sandbox button. This action must be completed before a new sandbox account comes online.

**Note:** Refresh Sandbox and Copy Data to Sandbox buttons are not displayed on the Sandbox Accounts page during NetSuite releases unless both the sandbox account and its associated production account are running the same version of NetSuite. When they are not running the same version, the Refresh Status field displays a popup version mismatch error.

Sandbox Account: [Redacted]	
General	Refresh Summary
Account Name	Refreshes Used / Refreshes Total <b>4/84</b>
Expiration Date <b>October 27, 2016</b>	Estimated Refresh Time (in hours) <b>61</b>
Last Refresh <b>August 13, 2013</b>	Date Refresh Requested <b>February 20, 2013 11:44 pm</b>
Last Refresh Requestor [Redacted]	Refresh Status <b>Pending Copy to Sandbox</b>
Production Snapshot Date <b>August 14, 2013 4:11 am</b>	<button>Copy Data to Sandbox</button>
Access After Sandbox Refresh <input checked="" type="radio"/> All Users	
<input type="radio"/> Administrators Only	

## Account Notifications

This section contains notifications relating to each of your accounts. It will alert you to required action items or status updates for each account, along with any applicable instructions.

General	Refresh Summary	Account Notifications
ACCOUNT NAME Wolfe Electronics - 123456	REFRESHES USED / REFRESHES TOTAL <b>18/96</b>	To access this account, go to <a href="https://system.netsuite.com">https://system.netsuite.com</a> and select the sandbox account from the Choose Role page.
EXPIRATION DATE <b>10/12/2019 12:00:00 AM</b>	ESTIMATED REFRESH TIME (IN HOURS) <b>3</b>	
LAST REFRESH COMPLETED <b>11/20/2017 12:00:00 AM</b>	DATE REFRESH REQUESTED <b>11/16/2017 12:05:00 AM</b>	
LAST REFRESH REQUESTOR <b>kwolfe@wolfeelectronics.com</b>	DATE REFRESH ACTIVATED <b>11/20/2017 12:00:00 AM</b>	
LAST REFRESH ACTIVATED BY <b>kwolfe@wolfeelectronics.com</b>	REFRESH STATUS <b>✓ Complete</b>	
PRODUCTION SNAPSHOT DATE <b>11/16/2017 12:05:00 AM</b>	<button>Refresh Sandbox</button>	
ACCESS AFTER SANDBOX REFRESH		
<input type="radio"/> ALL USERS <input checked="" type="radio"/> ADMINISTRATORS ONLY		

## Scheduled Version Upgrade Dates and Refresh Requests

During the upgrade period for a new release of NetSuite, please pay attention to your scheduled upgrade date. Do not request a sandbox refresh when the upgrade date is near. A sandbox refresh request will fail if it does not complete before your scheduled version upgrade begins.

Use your best judgement to decide when to request a sandbox refresh during the version upgrade period for a new NetSuite release. For example, if it usually takes approximately two days for your sandbox refresh to complete, and:

- if your scheduled version upgrade date is 72 hours (three days) away, defer your refresh request until your production and sandbox upgrades are complete.
- if your scheduled version upgrade date is a week away, you might decide to go ahead and refresh your sandbox.



**Important:** All sandbox accounts on the sandbox domain are taken offline for upgrade at 4 pm Friday Pacific Time (regardless of region) the same day of the production account upgrade. All sandbox accounts on the NetSuite domain are taken offline for upgrade at the same time the production account is taken offline for upgrade. The time to complete a sandbox upgrade can vary depending on the amount of data in the account. Average time is about an hour and most complete within 8 hours, but times can vary.

A sandbox account can only be refreshed from its associated production account. A sandbox account cannot be refreshed from another sandbox account. Although each sandbox account is related to its production account, no formal relationships exist among sandbox accounts tied to a single production account. Change management across your sandbox accounts is your responsibility.

You can request a refresh and monitor its status on the Sandbox Accounts page. This page is available to users with the Administrator or System Administrator roles. Go to Setup > Company > Sandbox Accounts.

When your account is ready to be activated, you will receive an email notification asking you to select the **Activate Sandbox** button on the Sandbox Accounts page.



**Important:** During the upgrade period for a new release of NetSuite, please pay attention to your scheduled upgrade date. Do not request a sandbox refresh when the upgrade date is near. A refresh will fail if it does not complete before your scheduled upgrade begins.



**Warning:** When you activate a refreshed sandbox, the new sandbox completely replaces the previous sandbox. The new sandbox contains a copy of production account data that is a snapshot taken at the time of the sandbox refresh request. Any changes to the sandbox account during the refresh process are not included in the newly activated sandbox. Before you activate the new sandbox, you must save any sandbox customization changes that occurred after the refresh request. These changes must be saved outside of the sandbox account so that they are available to be added to the new sandbox after activation. Account administrators should formulate a strategy for saving these changes and adding them to the new sandbox, and inform users of the processes to be used. For more information, see [Refreshing Sandbox Accounts](#).

## Sandbox Refresh Notifications


An email notification is sent each time a sandbox refresh is ready for activation. This email is sent to all account administrators. It includes the sandbox account name and ID, the date the refresh was requested, the user who requested the refresh, the date of the production data used to refresh




the sandbox, the number of refreshes used and remaining, and instructions on how to activate that sandbox account with the new copy.

You have 14 days to activate the new copy of your sandbox. You will receive a second notification after 12 days if you have not yet activated the account. If you do not activate the new copy of your sandbox account within the 14 days, it will be deleted and you will need to go through the sandbox refresh process again.

To activate the new copy of your sandbox, go to Setup > Company > Sandbox Accounts and select the **Activate Sandbox** button.

 **Warning:** When you activate a refreshed sandbox, the new sandbox completely replaces the previous sandbox. The new sandbox contains a copy of production account data that is a snapshot taken at the time of the sandbox refresh request. Any changes to the sandbox account during the refresh process are not included in the newly activated sandbox. Before you activate the new sandbox, you must save any sandbox customization changes that occurred after the refresh request. These changes must be saved outside of the sandbox account so that they are available to be added to the new sandbox after activation. Account administrators should formulate a strategy for saving these changes and adding them to the new sandbox, and inform users of the processes to be used. For more information, see [Refreshing Sandbox Accounts](#).

General	Refresh Summary	Account Notifications
ACCOUNT NAME Wolfe Electronics - 123456	REFRESHES USED / REFRESHES TOTAL 0/10	To access this account, go to <a href="https://system.netsuite.com">https://system.netsuite.com</a> and select the sandbox account from the Choose Role page.
EXPIRATION DATE	ESTIMATED REFRESH TIME (IN HOURS) 3	
LAST REFRESH 1/2/2018 12:00:00 AM	DATE REFRESH REQUESTED 1/2/2018 9:20:36 AM	
LAST REFRESH REQUESTOR kwolfe@wolfeelectronics.com	REFRESH STATUS ✓ Pending Sandbox Activation	
PRODUCTION SNAPSHOT DATE	<button>Activate Sandbox</button>	
ACCESS AFTER SANDBOX REFRESH		
<input checked="" type="radio"/> ALL USERS		
<input type="radio"/> ADMINISTRATORS ONLY		

 **Important:** If you do not activate the new copy of your sandbox and it is deleted, that refresh will still count against your total refreshes used.

Also be aware of the following information about sandbox refreshes:

- **You do not need to refresh a sandbox to update it to the latest NetSuite version.**  
Sandbox accounts are automatically updated to the same release level as the associated production account when the production account is updated. A refresh is not required for this type of update.
- **Sandbox refreshes cannot be done when a sandbox account is running a different version of NetSuite than the associated production account is running.**

During the release of a new version of NetSuite, there may be a period of time when your production account has been updated to the latest version but your sandbox account has not yet been updated, or vice versa. A refresh cannot occur in this case. If you request a refresh, it is delayed until both sandbox and production accounts have both been updated to the latest version. During this period, the Sandbox Refresh page displays a red X in the Refresh Status page with a popup version mismatch error.

## Data That is Not Copied from Production to Sandbox

During sandbox refreshes, the following things are not copied from production:

- **Websites and web store domains**

Domains are not copied from your production account to your sandbox. After a sandbox refresh, you must set up domains in the sandbox. If you have multiple sandboxes, ensure that across all of your sandboxes, the domains are unique. An error message is generated if there are duplicate domains. See *Previewing your Site Builder Site on NetSuite Sandbox*.

- **Customer Center role assignments for customer users**

Customer Center role assignments for customer users are not copied from production accounts to sandbox accounts during refreshes. Due to this limitation, customer login functionality does not work in sandbox after a refresh, even if it has been working in the production account. If you want to set up this functionality to work in sandbox, you can do a CSV import of customer records into the sandbox account, to set passwords and Give Access to True for customer users.

For more information, see the help topic [CSV Imports](#).

- **Inbound single sign-on mappings**

The mappings between users' external credentials and their NetSuite user credentials that are used for inbound single sign-on access to NetSuite, are not copied from production accounts to sandbox accounts during refreshes. These mappings must be recreated in sandbox accounts for any users who require inbound single sign-on access to these accounts. The mapping can be recreated either through the web services `mapSso` operation or upon user login. For more information, see the help topic [Inbound Single Sign-on](#). See also [Creating the Initial Mapping of the Administrator Role for Inbound Single Sign-on](#) and [Mapping Users and Roles for Inbound Single Sign-on Access to NetSuite](#).

- **SAML configuration**

SAML configuration is not copied from production to the sandbox account. For details, see the help topic [SAML SSO in Multiple NetSuite Account Types](#).

- **System notes on records**

System notes are not copied from production to the sandbox. For more information about system notes, see [System Notes Overview](#).


- **SuiteFlow (workflow) history logs**

SuiteFlow (workflow) history logs are not copied from production to the sandbox. For more information, see the help topics [SuiteFlow \(Workflow\)](#) and [Workflow History Subtab](#). Workflow instances are not copied from production to the sandbox.

- **2FA Settings**

2FA authentication required roles are copied from your production account to your sandbox. However, 2FA Settings, such as mobile phone numbers, are not copied to sandboxes on the sandbox domain. Users will need to set up their mobile phone numbers in a sandbox on the

sandbox domain just as they did in the production account. For more information, see the help topic [Setting Up Your Phone Number or Authenticator App in NetSuite](#).

 **Note:** 2FA Settings are shared between a production account and the sandboxes on the NetSuite domain associated with that production account. Users do not need to recreate their 2FA Settings for sandboxes on the NetSuite domain.

#### ■ Token-based Authentication (TBA)


Tokens created in your production account are not copied to your sandbox during a refresh. To test token-based authentication in your sandbox, you must create tokens in that sandbox. Each time your sandbox is refreshed, you will need to create new tokens in the sandbox. For information about creating tokens, see the help topic [Managing TBA Tokens](#).

## Credit Card Processing in Your Sandbox After a Refresh

An account administrator must complete the following procedure to process credit card transactions in your sandbox account after a refresh.

### To enable credit card profiles for use in sandbox:

1. Log in to your sandbox account.
2. Go to Setup > Accounting > Financial Statements > Payment Processing Profiles.
3. Click **Edit** next to the payment processing profile you want to use in your sandbox account.
4. On the payment processing profile, under **Authentication Credentials**, re-enter the credentials required for this profile.
5. Click **Save**.
6. Repeat these steps for each payment processing profile you want to use in your sandbox account.

 **Important:** Each time you refresh your sandbox account, you must repeat this procedure to process credit card transactions in your sandbox. No change is required in your production NetSuite account.

## When a Sandbox Account Expires


Sandbox accounts come with expiration dates. When a sandbox account is not renewed and expires, the status of the sandbox is set to inactive. Users are no longer able to log in to an inactive sandbox account. Administrators can view the sandbox expiration date on the Sandbox Account page.

Administrators of sandbox accounts receive email notifications before a sandbox account expires, so they can renew the account without experiencing an interruption of sandbox availability or potential data loss.

Administrators are notified by email several times before the expiration date, giving them plenty of time to renew the sandbox account. The first notification email is automatically generated one month before the sandbox expires. Notifications continue on a weekly basis until the sandbox account is renewed. If the sandbox account is not renewed, a final notification email arrives on the expiration date.

 **Note:** Contact your NetSuite account representative to renew your account before it expires.


There is a 30-day grace period after expiration during which an inactive sandbox account can be re-activated and the data retained. If you do not renew the sandbox account before this grace period ends, the sandbox is deleted and the data is purged. If your account has expired, contact your NetSuite account representative for more information.

 **Warning:** Data from expired sandbox accounts is purged after 30 days and cannot be recovered.

## Setting Preferences for Sandbox Email

When you use a sandbox account, anyone with the Administrator role can set a preference for delivery of email messages from the sandbox account. It is recommended that you choose the **Send Email To** option. You can enter specific email addresses (separated by commas) giving you complete control over exactly who receives email messages from your sandbox.

For example, if you are testing marketing campaigns in your sandbox account, you might not want customers to receive email messages generated by those campaigns until they have been finalized and rolled out in your production account. You might want email messages from your sandbox account delivered only to yourself, or to the people in your organization who are responsible for designing the new campaigns. You might want to ensure email messages generated from sandbox web stores are not delivered to recipients outside your organization. In all these cases, choose the **Send Email To** option.

 **Important:** Email messages generated from sandbox web stores will not be sent to the user logged in to the NetSuite UI. For example, an order notification email message would be sent to the shopper's email address, not the logged in user's email address. To prevent this, choose the **Send Email To** option.

There are exceptions to the email routing rules you specify. Security-sensitive emails will be always sent to the actual owner of the email address. For example, password reset emails do not obey preferences that override routing rules.

Examples of security-sensitive emails include:

- Reset Password
- Change Password
- Change Email Address
- Security Questions (Setup or Update)
- Two-Factor Authentication Setup
- One-Time Password

Set preferences for sandbox email delivery in your production account on the Email Preferences page.

### To set email delivery preferences for all sandbox accounts:

1. Log in to your NetSuite production account.
2. Go to Setup > Company > Email > Email Preferences.
3. Choose your preference on the **Sandbox and Release Preview** subtab. Under **Sandbox Options**, choose from the following:

Option	Description
<b>Send Email To</b> (This is the recommended option.)	<p>Choose this option to ensure email messages are delivered to specific addresses.</p> <ul style="list-style-type: none"> <li>Enter the email address or email addresses to which to deliver email messages. Separate each email address entered with a comma.</li> <li>Choose this option when testing your web store in your sandbox. This option ensures web store generated email messages are routed to the desired recipient.</li> </ul>
<b>Send Email to Logged In User</b>	<p>Choose this option to route email messages to the user logged in to the NetSuite UI.</p> <p>If you select this option, be aware of the following behaviors:</p> <ul style="list-style-type: none"> <li>Email messages initiated by an error in a scheduled script follow the notification settings in the script record.</li> <li>Email messages generated from web stores will not be sent to the user logged in to the NetSuite UI. For example, an order notification email message would be sent to the shopper's email address, not the logged in user's email address. To prevent this, choose the <b>Send Email To</b> option instead.</li> </ul>
<b>Do Not Send Emails</b>	Choose this option if you do not want any email messages sent.

- Click **Save**.
- On the Sandbox Accounts page, click **Copy Data to Sandbox** (or **Refresh Sandbox**). Your email delivery preferences are applied to all your sandbox accounts.



**Important:** During the upgrade period for a new release of NetSuite, please pay attention to your scheduled upgrade date. Do not request a sandbox refresh when the upgrade date is near. A refresh will fail if it does not complete before your scheduled upgrade begins. See [Scheduled Version Upgrade Dates and Refresh Requests](#).

After your sandbox account has been refreshed, you can log in to modify your email preferences directly on the sandbox account. This way, if you use multiple sandbox accounts, you can set different preferences for email delivery in each account.



**Note:** Upon refresh, the settings in your sandbox accounts always revert to the sandbox email preferences you set in your production account.

# FAQ: NetSuite Sandbox

See the following for answers to common questions about NetSuite sandboxes.

## I do not see my new sandbox when I log in. Why not?

When you are notified that your new sandbox has been provisioned, the initial account status of the sandbox is **Offline** and the refresh status is **Pending Copy to Sandbox**. Your company's NetSuite account administrator must log in to your production account, go to the Sandbox Accounts page, and click the **Copy Data to Sandbox** button. Clicking the button initiates the copy of production data to the sandbox. When the data copy is complete, on the Sandbox Accounts page, the sandbox account status displays a green check (✓) indicating the sandbox is online and available.

For more information, see [Using the Sandbox Accounts Page](#).

## What is the difference between a sandbox on the sandbox domain and a sandbox on the NetSuite domain?

The original sandboxes offered by NetSuite were all hosted on the sandbox domain. In 2016.1, NetSuite introduced sandboxes for customers with production accounts hosted in European Union (EU) data centers, now referred to as sandbox accounts on the NetSuite domain. These sandbox accounts can be accessed by logging in at <https://system.netsuite.com> and selecting the sandbox account from the Choose Role page. Currently, all sandboxes are being transitioned to the NetSuite domain. For customers in North American (NA) data centers, the transition occurs when a sandbox is refreshed.

For more information about sandboxes, see [NetSuite Sandbox](#) and [Sandbox Pre-transition Checklist](#). See also [Features Available for Testing in a Sandbox](#).

## How can I tell what kind of sandbox I have?

There are several ways to determine what kind of sandbox you have:

- The Sandbox Accounts page. See [Using the Sandbox Accounts Page](#).
- The way you access your sandbox account. See [Logging in to Your Sandbox Account](#), and [About Sandbox Accounts on the NetSuite Domain](#).

## What is the difference between a sandbox account and a development account?

Sandboxes are intended for full end-to-end testing, using your production data. Development accounts are intended for unit testing, and should only contain test data. Development accounts also provide access to both leading and lagging NetSuite versions, allowing you to test against the current version of software, and against the new version of software when it becomes available.

For more information, see [NetSuite Development Accounts](#), [Understanding NetSuite Account Types](#), and [NetSuite Sandbox](#).

For information about working in these different types of accounts with SuiteApps (bundles), see the help topics [SuiteApps and Sandbox Accounts](#) and [SuiteApp Development Process with SuiteBundler](#).

## What features can I test in a sandbox?

Many NetSuite features can be tested in sandbox accounts. For more information, see [Features Available for Testing in a Sandbox](#). The **Testing Notes** column in the **Testing Features in a Sandbox** table contains details about differences that might affect how you test the feature.

## I do not see all my production data in my sandbox. Why not?

For various reasons, not all data in your production account is copied to a sandbox. See [Data That is Not Copied from Production to Sandbox](#) for more information.

## My account has more than one sandbox. How do I switch between sandboxes?

If multiple sandbox accounts are associated with a single production account, users and their assigned roles are duplicated across these accounts.

Each user has a separate role for each sandbox account on the Choose Role page and in the Change Roles list. Sandbox roles are identified by the SB icon in the Change Roles list and by the label SANDBOX in the Account Type column on the Choose Role page.

- For sandbox accounts on the sandbox domain: The URL to log in to a sandbox account on the sandbox domain is `system.sandbox.netsuite.com`. A user can switch between sandbox accounts by switching roles in the Change Roles list. For more information, see [NetSuite Sandbox](#) and [Working with Multiple Sandbox Accounts](#).
- For sandbox accounts on the NetSuite domain: The URL to log in to a sandbox account on the NetSuite domain is `system.netsuite.com`. A user can switch between production roles and sandbox roles in the Change Roles list. For more information, see [About Sandbox Accounts on the NetSuite Domain](#).

**Note:** To help distinguish between multiple accounts, you can change the name of each account by going to **Setup > Company > Company Information** and changing the **Company Name**. Users could also color code accounts by changing the **Color Theme** under **Settings > Set Preferences > Appearance**. These measures will need to be reset after each refresh.

## How do I add (or remove) individual users access to a sandbox?

After a sandbox has been refreshed, account administrators can grant individual users access to this sandbox. See [Granting Access to Your Sandbox Account](#) for information on adding and removing access for individual users to your sandbox account.

# About Sandbox Refreshes

## What determines the Production Snapshot Date?

The Production Snapshot Date field on the Sandbox Accounts page displays the date and time of the production snapshot used for the most recent refresh. The snapshot is copied from the database backup from the night before the sandbox refresh actually begins. This date is not necessarily the same as the date the refresh was requested. It depends on the date when your refresh request starts processing.


The production snapshot is usually taken from the backup that occurred the night before the actual refresh starts. However, there are occasions when a backup is not suitable for creating the snapshot. In these rare cases, the snapshot is taken from the most recent suitable backup of the production database.

It is not possible to guarantee a specific date or time to be used for the production snapshot.

## Why is the Refresh Sandbox button missing from the Sandbox Accounts page?

You will not see the Refresh Sandbox button or the Copy Data to Sandbox button on the Sandbox Accounts page in the following circumstances:

- When a refresh request is already in progress.
- When the sandbox has been taken offline for a NetSuite version upgrade.
- During NetSuite version upgrades, except in cases where the sandbox account and its associated production account are running the same version of NetSuite.

 **Note:** When they are not running the same version, the Refresh Status field will display a popup with a **version mismatch** error message.

### How long does it take for my sandbox to be refreshed?

Various factors determine how long it takes to refresh your sandbox, including the size of your production account (the amount of data), the number of integrations in your production account, and the number of customers requesting a sandbox refresh during the same time period as your request was submitted.

### Can I cancel my sandbox refresh request?

It is not possible to cancel a refresh request.

A refresh completely replaces the content of the sandbox account with the content of the production account. After your sandbox account has been refreshed from production, it cannot be restored to its prior state. Before submitting a request to refresh a sandbox account, please ensure that your company is fully notified and ready for the refresh from production. Your refresh request cannot be canceled or otherwise modified in any way after it has been accepted.

### I have some important data I want to keep in my sandbox. Can my data be saved during the next refresh?

A sandbox is not intended for storage of data. A refresh completely replaces the content of the sandbox account with the content of the production account snapshot. Any data that exists in a sandbox before a refresh is requested is overwritten by the refresh.

### What happens to my sandbox during a NetSuite version upgrade?

All sandbox accounts on the sandbox domain are taken offline for upgrade at 4 pm Friday Pacific Time (regardless of region) the same day of the production account upgrade. All sandbox accounts on the NetSuite domain are taken offline for upgrade at the same time the production account is taken offline for upgrade. For more information, see [Scheduled Version Upgrade Dates and Refresh Requests](#).

### My NetSuite version upgrade date is near, should I refresh my sandbox?

Do not request a sandbox refresh when the upgrade date is near. A sandbox refresh request will fail if it does not complete before your scheduled version upgrade begins.

Use your best judgement to decide when to request a sandbox refresh during the version upgrade period for a NetSuite release. For guidelines, see [Scheduled Version Upgrade Dates and Refresh Requests](#).

### What does the refresh status Delayed mean?

On the Sandbox Accounts page, when the refresh status field displays **Delayed**, it indicates the refresh progress has stalled for some reason. When a sandbox refresh status is changed to Delayed, the Estimated Refresh Time field is blank. When the refresh resumes, the estimated refresh time is recalculated, and the new value is displayed in the Estimated Refresh Time field.



# NetSuite Development Accounts

NetSuite development accounts are isolated from your production account, in which you can develop and test new applications and customizations without worrying about affecting your production account.

The best time to begin using development accounts is at the start of a new project. It can be difficult to migrate to a development account if you are already in the middle of a development project in your sandbox. You should finish existing projects in your sandbox, and start new projects in a development account.

**Note:** You need multiple sandbox accounts if you have multiple large projects which need distinct accounts for User Acceptance Testing (UAT).

Development accounts have the same features and NetSuite-provisioned SuiteApps as your company's production account, but do not contain any production data. You can populate the account with only the data you need for development and testing purposes.

One of the benefits of using a development account is that you can, for example, let outside partners develop something for you. This is one reason that NetSuite recommends you enter only non-sensitive test data in development accounts.

**Warning:** Do not enter sensitive information or any real customer data, such as contact information or credit card numbers, in development accounts. Transactions will be processed and invoices will be generated.

**Note:** Email messages sent from development accounts are delivered to the logged-in user.

Development accounts are never refreshed, unlike sandbox accounts, so you never have to worry about your work in progress being accidentally overwritten by a refresh.

Development accounts provide ideal places for:

- Creating new applications and customizations.
- Testing customization elements before deployment.
- Fixing issues with existing customizations.
- Trying out third-party integration features.

Actions you take in development accounts, such as transaction entries, record deletions, and form customizations, have no effect on your NetSuite production account. However, development accounts are not guarded from external touch points in the same way as sandbox and Release Preview accounts can be. For example, in sandbox and Release Preview, you can specify how you want email to be handled in these accounts. You cannot configure email delivery from a development account in a similar manner. Email messages sent from development accounts are delivered to the logged-in user.

- For recommended best practices for using development accounts with SuiteBundler, see the help topic [SuiteApp Development Process with SuiteBundler](#).
- For information on acquiring one or more development accounts, contact your NetSuite account representative.

Administrators can change the name of each development account at Setup > Company Information to make it easier to distinguish among these accounts. Development accounts are not refreshed, unlike sandbox accounts, so these changes will not be overwritten.

## Features Available in Development Accounts

The development account is different from a sandbox account, in that the development account does not contain a copy of your production data. When the development account is provisioned, NetSuite makes available the same features and NetSuite-provisioned SuiteApps that are available in your production account. SuiteApps created by third parties are not included in development accounts when they are provisioned. Any customization object can be created or installed into these accounts with SuiteBundler. See the help topic [SuiteApp Development Process with SuiteBundler](#).

**Warning:** Do not enter sensitive information or any real customer data, such as contact information or credit card numbers, in development accounts. Transactions will be processed and invoices will be generated.

**Note:** Email messages sent from development accounts are delivered to the logged-in user.

## Logging in to Development Accounts

Users access development accounts in the same way that they access their production account. They can open a browser window and go to `system.netsuite.com` and enter their email address and password on the login page. Their role in a development account can be selected from the Choose Role page or Change Roles list. The appropriate role to choose is identified in the Account Type column on the Choose Role page.

ORACLE | NETSUITE

Search

?

Help

Jane Wolfe

Wolfe Electronics - Administrator

★

Activities

Transactions

Lists

Reports

Documents

Setup

Customization

Support

Choose Role

SHOW INACTIVES

TOTAL: 3

DEFAULT ROLE	ROLE	COMPANY	ACCOUNT TYPE ▲	LAST LOGIN
<input type="checkbox"/>	Administrator	Wolfe Electronics	DEVELOPMENT	3/14/2017 1:22 pm
<input checked="" type="checkbox"/>	Administrator	Wolfe Electronics	PRODUCTION	3/14/2017 5:37 am
<input type="checkbox"/>	Administrator	Wolfe Electronics	SANDBOX	3/7/2017 7:23 am

By default, new development accounts are only accessible to the administrator for whom the account was provisioned. This administrator can create up to 10 users for each account. See [Granting Access to Development Accounts](#). Users who need access to development accounts should contact this administrator.


## Granting Access to Development Accounts

Account administrators can select 10 users who can access each development account. Users must be created separately in each development account.

### To grant development account access to a user:

1. Log in to a development account. See [Logging in to Development Accounts](#).  
<https://system.netsuite.com>

2. Go to Lists > Employees > Employees > New and create an employee record for the user.


 **Note:** If this user is an employee in your production account, you can enter the username, email address, assign a role, and check the Give Access box on the Access subtab. You do not need to enter a password. When prompted whether the user should inherit the password from the production account, click Yes. For more information about creating an employee record, see the help topic [Adding an Employee](#).

3. Click **Save**.

The employee to whom you have granted access can now log in to this development account.

## Contacting Support for Development Account Issues

To report problems with your development account in this release, create a support case. You will need to provide your account ID when creating a case. Go to Setup > Company > Company Information to view the Account ID field, located below the Time Zone field in the right column.

 **Important:** The way you contact NetSuite Support, and the way you create a case varies depending on the level of support purchased with your account.

You can submit a question or issue online to NetSuite support professionals. You can send questions or comments by email 24 hours a day. You will receive a response by email as soon as possible. Response times vary depending on the level of support you have purchased and the support team's current case load. To improve response times, please provide lots of information (more is better), and if applicable, include steps to reproduce the problem.

**Contact Support by Phone** is available to customers with Gold or Platinum support, and to eligible NetSuite Partners, 24 hour a day, seven days a week. Call the number provided by your account manager. Please have your account number ready when you call for quicker assistance.

# Performance Best Practices

This section outlines some commonly used best practices for optimizing NetSuite performance. The following topics introduce some suggested guidelines:

- [Optimizing SuiteScript Performance](#)
- [Optimizing SuiteTalk Performance](#)
- [Optimizing SuiteFlow Performance](#)
- [Optimizing Custom Form Performance](#)

Other resources for managing NetSuite performance include:

- The Application Performance Management (Beta) SuiteApp supports observation and performance management of NetSuite customizations and business critical operations. See the help topic [Application Performance Management \(APM\)](#).
- The purchase of a SuiteCloud Plus license can enhance performance by increasing the threads available for Web services through support of a concurrent Web services user, increasing the number of SuiteCloud processors or queues available for scheduled scripts, and increasing the number of queues and threads available for CSV import jobs. For more details, see [SuiteCloud Plus Settings](#).
- Help topics in the [Troubleshooting Performance Issues](#) section provides tips for handling various NetSuite application performance issues compiled by NetSuite Customer Support.
- [Increasing Speed and Performance in NetSuite](#) provides additional tips for optimizing performance of the NetSuite user interface.
- [Script Optimization](#) provides additional tips for optimizing performance of SuiteScripts.
- [Best Practices for Website Performance](#) provides recommendations to optimizing performance on websites built with NetSuite Site Builder.
- The SuiteApp Architectural Fundamentals & Examples (SAFE) Guide, provided for ISVs (independent software vendors) who build custom SuiteApp solutions for deployment into customer accounts, includes a variety of best practices, some of which relate to performance optimization. See [https://netsuite.custhelp.com/app/answers/detail/a\\_id/30364/kw/SuiteApps%20Architectural%20Fundamentals%20Guide](https://netsuite.custhelp.com/app/answers/detail/a_id/30364/kw/SuiteApps%20Architectural%20Fundamentals%20Guide) in SuiteAnswers.

## Optimizing SuiteScript Performance

Check to see if there are custom scripts in your account at Customization > Scripting > Scripts. The following guidelines are suggested to optimize script performance:

- [General Scripting Guidelines](#)
- [Accessing Records in Scripts](#)
- [Scripting Searches](#)

## General Scripting Guidelines

- Save retrieved values on a variable and use again on succeeding calls.
- Execute a block of code only if it satisfies a condition.
- Remove redundant operations or actions and lines of code which are no longer used within the script execution.

- Remove duplicate logic on a script that is already performed by other events.
- Combine similar scripts/functions whenever possible.
- Inactivate scripts/deployments that are no longer needed.
- Utilize asynchronous processing for user events.
- Use built-in permissions (by leveraging Run as Role) instead of scripting permissions.
- Utilize `nlapiSubmitField()` instead of `nlapiSubmitRecord()`.
- Utilize `nlapiLookupField()` instead of `nlapiLoadRecord()`.

## Accessing Records in Scripts

- Retrieve records in read-only mode using `nlapiGetNewRecord()`.
- Do not set field values on the record object returned by `nlapiGetNewRecord()` because it is read-only.
- If applicable, change the trigger of a script to avoid reloading a record.
- Avoid using multiple calls to `nlapiLoadRecord` as part of a trial and error approach.
- Avoid saving records multiple times in an After Record Submit event.
- Avoid loading and submitting a record on a Before Record Submit trigger.
- Minimize API calls that perform load, search, or save record operations.

## Scripting Searches

- Optimize search filters and columns. Make your search results faster by:
  - Filtering inactive records.
  - Entering shorter date range criteria.
  - Using faster operators such as starts with/between/within instead of contains/formulas.
  - Removing unnecessary columns.
- Add fields to search results columns to avoid using `nlapiLoadRecord` or `nlapiLookupField`. This improves performance by eliminating the operation of loading the entire `nlobjRecord`.
- Remove search results columns that are not used by a script. Comment out any lines that add columns to search results, here the returned values are not used by the succeeding script logic.
- Combine searches of the same record type by using merged filters. Wherever possible, combine searches for the same record into one main search with merged filters. This improves performance by minimizing search instances.

## Optimizing SuiteTalk Performance

The following guidelines are suggested to optimize web services performance:

- Request Level Credentials mechanism is preferred.
- Use a Web Services Only form to minimize time to retrieve field values, included sourced fields and formula fields.
- Advanced Search allows reference to an existing saved search.
- Use context API to run minimal user event scripts for real time integration.

- Disable SuiteScript and workflow triggers for historical data imports.
- Use list operations when possible. This approach works with multiple record types, for example, addList Customer then Sales Order. The ideal list size is ~20 transactions, 50 entities/items, and 100 custom records.
- Optimize system notes logging.
  - Disable System Notes for custom fields (SOAP preference).
  - Log System Notes on update only (general preference).
  - Disable System Notes for custom record type.

## Optimizing SuiteFlow Performance

The following guidelines are suggested to optimize workflow performance:

- Combine multiple workflows that have the same logic and functions into a single workflow.
- Filter workflow execution by execution context and/or event type.
- Scheduled workflows that operate on records with static data, or data that does not change often, can be converted to event-based workflows instead. This way, the workflows do not execute on the records unnecessarily.

## Optimizing Custom Form Performance

To optimize form performance, use a minimalist approach with your custom forms. Ensure that you:

- Use the fewest fields and sublists possible.
- Minimize client scripts and workflows on forms, and manage them carefully.
- Implement server callbacks only as required.
- Use the free browser tool to audit the scripts on a form page

# Increasing Speed and Performance in NetSuite

In general terms, performance indicates how well a computer system or application is doing the work it is supposed to do.

The NetSuite application is designed to use bandwidth more efficiently than many other websites. In technical terms, NetSuite delivers a lower binary-to-text ratio than most websites, and we use patent-pending browser-side caching algorithms to further reduce bandwidth requirements. The actual bandwidth required will vary for each account, depending upon the number of users and how NetSuite is used. A user of a typical NetSuite account does not require more than 56 Kbps of dedicated bandwidth.

Now that you know NetSuite is designed for optimal bandwidth performance, here are some other topics covering how to further optimize the performance of the NetSuite application on your computer.

- [Identifying Performance Issues](#)
- [Improving Server Performance](#)
- [Improving Network Performance](#)
- [Improving Client Performance](#)
- [Speeding up your Searches and Reports](#)

The following sections describe some basic steps for optimizing NetSuite performance.

- [Adjusting NetSuite Preferences](#)
- [Adjusting Browser Settings](#)
- [Configuring Dashboard Portlets](#)

For tips to manage search and reporting performance, please read:

- [Optimizing Search Performance](#)
- [Scheduling Long Running Reports](#)

For tips to manage script-related performance issues, please read:

- [User Event Best Practices](#)
- [How Many User Events Can I Have on One Record?](#)

The following tip can help troubleshoot general performance issues:

- [Using a Trace Route to Troubleshoot Performance Issues](#)

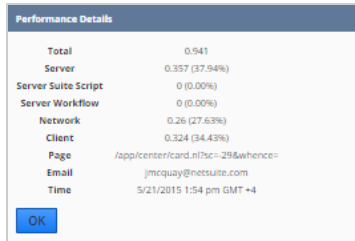
## Identifying Performance Issues

Several different factors can contribute to performance issues. For example, slow performance in the NetSuite application could be due to slow performance on a server at NetSuite, network performance, or the performance of your computer, also known as client performance.

The information below can help you to identify the source of the performance issue you may be experiencing, and provide guidance for troubleshooting. You can also find useful data to give NetSuite customer support if needed.

## Gathering Performance Details

To help identify performance issues, you can double-click the Oracle | NetSuite logo in the upper left corner of any page in the NetSuite application to display Performance Details. This window is also known as the Page Email and Time (or PET) window. It collects performance details that can be helpful for troubleshooting. If necessary, you can copy the information displayed to provide data to NetSuite Customer Support.



Performance Details	
Total	0.941
Server	0.357 (37.94%)
Server Suite Script	0 (0.00%)
Server Workflow	0 (0.00%)
Network	0.26 (27.63%)
Client	0.324 (34.43%)
Page	/app/center/card.nl?sc=29&whence=
Email	jmcquay@netsuite.com
Time	5/21/2015 1:54 pm GMT +4
OK	

The Performance Details (or PET) window includes the following data:

- **Total** – Displays total page load time in seconds.

**Note:** This data may not apply to reports, dashboards, centers, or saved searches.

- **Server** – Displays the percentage of the total page load time spent on retrieving information from the NetSuite server.  
If this row has the highest percentage in the list, see [Improving Server Performance](#).
- **Server SuiteScript** – Displays as a percentage the server time that was spent on server-side scripting.
- **Server Workflow** – Displays as a percentage the amount of server time that was spent on workflows.
- **Network** – Displays the percentage of the total page load time it takes for data to travel from the NetSuite servers to your computer.  
If this row has the highest percentage in the list, the problem could be related to your Internet Service provider (ISP). See [Improving Network Performance](#).
- **Client** – Displays the percentage of the total page load time it takes for your computer to render the page.  
If this row has the highest percentage in the list, see [Improving Client Performance](#).
- **Page** – Displays the Web address of the page you are viewing in the application.
- **Email** – Displays your email address.
- **Time** – Displays system date and time.

The information in the Performance Details window is based on the data sent to the client from the server. Occasionally, when the end to end time metric is not sent from the server, only the client, page, email and time are shown.

If you experience slow performance consistently on a certain page, then use the information displayed in the Performance Details (or PET) window to create a case with NetSuite Customer Support.

### To copy performance details into a support case:

1. Double-click the Oracle | NetSuite logo at the top left of the page that exhibits slow performance.
2. Select all the text in the window, and copy.



3. Click the **Support** tab.
4. Click the **SuiteAnswers** link.
5. On the SuiteAnswers site, select **Contact Support Online**.
6. In the **What would you like to do?** field, select **Report a performance problem**.
7. Paste the text into the **Message** field.
8. Click **Submit**.

## Improving Server Performance

Sever performance is measured as the time spent retrieving data from a NetSuite server. Adjusting NetSuite preferences can also improve server performance.

### Adjusting NetSuite Preferences

NetSuite includes many preferences that you can modify to configure your system for optimum performance. To review available preference options, go to Home > Set Preferences.

Adjust the following preferences to speed page loading:

- On the Appearance subtab, Centers & Dashboards section, set the **Landing Page** preference to open NetSuite to a page other than the Home page. You can set this preference to open NetSuite on the page that you visit most frequently.
- On the General subtab, Optimizing NetSuite section:
  - Enable the **Delay Loading of Sublists** preference to initially load NetSuite pages without data on subtabs.  
When this preference is enabled, the data on each subtab is loaded only when the subtab is clicked. This shortens the initial page loading time.
  - Set the **Number of Rows in List Segments** field to a lower number to speed the loading of pages containing long lists.  
NetSuite recommends a segment size of 50. When a page includes a long list of records, the list is divided into segments, with one segment loaded at a time. Resetting this preference decreases the size of each segment.
  - Set the **Maximum Entries in Dropdowns** field to a lower number to speed the loading of pages containing dropdown lists with large numbers of options.  
A setting of 50 or less is recommended, unless you find your workflow requires larger menus. Any list with more results than this setting appears in a popup instead of a dropdown list. Using popups speeds page load time.
    - With dropdown lists, all values in a list are loaded when you access a page.
    - With popup list fields, the lists are not loaded until you search for an item or click the list icon. You can quickly search and automatically complete fields by entering the first few letters of the item and pressing the Tab key.

### Speeding up your Searches and Reports

Displaying many thousands of rows of search results or report data can put considerable load on a NetSuite server. Consequently, you may experience a delay in the display of your search results, or your report.

The topics below describe ways in which you can optimize NetSuite to display your search results and reports more quickly.

- [Optimizing Search Performance](#)
- [Scheduling Long Running Reports](#)

## Optimizing Search Performance

NetSuite provides powerful search capabilities that enable you to retrieve the precise information you need from a potentially vast amount of stored data. However, going through a large number of stored records can slow down search results. Review the following tips for managing search performance.

For information about different types of NetSuite searches, see the help topic [Search Overview](#). For details about preferences you can set for searches, go to Home > Set Preferences, and click on field names on the Analytics subtab.

### Avoiding the “Contains” Condition in Searches

The contains condition is one of the most resource-expensive search mechanisms. Try to replace this condition wherever possible to improve search performance:

- If all the records you want to retrieve begin with the value you are attempting to match, use “starts with” or “keywords” instead of “contains”.  
For example, if you are searching for all records for customers with names beginning with “Goldman”, such as “Goldman Sachs-NY” and “Goldman Sachs-SF”, you can define search criteria of “Name/ID starts with Goldman”, rather than “Name/ID contains Goldman”.
- If all the records you want to retrieve contain words beginning with the value you are attempting to match, use “has keywords” instead of “contains”.  
For example, if you are searching for all records for customers with the word “Toys” in their names, such as “KayBee Toys” and “Toys R' Us”, you can define search criteria of “Name/ID has keywords TOYS”.

### Scheduling Long-Running Saved Searches

NetSuite offers you the option of scheduling saved searches and having results emailed to the recipients you choose, so you do not have to stop your work to wait for long-running searches. On the Email subtab of a Saved Search definition page, you can choose the date or dates when you want to run the search, and select one or more recipients for emailed search results. Scheduled saved searches are run at 2 a.m. Pacific time on selected dates. For more information, see the help topic [Enabling Saved Search Scheduled Email](#).


### Scheduling Long Running Reports

If you discover that a report takes a long time to return results, you can click **Schedule** in the footer of the report. Clicking the Schedule button opens the Schedule Report page where you can create a schedule to automatically email the report. Schedules can be created for standard and saved reports and can be sent to other users.

On the Schedule Report page you can select recipients, enter a message, and/or select attachments to include with the emailed report. You can then use the options on the Recurrence tab to define how often you want this report emailed to the recipients.

For more information, see the help topic [Scheduling a Report](#).

If performance of a scheduled report or saved search is abnormally slow, log a case with NetSuite Customer Support.

 **Warning:** If your report is not returning results quickly enough, **do not** repeatedly attempt to run it during the time that the original report is still running. Executing multiple reports at the same time can cause significant performance issues.

## Improving Network Performance

Network performance is measured as the time it takes for data to travel from a server at NetSuite to your computer. Some pages in NetSuite may take longer to load than others.


The following issues are symptoms of network performance problems:

- A form, such as a customer record, or transaction taking a long time to finish loading.
- A report taking a long time to display data on the page.

Use the Performance Details (or PET) window to determine if network time accounts for a large amount (for example, 25% or more) of the total time to bring up a slow page. For more information, see [Gathering Performance Details](#).

In the first half of the 2017 calendar year, we continued incorporating Content Delivery Networks, or CDNs, into our global distribution network. The use of a CDN in the global distribution network brings performance benefits to page load times in the NetSuite UI. All data centers currently have a CDN in the system network (<https://system.netsuite.com>).

The rollout of CDNs to the entire system network is complete, the CDNs that were on the system2 network (<https://system2.netsuite.com>) have been removed. Removing the CDNs from the system2 network provides an alternative CDN-free network for those customers who prefer to access NetSuite on a network that does not include CDNs.

 **Important:** After the incorporation of CDNs in the data center distribution network, you might have noticed a change to the range of IP addresses that correspond to a \*.netsuite.com URL, such as system.netsuite.com. The CDN provider is responsible for assigning IP addresses. We have no control over which IP addresses will be used to serve \*.netsuite.com requests. Customers who use IP address ranges as a means for light security need to be aware of this change. If you are programming a firewall to accept inbound requests from NetSuite, please accept inbound requests from all \*.netsuite.com sources.

If you notice persistent slowness due to network performance, see [Getting Help with Performance Issues from NetSuite Customer Support](#) to learn how to submit a case to NetSuite Customer Support.

## Improving Client Performance

Client performance is measured as the time it takes for your computer to render a page. Other applications running on your computer in addition to NetSuite are using your computer's resources. These applications may impact the performance of the NetSuite application on your computer.

Some client performance problems may appear in one browser and not in another. For example, some browsers may render pages faster than others. These differences may result from browser configuration, security defenders, and/or individual browser add-ons. For more details, see the help topic [Supported Browsers for NetSuite](#).

Also note that some NetSuite tasks require intensive resources, for example creation of a sales order with 200 items.

## Identifying Client Performance Issues

### To identify client performance issues:

1. Right-click the toolbar on your computer. Select **Start Task Manager**.
2. Click the **Processes** tab.
3. Click **Memory** to sort the processes based on memory usage, or RAM.

There are no universal requirements for the amount of Random Access Memory (RAM) or how fast a computer must be to run NetSuite. The requirements depend on the way your computer is being used and on the other applications running on your computer. For example, your computer may be able to run NetSuite but is not powerful enough to run NetSuite with your Voice Over IP (VOIP) application. Or, your computer is powerful enough to run your VOIP application and NetSuite at the same time, but cannot create a sales order that contains 200 line items.

## Troubleshooting Client Performance Issues

### To troubleshoot client performance issues:

1. Close all the applications you are not using. If you need to run more than one application consider increasing your computer resources.
2. Check your **Security Defender** (Anti Spyware/Virus/Phishing) firewall application. Some of these applications check the page before loading it on your browser; this check can cause a delay.
3. Remove any spyware that could be using your computer's resources.
4. Determine whether the issue is only happening for one type of form. Try to determine what is different about the form as compared to other forms that load more quickly.
5. Test on different browsers. You can install Firefox on your computer for free. Load the page using Firefox, then load the page using Internet Explorer. Use the browser that displays the page faster.
6. Determine whether there are add-ons running on your browser, like Anti Virus, Anti SPAM, or phishing? Eliminate browser add-ons, one by one, to identify the cause of the issue.
7. For more information about improving browser performance, see [Adjusting Browser Settings](#).

## Configuring Dashboard Portlets

NetSuite provides great flexibility for dashboard configuration, giving you the freedom to include a large number of portlets on every page. Be aware that the loading of real-time data for portlets can increase page loading times. For example, Key Performance Indicators portlets and custom saved search portlets may be slow to load.

When you are setting up your dashboard, consider ways to manage page loading performance.

- If you would like easy access to a portlet's information but do not need to see it right on your dashboard, consider adding a shortcut in the shortcuts portlet, rather than placing an additional portlet on the dashboard. For information, see the help topic [Shortcuts Portlet](#).
- If you want to include slow-loading portlets on your dashboard, you can avoid loading their data at initial page load by minimizing them.

To minimize a portlet, click the portlet's title.

Then, after a page has been loaded, you can click the title of a minimized portlet to display the data.

## Adjusting Browser Settings

In some cases slow performance in the NetSuite user interface or in a web store may be caused by browser issues.

### To verify whether a performance issue is caused by the browser:

1. Check the browser version.
  - Verify that the browser version is supported by NetSuite. For more information, see the help topic [Supported Browsers for NetSuite](#).
  - Ensure that you are using the latest version of the browser.
  - Use of trial, development, or early adoption browser versions is not recommended.
2. Check whether the problem is occurring on other supported browsers.

Adjusting browser settings to cache pages in your Web browser enables you to quickly access the pages you visit frequently. These adjustments make pages load faster and reduce the possibility of JavaScript error messages.

NetSuite recommends that you adjust browser settings to maximize your NetSuite performance. For information, see:

- [Caching Pages in Internet Explorer](#)
- [Caching Pages in Firefox](#)
- [Enabling Caching of Secure Pages in Firefox](#)
- [Caching Pages in Chrome](#)

## Caching Pages in Internet Explorer

### To cache pages and improve performance in Internet Explorer:

1. In your browser header, go to Tools > Internet Options.
2. On the **General** tab, in the Temporary Internet Files or Browsing history section, click **Settings**.
  - a. In the Check for newer versions of stored pages section, select **Automatically**.



**Warning:** Do not choose the Never option. The Never option does not significantly improve performance but **can** create security issues by delivering Web pages that contain expired data.

- b. In the Temporary Internet files folder section, set **Amount of disk space to use:** to 50MB.
  - c. Click **OK**.
3. Click the **Security** tab.
  - a. Click the **Trusted Sites** icon, and then click the **Sites** button.
  - b. Enter the address **https://\*.netsuite.com** and click **Add**.
  - c. Click **OK**.
4. Click the **Privacy** tab.

The Settings section should not require any changes.

Oracle recommends setting the slider to **Medium** or **Medium High**.

Setting privacy to **High** requires that you manually enter **https://system.netsuite.com**, **https://checkout.netsuite.com**, and **https://www.netsuite.com** as allowed sites by clicking the **Sites** button.

5. In the Pop-up Blocker section, if the **Block pop-ups** box is checked, click **Settings**.
  - a. Enter the address **system.netsuite.com**, and click **Add**.
  - b. Click **Close**.
6. Click the **Advanced** tab.
  - a. Under the HTTP 1.1 section ensure that both the **Use HTTP 1.1** and **Use HTTP 1.1 through proxy connections** boxes are checked.  
These settings guarantee that all content on a page is delivered as rapidly as possible.
  - b. Under the Security section, clear the box for **Do not save encrypted pages to disk**.  
If you must ensure that none of your cached content is ever accessible, check the **Empty Temporary Internet Files folder when browser is closed** box instead. This will cause NetSuite to perform more slowly upon login, but all subsequent pages will perform well.
7. Click **Apply**, and then click **OK**.

## Caching Pages in Firefox

### To cache pages in Firefox:

1. In the browser heading, go to Tools > Options.
2. Click the **Advanced** icon.
3. In the Cache section, edit your settings to "Use up to: **50 MB** of disk space for the cache."
4. Click **OK**.

Close all open browser windows after changing your settings, and then open a new browser window before logging back in to your NetSuite account.

If you encounter JavaScript errors after making these changes, hold down the Ctrl key and click the Refresh button in your browser. This forces an update of your cached JavaScript files.

If this change does not result in performance improvements, you can check to see whether the caching of secure pages currently is enabled.

## Enabling Caching of Secure Pages in Firefox

Note that client performance can be adversely impacted because of the default setting in Firefox not to cache secure pages.

### To enable caching in Firefox for secure pages (<https://system.netsuite.com>):

1. Open a Firefox browser window.
2. In the address bar, type the text below:

```
about:config
```

3. Click **Go**.

4. Scroll down to the preference **browser.cache.disk\_cache\_ssl**.
5. Right-click on the preference line and select **Toggle** to set the Value to "true."

Firefox now caches secure pages, including all <https://system.netsuite.com> pages. By caching these pages, Firefox can load pages more quickly.

## Caching Pages in Chrome

Chrome comes with most caching optimization in place, so no manual configuration is required.

# Troubleshooting Performance Issues

This section provides tips for handling various NetSuite application performance issues. Each topic includes suggested steps you can take to improve slow performance for a specific aspect of NetSuite. This information has been compiled by NetSuite Customer Support, based on their experiences troubleshooting performance issues.

Before consulting the troubleshooting tips, check [status.netsuite.com](https://status.netsuite.com) to see if there are any system issues currently being addressed, and the resolution path.

To help with troubleshooting performance issues, use the Application Performance Management (APM) SuiteApp to monitor and manage NetSuite performance for business critical operations. APM compiles information into a performance dashboard that highlights performance issues and anomalies, and links to more detail. For more information, see the help topic [Application Performance Management \(APM\)](#).

See the following topics for help with performance issues:

- [Slow Loading of Dropdown Lists](#)
- [Slow Display of Transaction Line Item Values](#)
- [Slow Performance when Adding Transaction Line Items](#)
- [Slow Loading of List Rows](#)
- [Slow Loading of Sublist Rows](#)
- [Slow-Running Report](#)
- [Slow-Running Saved Search](#)
- [Slow Export of Report or Saved Search Results](#)
- [Slow Execution of a Single Action on a Record](#)
- [Slow Load of a Standard List Page](#)
- [Slow-Running Bulk Process](#)
- [Slow Loading of Key Performance Indicators](#)
- [Slow CSV Import](#)
- [Slow Web Services](#)
- [Slow Loading of a Website Page](#)
- [Slow Loading of an Online Customer Form Embedded in a Website](#)
- [Slow Loading of an Online Case Form Embedded in a Website](#)
- [Slow Web Store Checkout](#)
- [Getting Help with Performance Issues from NetSuite Customer Support](#)

## Slow Loading of Dropdown Lists

Dropdown lists allow users to select values and are widely used in the NetSuite application.

**If loading the dropdown list takes longer than usual:**

1. Check the **Maximum Entries in Dropdowns** field at Home > Set Preferences, on the **General** subtab, in the Optimizing NetSuite section. Set this value to 25 or less to reduce load times. For more information, see the help topic [Setting General Preferences](#).



2. If you are using Internet Explorer, check the **Prefer Native Select Fields Over NS Dropdowns in Internet Explorer** option at Home > Set Preferences on the **General** subtab, in the Optimizing NetSuite section. For more information, see the help topic [Setting General Preferences](#).
3. Check whether the [Editing a Custom Field](#).
  - a. If the field is a custom field:
    - To see what kind of custom field it is, go to Customization > Lists, Records, and Fields, and check the list of different custom fields to find the specific custom field.
    - Review the description of the field in [Kinds of Custom Fields](#).
    - Ensure that the basic properties of this kind of custom field are appropriate for the intended purpose.
    - For information about how to define a custom field see the help topic [Creating a Custom Field](#).
  - b. If the field is a standard field, contact NetSuite Customer Support.
4. Check whether a client script function is being triggered.
  - See the help topic [The Scripted Records Page](#).
  - Be aware that the following client script functions may affect fields:
    - Validate Field
    - Field Changed
    - Post Sourcing

For more information see the help topics [Client Event Types](#) and [Client Script Best Practices](#).

## Slow Display of Transaction Line Item Values

When you are creating or editing a transaction, each time you add a line item, a list of available items displays for you to make a selection.

### If loading the list of available items to add on a transaction takes longer than usual:

1. Check the **Maximum Entries in Dropdowns** field at Home > Set Preferences on the **General** subtab, in the Optimizing NetSuite section. Set this value to 25 or less to reduce load times. For more information, see the help topic [Setting General Preferences](#).
2. Check whether the form is a standard or custom form.
  - a. If the form is customized, check its settings to see whether an item saved search is used to filter the items available to be added.
    - Go to Customization > Forms > Transaction Forms and edit the transaction form.
    - On the **Screen Fields** subtab, click the **Columns** subtab, and see whether the **Item Filter** dropdown list is populated.
    - If a saved search is selected in the **Item Filter** dropdown list, the performance problem may be related to the saved search.
      - Run the saved search to see if it runs slowly. If it does, the problem is related to the saved search.
      - Determine the number of item records returned by the saved search. See [Speeding up your Searches and Reports](#).
      - Check the criteria and results of the saved search to see if it can be enhanced to run faster. See the help topics [Defining an Advanced Search](#) and [Optimizing Search Performance](#).

- b. If the form is a standard form, contact NetSuite Customer Support.

## Slow Performance when Adding Transaction Line Items

Most transactions require you to enter one or more line items to account for the transaction total. Line items you enter determine the changes that post in NetSuite when you process the transaction. For more information, see the help topic [Entering Transaction Line Items](#).

**If there is a noticeable delay from the time an item is selected on a transaction line to the time it is added:**

1. Check whether a client script function is being triggered.

Be aware that the following client script functions may affect fields:

- Line Init
- Post Sourcing
- Validate Line
- Validate Insert
- Validate Delete
- Recalc

For more information see the help topics [Client Event Types](#) and [Client Script Best Practices](#).

## Slow Loading of List Rows

You can use NetSuite lists to access individual records or to work with multiple records at one time. For more information, see the help topic [Working with Lists](#).

**If loading a list takes longer than usual:**

1. Check the **Number of Rows in List Segments** field at Home > Set Preferences on the **General** subtab, in the Optimizing NetSuite section. Set this value to 25 or less to reduce load times. For more information, see the help topic [Setting General Preferences](#).
2. Check whether the list view is standard or custom.
3. If the list view is custom, switch to the default view and observe whether performance is still slow. See the help topic [Working with List Views, Sublist Views, and Dashboard Views](#).
4. If performance is faster with the default view, use that view or modify the custom list view for better performance.
  - For help editing a customized list view, see the help topic [Customizing List Views](#).
    - A best practice is to select only the columns that are needed. The selected fields for results and available filters affect performance because they determine the volume of data returned for display in the list.
  - For help using a saved search as a list view, see the help topic [Using a Saved Search as a View](#).
    - Determine the number of records returned by the saved search. For more information, see [Speeding up your Searches and Reports](#).
    - Check the criteria and results of the saved search to see if they can be limited. For more information, see the help topics [Defining an Advanced Search](#) and [Optimizing Search Performance](#).

- Run the saved search to check its performance. If it runs slowly, then the problem is with the saved search.
- 5. If the list is standard, contact NetSuite Customer Support.
- 6. If the list view cannot be customized, contact NetSuite Customer Support.

## Slow Loading of Sublist Rows

Sublists are lists that are viewed in a subtab.

### If loading a sublist takes longer than usual:

1. Check the account setting for loading of sublists (clear the Delay Loading of Sublists box on Setup > Company Preferences > General). If your records have a large number of sublists, enable this option. Load time of the page improves if the sublists are not on the initial tab.
2. Check whether the sublist view is standard or custom.
3. If the sublist view is custom, switch to the default view and observe whether performance is still slow. For more information, see the help topic [Working with List Views, Sublist Views, and Dashboard Views](#).
4. If performance is faster with the default view, use that view or modify the custom sublist view for better performance.
  - For help editing a customized sublist view, see the help topic [Customizing Sublist Views](#).
    - A best practice is to select only the columns that are needed. The selected fields for results and available filters affect performance because they determine the volume of data returned for display in the list.
  - For help using a saved search as a list view, see the help topic [Using a Saved Search as a View](#).
    - Determine the number of records returned by the saved search. For more information, see [Speeding up your Searches and Reports](#).
    - Check the criteria and results of the saved search to see if they can be limited. For more information, see the help topics [Defining an Advanced Search](#) and [Optimizing Search Performance](#).
    - Run the saved search to check its performance. If it runs slowly, then the problem is with the saved search.
5. If the sublist is standard, contact NetSuite Customer Support.

## Slow-Running Report

A large number of standard reports are available from the **Reports** tab. Customized versions of some reports may also be available.

### If loading report results takes longer than usual:

1. Check whether the report is standard or custom.
2. If the report is customized:
  - Determine the volume of data being returned. For more information, see [Speeding up your Searches and Reports](#).
  - Check the customizations applied to the report and assess whether these can be modified to get better results.
    - A best practice is to select only the columns that are needed.

- Consider scheduling the report to be run in the background, if you do not need real-time information. For more information, see [Scheduling Long Running Reports](#).
- 3. If the report is standard, contact NetSuite Customer Support.  
For a list of standard reports, see the help topic [Standard Reports](#).

## Slow-Running Saved Search

A saved search is a reusable search definition that can have many advanced search filters and results display options. After you have defined a saved search, the users designated as audience members can access the search by title from NetSuite saved search menus, or from links to search results.

### If loading search results takes longer than usual:

1. Check the settings of the search.
  - Determine the number of records being returned. For more information, see [Speeding up your Searches and Reports](#).
  - Check the criteria and results of the saved search to see if they can be modified for better performance.
    - A best practice is to select only the fields that are needed on the **Results** subtab.
    - You may be able to use a formula to simplify filter criteria. Large data gathered from multiple filters may display results faster when a single formula filter is used instead. For more information, see the help topic [Search Formula Examples and Tips](#).
2. Consider scheduling the saved search to be run in the background, if you do not need real-time information. See the help topic [Saved Search Email](#).
3. Consider using the high volume data export capability for saved searches. See the help topic [Persisting Search Results](#).

## Saved Search Custom Fields

If your saved search is slow, limit the use of saved search custom fields that run large aggregate searches. The number of queries executed grows with each saved search field.

All searches are run every time a record is loaded (to view or edit). The saved search custom field is not stored, and the search is executed each time the page loads. Instead of adding a field to the page, it is better to use a saved search page.

You can add a record ID filter to the saved search page to get the field value filtered by the record ID. This way, you do not slow down every page load.

## Slow Export of Report or Saved Search Results

You can export your report as a CSV file or a PDF file, or export the data to Microsoft® Word, or Microsoft® Excel. You also can export most NetSuite search results as a CSV file or a PDF file, or export the data to Microsoft® Excel.

### If exporting results from a report or a saved search takes longer than usual:

1. Determine the number of records being returned. For more information, see [Speeding up your Searches and Reports](#), and the SuiteAnswers article [Error Message: "This Search Has Timed Out" when trying to Export the Saved Search](#).

2. Compare the performance of exports to different file formats, to see if another file format has better performance. See the Comparing Export Formats section in [Exporting Reports, Searches, and Lists](#).
3. Perform a trace route to determine if there is an issue with the network.  
Exporting is similar to downloading data and requires a strong and stable internet connection. For more information, see [Using a Trace Route to Troubleshoot Performance Issues](#).
4. Areas of the world where network is heavily monitored (for example, China) may experience network-related issues when downloading reports. NetSuite is not the ISP and does not own the network monitoring. Using a VPN connection might help improve the download speed.

## Slow Execution of a Single Action on a Record

The actions that users can perform on a NetSuite record are view, edit, create, and delete.

### If completing an action on a record is taking longer than usual:

1. After the action has completed, review the Performance Details.  
You can double-click the Oracle | NetSuite logo in the upper left corner of any page in the NetSuite application to display Performance Details. This page is also known as the Page Email and Time (PET) window. For more information, see [Identifying Performance Issues](#).
  - If the largest portion of time is associated with the server:
    - See [Improving Server Performance](#) for tips.
    - Check whether SuiteScript time or workflow time make up a large portion of the server time. If so, see the help topics [User Event Best Practices](#) and the SuiteAnswers article [SuiteScript Best Practice: Convert After Submit to Before Submit Logic](#).
    - If further investigation is required, log a case with Customer Support.
  - If the largest portion of time is associated with the client:
    - See [Improving Client Performance](#) and the SuiteAnswers article [Client Side Performance Causes](#) for tips.
    - Determine whether the problem is related to the browser. See [Adjusting Browser Settings](#).
    - Determine whether a client script function is being triggered. See the following:
      - [The Scripted Records Page](#)
      - [Client Event Types](#)
      - [Client Script Best Practices](#)
  - If the largest portion of time is associated with the network:
    - Perform a trace route going to system.netsuite.com. See [Using a Trace Route to Troubleshoot Performance Issues](#).
    - If possible, connect to a different network and observe whether the problem is still present. This step helps to isolate potential network factors.

## Slow Load of a Standard List Page

NetSuite provides list pages for bulk transaction processing such as Approve Sales Orders and Bill Payment.

### If loading a standard list page is taking longer than usual:

1. Check the number of transactions displayed on the page.
  - Transactions are listed in a sublist, with the fields required for the process.
  - The value for each field is pulled from each transaction record before being displayed in the sublist.
  - The time it takes to pull field values from a single record is multiplied by the number of transactions listed.
2. Check whether the list is customized.
  - Click **Customize**.
  - On the **Additional Columns** tab, review how many columns are selected.
  - Additional columns affect performance; it is a best practice to only select the columns that are required.
3. Add filters to the list of transactions.
  - Filters can positively impact performance by limiting the transactions listed.
  - A best practice is to display only the transactions to be processed.
4. After the action has completed, review the Performance Details.
 

You can double-click the Oracle | NetSuite logo in the upper left corner of any page in the NetSuite application to display Performance Details. This window is also known as the Page Email and Time (PET) window. For more information, see [Identifying Performance Issues](#).

  - If the largest portion of time is associated with the server, log a case with NetSuite Customer Support.
  - If the largest portion of time is associated with the client:
    - See [Improving Client Performance](#) and the SuiteAnswers article [Client Side Performance Causes](#) for tips.
    - Determine whether the problem is related to the browser. See [Adjusting Browser Settings](#).
    - Determine whether a client script function is being triggered. See the following:
      - [The Scripted Records Page](#)
      - [Client Event Types](#)
      - [Client Script Best Practices](#)
  - If the largest portion of time is associated with the network:
    - Perform a trace route going to system.netsuite.com. See [Using a Trace Route to Troubleshoot Performance Issues](#).
    - If possible, connect to a different network and observe whether the problem is still present. This step helps to isolate potential network factors.

## Slow-Running Bulk Process

Many operations in NetSuite can be performed as bulk processes. These include tasks such as approval of journal entries and fulfillment of sales orders, and mass updates of field values that may be standard or customized.

### If a bulk process takes a long time to complete:

Consider the number of records being processed.

- A bulk process can take longer to complete if a larger number of records is involved.
- Some bulk processes are limited to a defined number of records that can be processed at one time, and do not complete successfully if the number of records exceeds this threshold.
- For more information, search for the following topics in SuiteAnswers:
  - Maximum Number of Sales Orders That Can be Processed in Bulk Fulfill Page
  - Bulk Billing Purchase Order Limit
  - Mass Update Limitation
  - Bulk Merge Limit Per Month
  - Line Limit for Vendor Bill Variance Journal Entries
  - Revenue Recognition Enhancements

## Slow Loading of Key Performance Indicators

Key Performance Indicators (KPIs) synthesize raw data into critical business metrics that can be displayed in dashboard portlets. For more information, see the help topic [Key Performance Indicators Overview](#).

### If loading a KPI takes too long after it has been executed:

1. Consider the amount of data being processed.  
The volume of data being processed can affect performance. More time could be required to process a greater volume of data.
2. Check whether the KPI is standard or custom.
  - If the KPI is custom, review the saved search used as a basis for the custom KPI. See the troubleshooting steps in [Slow-Running Saved Search](#) and [Optimizing Search Performance](#).
  - If the KPI is standard, contact NetSuite Customer Support.  
For a list of standard KPIs, see the help topic [Standard Key Performance Indicators Table](#).
3. Consider using the Cached Data option in the KPI portlet's setup settings to prevent the KPI portlet from updating data on page load. When this option is selected, the KPIs data is updated every 12 hours or when you click the Refresh icon in the KPI portlet.

## Slow CSV Import

CSV import is the most commonly used method for transferring small to medium-sized data sets from other applications into NetSuite. You can use an Import Assistant to step through the process for most CSV imports. For more information, see the help topic [CSV Imports Overview](#).

### If a CSV import is taking longer than usual:

1. Assess the volume of data being imported.  
The number of rows and columns in a CSV file affect the performance of a CSV import. You may be able to break up a large import job into multiple, smaller jobs. See the help topic [General CSV File Conventions](#) for best practices.
2. Check the **Run Server SuiteScripts and Trigger Workflows** option at Setup > Import/Export > CSV Import Preferences.

For information about this option see the help topic [Setting CSV Import Preferences](#).

- If possible, disable this option to improve CSV import performance.
- For instances that require some scripts or workflows to execute for data changes occurring during CSV imports, NetSuite recommends that you make sure that other unneeded scripts and workflows do not execute during CSV imports.
  - For scripts, add a condition that prevents execution when the context is CSV import. See the help topic [nlobjContext](#) for information about the `getExecutionContext()` method to use for this purpose.
  - For workflows, clear the CSV option in the **Context** field. See the following for more information:
    - [Creating a Workflow](#)
    - [Workflow Context Types](#)
    - [Context Types Reference](#)
- 3. If your account has one or more SuiteCloud Plus licenses, try running a slow CSV import on a different queue.

See the help topic [Use Multiple Threads and Multiple Queues to Run CSV Import Jobs](#).

## Slow Web Services

The SuiteTalk Platform provides programmatic access to NetSuite data and business processes through an XML-based application programming interface (API), using SOAP-based web services and HTTPS transport.

### If a web services operation is taking longer than usual:

1. Assess the volume of data involved in the web services request.  
For information about factors that affect web services performance, see the following:
  - [Web Services Governance Overview](#)
  - [Web Services \(SuiteTalk\) FAQ](#)
  - [Web Services Processing](#)
2. Check the preferences set for web services, at Setup > Integration > Web Services Preferences. For more information, see the help topic [Company-Wide Preferences](#).
3. Run tests to determine whether the problem is isolated to web services only or also occurs in other contexts.
  - Simulate the action in a single record in the UI, to see whether a timeout error is encountered.
  - For addList or upsert operations, try to do a similar process through an add/update CSV import job.

If the problem occurs in these other contexts, then it is more general and not related to your web services.
4. For web services search operations, check the search definition.
  - If the search is being created in web services, see help topics about web services search operations for tips.
  - If the web services search references an existing saved search, see the troubleshooting step in *Slow performance when running Saved Searches*.





**Important:** To maintain performance, 5,000 lines per transaction is the maximum limit for transactions submitted through synchronous web services. For example, if you submit 200 records, each record may contain 5,000 lines. With asynchronous web services, the limit is 10,000 lines per transaction. When submitting records, also consider that the operation must be completed within the session timeout limits. For information about session timeouts and session limits, see the help topic [Session Management for Web Services](#).

## Slow Loading of a Website Page

You can use NetSuite to host your website.

### If loading a page for a NetSuite-hosted website is taking longer than usual:

1. Check whether the website is using Site Builder or SuiteCommerce Advanced (SCA).  
See the following for information:
  - [Best Practices for Website Performance](#) (Site Builder)
  - SuiteAnswers article [Accessing Web Site is Slow after Clearing the Browser's Cache](#)
2. Use the network tool available in the browser developer tools.
  - For Internet Explorer: HTTPWATCH at <http://www.httpwatch.com/features/webperformance.aspx>
  - For Firefox: FireBug at <http://getfirebug.com/network>
  - For Chrome: Google Developer Tool at <https://developer.chrome.com/devtools#improving-network-performance>
3. Identify the page where slow performance is occurring.
4. If the problem just began occurring, check with the person who manages your website to determine if changes have been made recently.

## Slow Loading of an Online Customer Form Embedded in a Website

An online customer form can be embedded in a website.

### If loading an online customer form in a website is taking longer than usual:

1. Load the publishable URL of the form independently from the website to determine whether the problem is related to the form load or the page itself.
  - a. Go to Setup > Marketing > Online Customer Forms.
  - b. View the form embedded in the website.
  - c. On the **External** subtab, click **Publishable Form URL**.
  - d. Use the URL to load the plain form, without website customizations.
2. Check the setup of the online customer form. Consider the following properties that may affect performance:
  - Select Fields
    - Fields that source values may take more time to load, depending on the size of the sourced data.

- Having a large number of select fields may add to the time required to load the form on the page. Do not include fields that are not needed.
- Custom Code
  - When a script function is triggered after a form is loaded, users may not be able to interact with the page immediately.
  - It may seem like the page is still loading because it is not yet responsive, but instead the script is still running.

For more information, see the help topic [Creating an Online Customer Form](#).

## Slow Loading of an Online Case Form Embedded in a Website

An online case form can be embedded in a website.

### If loading an online case form in a website is taking longer than usual:

1. Load the publishable URL of the form independently from the website to determine whether the problem is related to the form load or the page itself.
  - a. Go to Setup > Support > Online Case Forms.
  - b. View the form embedded in the website.
  - c. On the **External** subtab, click **Publishable Form URL**.
  - d. Use the URL to load the plain form, without website customizations.
2. Check the setup of the online case form. Consider the following properties that may affect performance:
  - Select Fields
    - Fields that source values may take more time to load, depending on the size of the sourced data.
    - Having a large number of select fields may add to the time required to load the form on the page.
  - Custom Code
    - When a script function is triggered after a form is loaded, users may not be able to interact with the page immediately.
    - It may seem like the page is still loading because it is not yet responsive, but instead the script is still running.

For more information, see the help topic [Online Case Forms](#).

## Slow Web Store Checkout

The web store checkout process includes the following tasks:

- Add an item to the shopping cart
- Apply a promotion code
- Register as a new customer
- Log in as a returning customer

- Log in as a guest
- Select a shipping option
- Select a payment option
- Submit the order
- Load the order confirmation page

### If the checkout process using NetSuite's cart and checkout is taking longer than usual:

1. Use the network tool available in the browser developer tools.
  - For Internet Explorer: HTTPWATCH at <http://www.httpwatch.com/features/webperformance.aspx>
  - For Firefox: FireBug at <http://getfirebug.com/network>
  - For Chrome: Google Developer Tool at <https://developer.chrome.com/devtools#improving-network-performance>
2. Identify the page where slow performance is occurring.
3. Check whether standard checkout or reference checkout is implemented in the website.
  - Standard checkout is the default checkout provided with Site Builder. If your website is using this type of checkout:
    - Check for elements such as heavy images and scripts implemented in the **Shopping** and **Checkout** tabs. These can affect performance because loading elements with large file sizes may require more time.
    - You can make changes by navigating to Lists > Web Site > Tabs, and editing the **Shopping** tab or the **Checkout** tab.
  - Reference checkout is the NetSuite reference implementation of the web store checkout process, which includes customized login, cart, and checkout pages, along with associated source files and assets. If your website is using this type of checkout, you can try to modify any customizations that have been made to these pages to achieve better performance.
4. Check whether **Scriptable Cart and Checkout** is enabled in Setup > Site Builder > Set Up Web Site.
  - This feature allows client-side scripts to be triggered in the website, which may contribute to page load time.
  - For more information, see the help topic [Deploying and Running Scriptable Cart](#).
5. If the problem just began occurring, check with the person who manages your website to determine if changes have been made recently.

## Troubleshooting Problems with Firewalls and Proxy Servers

### Firewalls and NetSuite

A firewall is generally set up to protect your network or computer from unwanted internet traffic. The primary function of a firewall is to let good traffic pass through whereas bad traffic is blocked. If your company uses a firewall to monitor internet traffic, your network manager may need to modify the firewall to use NetSuite successfully.

If you are experiencing performance issues, pages that load slowly, or frequent time-outs, try accessing NetSuite from a location outside of the firewall. If you determine that the firewall may be a problem, try making the following changes to the firewall:

- Set up the firewall to allow all traffic to and from:
  - [www.netsuite.com](http://www.netsuite.com)
  - [system.netsuite.com](http://system.netsuite.com)
  - [shopping.netsuite.com](http://shopping.netsuite.com)
- Open the following Ports:
  - Port 80 for non-secure http pages
  - Port 443 for secure https pages
  - Port 1708 for SuiteAnalytics Connect access

## Proxy Servers and NetSuite

A proxy server is not recommended for use with NetSuite.

When your company uses a proxy server for internet traffic, and you visit a Web page from your work station, a request is sent to the proxy server for that page. The proxy server retrieves the page from the internet and forwards the page to your computer. The page is then cached, or saved, on the proxy server's disk drive for future use. For subsequent requests of the same page, the proxy server returns the cached version of the page stored on its drive instead of accessing a current version of the page from the internet.

Cached pages returned by a proxy server can cause problems when using NetSuite, because you need to view accurate and up to date information about your company, but the proxy server shows cached pages with stale data.

## Getting Help with Performance Issues from NetSuite Customer Support

Generally, when you encounter performance issues with NetSuite, log a case with NetSuite Customer Support if any of the following are true:

- The problem has arisen suddenly.
- The problem is isolated to a single record, role, or user, or to a small set of records, roles, or users.
- You need further assistance.

If you notice persistent slowness due to network performance, report the problem to NetSuite Customer Support only after you have observed a high percentage in the Network section of the Performance Details (or PET) window at least three times in succession. For more information, see [Gathering Performance Details](#).

### To open a case with Customer Support,

1. Click the **Support** tab.
2. Click the **SuiteAnswers** link.
3. On the SuiteAnswers site, select **Contact Support Online**.
4. In the **What would you like to do?** field, select **Report a performance problem**.

5. Add detailed information about the issue you are experiencing into the **Message** field.

When you report a Network Performance issue to Customer Support, please include answers to the questions below. This information will help to diagnose and resolve the problem quickly.

- What browser are you using? Do you have any plug-ins installed?
- Are you using a firewall? If so, what is the name and version of the firewall software or device? What ports are open?
- Are you using a proxy for your HTTP Connections? If so, what is the name and version of the software? For more information, see [Troubleshooting Problems with Firewalls and Proxy Servers](#).
- Are you using an anti-virus or anti-spyware application? If so, what is the name and version of the software?
- Include your public IP address in the case.

To get this information, go to <http://www.whatismyip.com>.

The more information you add to a case, the better NetSuite Customer Support can serve you. If you are using a PC, open a command prompt and run the following commands to gather more information to add to your case:

- Execute a `nslookup` on the affected domain and include the output. For example, if you are having trouble with `system.netsuite.com`, then type the command below in a Command Prompt window, and press Enter.

```
nslookup.exe system.netsuite.com.
```

- Execute a `tracert` on the affected domain and include the output. For more information, see [Using a Trace Route to Troubleshoot Performance Issues](#).
- Execute the following commands, and add the results to your case.

```
ping system.netsuite.com
telnet system.netsuite.com 443
```

## Using a Trace Route to Troubleshoot Performance Issues

You can perform a trace route (tracert) to determine if the performance issues you are experiencing are due to your internet connection or to NetSuite server performance.

**To perform a trace route:**

### On a PC:

1. Open a command window.
  - a. Click the **Start** icon on the Windows Taskbar.
  - b. Type `cmd`.
  - c. Press **Enter**
2. At the command prompt type `cd\`.
3. Press **Enter**.
4. At the `C:\>` prompt type

```
tracert system.netsuite.com
```

5. Press **Enter**.

### On a Mac:

1. Open the **Network Utility** application.  
By default, this application is located in the Utilities folder, found inside the Applications folder on the main system hard drive (Hard Drive > Applications > Utilities > Network Utility).
2. Click the **Traceroute** tab.
3. Enter `system.netsuite.com` in the network address box, and click **Trace**.

The results of this command will show the path taken from your computer and every hop taken to reach NetSuite. Look for "Timed Out" or any result over 200ms. The first line which reads Timed Out or is over 200ms may indicate a connection problem.

If the first problematic line is within the first three lines, this usually indicates a connectivity issue within your own network. Please contact your network administrator, and provide the results of your trace route.

If the first problematic line appears after the first three lines and before the last three result lines, this indicates there may be a problem with a router you travel through prior to reaching the NetSuite servers. Please contact your Internet Service Provider (ISP) with the results of the trace route so they can further investigate any connection problems.

If you are getting timed out within the last three result lines, this may point to a performance problem with the NetSuite network providers. Contact NetSuite Support for assistance.

### To copy the results of the trace route and paste them into a NetSuite support case:

1. On a PC:
  1. At the command prompt type `cd\`.
  2. Press **Enter**.
  3. At the `C:\>` prompt type:  

```
tracert.exe -4 -d system.netsuite.com>>results.txt
```
  4. Press **Enter**.
  5. Open **My Computer** from your desktop, and then open the (C:) drive.
  6. Double-click the `results.txt` file to open it.
  7. Copy the results of the trace route.
2. On a Mac:
  1. Highlight the results of the trace route.
  2. Go to Edit > Copy.
  3. In NetSuite, click the **Support** tab.
  4. Click the **SuiteAnswers** link.
  5. On the SuiteAnswers site, click **Contact Support Online**.
  6. Paste the trace route results into the **Message** field.