

# Version 2014 Release 1 Release Notes

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This document summarizes the changes to NetSuite between Version 2014 Release 1 (also known as 2014.1) and the previous release.

These release notes are subject to change. Please make sure to review the release notes section of the Documentation Revision History for a list of the changes made in this build of the release notes.

The Version 2014 Release 1 enhancements and changes listed in this document are not available to NetSuite customers until they are upgraded to Version 2014 Release 1. Please check the version number at the bottom of your Home page if you are unsure which NetSuite version you are using.

Click links in the following table for details about product changes:

Product	Section	Summary
NetSuite	SuiteApps (Bundles) Released by NetSuite	Germany GDPdU Data Export
		France Standard Audit File for Tax Purposes (SAF-T)
		Statutory Chart of Accounts
		Supply Chain Management
		Warranty and Repairs Management
		Fixed Assets Management Enhancements
		SuiteOrgChart (Beta)
		StickyNotes (Beta)
		SuiteSocial Enhancements
		Recurring Billing Enhancements
		File Drag & Drop Enhancements
		Subsidiary Navigator SuiteApp (Beta)
		Payment Gateway Plug-in SuiteApp
		Electronic Payments Enhancements
		Resource Allocations Chart
		Resource Allocations Custom Approval Workflow
		Resource Skill Sets

Product	Section	Summary
		Project Task Manager Last Sales Activity EITF 08-01 Revenue Recognition Software Vertical Contract Renewals Script Queue Monitor (Beta)
	User Interface	
	Administration	Password Management Enhancements Enhancements to Sandbox Refresh Validation Process for Email Changes Role Restrictions for Subsidiaries Applied to Vendor Records
	Customer Relationship Management (CRM)	Campaign Response Enhancements Scriptable Template Enhancements Campaign Event Tracking Managing Bounced Campaign Email Customer Support Enhancements Enhanced Duplicate Detection NetSuite for iPhone Version 2.5 Enhancements to Advanced Promotions Event Enhancements
	Enterprise Resource Planning (ERP)	Statistical Accounts Multi-Book Accounting Extended Transaction Numbering Timesheets Free Item Shipping in Estimates, Invoices and Cash Sales Time Fences Planned Work Orders Planning Action Messages Gross Requirements Inquiry Detail Requisitions Work Order Validation Work Center Calendar

Product	Section	Summary
		<p>Synchronize Intercompany Special Order and Drop Shipment Processing</p> <p>Batch Processing for Revenue Recognition Journal Entries</p> <p>Collapse/Expand VSOE Column on Sales Transactions</p> <p>Enhanced Deferred Revenue Reconciliation Reports</p> <p>Bulk Invoicing Enhancements</p> <p>Customer Payment Enhancements</p> <p>Show Planned Capacity Preference</p> <p>Capacity to Specify Type of Return for Fedex</p> <p>Currency Field Unlocked on Intercompany Clearing Accounts</p> <p>Automatic Handling of Negotiated Rates for UPS</p> <p>Sending Transactions in Bulk</p> <p>Expense Report Summary Box</p> <p>Time Entry Rounding for Time Tracking</p> <p>Bulk Processing/Authorizing Commission</p> <p>Employee Payroll Item History Report</p> <p>Charge Transaction Enhancements</p> <p>Applying Deposits in the Customer Center</p>
	Projects	<p>Job Costing and Project Budgeting</p> <p>Resource Allocations</p> <p>Generic Resource Records</p> <p>Advanced Project Templates</p> <p>Copy Project Tasks</p> <p>Project Dashboard</p> <p>Non-billable Project Tasks</p>
SuiteCommerce	General SuiteCommerce Settings	<p>New Preference for Applying Gift Certificate Amount</p> <p>New Deploy to Domain Button on SSP Application Records</p>
	Site Builder	Google Checkout Retirement Impact on NetSuite Web Stores
	SuiteCommerce Advanced	<p>Ending Support for Web Site Tags in SuiteCommerce Advanced</p> <p>Reference Implementation Enhancements</p>
	SuiteCommerce Platform	<p>Commerce API Support for Item-Specific Shipping Promotions</p> <p>Commerce API Enhancement for Logged In Status</p>

Product	Section	Summary
		Commerce API Support for Lead Source in Customer Registration Enhancement of the setLoginCredentials() API to Support Custom Fields Commerce API Support for Removing Billing and Shipping Addresses
<b>SuiteCloud Platform</b>	General SuiteCloud Platform	New Customization Menu
	SuiteBundler	Support for Advanced PDF/HTML Templates Support for Charge Type Search for Popular SuiteApps
	SuiteBuilder - Customization	Advanced PDF/HTML Templates (Beta) Enhancements SuiteBuilder Support for the Timesheets Feature Option to Encrypt New Custom Fields Enhanced Delete Behavior for Records Referenced by Custom Fields Support for Custom Note Forms
	SuiteAnalytics (Dashboards, Reporting and Search)	Introduction to SuiteAnalytics Connect End of Support for NetSuite ODBC Driver 5.5 ODBC Middleware Upgrade Enhancements to Balance Sheet and Trial Balance Reports Increase in Maximum Supported Report Size Support for Multi-Book Accounting in Reports, Searches, and KPIs Internal ID Fields Available as Report Columns and Filters Change of Sign for Expense Account Amounts in Transaction Saved Searches
	CSV Import	CSV Import Support for Multi-Book Accounting Newly Supported Record Types for CSV Import
	Single Sign-on	SAML Single Sign-on for Web Store Ability to Set SAML IDP as Primary Authentication Method
	SuiteFlow (Workflow Manager)	Execute Scheduled Workflow On Demand Timesheet and Time Entry Records Supported in SuiteFlow Relocation of Active Workflows and Workflow History Subtabs Active Workflow Instances in Saved Searches Workflow History in Saved Searches
	SuiteScript	Undeployed Scheduled Scripts No Longer Added to the Work Queue Existing Message Records Can No Longer be Edited with SuiteScript

Product	Section	Summary
		<p>RESTlets Can No Longer Include Multiple Forms of Authentication</p> <p>SuiteScript Support for Timesheets Feature</p> <p>XML Validation API</p> <p>Void Transaction API</p> <p>Email Bounceback Notification Support</p> <p>CSV Import Enhancements</p> <p>Custom Plug-in Type Support for RESTlets</p> <p>Expanded Administrator Access to Tasks, Events, and Phone Calls</p> <p>SuiteScript Support for Multi-Book Accounting</p> <p>API Additions and Enhancements</p> <p>Newly Supported Record Types for SuiteScript</p> <p>Redesigned Records Browser</p>
	SuiteCloud IDE	<p>Accessing the Records Browser from SuiteCloud IDE</p> <p>Support for New SuiteCloud IDE and Eclipse Versions</p> <p>Support for SuiteScript Functions</p>
	SuiteTalk (Web Services) Integration	<p>NetSuite to End Support for SuiteTalk 2009.2 and Earlier Endpoints</p> <p>SuiteTalk Support for Multi-Book Accounting</p> <p>Changes Related to Enhanced Credit Card Security</p> <p>Issue Record Is Enhanced</p> <p>New Fields Enable Creation of Work Order from Sales Order Line</p> <p>On Custom Record, altName and autoName Are Exposed</p> <p>New Search Objects for Pricing Levels</p> <p>ChargeType Changed From Enum to RecordRef</p> <p>Fields Deprecated on Subsidiary Record</p> <p>Newly Supported Record Types for SuiteTalk</p> <p>2014.1 WSDL Now Generally Available</p> <p>Araxis Merge Diff File for the 2014.1 Endpoint</p> <p>Redesigned Schema Browser</p>

## SuiteApps (Bundles) Released by NetSuite

Version 2014 Release 1 includes the following enhancements to SuiteApps released by NetSuite:

- Germany GDPdU Data Export
- France Standard Audit File for Tax Purposes (SAF-T)
- Statutory Chart of Accounts
- Supply Chain Management
- Warranty and Repairs Management
- Fixed Assets Management Enhancements
- SuiteOrgChart (Beta)
- StickyNotes (Beta)
- SuiteSocial Enhancements
- Recurring Billing Enhancements
- File Drag & Drop Enhancements
- Subsidiary Navigator SuiteApp (Beta)
- Payment Gateway Plug-in SuiteApp
- Electronic Payments Enhancements
- Resource Allocations Chart
- Resource Allocations Custom Approval Workflow
- Resource Skill Sets
- Project Task Manager
- Last Sales Activity
- EITF 08-01 Revenue Recognition
- Software Vertical Contract Renewals
- Script Queue Monitor (Beta)

## Germany GDPdU Data Export

The Principles of Data Access and Verification of Digital Documents (GDPdU) standard defines the rules around the access, storage, and verification of financial data and the obligation of German taxpayers in case of a tax audit.

Users in Germany can generate and export tax audit files in NetSuite that comply with Finanzamt-mandated rules and with the format defined by the GDPdU standard.

NetSuite provides Germany GDPdU Data Export composed of the following files:

- Company Data
- Chart of Accounts
- Transaction Journal
- Sums and Balances List
- Account Sheets, Chart of Accounts
- Account Sheets, Debtors and Creditors
- Annual VAT Figures
- Tax Codes

A DTD file and an index are also generated during the export. GDPdU data export should be generated for a full financial year (based on accounting periods). Each export generates a total of eleven files for download.

This feature is available to users with NetSuite or NetSuite OneWorld accounts that have the Tax Audit Files SuiteApp and an active Germany nexus. For more information, see the help topic Germany GDPdU Data Export.

## France Standard Audit File for Tax Purposes (SAF-T)

In France, tax paying companies using computerized accounting system are mandated to remit their accounts to the tax auditors by submitting a Standard Audit File for Tax Purposes (SAF-T). The tax audit file must be in flat file format and must include chart of account names and numbers in the formats that comply with the French GAAP.

Using the NetSuite Tax Audit Files SuiteApp, you can generate a France SAF-T report that complies with the requirements of the French tax authority.

This feature is available to NetSuite accounts with the France nexus. For more information, see the help topic France Standard Audit File for Tax Purposes (SAF-T).

## Statutory Chart of Accounts

Some countries require companies to submit a tax audit file that includes chart of account names and number in the formats that comply with statutory requirements.

Use the Statutory Chart of Accounts if your standard Chart of Accounts does not comply with regulatory requirements. For example, if the standard chart of accounts is shared with other subsidiaries, or if the parent company requires a subsidiary to use account names and numbers that are not in the formats required for statutory compliance in the subsidiary's country.

The Statutory Chart of Accounts is included in the Tax Audit Files SuiteApp. You can set up or update the statutory chart of accounts using CSV import or by going to Setup > Accounting > Statutory Chart of Accounts.

This feature is only available for France and Portugal Standard Audit File for Tax Purposes (SAF-T). For more information, see the help topic Statutory Chart of Accounts.

## Supply Chain Management

Version 2014 Release 1 introduces the following built-in forms to help consolidate real-time data for various supply chain processes:

- **Inventory Count Sheet** – This document provides information on items that need to be counted. Often associated with conducting year-end audit valuations of inventory, the inventory count sheet can be used by warehouse personnel to perform physical inventory counts and inspections for any warehouse on a regular basis.
- **Manufacturing Dispatch List** – This document consolidates manufacturing operation tasks and provides details of outstanding operations by work center.
- **Manufacturing Traveler** – This document provides information on the products that need to be created or repaired, and details of the specific tasks needed in creating a product. This form is passed from one work center to another as each manufacturing task is completed.

For more information, see the help topic Supply Chain Management.

## Warranty and Repairs Management

Version 2014 Release 1 introduces new warranty and return merchandise authorization (RMA) capabilities that will help companies keep their product promises to their customers.

Warranty and Repairs Management lets you set up warranty information for any item available for sale and then register the warranty after the product is sold. When customers file a claim case for defective products, a support representative will validate the claim against the warranty information associated with the item. After the claim is verified, options will be available to refund, repair, or replace the defective product for the customer.

For more information, see the help topic Warranty and Repairs Management.

## Fixed Assets Management Enhancements

The latest release of the Fixed Assets Management SuiteApp includes the following enhancements:

- Asset transfers can now be conducted and automatically translated into multiple currencies across subsidiaries. As a result, accountants will be able to post one set



of journal entries for fixed asset transfers much more efficiently without having to manually calculate and create a separate batch of journal entries to account for currency translations.

- Depreciation expense is now summarized by fixed asset type or other higher level of detail, resulting in fewer journal entries and improving general ledger posting performance.
- The Depreciation Schedule Report is now categorized by subsidiary and displays transferred assets in multiple subsidiaries when the asset transfer date falls within the specified date range for the report. Depreciation amounts for Annual Methods are shown as annual values, and no longer broken down into monthly values.

For more information on Fixed Assets Management enhancements, see the following help topics:

- Summarizing Journal Entries
- Transferring Assets Across Subsidiaries
- Asset Depreciation Schedule Report

## SuiteOrgChart (Beta)

SuiteOrgChart renders a chart of your organization based on the employee records. Administrators can customize employee details displayed in the organization chart.

Depending on a user's access to the SuiteApp, they can view the whole organization chart on a dedicated page or add it as a portlet in the dashboard. A limited view of the organization chart can also be made available in the subtab of the employee's record.

For more information, see the help topic Working with SuiteOrgChart (Beta).

**Note:** The SuiteApp is being released as a beta version.

## StickyNotes (Beta)

StickyNotes lets users conveniently share relevant and important information across your global workforce. The SuiteApp enables you to attach private or public notes to a NetSuite record or transaction, or to a specific field on a form.

You can manage all your notes across record pages in one place with the StickyNotes Board. You can also sort, filter, archive, delete, reply to, and search for your notes as well as alternate between grid and list views.

The SuiteApp also includes options to customize your notes to suit your preference. You can change note colors to distinguish between high and low priority items. You can also change the note and font size for better readability.

For more information, see the help topic Creating StickyNotes on Record Pages.

## SuiteSocial Enhancements

The latest release of SuiteSocial includes the following enhancements:

- Using condition-based subscription, users can follow transactions based on a specific set of criteria. With this enhancement, business users can refine the information they want to track by focusing on only the most relevant fields within the context of records on which they are working. Users can also search through news feed posts and send notifications whenever new posts are created.
- Users can drag and drop files from their desktop to their news feed to upload them.

## Recurring Billing Enhancements

Version 2014 Release 1 includes the following enhancement to the Recurring Billing SuiteApp:

- [Multi-Queue Support for Rating Engine](#)
- [Recurring Billing Integration](#)
- [Custom Pricing](#)
- [Co-term](#)
- [Subscription Start Date Enhancement](#)
- [Billing Enhancement](#)
- [Subscription Creation Enhancement](#)
- [One-Time Subscription Charges](#)
- [Other Recurring Billing SuiteApp Highlights](#)

### Multi-Queue Support for Rating Engine

The latest release of the Recurring Billing SuiteApp includes multi-queue support for rating engine. This feature enables you to process higher volume of usage data with increased throughput using multiple queues.

**Note:** This feature is available only to users with SuiteCloud Plus License.

For more information, see the help topic [Multi-Queue Support for Rating Engine](#).

### Recurring Billing Integration

**Important:** This feature is available only in beta version.

Recurring Billing Integration provides an API-based architecture that you can use to build integrations and extensions to the Recurring Billing SuiteApp.

A library file is provided with the Recurring Billing SuiteApp. You can attach this library file to your script or RESTlet for Recurring Billing Integration.

Recurring Billing Integration supports the following methods:

- General Discovery Methods
  - `rbGetLeadItems` – retrieves available items
  - `rbGetSubscriptionPlans` – retrieves available subscription plans
  - `rbGetRatePlanDetails` – retrieves rate plan details
  - `rbGetCustomerSubscriptions` – retrieves subscription and primary subscription item details
  - `rbGetCustomerSubscriptionDetails` – retrieves primary subscription items and its secondary subscription items
  - `rbGetCustomerTransactions` – retrieves subscription transactions and payment methods
- Subscription Creation Method
  - `rbCreateSubscriptionFromOrder` – creates a sales order to generate a new subscription or to add items to an existing subscription
- Subscription Management Methods
  - `rbCreateChangeOrder` – creates a change order when used with any of the following supported change order objects:
    - `rbSetStartDate` – modifies the start date of a subscription
    - `rbMigrateSubscription` – migrates a subscription from one subscription plan to a new subscription plan
    - `rbSuspend` – suspends a subscription item
    - `rbTerminate` – terminates a subscription item
    - `rbReactivate` – reactivates a suspended subscription item
    - `rbSetFixedUsage` – changes the quantity of a fixed usage subscription item within a subscription
    - `rbManagePricing` – updates the pricing of a subscription item
    - `rbOneTimeCharge` – adds a positive or negative one-time charge to a subscription
    - `rbAddToExisting` – adds an item to an existing subscription
  - `rbCancelChangeOrder` – cancels a pending change order

- `rbEvaluateChangeOrder` – evaluates the revenue impact if the specified subscription change order object with the specified properties is to be executed

**Note:** A change order object must be included in the `rbEvaluateChangeOrder` request parameter. Supported change order objects are the same as in `rbCreateChangeOrder`, except for `rbManagePricing`, `rbOneTimeCharge`, and `rbAddToExisting`.

## Custom Pricing

Custom pricing supports the following functionalities:

- Specifying a custom rate, discount, and quantity on a sales order
- Modifying the rate, discount, and uplift on a change order

**Note:** Recurring Billing version 3.1 supports custom pricing for only secondary subscription items.

To apply custom pricing on an item, the following checkbox fields must be enabled in the subscription plan item record:

- Allow Line Discount
- Allow Custom Rate
- Allow Item Uplift

For more information, see the help topic Custom Pricing.

## Co-term

Co-term enables you to align the end date of subscription plan items when adding items to existing subscriptions on a sales order. Alignment options include:

- Add new item but no co-term alignment
- Align new item's co-term with existing subscription
- Align existing item's co-term with newly added item

A new item's end date can only be truncated, whereas an existing item's end date can only be extended.

Co-term is applicable for only Add to Existing subscriptions.

For more information, see the help topic Co-termination.

## Subscription Start Date Enhancement

For anniversary subscriptions with multiple subscription plan items with different start dates, this enhancement enables you to set the start date of the items to any date. The item charges will be prorated based on the start date. Billing dates will be aligned to the anniversary date (subscription start date).

In Recurring Billing version 3.0 and earlier, if you are entering multiple subscription items with different start dates for new anniversary subscriptions, the start dates of the subscription items are automatically aligned to the item with the earliest start date. In Recurring Billing version 3.1, this start date restriction for new anniversary subscriptions with multiple items is removed. You can now enter different start dates for each subscription item you enter in a new anniversary subscription sales order.

For more information, see the help topic Entering a Subscription Sales Order.

## Billing Enhancement

The following functionalities are supported:

- **Fixed Date Billing** – This enhancement replaces Day of Month (DOM) billing mode with Fixed Date billing. Fixed Date billing enables you to select a specific date from a fixed set of billing dates for the year. Billing date options for a subscription depend on the Fixed Billing Dates list, subscription start date, and rating frequency.

**Note:** You must first define a fixed set of billing dates for the year and associate each billing date to one or more rating frequencies in the Fixed Billing Dates list. After the Fixed Billing Dates list has been set up, the Fixed Billing Date field on the subscription sales order form is automatically populated with available billing dates when you add subscription plan items. For more information, see the help topic Setting Up Fixed Billing Dates.

For more information on Fixed Date billing mode, see the help topic Fixed Date Billing.

- **Installment Billing** – This enhancement supports different rating and billing frequencies for subscription plan items, so you can define rates for a specific period (frequency) and bill items on a different frequency. For example, if an item with a rated charge of \$1200 has a yearly rating frequency and a quarterly billing frequency, then four invoice entries are generated for the item, each for \$300 and dated 3 months apart .

For more information, see the help topic Setting Up Subscription Plan Items.

- **Proration Formula** – This enhancement enables you to define a custom proration formula in the Subscription Billing Preferences. This formula is used by the rating engine

as the multiplier for rate when creating charges. The following variables may be used to define a proration formula:

- SD – service days in a period
- DPD – duration period (days)
- DPM – duration period (months)
- DCM – days of the current billing month
- MR – months remaining in a period
- DRM – days remaining for the current billing month
- DRY – days remaining for the current billing year

**Note:** Recurring Billing version 3.1 supports only the following proration formulas: SD/DPD and (DRM/DCM)+MR.

For more information, see the help topic [Setting Up Recurring Billing Preferences](#).

## Subscription Creation Enhancement

This enhancement enables creating subscriptions in a suspended mode. When entering a sales order, the start type of the subscription item can be set to:

- Immediate – creates the subscription with the subscription item status set to open or pending
- Suspended – creates the subscription with the subscription item status set to suspended

The status of a subscription item created in suspended mode can later be set to open when it is ready to be billed. You can reactivate a suspended subscription item through the Change Order button on the subscription record.

For more information, see the help topic [Creating Subscription Items in Suspended State](#).

## One-Time Subscription Charges

You can add a positive one-time charge (add-on charge) or negative one-time charge (concession charge or rebate) to a subscription through a change order. Add-on charges are usually applied for one-time setup costs, training or support fee, or administrative charges. Rebates are typically provided to compensate for unexpected outage or service flaws.

To add a one-time charge to a subscription, you must set up one-time charge types that you can add to a primary subscription item through a change order.

For more information, see the help topic [Adding One-Time Subscription Charges](#).

## Other Recurring Billing SuiteApp Highlights

The following enhancements to the Recurring Billing SuiteApp are supported:

- **Additional number of queues for the billing engine** – Maximum number of dedicated queues that can be assigned to the billing engine has increased from 8 to 12. This enhancement enables you to create billing transactions in a shorter period of time. You can specify the number of queues dedicated to the billing engine and rating engine in the Dedicated Queues field on the Subscription Billing Preferences page.

For more information, see the help topic Setting Up Recurring Billing Preferences.

- **Adding a subscription item through a change order** – This new change order functionality enables you to add an item to an existing subscription. Custom pricing, co-termination, and immediate suspension options are also supported in the Add Subscription Item change order.

For more information, see the help topic Adding a Subscription Item.

- **Extending subscription term upon reactivation** – This enhancement supports extension of the subscription term upon reactivation of a suspended subscription item. You can extend the subscription item's current end date to cover the number of days that it has been suspended, allowing you to complete the full duration of the subscription item's original term.

For more information, see the help topics Reactivating a Suspended Subscription Item and Extending Subscription Term upon Reactivation.

- **Additional term options** – Additional subscription term options of 48 months up to 120 months are available. In previous versions, non-perpetual term options were up to only 36 months.

For more information, see the help topic Setting Up a Subscription Plan.

- **Breakdown of charges** – Charge records include a breakdown of the assessed usage data charges and cost based on the display filter set in the rate plan. In previous versions, only the effective charge of usage-based items is shown on the charge record and the breakdown of the charges based on the display filter only appears on the invoice. This enhancement aligns the contents of the charge records to the invoice so that there is one charge per invoice line item.

For more information, see the help topic Creating a Display Filter.

- **Comprehensive KPI reports** – The Analytics subtab on subscription and subscription item records includes monthly recurring revenue (MRR) results reported in calendar months and in subscription months. Aside from the MRR for the current month, the report also includes MRRs for the last three months and for the next three months.

For more information, see the help topic Subscription and Subscription Item KPIs.

## File Drag & Drop Enhancements

The latest release of File Drag & Drop includes the following enhancements:

- Drag and drop files to File Cabinet – The SuiteApp comes with a dedicated File Cabinet page that features a Dropzone where you can drop the files you want to upload to the File Cabinet.
- Drag and drop files to new record pages and to line items – You can now attach files to line items and to a record page that you are creating. While the record page is not yet saved, files attached to it will be stored in a temporary folder.

For more information, see the help topics [Adding Files to Records Using File Drag & Drop](#) and [Adding Files to the File Cabinet Using File Drag & Drop](#).

## Subsidiary Navigator SuiteApp (Beta)

**Important:** Subsidiary Navigator SuiteApp (Beta) is still under development. There may be significant changes between this beta version and the first production release.

The Subsidiary Navigator (Beta) SuiteApp enables you to limit the information displayed on your dashboard, searches, and reports to a specific subsidiary.

The portlet contains a chart displaying all of your subsidiaries. You can select from the subsidiaries shown to restrict access to records relevant to the chosen area. This is equivalent to setting the Restrict View field to a subsidiary option in the Set Preferences page.

Subsidiary Navigator is available for installation as a SuiteApp:

- Name – Subsidiary Navigator
- Bundle ID – 44281
- Location – Production (Account ID 3802169)

For more information, see the help topic [Subsidiary Navigator \(Beta\)](#).

## Payment Gateway Plug-in SuiteApp

The Payment Gateway Plug-in SuiteApp enables NetSuite integration with various regional payment gateways — including SecurePay, eWAY, and AsiaPay— to provide international credit card processing and merchant services. This is a NetSuite-managed SuiteApp. After you install this SuiteApp in your account, you can set up as many credit card processing profiles for these gateways as needed. For more information, see the help topic [Setting Up Regional Payment Gateways](#).



This SuiteApp is automatically provisioned on new Australian and New Zealand accounts with the following products:

- NetSuite Australian Edition
- NetSuite JCurve Premium Edition (PRO)
- NetSuite JCurve Financials Edition (GROW)
- NetSuite JCurve Edition (GO)

Customers who installed the earlier SecurePay Plug-in SuiteApp do not need to do anything. The transition is automatic.

Customers who installed the earlier AsiaPay Payment Gateway Plug-in need to install the new Payment Gateway Plug-in SuiteApp.

## Electronic Payments Enhancements

Version 2014 Release 1 includes the following enhancements to the Electronic Payments SuiteApp:

- Enhanced Email Payment Notifications
- Support for New Payment Formats
- Automated Payment Batch Creation
- Payment Batch Approval Routing
- Simultaneous Processing of Multiple Payment Batches from Different Subsidiaries
- Ability to Add a File Name Prefix to a Payment File
- Electronic Payments API
- Payment File Templates in FreeMarker Syntax to Replace XML
- Ability to Add Field Validations to Custom Payment File Templates
- Ability to Display Entity Names in Transaction Lists
- Ability to Assign Multiple Deployments for Payment Batch Processing and Run them in Parallel Queues

### Enhanced Email Payment Notifications

The NetSuite Electronic Payments SuiteApp has been updated to support email templates and the ability to add multiple recipients when sending remittance advice. Prior to this enhancement, the email recipient was sourced from the default email address of the vendor, employee, partner, or customer record. It was not possible to change the intended recipient or

add more recipients. Now you can change the default email address and add more recipients, letting more people know that payment will be deposited or collected from their bank.

Support for email templates is also included in the update. The new version comes with an email template, or you can create and use your own email templates when sending payment notification. For more information, see the help topic [Sending Payment Notifications](#).

## Support for New Payment Formats

This release of the Electronic Payments module supports the following payment file formats:

- JP Morgan Bank Interbank GIRO format and HSBC ISO 20022 XML format (Singapore)
- ACH CCD/PPD format for California Bank & Trust (US)
- ABA Direct Debit format (Australia)
- ABO format (Czech Republic)
- SEPA Credit Transfer format (France)
- SEPA Credit Transfer format (Belgium)
- DTAZV Payment format (Germany)
- SEPA Credit Transfer format (Ireland)
- SEPA Credit Transfer and Direct Debit formats (Italy)
- SEPA Credit Transfer (Luxembourg)
- SEPA Direct Debit format (Germany)

For more information, refer to the payment format topic for each country.

## Automated Payment Batch Creation

In Version 2014 Release 1, NetSuite Electronic Payments OneWorld enables you to automate the creation of payment batches using your own saved searches. You can select your own search criteria to create separate batches of bills and expense reports. For example, you can group bills per vendor, or per location, or per amount, at the same time that you are maintaining only one bank record. You can also remove a bill or expense report from a group before processing the batch. Bills removed will not be linked to any batch, and will be available to be picked up in your next search. You can also set up a schedule for batch creation.

For more information, see the help topic [Setting Up Payment Aggregation Methods](#).

## Payment Batch Approval Routing

The built-in approval routing in NetSuite Electronic Payments OneWorld enables you to restrict the approval process to selected individuals with authorization to approve. To minimize

delays, approvers are instantly notified when payment batches are routed to them for approval. For more information, see the help topic [Setting Up Approval Routing for Payment Batches](#).

## Simultaneous Processing of Multiple Payment Batches from Different Subsidiaries

This feature supports the clustering of multiple processing queues to enable you to do the following:

- Assign specific payment processing queues to different subsidiaries
- Run simultaneous payment processing queues from different subsidiaries
- Simultaneously run multiple payment processing queues from a single subsidiary

To use this feature, you need to configure the script queues and subsidiary assignments on the Queue Management tab under Payments > Setup > Electronic Payments Preferences. The tab provides columns for Subsidiary, Parent Deployment, Payment Creator Deployment, Rollback Deployment, Reversal Deployment, Notification Deployment, and Default. You can select multiple subsidiaries to share a single script queue or multiple queues. To optimize the use of script queues, it is recommended that you assign a script queue to subsidiaries that are in different time zones. For more information, see the help topic [Setting Up Multiple Script Queues to Generate Payment File Formats](#).

**Note:** This feature can only be used with NetSuite Electronic Payments for OneWorld, and requires a SuiteCloud Plus license. Contact your NetSuite account representative for information on upgrading to SuiteCloud Plus.

## Ability to Add a File Name Prefix to a Payment File

In Version 2014 Release 1, NetSuite Electronic Payments provides a File Name Prefix field on the Company Bank Details record, to support payment formats where a file prefix is mandatory, such as SEPA Credit Transfer (Bank of Ireland). However, the File Name Prefix is available for all countries. A maximum of 40 alphanumeric characters can be entered as a prefix for the file number sequence.

## Electronic Payments API

**Important:** This enhancement is currently available only in the preview version of the Electronic Payments SuiteApp version 4.0 installed in Sandbox accounts. The general release to production accounts is targeted for July 2014.

This feature enables you to create a custom Bill Payment Processing page. Using the exposed functions, you will be able to do the following customizations:

- Remove certain fields

- Add columns to a list
- Add custom filters and remove standard filters
- Add field groups to new filters

This ability to make customizations gives you more ease and flexibility in selecting bills to pay.

For more information, see the help topic Electronic Payments API.

## Payment File Templates in FreeMarker Syntax to Replace XML

**Important:** This enhancement is currently available only in the preview version of the Electronic Payments SuiteApp version 4.0 installed in Sandbox accounts. The general release to production accounts is targeted for July 2014.

This feature enhances the templates used to generate payment files from the current XML format to a format that uses FreeMarker syntax. The enhanced template format using FreeMarker syntax provides greater flexibility and increased functionality. You can extract values from NetSuite records and search results, and modify the fields to be included in payment files. The update also includes a FreeMarker template library that you can use to call built-in functions and data.

The Advanced PDF/HTML Templates feature must be enabled in your account to continue to use standard payment file templates, create new custom payment file templates, create payment files, and submit payment batches. Knowledge of FreeMarker is also required.

**Note:** Support for the XML payment file format will be discontinued in April 2015, and you will no longer be able to generate payment files using your custom XML templates. If you need assistance in transitioning your XML templates to the new FreeMarker templates, contact Customer Support or your account manager.

For more information, see:

- Creating a New Custom Payment File Template
- Changing an Existing XML Payment File Template to an Advanced Template
- Working with Advanced Templates

## Ability to Add Field Validations to Custom Payment File Templates

**Important:** This enhancement is currently available only in the preview version of the Electronic Payments SuiteApp version 4.0 installed in Sandbox accounts. The general release to production accounts is targeted for July 2014.

This enhancement enables you to add common field validations to your custom payment file templates. The following validations are supported:

- **modulo97** – Validates the check digit in IBAN and account numbers.
- **modulo11check1** – Validates the account number. Also commonly called the Modulus 11 Self-Check.
- **iban** – Validates the International Bank Account Number (IBAN) using Modulus 97 and ISO validations.
- **bic** – Validates the SWIFT code, a standard format for Business Identifier Codes (BIC) used to identify banks.
- **routingNumber** – Validates the routing number used to identify banks for processing wire transfers and ACH transfers.
- **bban** – Validates the Base Bank Account Number (BBAN), a national bank account number typically used for domestic payments. Currently, only the bban validation for the HU country code is supported by the NetSuite Electronic Payments module.
- **validContent** – Validates the values entered by the user in text fields.

For more information, see the help topic Adding Field Validations to Custom Payment File Templates.

## Ability to Display Entity Names in Transaction Lists

**Important:** This enhancement is currently available only in the preview version of the Electronic Payments SuiteApp version 4.0 installed in Sandbox accounts. The general release to production accounts is targeted for July 2014.

Previously, when processing electronic payments, transaction lists only display the entity ID associated with each transaction. Now, if you want to see the company name in addition to the entity ID, you check the **Include Name in Transaction List** box on the Electronic Payments Preference page. Enabling this option displays the Name column in transaction lists for bills and expenses, customer refunds, customer payments, and Positive Pay check transactions.

## Ability to Assign Multiple Deployments for Payment Batch Processing and Run them in Parallel Queues

**Important:** This enhancement is currently available only in the preview version of the Electronic Payments SuiteApp version 4.0 installed in Sandbox accounts. The general release to production accounts is targeted for July 2014.

This enhancement enables multiple on demand deployments of the payment batch processing script to run concurrently, therefore permitting batches for multiple bank accounts and subsidiaries to be created at one time.

Go to Customization > Scripting > Scripts (Administrator) and create multiple script deployments for the new script named On Demand Batch Processing. After creating the deployments, go to Payments > Setup > Electronic Payments Preferences to set up multiple queues. On the Queue Management subtab, enter the script deployment ID for On Demand Batch Processing in the new column named Batch Processing Deployment.

For more information, see the help topics Defining a New Deployment for the Electronic Payments Processing Scripts and Setting Up Multiple Queues for Payment Processing in the Electronic Payments Preferences.

## Resource Allocations Chart

**Important:** The Resource Allocations feature is required to install and use the Resource Allocations Chart SuiteApp. For more information, see [Resource Allocations](#).

The Resource Allocations Chart offers visual management of your resource allocations with the ability to edit existing allocations and create new allocations directly from the chart. For more information, see [Resource Allocations Chart](#).

## Resource Allocations Custom Approval Workflow

**Important:** The Resource Allocations feature is required to install and use the Resource Allocation Custom Approval Workflow SuiteApp. For more information, see [Resource Allocations](#).

The Resource Allocations Custom Approval Workflow SuiteApp enables you to implement resource allocation approvals through NetSuite's SuiteFlow feature without building a workflow from scratch. For more information, see [Resource Allocations Custom Approval Workflow](#).

## Resource Skill Sets

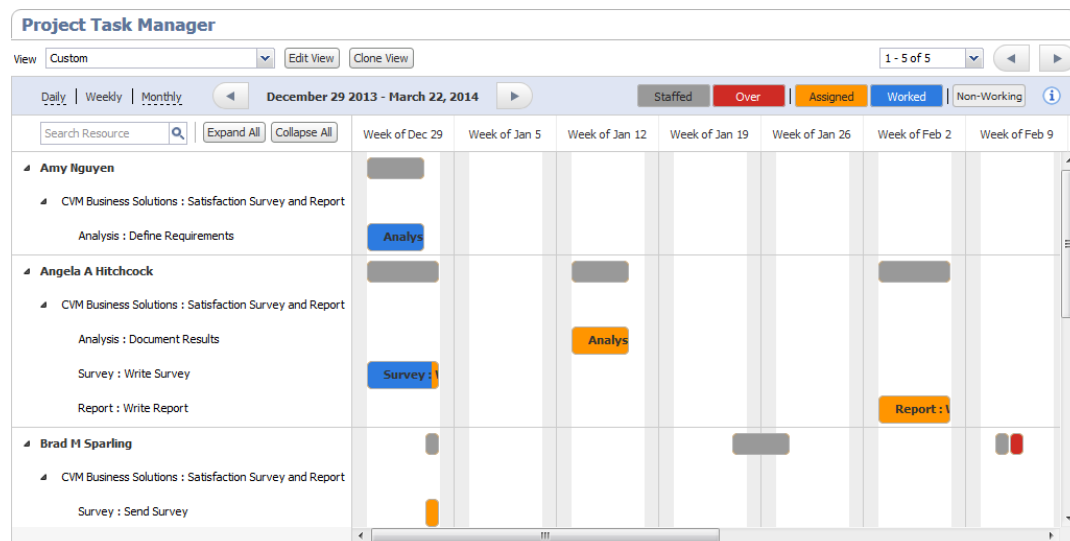
Resource Skills Sets enables you to add information to employee and vendor records about skills and expertise and then search that information for the best matched project resource. For more information, see [Resource Skill Sets](#).

## Project Task Manager

The Project Task Manager SuiteApp is now available for new installations. The SuiteApp offers all of the same features of previous versions with several new enhancements.

The Project Task Manager interface has been updated with a new look and feel and improved speed and performance. You will also be able to access the Project Task Manager using any NetSuite supported browser; previously only Internet Explorer was supported.

Among the new enhancements are links at the top of the chart to quickly toggle between daily, weekly, and monthly views. You can also scroll through date ranges using Next and Previous arrows. If you have many resources appearing on a single chart, you can select a specific page from the dropdown menu or use the Next and Previous arrows to scroll through pages. You can also now search for a resource directly in the Project Task Manager using the Search Resource field at the top of the resource list.



The Project Task Manager is a managed SuiteApp. Existing installations are automatically updated with any changes. New installations can be installed from the Enable Features page. Go to Setup > Company > Enable Features. On the Company subtab, in the Project section under Related SuiteApps, click Project Task Manager. Click the Install button to begin installing the bundle.

- Location – Production
- Name – Project Task Manager
- Bundle ID – 48331
- Account ID - 3845642

**Important:** The Project Task Manager is a shared SuiteApp. Your account must be given access to the SuiteApp prior to installation. Contact your account manager for more information.

## Last Sales Activity

The latest release of the Last Sales Activity SuiteApp includes the following enhancements:

- Architectural improvements to enhance the way Last Sales Activity is calculated on the customer, contact, and opportunity records. This ensures that the Last Sales Activity field is properly updated to reflect the latest activity.
- Support displaying Last Sales Activity value in Reports and customer, contact, and transaction saved searches.

While upgrading to the latest version of the SuiteApp, the Last Sales Activity values will be recalculated. Because of this, the Last Sales Activity field will appear blank on the customer, contact, and opportunity record three to four days before your account is upgraded to Version 2014 Release 1. Saved searches and reports that include the Last Sales Activity fields will be automatically updated when the upgrade is complete.

## EITF 08–01 Revenue Recognition

The latest release of the EITF 08–01 Revenue Recognition SuiteApp includes enhancements to support two-step revenue allocation on the server-side script.

## Software Vertical Contract Renewals

The latest release of the Software Vertical Contract Renewals SuiteApp includes the following enhancements:

- **Install Base Field Mapping** — The Contract Item Field Mapping functionality has been extended to Contracts. Transaction fields can now be mapped to a custom field in the contract or contract items, and vice versa.
- **Price Level on Contract with Custom Price Handling** — This new Renewals License Pricing Model renews contract item prices based on the level on the item record, with the option to set a custom price on the contract. When a custom price is set on an item and the Renew With item is the same, the renewal transaction will use the custom price set on the item. If the Renew With item is different, the renewal transaction will use the base price of the Renew With item.

For more information on Renewals License Pricing Models, see the help topic Contract Renewals Creation.

## Script Queue Monitor (Beta)

The Script Queue Monitor SuiteApp is intended for use in accounts with one or more SuiteCloud Plus licenses. SuiteCloud Plus enables larger accounts to divide their scheduled script work so that scripts can be processed more efficiently. Generally, companies that run NetSuite are provided a single queue for running their scheduled scripts. Companies can



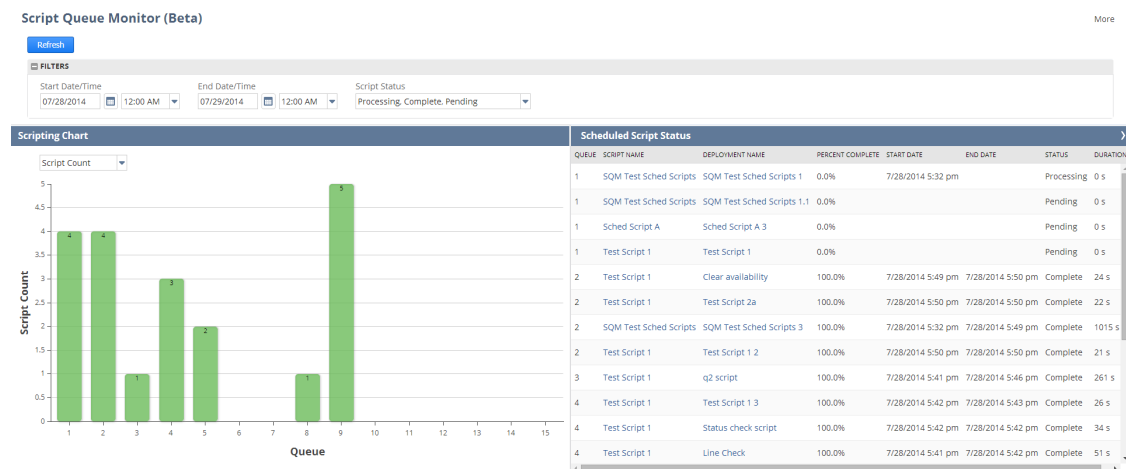
upgrade their number of scheduled script queues from one to five with the purchase of a SuiteCloud Plus license. The purchase of two SuiteCloud Plus licenses provides 10 queues and the purchase of three licenses provides 15 queues.

This SuiteApp provides charts and a list of status details for scheduled script instances running on multiple queues. Account administrators can use the visualizations provided by the Script Queue Monitor to review and manage script queue usage. This information can inform the retargeting of scheduled script deployments to different queues to maximize the benefit obtained from SuiteCloud Plus.

**Note:** The Script Queue Monitor is currently considered a beta feature.

The Script Queue Monitor currently is not supported if you are running NetSuite in Internet Explorer 11.

Once this SuiteApp has been installed, the Script Queue Monitor is available at Customization > Script Performance > Script Queue Monitor. The UI for this SuiteApp includes two panes: on the left, a **Scripting Chart** pane that illustrates script instances for each queue, and on the right, a **Status Details List** pane that lists relevant information about each script instance. In a Filters section at the top, you can select the time period and status (Pending, Processing, Failed, Complete, Retry) for scripts to be included in the chart and list. Note that you can collapse and expand the Filters section as needed by clicking on its header bar. In the Scripting Chart pane, you can select the type of chart to display. You click the **Refresh** button to implement these selections in the Script Queue Monitor display.



## Status Details List

The list in the right pane of the Script Queue Monitor includes the following details about each scheduled script that has been run during the selected time period:

- Queue number
- Script name (Click a link in this column to see the script record.)
- Script deployment name (Click a link in this column to see the script deployment record.)
- Percentage of the script that has completed
- Date and time that the script started running
- Date and time that the script stopped running
- Status of the script
- Number of seconds the script took to run

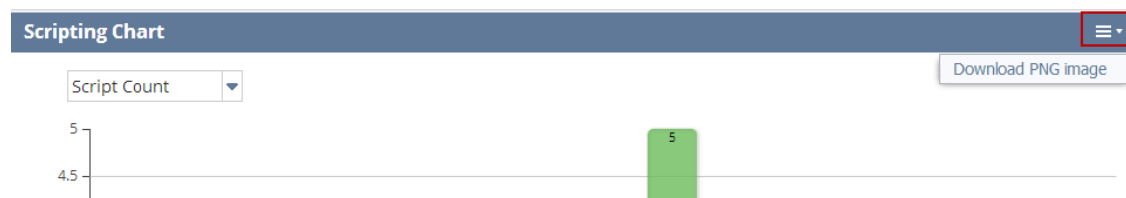
You can click on a column header to sort the list by that column's values. Click two times to switch the sorting from ascending to descending.

## Scripting Chart

The Script Queue Monitor supports three types of charts:

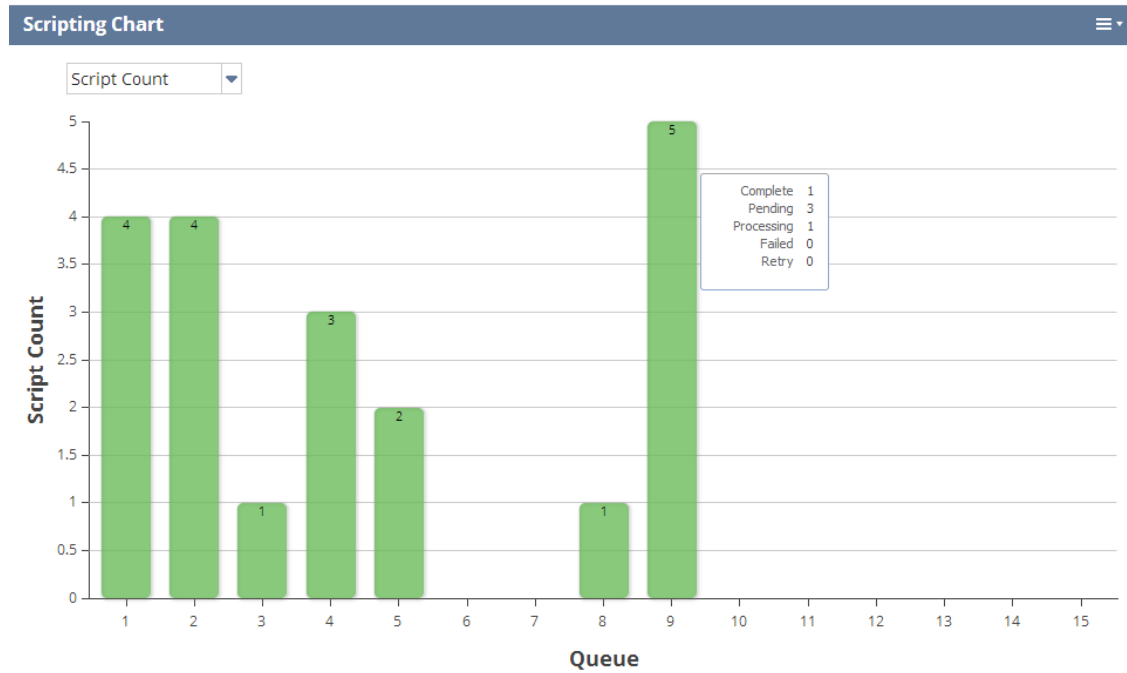
- [Script Count Chart](#)
- [Utilization Chart](#)
- [Timeline Chart](#)

Note that you can click the button available in the chart pane to download the currently displayed chart as a file named chart(<#>).png. (The # variable starts at 1 and is increased each time a chart is downloaded to avoid overwriting previously downloaded charts.)



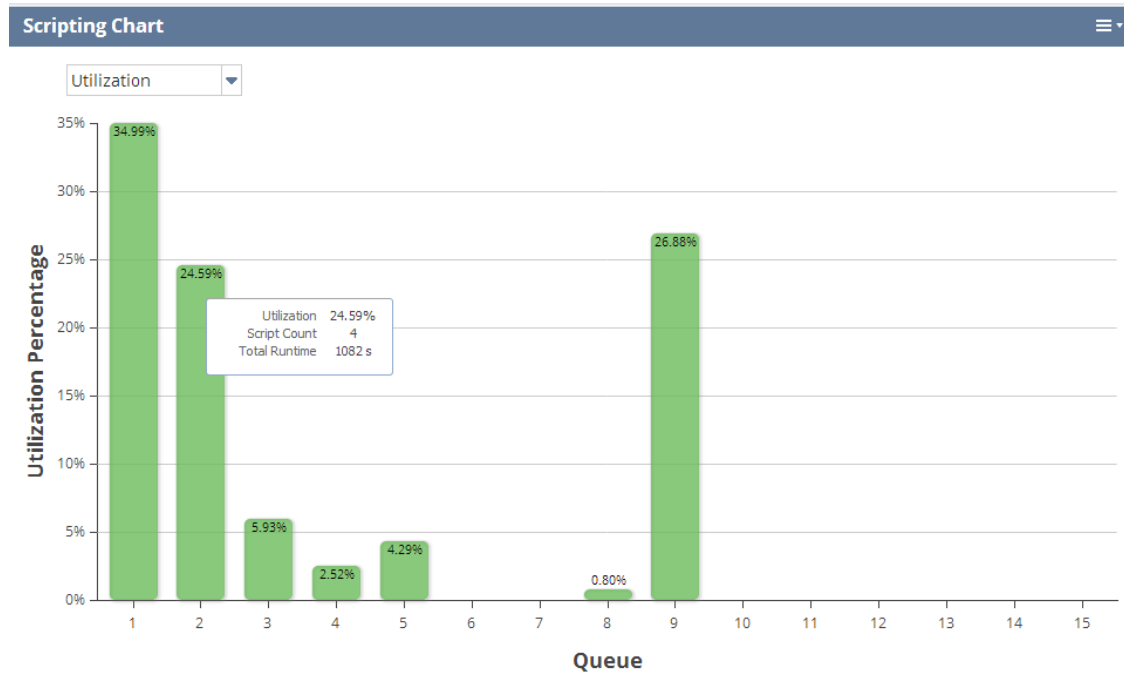
## Script Count Chart

The Script Count chart displays vertical bars representing the number of scripts running on each queue during the selected time period. A hover over the bar for a queue displays a popup listing the number of scripts for each script status.



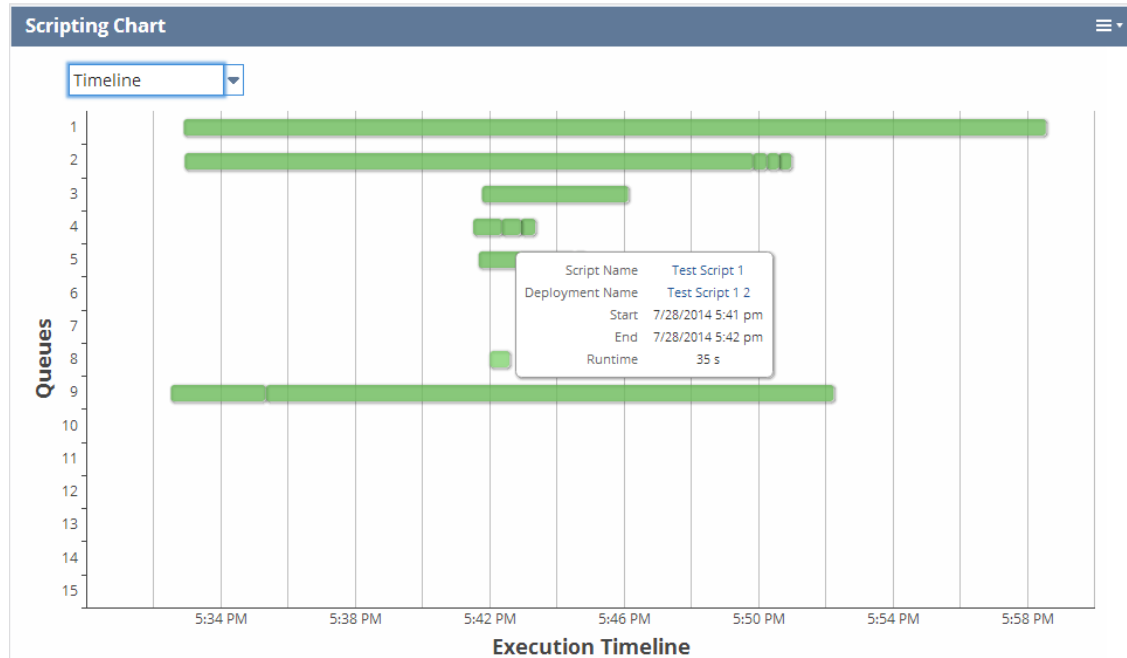
### Utilization Chart

The Utilization chart displays vertical bars representing the percentage of capacity used for each queue during the selected time period. A hover over the bar for a queue displays a popup listing this percentage, the count of scripts run in the queue, and the total runtime of these scripts, in seconds.



## Timeline Chart

The Timeline chart displays horizontal bars representing the times during which scheduled scripts were running on each queue during the selected time period. A hover over the bar for a script displays a popup listing this script name, deployment name, start and end times, and total runtime, in seconds.



You can grab and highlight a vertical slice of the timeline to zoom in and get a better view of script executions during the highlighted time period. To return to the higher level view, click the Reset Zoom button that is available in the lower right corner of the chart after a zoom.

**Important:** The timeline chart cannot display a time period longer than 3 days. If the selected date range is longer, the timeline chart includes only the first 3 days.

## User Interface

Version 2014 Release 1 includes the following enhancements to the NetSuite user interface (UI):

- StickyNotes (Beta)
- File Drag & Drop Enhancements

## Administration

Version 2014 Release 1 includes the following enhancements to Administration features:

- Password Management Enhancements
- Enhancements to Sandbox Refresh

- [Validation Process for Email Changes](#)
- [Role Restrictions for Subsidiaries Applied to Vendor Records](#)

## Password Management Enhancements

Version 2014 Release 1 supports new built-in password policies that provide three levels of password validation to enforce requirements for password length and content. This release also increases the maximum supported password length and prohibits passwords that are too easy to guess, such as common names, words, and strings like abcd123456.

Before this release, account administrators could specify the minimum password length, with a maximum length of 16 characters, and password expiration in days, at Setup > Company > General Preferences. Now, a Password Policy setting is available on this page, and the minimum password length must be at least the minimum required by the policy.

All NetSuite accounts are set to a Strong policy by default and the Minimum Password Length defaults to 10 characters. You can, if desired, make the minimum password length longer than that specified by the policy. It is also possible to reset the policy to Medium or Weak, but this is not recommended.

**Important:** As of Version 2014 Release 1, 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.

The new Strong policy will be enforced for all new users going forward. Existing users' passwords will not be affected until their current passwords expire. It is strongly recommended that you set a value for Password Expiration in Days to ensure that the new policy is applied to existing users. You also can enable the Require Password Change on Next Login option on employee records; you can use CSV import to update this option on many employee records at one time.

In addition to the new password policy setting, as of this release, passwords for new users logging in with the Customer Center role and for web site shoppers require a minimum of 6 characters. Passwords for existing Customer Center users and web site shoppers are not affected by this change.

The new password policies enforce the following requirements:

- **Strong:** minimum length of 10 characters, at least 3 of these four character types — uppercase letters, lowercase letters, numbers, non-alphanumeric characters
- **Medium:** minimum length of 8 characters, at least 2 of these four character types: uppercase letters, lowercase letters, numbers, non-alphanumeric characters

- **Weak (Not Recommended):** minimum length of 6 characters

All three password policies continue to enforce validation against these basic criteria: significant difference from previous password, use of only legal characters.

The password policy is set at Setup > Company > General Preferences:

## General Preferences

Save Cancel Reset

\*Date Format

MM/DD/YYYY

\*Long Date Format

Month DD, YYYY

Time Format

hh:mm AM/PM

Number Format

1,000,000.00

Negative Number Format

-100

Phone Number Format

First Day of Week

Sunday

Add Primary Contact to Bill To Address

☒

Use Last Name First for Employees

☐

Use Last Name First for Entities

☐

Pre-Populate Contact Address

☒

Show Employees as Contacts

☒

Show Display Name with Item Codes

☐

Password Policy

Strong

Password Expiration in Days

\*Minimum Password Length

10

Internal Web Site

Wolfe Electronics

If a user has access to multiple NetSuite accounts that have different password policies, the strongest policy is enforced for that user. A user is defined as an email and password pairing.

As they enter a new password, users receive immediate feedback on compliance with requirements.

The screenshot shows a 'Change Password' form with three input fields: 'Current Password', 'New Password', and 'Confirm New Password'. To the right of the 'New Password' field is a 'Password Criteria' section with a list of requirements, each followed by a green checkmark indicating compliance.

Password Criteria	
Does not contain illegal characters	✓
Is at least 10 characters long	✓
Is sufficiently different from previous password	✓
Contains at least 3 of these 4 character types:	✓
• Uppercase alpha characters (A, B...)	
• Lowercase alpha characters (a, b...)	
• Numbers (1, 2, 3...)	
• Non-alphanumeric characters (\$, @, #...)	
New passwords match	✓

## Enhancements to Sandbox Refresh

### Sandbox Accounts Page Improvements

The Setup > Company > Sandbox Accounts page includes the following improvements:

- When a refresh fails, a popup message now displays in this page's Refresh Status field. This message includes an error ticket number that you can provide to Customer Support to help them resolve the issue.
- As of this release, Copy and Refresh buttons are removed for sandbox accounts during phased release when these accounts are running a different version of NetSuite from the production account. In these cases, the Refresh Status field displays a popup version mismatch error.

This error can occur during phasing of a new release, because sandbox accounts are not upgraded at the exact same time as their related production accounts. Previously, this situation was not identified, so you might have attempted to refresh a sandbox account and not understood the issue when the refresh failed.

- The Estimated Refresh Time field now displays a far more accurate estimate of the hours required for a refresh to complete.
- The options for access after refresh have been combined into a single field called Access After Sandbox Refresh, with options for All Users and Administrators Only.



Sandbox Accounts	
✓ Sandbox Account: [REDACTED]	
<b>General</b> Account Name [REDACTED] Expiration Date November 11, 2016 Last Refresh August 21, 2013 Last Refresh Requestor [REDACTED] Production Snapshot Date August 21, 2013 12:04 am Access After Sandbox Refresh <input type="radio"/> All Users <input checked="" type="radio"/> Administrators Only	<b>Refresh Summary</b> Refreshes Used / Refreshes Total 2/48 Estimated Refresh Time (in hours) 10 Date Refresh Requested August 21, 2013 10:58 am Refresh Status ✖ <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <b>✖ Version Mismatch</b>              Version Mismatch Between Sandbox 2013.2 and Production 2014.1. Please contact NetSuite Support to resolve this issue.           </div>

## Improved Refresh Performance for Multiple Sandbox Accounts

Sandbox refresh performance has been greatly enhanced for environments that include multiple sandbox accounts. The initial copy of data into a sandbox account, as well as subsequent refreshes, now complete up to four times faster than in previous releases.

## Validation Process for Email Changes

Users can change the email address they use to access NetSuite by clicking the Change Email link in the Settings portlet on their NetSuite Home page, and then completing the Change Email page. As of Version 2014 Release 1, whenever a user attempts to change their email address in this manner, the following validation process occurs:

- A notification message similar to the following is sent to the current email address.

We received a request to update the email address that you use to log in to (account name or web site name) from currentaddress@abc.com to newaddress@abc.com. To complete this change, follow the instructions in the email sent to newaddress@abc.com before 4/15/14 5:13 AM. Until this change is completed, you can continue to use your current email address (currentaddress@abc.com). If you did not make this request, please contact your administrator.

- A validation message similar to the following is sent to the new email address, with a link that the user must click to complete the change:

We received a request to update the email address that you use to log in to (account name or web site name) from currentaddress@abc.com to newaddress@abc.com. To complete this change, please click the following link to confirm: <http://main.corp..netsuite.com/app/center/validatekey.nl?key=5qNAWGemj70gui1zqdbx>

This link is valid until 4/15/14 5:13 AM. If you did not make this request, please contact your administrator.

- The times in the notification and validation messages are based on the user time zone preference defined at Home > Set Preferences.
- The user must continue to use the current email address to access NetSuite until the validation link is clicked.
- The new email address is listed in the Pending Email Change field on the Change Email page, until either the validation link is clicked, or the link expires.

**Change Email**

Save Cancel

\* Current Password

\* New Email Address

\* Confirm New Email

Just This Account ☐

Pending Email Change:

**Important:** The email validation feature has caused a change in behavior for the Web services operations `changeEmail` and `changePasswordOrEmail`, and the SuiteScript method `nlobjLogin.changeEmail`. Before this release, when you used either of these operations or this method, the email address was immediately changed and could be used for subsequent calls to login. As of Version 2014 Release 1, the email address is not immediately changed. The old email address remains in use until the new email address is validated by the user.

The new email change validation process provides the following benefits:

- Improved security by ensuring the user owns the new email address

If the user receives a notification message about a change the user did not initiate, they can alert their account administrator to a possible security issue so that the administrator can take appropriate action.

- Avoidance of typos in new email addresses

If a user receives a notification message and realizes that the change is in error, they can let the validation link expire, and if necessary, later enter a change to a different email address.

- Readily available information about pending email changes on the Change Email page

## Role Restrictions for Subsidiaries Applied to Vendor Records

Version 2014 Release 1 applies subsidiary restrictions set on roles to vendor records. Before this release, subsidiary restrictions were applied to customer and transaction records, but not to vendor records. These subsidiary restrictions are set on the Role page.

Subsidiary restrictions defined for a role limit the subsidiary values that users with this role can set for customer and vendor records. These restrictions also limit the transaction, customer, and vendor records that users with this role can edit, to only those records with the selected subsidiaries. To allow users logging in with a role to see, but not edit, records from other subsidiaries, check the Allow Cross-Subsidiary Record Viewing box on the Role page.

**Warning:** As of Version 2014 Release 1, users logging in with roles that have subsidiary restrictions can no longer edit cross-subsidiary vendors, even if Allow Cross-Subsidiary Record Viewing is enabled. Viewing of cross-subsidiary vendors continues to work as before.

## Customer Relationship Management (CRM)

Version 2014 Release 1 includes the following enhancements to CRM features:

- Campaign Response Enhancements

- Scriptable Template Enhancements
- Campaign Event Tracking
- Managing Bounced Campaign Email
- Customer Support Enhancements
- Enhanced Duplicate Detection
- NetSuite for iPhone Version 2.5
- Enhancements to Advanced Promotions
- Event Enhancements
- SuiteSocial Enhancements
- Last Sales Activity

## **Campaign Response Enhancements**

- Campaign Response Error Details
- Enhanced Campaign Response Tracking

### **Campaign Response Error Details**

Now, when campaign email is not successfully delivered, you are given more information on the reason. To view the reason email was not delivered, open the campaign response on the recipient's record. In the list of responses, at the bottom of the page in the Notes column, you can see detail on why the email delivery failed.

You can also include these details in reports and in searches. On reports, you can add the Comment field as a column or filter. To include these responses in searches, use the Response Comments field in the Campaign Response fields.

### **Enhanced Campaign Response Tracking**

You can keep track of all of the responses a recipient has had to a campaign event in addition to when each response was entered. This has been enhanced with the possibility to enter date and time to a new response and to remove previously manually entered responses.

Clicking the new Update Status link on the Campaigns subtab of an entity record enables you to update the recipient's response to a campaign. In addition to setting the new response status, you can enter the date and time of the response. When you click Save New Response, your update is added to the list of responses.

For more information, see the help topic [Tracking Campaign Responses](#).

## Scriptable Template Enhancements

- [Scriptable Support for All Templates](#)
- [Attaching Images and Files to Scriptable Templates](#)
- [Inserting Subtemplates into Scriptable Templates](#)

### Scriptable Support for All Templates

Scriptable templates can now be used for any type of email or fax template in NetSuite. This includes:

- email templates
- fax templates
- marketing campaign email templates
- system email templates
- email and faxes sent from the Communication subtab of records
- email and faxes sent from the Messages subtab of transactions

**Note:** Email and fax templates that use CRMSDK tags will be deprecated and fully replaced by scriptable templates in a future version. PDF and letter templates will continue to use CRMSDK tags.

For more information on scriptable templates, see the help topic [Scriptable Templates](#).

### Attaching Images and Files to Scriptable Templates

Now, you can include images in scriptable templates.

There are three standard image fields you can add to scriptable templates:

- Item Display Image (ID: `storeDisplayImage`) - item record
- Item Display Thumbnail (ID: `storeDisplayThumbnail`) - item record
- Image (ID: `image`) - entity records

References to these images are structured like this:

```

```

Including this code in a template creates a link to the image using the publishable URL on the image's file record in the file cabinet.

To insert a link to a file in a scriptable template, reference the file record ID in an `include` directive. For example, the following code inserts the publishable file URL for file 123 in the email message:

```
<#include "123">
```

You can also include image custom fields in your templates.

It is also possible to include content of a file into the template using `#include` directive, thus allowing users to create sub-templates and include them in other templates. It is also possible to include a file URL from file cabinet for custom fields of type "Document". If you reference the field using `${}` it will be translated to a public URL of the file from the file cabinet. It is not possible to use the `#include` directive for this purpose – this can be used only to include content of the file.

## Inserting Subtemplates into Scriptable Templates

You can use the `include` directive to insert another template inside of a template. This directive is often used when you have a template that presents information you want to reuse many times. For example, you might create a template that is used as a header for all communication you send out. This might include your company logo and contact information. The `include` directive can reference template files by URL or file cabinet ID.

For more information, see the help topic [Inserting Subtemplates into Scriptable Templates](#).

## Campaign Event Tracking

With Version 2014 Release 1, the Campaign Event field on a customer record enables you to track which specific campaign event brought a lead or customer to do business with your company. The Lead Source Analysis and Gross Lead Source Analysis reports have been updated to include campaign event.

You can associate a campaign event with a customer using an online customer form. Each campaign event is assigned a unique event ID, enabling you to track its performance independently of the campaign. When you create an online customer form at Setup > Marketing > Online Customer Forms, a new Set Campaign Event field is available on the Set Up Workflow subtab. When you select a campaign in the Set Lead Source field, you can select any of that campaign's events to be associated with customers who submit the form.

The screenshot shows the 'Online Customer Form' interface. At the top, there are four tabs: 'Select Fields', 'Detail Message', 'Set Up Workflow', and 'Set Up Appearance'. The 'Set Up Workflow' tab is currently selected. Below the tabs, there is a 'Preferences' section. It includes a checkbox for 'Create Customers as Companies' which is checked. Below this are three dropdown menus: 'Set Lead Status' (set to 'Customer - Closed Won'), 'Set Lead Source' (set to 'Impressivo 1500 Special'), and 'Set Campaign Event' (set to 'Impressivo Special Promotion'). To the right of each dropdown menu is a circular arrow icon and a text label: 'Allow Update' for the first, 'Allow Update or' for the second, and no label for the third.

If you are linking to an online customer form from multiple campaigns, you can include each campaign event's ID in a parameter in the URL you provide through the campaign email. To do this, you must include the Campaign Event field on the online form (although the field may be hidden from those submitting the form).

## Managing Bounced Campaign Email

One of the most important ways a marketer can develop a positive sender reputation is to avoid sending email to invalid email addresses. With Version 2014 Release 1, NetSuite provides tools you can use to manage email addresses that have triggered hard bounce, or invalid email address, responses.

The new Hard Bounced field is available when searching for entity records. You can add this field as a filter on saved searches used to define dynamic recipient groups.

Each email address that triggers a hard bounce response is automatically excluded from any email campaign for a defined period of time. You can view a list of bounced email addresses at Lists > Relationships > Bounced Email Addresses. On this page, you can also remove email addresses from this list with the purpose of including them in future email campaigns.

You can set the amount of time an email address is excluded by going to Setup > Company > Preferences and clicking the Email subtab. In the **Remove email addresses from Bounced Email Address list after** field, choose the length of time that must pass before an email address is no longer excluded from email campaigns. This preference is set by default to **90 days**.

You can also choose to unsubscribe customers and other entities with invalid email addresses using a mass update based on the Hard Bounced field.

## Customer Support Enhancements

- Replying To and Forwarding Case Replies
- Support Case Profiles

### Replying To and Forwarding Case Replies

Now you can reply to, and forward a message on a case record directly from the page in which you are viewing the record. Messages to which you reply are recorded in the message history.

### Support Case Profiles

With Version 2014 Release 1, you can create case profiles that enable you to apply different configurations to sets of support cases.

The screenshot shows the 'Case Profile' configuration window. At the top, there's a title bar 'Case Profile' with buttons for 'Edit', 'Back', and 'More Actions'. Below this is a tabbed interface with 'General' and 'Notifications' tabs. The 'General' tab is active, displaying a table of settings. The table has two columns: 'Name' and 'Value'. The rows are: 'Name: West Coast Gold Support', 'Anonymous Customer - Online Form: Anonymous Customer', 'From Name: Wolfe Electronics West Customer Support', 'Anonymous Customer - Inbound E-mail: Anonymous Customer', 'From Email Address: support@wolfelectronics.com', and 'NetSuite Inbound Email Address: cases.3753395\_2.8523f055bb@cases.wg.netsuite.com'.

Name	Value
West Coast Gold Support	Anonymous Customer - Online Form
Anonymous Customer - Online Form	Anonymous Customer
From Name: Wolfe Electronics West Customer Support	Anonymous Customer - Inbound E-mail
Anonymous Customer - Inbound E-mail	Anonymous Customer
From Email Address: support@wolfelectronics.com	NetSuite Inbound Email Address
NetSuite Inbound Email Address	cases.3753395_2.8523f055bb@cases.wg.netsuite.com

Case profiles include the following settings:

- Support From name and email address
- Anonymous customers for inbound email and online forms
- Customer and employee case notification templates

Using case profiles provides better control over the branding of your support communication. By setting the templates that are used for each profile, you can handle situations like the following:

- Providing unique support communication for multiple web sites with different branding, From names, and email addresses
- Having different identities for replying to support cases that are independent of subsidiaries
- Having different case capture email addresses that are independent of subsidiaries



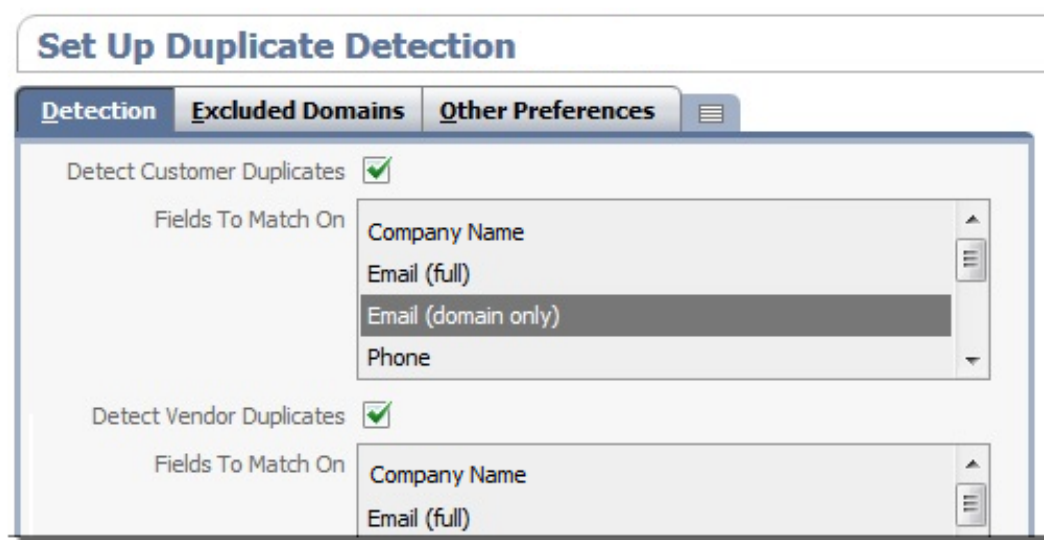
Case Profile is a required field on the case form. A single case profile is created in your account when it is upgraded to Version 2014 Release 1, and it is set as the default for new and existing cases.

To create new case profiles, go to Setup > Support > Case Management > Case Profiles > New.

## Enhanced Duplicate Detection

The following improvements have been made:

- Duplicate Detection has been enhanced with the availability of newly added criteria fields that provide better control and accuracy in the detection of duplicate records. A sample of the newly added fields include Alternative Email, Web Address, Primary Contact First Name, and Primary Contact Last Name. These new fields appear in the form Set Up Duplicate Detection located at Setup > Company > Duplicate Detection.
- The field Name/ID has been replaced with Company Name, which exactly matches the Company Name in the type of record selected, removing any existing confusion. First Name, Middle Name, and Last Name fields have been added to Duplicate Detection Criteria, enabling you to match exact names in records with primary information of type individual.
- The form Set Up Duplicate Detection has been redesigned and includes a new tab called Excluded Domains, which enables you to enter or remove the domains you want to exclude from domain only duplicate detection matching.



- Starting with Version 2014 Release 1, records from different subsidiaries are never considered duplicates.
- The page that displays possible duplicates has been enhanced to enable you to customize the columns that appear.

## NetSuite for iPhone Version 2.5

**Important:** NetSuite for iPhone 2.5 is targeted to be available in the second quarter of 2014.

The NetSuite for iPhone 2.5 app adds new features and enhancements including time tracking and expense tracking.

For more details about NetSuite for iPhone 2.5, see the following:

- [File Upload](#)
- [64bit Support](#)
- [Custom Records](#)
- [Time Entry](#)
- [Expense Tracking](#)
- [Additional Supported Records](#)

## File Upload

NetSuite for iPhone 2.5 introduces the ability to upload and attach files to records, directly from your iOS compatible device. This feature has many practical applications including attaching photos of expense receipts from your iPhone's image library or camera.

## 64bit Support

64bit support allows the NetSuite for iPhone 2.5 app to take full advantage of iPhone 5s capabilities.

**Note:** The 64bit app requires a 64bit device running iOS 7.0.3 or later.

## Custom Records

NetSuite for iPhone 2.5 provides the possibility of complete access to custom records including support for view, edit, create and delete (for any custom records already accessible via the NetSuite web application). The custom records feature also provides access to Saved Searches based on custom records, and makes custom records searchable using the Global Search feature. Administrators can control which custom record types are available on their user's devices.

## Time Entry

NetSuite for iPhone 2.5 provides features that enable you to track time and expenses directly from your iPhone.

- **Time Tracking Portlet on the Home Dashboard**

The Home dashboard now includes a Time Tracking portlet – available to all users who have the necessary permission to create a Time Entry record. From the new portlet, you can create a new time entry directly from your iPhone.

- **Timer**

The timer feature enables you to track your time during the period in which you are on the road. Using a stopwatch function you can time events, creating time logs of your activities. Time logs are stored securely on your device, ready to be transformed into real Time Entries.

## My Time

The new My Time feature provides you with a complete overview of time entries entered against a timesheet. You can cycle through timesheets week-by-week using the familiar weekly calendar view and quickly view the status of individual time entries. Time entries for a specific date can be created directly from My Time.

## Expense Tracking

The Home dashboard now includes an Expense Report portlet providing an overview of all outstanding expenses – available to all users who have the necessary permission to create Expense Reports. From the new portlet you can create a new Expense Report and attach expense receipts directly from your iPhone. See [File Upload](#).

## Additional Supported Records

With NetSuite for iPhone 2.5 more record types are supported for Saved Searches, Global Search, create, edit, delete, and drill down from related records. See the help topic NetSuite for iPhone Supported Record Types.

The following additional record types are supported by NetSuite for iPhone 2.5:

- Employee
- Partner
- Purchase Order
- Vendor

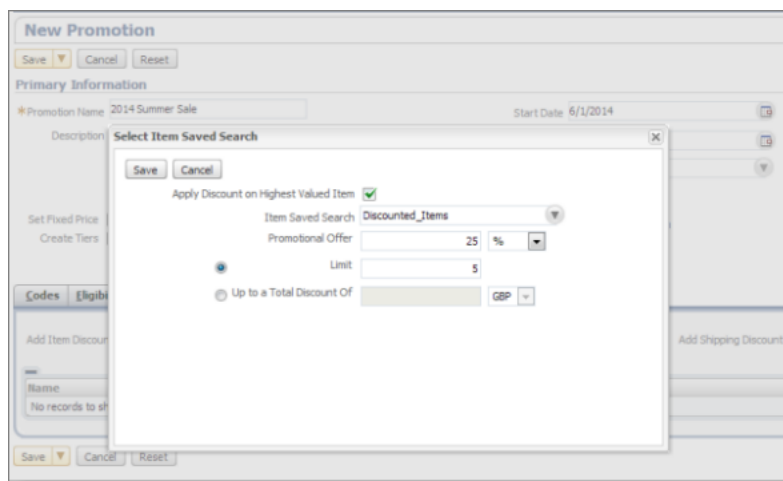
## Enhancements to Advanced Promotions

Version 2014 Release 1 includes the following enhancements to Advanced Promotions:

- [Apply Discounts to the Highest Value Item on an Order](#)
- [Item-Specific Shipping Promotions](#)

### Apply Discounts to the Highest Value Item on an Order

A new check box has been added to Item-Based Promotions and Buy X Get Y Promotions so you can apply a discount to the highest value item on an order. Previously, discounts were only applied to the lowest value item on an order. Note that default behavior has not changed. The new check box is not marked automatically.



To apply a discount to the highest value on an order, click the Discount subtab on an Item-Based Promotion or a Buy X Get Y Promotion. Then, check the **Apply Discount to Highest Valued Item** box in the popup screen. Also, set the maximum number (units) of items you are offering the discount on. The new check box only affects promotions with defined unit limits. You must set a unit limit when selecting items on the promotion.

## Item-Specific Shipping Promotions

An enhancement to the Advanced Promotions SuiteApp enables you to create item-specific free shipping promotions. In this way, merchants can associate free shipping with certain products.

Starting in Release 2014 Version 1, sales and merchandising reps have more flexibility in defining promotions that permit shipping discounts per item. This new capability enables a customer to purchase an item using a coupon code that flags the item for free or discounted shipping, different from the rest of the items in the order. For example, you can configure a promotion where a customer can purchase items X, Y, and Z, where Z is shipped free of charge. For more information, see the help topic [Item-Based Shipping Promotions](#)

## Event Enhancements

- [Calendar Synchronization Using iCal Format Support](#)
- [Administrator Access to Events](#)
- [Event Access Filters](#)

## Calendar Synchronization Using iCal Format Support

Now you can sync your NetSuite calendar to mobile devices and external calendar apps without installing any software or plugins.

To sync your calendar to another device or application, go to Activities > Setup > Calendar Preferences and click the Preferences subtab. Under Calendar Sharing, choose whether you want to generate a public (which includes only those events marked public) or a private URL (which includes all events on your NetSuite calendar). NetSuite generates a unique URL that you can use to access your NetSuite calendar.

Sharing your calendar this way can be used for any application or device compatible with ICS files. This synchronization is read-only. You cannot update your NetSuite events from other applications using this feature.

### **Administrator Access to Events**

In Version 2014 Release 1, administrators are able to view, edit, or delete, any task, event or call, even if it is not assigned to them and regardless of the event access settings.

### **Event Access Filters**

When you are searching events using a saved search, you now have the option to filter by event access. A dropdown is provided on the saved search form enabling you to select from a list of choices such as public, private, or busy. For example, you can search for public meetings or change the filter settings in the saved search to private and search for private meetings.

## **Enterprise Resource Planning (ERP)**

Version 2014 Release 1 includes the following enhancements to ERP features:

- Statistical Accounts
- Multi-Book Accounting
- Extended Transaction Numbering
- Timesheets
- Free Item Shipping in Estimates, Invoices and Cash Sales
- Time Fences
- Planned Work Orders
- Planning Action Messages
- Gross Requirements Inquiry Detail
- Requisitions
- Work Order Validation
- Work Center Calendar

- Synchronize Intercompany Special Order and Drop Shipment Processing
- Batch Processing for Revenue Recognition Journal Entries
- Collapse/Expand VSOE Column on Sales Transactions
- Enhanced Deferred Revenue Reconciliation Reports
- Bulk Invoicing Enhancements
- Customer Payment Enhancements
- Show Planned Capacity Preference
- Capacity to Specify Type of Return for Fedex
- Currency Field Unlocked on Intercompany Clearing Accounts
- Automatic Handling of Negotiated Rates for UPS
- Sending Transactions in Bulk
- Expense Report Summary Box
- Time Entry Rounding for Time Tracking
- Bulk Processing/Authorizing Commission
- Employee Payroll Item History Report
- Charge Transaction Enhancements
- Applying Deposits in the Customer Center
- Germany GDPdU Data Export
- Supply Chain Management
- Warranty and Repairs Management
- Fixed Assets Management Enhancements
- SuiteOrgChart (Beta)
- Recurring Billing Enhancements
- Subsidiary Navigator SuiteApp (Beta)
- Payment Gateway Plug-in SuiteApp
- Electronic Payments Enhancements
- EITF 08–01 Revenue Recognition
- France Standard Audit File for Tax Purposes (SAF-T)
- Statutory Chart of Accounts

- [Software Vertical Contract Renewals](#)

## Statistical Accounts

The Statistical Accounts feature, part of the Advanced Financial module, enables your financial team to track non-monetary data and then use that information on reports and income statements. Financial users can examine the non-monetary data to view its relationship with the financial activity of your organization.

Users who would find this feature valuable include those responsible for accounting maintenance and period close activities, journal entries, cost and revenue allocation, and financial reporting using ratios such as EPS (Earnings per Share).

Users can manually make statistical journal entries, or autogenerate them through a saved search run by a statistical schedule.

If the Dynamic Allocation feature is enabled (Setup > Company > Enable Features > Accounting under Advanced Features), users can assign any statistical account to an allocation schedule. The weight for the allocation, based on the balance of the statistical account through statistical journals, is dynamically calculated at the time the allocation journal is generated.

**Note:** The Expense Allocation and Accounting Periods features (Setup > Company > Enable Features > Accounting under Advanced Features and Basic Features, respectively) are required to create allocation schedules.

To run multiple dynamic allocation schedules in a specific sequence, users can create allocation batches. Commonly referred to as the step-down allocation method in cost accounting, users define a sequence where the result of the first allocation is the source pool of the second allocation and so on. You can include up to ten allocation schedules in a batch.

There are several methods users can employ to monitor the balance of a statistical account. From the chart of accounts, users can view a specific statistical account register. From the saved search assigned to a statistical schedule, users can access the details of each statistical journal associated with that schedule. Users can search for statistical journal entries. Users can customize the Income Statement to include statistical account data, and then examine its relationship with their financial data.

For more information about Statistical Accounts and how to use the feature, see the following help topics:

- [Using Statistical Accounts](#)
- [Enabling Statistical Accounts](#)
- [Creating Statistical Accounts](#)
- [Working with Statistical Journal Entries](#)
- [Auto-Generating Statistical Journal Entries](#)



- Monitoring the Balance of a Statistical Account
- Running Financial Reports and Income Statements

### Dynamic Allocation

If you have enabled the Statistical Accounts feature (Setup > Company > Enable Features > Accounting under Advanced Features), the Dynamic Allocation feature extends the existing fixed rate revenue and cost allocation capability. With fixed rate allocation, you must specify the fixed allocation weight for the entire life cycle of any allocation schedule. Using Dynamic Allocation, you can assign any statistical account to any Single or Intercompany Allocation Schedule. The weight for the allocation, based on the balance of the statistical account through statistical journals, is dynamically calculated at the time the allocation journal is generated.

For more information about Dynamic Allocation, see the help topics Enabling Dynamic Allocation and Working with Allocation Schedules Weighted by the Balance of a Statistical Account.

### Allocation Batch

If you have enabled the Expense Allocation and Accounting Periods features, you can run multiple fixed allocation schedules in a specific sequence. If you have also enabled the Dynamic Allocation feature, you can add dynamic allocation schedules to your allocation batch. For more information about allocation batches, see the help topic Creating an Allocation Batch.

## Multi-Book Accounting

**Note:** In Version 2014 Release 1, Multi-Book Accounting is supported only in new NetSuite accounts. Please contact your sales representative to find out how to get Multi-Book Accounting.

The Multi-Book Accounting feature provides the ability to maintain multiple sets of accounting records based on a single set of real-time financial transactions. This feature enables businesses to support different managerial and regulatory compliance needs, such as:

- **Deliver different financial reports to serve different purposes**

A company that maintains its primary accounting records according to United States Generally Accepted Accounting Principles (U.S. GAAP), for example, can add accounting books to generate different versions of financial reports and statements that are mandated by local governments or industry regulations.

- **Provide detailed transaction-based reports for each accounting book**

Transaction level reports can be generated for individual accounting books to satisfy managerial reporting requirements and provide a detailed transaction level audit trail

to book specific financial statements. Saved searches and KPI's also support display by accounting book.

- **Automate posting to multiple accounting books according to pre-defined accounting rules**

You can create different revenue recognition and expense amortization rules for different accounting books.

- **Adjust financial results on a per-book basis**

Manual journal entries, including intercompany journal entries, can be posted for individual accounting books.

- **Ensure data integrity across multiple accounting books**

The system automatically maintains data synchronization for parallel transactions in different accounting books to ensure data integrity.

- **Enable customization to leverage the Multi-Book Accounting context**

SuiteApps and customization can be implemented to yield book specific financial results. For more information, see [SuiteScript Support for Multi-Book Accounting](#).

The Multi-Book Accounting feature includes options for chart of account mapping, foreign currency management, and revenue and expense management to address these needs.

For more information about the Multi-Book Accounting feature and its options, see the following help topics:

- Using Multi-Book Accounting
- Planning for Multi-Book Accounting
- Setting Up Multi-Book Accounting
- Chart of Accounts Mapping
- Foreign Currency Management
- Revenue and Expense Management

## Extended Transaction Numbering

Transaction numbering has been enhanced to provide autogenerated numbers for the remaining twelve transaction types. 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, autogenerated number in the Transaction Number 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 will be different from the value in the Number field for the twelve transaction types available through Version 2014 Release 1. For the transaction types available through previous releases, these two values will be the same.

**Note:** The Transaction Number field is visible by default on standard NetSuite forms and invisible by default on customized forms. You can, however, customize a form to display this field.

The following new transaction types will be available for autogenerated numbering when your NetSuite account is updated to Version 2014 Release 1:

- 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
- Paycheck Journal, Regular
- Payroll Liability Check, Account-based
- Sales Tax Payment (Tax Payment), Account-based
- Tax Liability Cheque (Tax Liability), Account-based

**Note:** The Allow Override feature (Setup > Company > Auto-Generated Numbers > Transactions tab) is not available for account-based and externally referenced transaction types. For more information about transaction numbering, see the help topic Setting Up Auto-Generated Numbers.

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

For more information about auto-generated numbers and transaction types, see the help topic Records and Transactions Available for Auto-Numbering.

For a complete list of every transaction number, including the numbers assigned to transactions that have been deleted or failed to be created, see the help topic Transaction Numbering Audit Log.

## Timesheets

**Important:** The Timesheets feature is not currently available at Setup > Company > Enable Features. You must contact NetSuite Customer Support to enable this feature.

The new Timesheets feature enables companies to track time in bulk using timesheets rather than individual time entries. Companies that track time for projects, cases, tasks, or events can use timesheets to submit a whole week's worth of time at one time. Previously, time entries had to be recorded by a single date and the Weekly Time Sheet option did not permit editing of time entries.

The new Timesheets feature enables employees to save their time, without submitting, over the course of a week. Time entries can be edited from the weekly timesheet, and when employees are sure that all time entries are correctly recorded, they can then submit the timesheet for approval.

The new Timesheet grid offers at-a-glance access to information about entered time including color coding for time entry status and daily and weekly totals. Timesheets are also available for use with SuiteScript, SuiteFlow, and SuiteTalk.

To use Timesheets, you must first enable the feature at Setup > Company > Enable Features. On the Employees tab, under Time & Expenses, check the Timesheets box.

**Warning:** The Timesheets feature is not compatible with Time Tracking and Time Tracking for CRM. If you previously used these features, you must disable them when you enable Timesheets. CSV imports are not available with the Timesheets feature. Your time entry custom fields, records, and saved searches will be updated for use with the Timesheets feature.

When Timesheets is initially enabled, NetSuite converts existing time entry records for use with timesheets. Time entries are not available during this time. After this process is complete, all time entries will be available.

SuiteScript or SuiteTalk users accessing time entry fields must update their existing code to continue using these features.

For more information on SuiteScript and Timesheets, see [SuiteScript Support for Timesheets Feature](#). For more information on SuiteTalk and Timesheets, see [Newly Supported Record Types for SuiteTalk](#). For more information on SuiteFlow and Timesheets, see [Timesheet and Time Entry Records Supported in SuiteFlow](#). For more informations on custom forms and fields and Timesheets, see [SuiteBuilder Support for the Timesheets Feature](#).

After the Timesheets feature is enabled, the timesheet is accessed at Transactions > Employees > Enter Time. Timesheets are also made available in any Center with access to entering time.

### To enter time using a timesheet:

1. Go to Transactions > Employees > Enter Time.
2. The timesheet for the current employee and week automatically loads. If you are entering time on behalf of another employee or for a different week, click the **Quick Find** icon at the top of the page. In the popup window, select an employee and **Date** and click **Continue**.
3. In the **Customer** column, select a customer or project if the time worked is for a customer or project.
4. If you use the Advanced Projects feature and selected a project in the **Customer** field, use the **Case/Task/Event** column to select an activity associated with the project and time.
5. Select the service that was provided if you track time spent on services.  
If the time you are entering is billable, you must select a service item.
6. Enter the hours for each day.
7. You can edit the individual time entries, by clicking the **Set** icon next to each entry. A popup opens where you can designate the entry as billable, add a payroll item, memo, department, location, or class. Click **OK** in the popup to save any updates made to individual entries.
8. When you have finished, click **Add**.
9. Continue adding lines as necessary.
10. When you have finished with the timesheet, click **Save for Later** to save your information for further editing later. Click **Submit** to save your information and submit the timesheet for approval.

**Note:** Submitted time entries are not available to be edited. You can add new time entries to a submitted timesheet.

After a new timesheet is saved, the status is updated to Open. Open timesheets can be edited and updated as many times as necessary until they are submitted.

When a timesheet is submitted, it is routed to a supervisor or administrator to approve or reject.

### To approve or reject an entire timesheet:

1. Go to Transactions > Employees > Approve Time.
2. Check the box in the **Select** column for each timesheet you want to approve or reject.

You can filter the timesheets displayed by selecting an employee in the **Employee** field. Click **Mark All** to select all displayed timesheets.

3. Click **Approve** to approve the selected timesheets or click **Reject** to reject the selected timesheets.

Individual time entries within a timesheet can also be approved or rejected without approving or rejecting the entire timesheet.

#### To approve or reject individual time entries:

1. Go to Transactions > Employees > Approve Time.
2. In the **Employee** field, select the employee for whom you want to approve an individual time entry.
3. In the **Period** column, click the date range for the individual time entry.
4. Check the box in the **Select** column next to the individual time entries you want to approve or reject.
5. Click **Approve** to approve the selected time entries or click **Reject** to reject the selected time entries.

**Timesheet: Brian K Wolfe (12/15/2013 - 12/21/2013)** Status: **Rejected**

Employee: **Brian K Wolfe** Total Hours: 17:30  
Start Date: 12/15/2013

Customer	Case/Task/Event	Service Item	Sun, 15	Mon, 16	Tue, 17	Wed, 18	Thu, 19	Fri, 20	Sat, 21	Total
Adley Electric Systems	Case # 70	Labor 1	2:00	1:00			2:00		1:30	6:30
Adley Electric Systems	Case # 70	Labor 1				4:00		7:00		11:00
			2:00	1:00	0:00	4:00	2:00	7:00	1:30	17:30

Memo Pending Approval Approved Rejected

When individual time entries on a timesheet are rejected, the status for that timesheet is updated to Rejected. However, time entries are color coded on the timesheet to show which entries are approved and which are rejected. A rejected time entry can be edited and resubmitted for approval.

## Free Item Shipping in Estimates, Invoices and Cash Sales

It is now possible to exclude certain inventory and assembly items from shipping calculations when creating an estimate, invoice, or a Cash Sale order. The Exclude Item from Rate Request box has been added to the forms. Checking the box excludes the item from the shipping cost calculation.

## Time Fences

Materials planners can now use planning and demand time fences to protect a materials plan. By protecting existing orders from being changed, time fences can prevent disruptions and refine demand requirements in short range materials planning.

You can set up Demand Time Fences as well as Planning Time Fences.

- **Demand Time Fences** – Planners can establish demand time fences in order to use more accurate data for planning purposes. Demand time fences use sales orders for short range planning and forecasts for long term planning.
- **Planning Time Fence** – Planners can establish planning time fences to provide better suggestions of future supply. First, establish a planning time fence, such as the lead time for procuring the materials. Then, after a planning time fence is established, NetSuite creates supply orders only outside the established time fence.

**Note:** The Demand Planning feature must be enabled in order to use Time Fences.

### Demand Time Fences

Instead of using forecasts for long term planning, demand time fences refine short range planning by using sales orders instead of forecast sales. Examining sales can provide more accurate data for short-term planning purposes.

For example, to plan for your supply of an item needed right away, your plan can be more accurate if you calculate demand based on the orders that are already entered. Existing orders show real-time demand instead of a forecast estimation. To plan the supply needed based on orders for an item instead of forecast estimations, set up a time fence for that item. Then, when orders are entered within the time fence, NetSuite knows to make demand calculations based on orders.

When NetSuite runs the supply planning engine, the calculation of demand respects demand time fences for items. The demand time fence is time frame of days relative days from the start date of the engine. Based on the item record and preferences set, NetSuite determines if a demand time fence applies.

Then, NetSuite establishes demand for planning based on the following criteria:

1. Within the time fence, NetSuite always uses orders.  
Days within the time fence are calculated as being equal to or less than (start date + demand time fence).
2. Outside the time fence, NetSuite uses the setting from the demand source.  
Days outside the time fence are calculated as being greater than (start date + demand time fence).

**Note:** For time fences, the start date is determined as follows:

Expected ship date (for sales orders and transfer orders)

Production end date (for work orders)

You may find it useful to use item lead times as a guide when setting up time fences to make supply planning as accurate as possible.

For details about setting a demand time fence, read the help topic Time Fences on Item Records.

For details about using forecasts and the Demand Source setting for long term planning, read the help topic Demand Planning on Item Records.

## Planning Time Fence

Planning time fences enable NetSuite to make better suggestions for planning future item supply. You can establish a planning time fence, such as the lead time of procuring materials. After a planning time fence is established, NetSuite creates only the supply orders outside the time fence. When the supply planning engine is run, the creation of supply orders respects the planning time fence. This means that late orders are no longer immediately created for recommendation. They will be created outside the supply order.

First, NetSuite checks the item record for a planning time fence.

1. Within the time fence, NetSuite will not create a purchase order or work order.

Days within the time fence are calculated as being equal to or less than (start date + planning time fence).

2. Outside the time fence, NetSuite processes the order normally.

Days outside the time fence are calculated as being greater than (start date + planning time fence).

**Note:** For time fences, the start date is determined as follows:

Expected ship date (for sales orders and transfer orders)

Production end date (for work orders)

**Note:** If the item record does not identify a planning time fence, NetSuite uses the default planning time fence value identified in the inventory preference setting. For details on this preference, read the help topic Time Fence Preferences. If the Planning Time Fence field is left blank on both the item record and the Inventory management Preferences page, then no planning time fence is used.

For details about setting up a planning time fence, read the help topic Time Fences on Item Records.



**Note:** The Demand Planning feature must be enabled in order to use Time Fences.

## Planned Work Orders

In Version 2014 Release 1, you can enter work orders that have a status of Planned. A planned work order functions as follows:

- Includes component information
- Includes resource information
- Does not commit items until the work order is released

Prior to Version 2014 Release 1, possible work order statuses were as follows:

- Pending Build – No transaction has posted and no activities have been recorded.
- In Process – A transaction has been posted.
- Built – The quantity built is equal to the quantity planned.
  - Manually set to this status.
  - No additional posting transactions could be added.
- Closed

Using Version 2014 Release 1, work orders can now have these statuses:

- Planned – No components are committed regardless of commit option settings.
- Released – No transaction has posted and no activities have been recorded.
  - This is the same as the previous status called Pending Build.
  - Components can be committed based on commit option settings.
- In Process – A transaction has been posted.
- Built – The quantity built is equal to the quantity planned.
- Closed

## Planned Work Orders

Planned work orders can be either Open or Firmed.

- Open – Open planned work orders will be deleted before supply planning runs.

- **Firmed** – Firmed planned work orders will NOT be deleted before supply planning runs.

Planned work orders can be created manually or generated by the supply planning engine.

### Manually Enter Planned Work Orders

#### To manually enter planned work orders:

1. Go to Transactions > Manufacturing > Enter Work Orders.
2. In the **Status** field, select **Planned**.
3. Complete additional fields on the form as necessary.
4. Click **Save**.

### Automatically Generate Planned Work Orders

Set preferences for the NetSuite planning engine to generate planned work orders. When you let NetSuite generate planned work orders, you can see the resources and materials required right after a planning engine run.

#### To set up preferences:

1. Go to Setup > Accounting > Preferences > Accounting Preferences.
2. Click the **Items/Transactions** subtab.
3. In the **Generate Work Orders in Supply Planning** field, select one of the following to define the default for supply planning work orders:
  - **Do Not Generate**
  - **Generate in Planned Firm Status**
  - **Generate in Planned Open Status**
  - **Generate in Released Status**

Your selection defines the default status of new work orders generated by a planning engine run.

4. In the **Default Work Order Status** field, choose one of the following:
  - a. **Firm Planned**
  - b. **Open Planned**
  - c. **Released**

Your selection defines the default status of new work orders you manually create.

5. Click **Save**.

### Mark Work Orders Firmed

You must change the status of Open order to be Firmed if you want the order to be saved and processed when the supply planning engine runs. You can open an individual order and set it to Firm, or use the steps below to update the status of many orders at one time.

#### To mark work orders firmed:

1. Go to Transactions > Manufacturing > Mark Work Orders Firmed.
2. In the **Item** field, select an item to filter the list and show only orders that include that item.
3. In the **Customer** field, select a customer to filter the list and show only orders for that customer.
4. Check the box in the **Mark Firmed** column next to each order you want to firm.
5. Click **Submit**.

### Mark Work Orders Released

Any work order in a Planned Firm state must be set to the Released status in be able to commit items to it. You can open an individual order and set it to released, or use the steps below to update the status of many orders at one time.

#### To mark work orders released:

1. Go to Transactions > Manufacturing > Mark Work Orders Released.
2. In the **Item** field, select an item to filter the list and show only orders that include that item.
3. In the **Customer** field, select a customer to filter the list and show only orders for that customer.
4. Check the box in the **Mark Released** column next to each order you want to firm.
5. Click **Submit**.

## Planning Action Messages

When you use the Demand Planning feature, planners can use planning action messages that provide recommendations to take action during each supply plan run in order to optimize productivity. A Planning Messages subtab on the item supply plan displays a message for each line. Some messages are also incorporated as part of saved search for generating reminders and alerts in a dashboard.

For example, in the following screenshot you can see a message that informs us that on 12/3 the quantity on hand exceeds the safety stock.

Date Created	Date	Reschedule Date	Message Code	Message
12/3/2013	11/1/2013	12/3/2013	130	Late Purchase Order
12/3/2013	12/3/2013	12/3/2013	120	Quantity On Hand is Above Safety Stock
12/3/2013	12/4/2013	12/3/2013	120	Quantity On Hand is Above Safety Stock

The planning messages that can be generated are described below.

### Planning Action Messages: Inventory On Hand

- Quantity On Hand is Below Zero
- Quantity On Hand is Below Safety Stock
- Quantity On Hand is Above Safety Stock

**Note:** Each of the messages above references only the particular day listed and is a projected quantity.

### Planning Action Messages: Late Purchase and Work Orders

- Late Purchase Order (Purchase orders have not been fully received before the start date.)
- Late Work Order (Work orders have not been fully built before the start date.)

### Planning Action Messages: Reschedule In, Reschedule Out / Cancel

NetSuite provides recommendations to adjust the order date of work orders and purchase orders based on demand changes. These adjustments will change the date of the order to be earlier or later than originally entered, depending on increased or decreased demand requirements.

For example, if a supply order is generated for an item, but there is no demand for the additional supply, NetSuite can recommend to change the order date to a later date, or Reschedule Out. This can prevent unnecessary expenditures on stock before it is needed.

Similarly, if demand for an item has surpassed the supply orders generated, NetSuite can recommend to change the order date to an earlier date, or Reschedule In. This can help you manage stock levels to fulfill orders in a timely manner.

These messages are available as part of saved search for use with reminders and dashboards.

**Important:** Changes recommended by NetSuite in action messages must be manually entered.

### Reschedule Out / Cancel

If there is an unapproved purchase order or work order that is scheduled to be received on a day that lacks demand for the item, NetSuite can recommend the following:

- Reschedule the items ordered on that line to a later date to meet anticipated future demand.
- Cancel the items ordered on that line when there is no anticipated demand in the future.

**Note:** Reschedule Out messages are available only for unapproved purchase orders and work orders that are outside the planning time fence. For details about time fences, read the help topic Time Fences.

To use Reschedule Out messages, specify the number of allowed Reschedule Out Days on individual item records.

### Reschedule In

If for a specific day there is demand but no supply is scheduled to cover it, NetSuite can examine future unapproved supply orders and recommend rescheduling the order to an earlier date.

**Note:** Reschedule In messages are available only for unapproved purchase orders and work orders that are outside the planning time fence. For details about time fences, read the help topic Time Fences.

For details about setting up planning action messages, read the help topic Planning Action Messages.

Location	Quantity On Hand	Value	Average Cost	Last Purchase Price	Reorder Point	Preferred Stock Level	Lot Sizing Method	Fixed Lot Size	Periods of Supply Type	Periods of Supply Increment	Supply Type	Demand Source	Backward Consumption Days	Forward Consumption Days	Demand Time Fence	Supply Time Fence	Reschedule In Days	Reschedule Out Days
Warehouse - East Coast							Lot For Lot				Purchase	Forecast from Demand Plan						
Warehouse - West Coast							Lot For Lot				Purchase	Forecast from Demand Plan						

**Note:** The Demand Planning feature must be enabled in order to use Planning Messages.

## Gross Requirements Inquiry Detail

The Gross Requirements Inquiry now includes a checkbox called Show Details. When this box is checked, each line of the Gross Requirement Inquiry details the orders that create the demand. This includes sales orders, transfer orders and work orders that create demand for items and components.

When the Show Details box is checked, the Gross Requirement Inquiry shows these additional columns:

- Order – This column lists the sales order or transfer order number that created the demand for the line. Click the number to open the order.
- Assembly – This column lists the work order number that created the demand for the line. Click the number to open the order.

This list shows in segments of 250 lines and has a maximum of 1000 lines.

Gross Requirements Inquiry: Item Supply Plan

Gross Requirements Inquiry

Location Warehouse - East Coast

Unit of Measure

Item test component

Safety Stock Level 0

Show Details ☒

Date	Order Date	Type	Transaction	Order	Assembly	Quantity	Quantity On Hand
5/1/2013		Beginning Inventory					0
6/13/2013	5/30/2013	Entered Supply Orders	Purchase Order	1008		3,000	3,000
6/13/2013	11/6/2013	Entered Demand Orders	Work Order	1	174	-1,500	0
6/13/2013	11/6/2013	Entered Demand Orders	Work Order	5	174	-1,500	0
6/20/2013	6/6/2013	Entered Supply Orders	Purchase Order	1004		1,500	1,500
6/20/2013	11/6/2013	Entered Demand Orders	Work Order	2	174	-1,500	0
6/27/2013	6/13/2013	Entered Supply Orders	Purchase Order	1005		1,500	1,500
6/27/2013	11/6/2013	Entered Demand Orders	Work Order	3	174	-1,500	0
7/4/2013	6/20/2013	Entered Supply Orders	Purchase Order	1006		1,500	1,500
7/4/2013	11/6/2013	Entered Demand Orders	Work Order	4	174	-1,500	0
11/6/2013	11/6/2013	Entered Supply Orders	Inventory Adjustment	5		10	10
12/1/2013	11/17/2013	Planned Purchase Order				90	100
12/1/2013	12/1/2013	Forecast from Demand Plan				-100	0

## Requisitions

When your company must make a purchase, the Requisitions feature can help you track pertinent information, such as the following:

- Who needs the item?
- What exactly is the item that is needed?
- When is the item needed?

- How much do we expect to spend for the item?
- Who has approved the expenditure for the item?

When an employee or company representative, such as a consultant, needs something that must be purchased using company funds, they can use a requisition to initiate the purchasing process. 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.

A requestor can enter a new requisition to initiate a purchase even if they do not know the price or vendor name. This information can be added later in the process.

Your procurement workflow may require that a requisition has appropriate approval prior to processing a purchase. Requisitions can be approved using a company hierarchy before a buyer enters a purchase order for requisition items, services or expenses.

After the requisition is completed and approved, the buyer can place orders with vendors for materials on requisitions. A buyer can order requisitions individually or set up automatic purchasing using preferred vendors and pricing.

Because one requisition can include multiple items with no vendor specified, a single requisition may result in the creation of one or more orders from one or more vendors. For example, Jane enters a requisition for a laptop, a desk chair, and a telephone. When the purchaser processes the requisition, the following purchase orders are created:

Purchase Order #	Vendor	Item
1001	Dell	laptop
1002	Task	desk chair
1003	GE	telephone

In this way, items are parceled out to individual purchase orders as necessary to communicate efficiently with vendors .

In addition, if a buyer has multiple requests for the same item that originate from different requisitions, the buyer can consolidate those requests into one purchase order for the vendor who supplies that item. This can be beneficial in the case that the vendor offers a volume discount for the purchase of the item. The purchaser can place a single order for a quantity that covers the demand from of many requisitions and all can be filled at the volume discounted rate.

For example, a requisition for a laptop is entered by Jane, Bob, and Mary. When the purchaser processes the requisitions, the following purchase order is created:

Purchase Order #	Vendor	Item	Requisition #
1004	Dell	laptop	555

Purchase Order #	Vendor	Item	Requisition #
1004	Dell	laptop	600
1004	Dell	laptop	635

In this way, items are consolidated on purchase orders from individual requisitions as necessary to take advantage of vendor discounts.

## Requisitions vs. Purchase Requests

Requisitions serve a different purpose than purchase requests. The table below summarizes the differences between the two.

	Requisition	Purchase Request
Transaction numbering is distinct from purchase order numbering?	Yes	No
Requires vendor for each item/expense?	No	Yes
All items/expenses on the form must be for only one vendor?	No	Yes
Can consolidate demand from many employees into one purchase?	Yes (many requisitions can generate one purchase order)	No (One purchase request = one purchase order)
Employee can enter one requisition with items sourced from multiple vendors?	Yes	No (One purchase request = one vendor)
Can be processed in bulk?	Yes	No

Both Purchase Requests and Requisitions can be enabled concurrently in your account, if you choose.

**Note:** In order to use Requisitions, you must enable the Purchase Orders feature and the Requisitions feature. Then assign either the Employee center role or the Consultant role to the appropriate users.

**Important:** For information on accessing the Requisitions feature, contact your account representative.

To enable features, go to Setup > Company > Enable Features.

After you have enabled features, set the appropriate preferences.

## Requisitions Preferences

To set preferences, go to Setup > Accounting > Accounting Preferences.



- **Approval Routings - Requisitions**

Check the Requisitions box to require approvals on requisitions. Clear this box if you do not require approvals for requisitions.

The standard Requisition Approval Workflow bundle must be installed to use this preference. This standard approval workflow can be modified for specific requirements.

- **Maximum Requisition Lines to Consolidate** (at Order Management: Purchase Orders)

Enter a value in this field in order to define the maximum number of lines to consolidate on purchase orders. This applies when items from one or more requisitions are combined on a single purchase order when you Submit Multiple Orders on the Order Requisitions page. This value defaults to 1 but you can enter a number up to 250.

If you leave this field blank, all requisition lines for a vendor are consolidated into a single purchase order from the Order Requisition page.

- **Allow Expenses on Purchases** – You must check this box and enable this preference to use the Requisitions feature.

## Enter a Requisition

When logged in to your Employee Center role, click the Enter Requisition link to enter a new requisition. As you add items and expenses to the requisition, the form displays the estimated total. After a purchase order has been created, the requisition displays the total, linked purchase order number and linked purchase order status.

**Note:** Though a vendor and rate are not required to create a requisition, a vendor and rate must be entered prior to ordering requisition items. This information can be entered either by the requestor or by a purchasing manager.

**Note:** A Requisition will be associated with a single Subsidiary selected from Requestor's employee record or employee role.

## Work Order Validation

In Version 2014 Release 1, you can set a preference to validate that routing operation sequences are always followed in accordance with the work order.

When the preference is enabled, NetSuite ensures that the correct quantity is completed for each operational step before permitting the work order to continue being processed.

For example, if Step #2 of your routing requires 5 widgets that are created during Step #1, you can enable this preference and NetSuite verifies that 5 widgets are completed during step #1 before Step #2 can begin. Such verification helps prevent problems due to out-of-sequence processing.

For orders completed across multiple days or shifts, partial quantities can be logged over time.

Operation	Qty. Day 1	Qty. Day 2	Qty. Day 3	Qty. Day 4
Operation 10	50	30	15	5
Operation 20	40	40	5	15
Operation 30	35	45	0	20

For the Check Completed Quantity in Prior Operations During Operation Completion preference, choose from the following settings:

- **No Verification** – Choose this setting if you do not want to receive verification warnings.
- **Require Confirmation before Saving** – Choose this setting to receive verification warnings. NetSuite will permit the completed quantity to be greater than the predecessor completed quantity after the warning is acknowledged.
- **Do Not Allow Saving** – Choose this setting to require that the completed quantity is not greater than the predecessor completed quantity.

This field defaults to the No Verification selection.

**Note:** Completion validation does not function when the completion transaction is edited or deleted.

## Work Center Calendar

When work centers are efficient, operations can produce as many products as possible within their time and resource constraints. Previously, work centers could be associated only with the default work calendar. With NetSuite Version 2014 Release 1, you can use individual work center calendars to analyze scheduling capacities to optimize your work center processes.

For each individual work center, you can create a work calendar specific to the needs of that work center that represents the times the center is available to process work orders. Specified work center calendars enable you to manufacture products efficiently within time and resource constraints.

For example, your work centers operate as follows:

- Work Center 1: Operates five days a week for eight hours
- Work Center 2: Operates four days a week for ten hours

Your production manager can set up a work calendar for each work center that specifies the hours available for each. Based on this work center calendar information, you have real-time visibility into total scheduling capacity, as well as intelligent manufacturing routing that calculates the processing time.

After you have created the necessary calendar, define that work calendar on the work center record. Then, NetSuite can use the designated work calendar to determine the time when resources should be scheduled for associated manufacturing operation tasks.

Based on the requirement date, the supply planning engine determines the start date of a planned order using backward scheduling considering the work calendar assigned. The supply planning engine also considers work center calendars for forward scheduling when creating work orders.

To use work center calendars, complete these steps:

- Set up a Work Center Calendar
- Assign a Work Calendar to a Work Center

## Synchronize Intercompany Special Order and Drop Shipment Processing

For Version 2014 Release 1, NetSuite synchronizes order data to ensure accurate data for processing special orders, drop shipments, and intercompany transactions. This makes it easier to update information across sales orders and purchase orders without numerous manual changes on related forms. To use order synchronization, go to Setup > Accounting > Accounting Preferences to set the preferences below.

Use these preferences to sync transaction quantities for drop shipments and special orders.

- **Update Drop Ship Order Quantities Automatically Prior to Shipment**
- **Update Special Order Quantities Automatically Prior to Shipment**

Enable the preference to automatically update the quantity of a drop-ship or special order item on linked transactions when a sales order or purchase order quantity is changed. When a drop-ship or special order item quantity is changed on an existing sales order or purchase order before it is shipped, NetSuite examines the quantity on the linked transaction. If the quantity on the linked transaction does not match, NetSuite adjusts the corresponding quantity to match.

For example, a sales order you entered shows a quantity of 10 units of drop-ship item #AB1001. The purchase order generated from that sales order also shows 10 units of item #AB1001. The next day, the order is changed and you reduce the sales order quantity to 8 units of item #AB1001. With this preference enabled, after you save the new quantity on the sales order, NetSuite examines the linked purchase order to sync the quantity of items being ordered. The purchase order is automatically updated to show 8 units of drop-ship item #AB1001.

**Important:** The preference applies only if the following conditions are met:

- The sales order line has not been fulfilled.
- The purchase order line has not been received or marked shipped.

- Neither the sales order or purchase order line have been manually closed.

These preferences apply only to assembly items and inventory items.

Disable the preference if you do not want to update the quantity of a drop-ship item on linked transactions when a sales order or purchase order quantity is changed. Then, when the quantity on linked forms does not match, the quantity remains unchanged and is not updated to match.

**Note:** When the sales order and purchase order quantities do not match, the item is no longer treated as a drop shipment or special order and your inventory may be affected.

OneWorld accounts can use this preference to sync intercompany orders.

- **Update Intercompany Order Quantities Automatically Prior to Shipment**

Enable this preference to automatically update the quantity of an intercompany purchase order item when the quantity is changed on the linked intercompany sales order. This preference applies only to assembly items and inventory items. When the quantity is changed on an intercompany sales order item before it is shipped, NetSuite examines the quantity on the linked intercompany purchase order. If the quantity on the linked intercompany purchase order does not match, NetSuite adjusts the corresponding quantity to match the sales order.

Disable this preference if you do not want to update the quantity of an intercompany purchase order item when the quantity is changed on the linked intercompany sales order. Then, when the quantity on linked forms does not match, the quantity remains unchanged and is not updated to match.

## Batch Processing for Revenue Recognition Journal Entries

This enhancement improves processing of revenue recognition journal entries for customers with a high volume of monthly transactions. Previously, NetSuite limited the number of revenue recognition schedules that could be processed to 10,000 at one time. Each batch of 10,000 had to be started manually.

Version 2014 Release 1 introduces the following improvements:

- The 10,000 batch limit has been removed.
- When one batch finishes, the next automatically begins.
- Up to five batches can run concurrently to complete processing more quickly.

A small change in the user interface accompanies this enhancement. When you clear the Select Individual Schedules box, the system limits the list of schedules displayed to a sample of 50

and adds an Estimate button at the top of the page. Click Estimate to count the number of schedules and calculate the amount included with your current filter settings. The filters and check boxes on the Create Revenue Recognition Entries page remain the same. If you check the Select Individual Schedules box, the behavior is the same as prior to the enhancement.

## **Collapse/Expand VSOE Column on Sales Transactions**

Revenue allocations are derived from sales transactions such as sales orders, invoices, and cash sales. One of the key revenue recognition elements on these forms is the VSOE column. This column contains all of the revenue recognition parameters required for VSOE allocations, each on a separate line. Beginning with this release, by default the VSOE column displays only the Allocation Amount line.

In a new transaction or in edit mode, the VSOE column includes an edit button. Click the button to open an allocation popup window and enter or change the parameters.

In view mode, the lines in the VSOE column are collapsed by default. Click show... to expand the lines and display all of the parameters. Click less... to collapse the lines again.

To revert to the previous expanded column display, go to and clear the Collapse VSOE Column by Default on Sales Transactions box.

## **Enhanced Deferred Revenue Reconciliation Reports**

Four fields have been added to the Transaction Dimension group in the Report Builder so that they can be used in Edit Columns, Filters, and Sorting for deferred revenue reconciliation reports. The reports that are enhanced by this addition are:

- Deferred Revenue By Customer
- Deferred Revenue by Item
- Deferred Revenue By State
- Revenue by Customer
- Revenue By Item
- Revenue By State
- Deferred Revenue Reclassification Activity
- Deferred Revenue Reclassification

The additional fields all reference the source document for the transaction. When added to a report, they enable you to identify the original source and drill down to it. The following table shows how the source document type is derived.

Transaction	1st Level Parent	2nd Level Parent	Source Document Type
Manual journal entry	Journal		Journal
Rev. rec. journal entry on manual invoice	Invoice		Invoice
Rev. rec. journal entry	Invoice	Sales Order	Sales Order
Rev. rec. journal entry	Revenue Commit	Sales Order	Sales Order
Reclassification	Sales Order		Sales Order
Invoice	Sales Order		Sales Order
Credit Memo	Invoice	Sales Order	Sales Order

The four additional fields in the Transaction Dimension group are:

- **Source Document Number** – The transaction number of the original source
- **Source Document Type** – The transaction type of the original source
- **Source Rev. Rec. Start Date** – The revenue start date in the source document
- **Source Rev. Rec. End Date** – The revenue end date in the source document

## Bulk Invoicing Enhancements

The following changes have been made for the Invoice Customers page at Transactions > Customers > Invoice Billable Customers:

- Check the new Show Invoices box to see a list of invoices that will be created, or clear the box to show only a summary with the invoice total (pre-tax and pre-discount) and number of invoices created. This gives you a clear preview of the invoice amount that results when invoicing in bulk.
- On customer records, you can choose how each customer is billed when you create invoices in bulk through the Invoice Customers page. On the customer record, you can set the following preferences on the Financial subtab of the customer record:
  - **Billing Schedule** - Select the billing schedule that you want applied to charges created for the customer.
  - **Billing Transaction Type** - Select the type of transaction you want to create for the customer from the Invoice Billable Customers page.
  - **Billing Transaction Form** - Select the transaction form you want to use when creating transactions through the Invoice Billable Customers page. This field presents the transaction forms of the transaction type you select in the Billable Transaction Type field.

The form selected on the customer record takes precedence over the transaction form selected on the Invoice Billable Customers page.

## Customer Payment Enhancements

The following enhancements have been made to customer payments and credit card processing in Version 2014 Release 1:

- [Recurring Credit Card Billing Enhancement](#)
- [Bill Me Later Support for PayPal](#)
- [Gift Certificate Enhancements](#)
- [Improved Credit Card Security](#)
- [Transaction Line Data for CyberSource Decision Manager](#)

### Recurring Credit Card Billing Enhancement

To ensure that recurring credit card payments are not interrupted due to expired credit cards, NetSuite has implemented a new process for credit card authorization.

A new Recurring Payment box appears on two types of transactions: cash sales generated from sales orders with billing schedules and memorized cash sales. When credit card authorization for a recurring transaction is declined due to the card having expired, NetSuite automatically resubmits the payment with an adjusted expiration date.

Each credit card authorization request is tracked in payment history, including both the failed authorization and the second attempt with the adjusted expiration date. Additionally, when a credit card authorization request is declined due to expiration, that card's expiration date is automatically adjusted for future authorization requests.

Payments marked as recurring also incur lower transaction costs from payment gateways.

Some credit card processor configurations do not support recurring payments. To disable the marking of payments as recurring, go to Setup > Accounting > Accounting Preferences > Item/Transactions. Under Payment Processing, clear the Allow Adjusted Expiration Date to Improve Recurring Payments box.

### Bill Me Later Support for PayPal

With Version 2014 Release 1, you can offer PayPal's Bill Me Later payment option with your PayPal Express Checkout account. You must first apply for the Bill Me Later service with PayPal. Then, log in to your NetSuite account, and go to Setup > Accounting > Financial Statements > PayPal Accounts. Under Account Basics, check the Use Express Checkout with Bill Me Later box, and click Submit.

When customers makes payment for purchases on your website, they can choose to log in to their PayPal accounts and use the Bill Me Later option.

## Gift Certificate Enhancements

You can now control the gift certificate amount that is applied to orders. A new column has been added to the Gift Certificates section on the Payments subtab of sales transactions.

Gift Certificate	Amount Applied	Available Credit
HYEBPCV0H	25.00	25.00

<Type then tab> >>

Add Insert Remove Cancel

In the Amount Applied column, enter the amount you would like to apply to the transaction, and click Add. The remaining credit for the selected gift certificate is shown in the Available Credit column.

## Improved Credit Card Security

In an effort to increase the security of your customers' credit card information, beginning on **January 9th, 2014**, search criteria based on the Credit Card Number field will only be able to use the following operators: is empty or is not empty.

Existing saved searches that use other operators (like **is** or **is not**) with the Credit Card Number field will be deleted from your account after this date.

Additionally, any credit card number searches executed programmatically through Web Services, SuiteScript, or SuiteFlow that use disallowed operators will no longer work.

## Transaction Line Data for CyberSource Decision Manager

With Version 2014 Release 1, when you are using the CyberSource Decision Manager, detailed line-level transaction information is sent with authorization requests to CyberSource. This detail enables the Decision Manager to better evaluate the risk of fraud for a given transaction.

## Show Planned Capacity Preference

In Version 2014 Release 1, the Show Planned Capacity preference lets production managers and production planners enable a preference to create planned time entries automatically when processing manufacturing work orders.

The Show Planned Capacity preference determines the default setting on new work orders being created. When this preference is enabled, work orders display a new Planned Time subtab. NetSuite generates planned time entries showing the amount of time being allocated to each work center per day.

Production managers and production planners can access this aggregated planned time data to determine if the resource capacity is enough to meet these needs, enabling more efficient manufacturing planning.



**Note:** These generated planned times cannot be edited.

The Show Planned Capacity preference is available at Setup > Accounting > Accounting Preferences.

## **Capacity to Specify Type of Return for Fedex**

When creating shipping labels for Fedex packages, it is now possible to select from a choice of values for the Return Type field describing the reason for which the package is being returned. The selected value is printed on the return shipping label. It is also possible to enter your own text.

## **Currency Field Unlocked on Intercompany Clearing Accounts**

Beginning with Version 2014 Release 1, a new intercompany clearing account is being used to process intercompany time and expense transactions and intercompany inventory transfer transactions. The currency on the new clearing account is not locked.

The account is created automatically as the parent account of all existing intercompany payable/receivable accounts. If you edit a historical intercompany transaction, the original intercompany payable/receivable account will be used. The new intercompany clearing account does not replace existing accounts.

## **Automatic Handling of Negotiated Rates for UPS**

With Version 2014 Release 1, customers can get automatically authenticated with UPS by completing a few new fields. Authenticated UPS customers can take advantage of their negotiated rates.

## **Sending Transactions in Bulk**

With Version 2014 Release 1, you can bulk process email or faxes for multiple transactions at one time. When you process bulk transactions you are able to attach any message or use scriptable templates. This feature is useful when you want to send reminder email related to multiple transactions for which payments have not been received. Optionally, you can use criteria to filter the transaction list, then check the box in the Select column next to transactions requiring the bulk email or fax. You can also use the To Be Faxed option on a Mass Update to bulk sending of faxes.

## **Expense Report Summary Box**

Expense reports now include a summary box in the upper corner of the entry form to display totals for the transaction. Previously, a summary box only appeared on sales orders, invoices, and purchase orders.

The new expense report summary box appears on expense reports in both the edit and view mode. Totals update in real-time offering employees and supervisors an at-a-glance view of expenses included on the current transaction. The summary box includes totals for expenses, non-reimbursable expenses, reimbursable expenses, any advances to apply, and the total reimbursable amount.

## Time Entry Rounding for Time Tracking

You can now set a company-wide preference to round time entries entered using the Time Tracking feature. The preference is available at Setup > Accounting > Accounting Preferences > Time & Expenses. Under Time Tracking, in the Round Time Entry Duration field, select how you want time entries to be rounded.

You can select to round up to or to the nearest 5, 6, 10, 15, 30, or 60 minute increment. For example, if you select round to the nearest 10 minute increment and an employee enters a time entry for 2 hours and 32 minutes, NetSuite automatically rounds the time entry down to 2 hours and 30 minutes. If you select round up to the next 10 minute increment, NetSuite automatically rounds the time entry up to 2 hours and 40 minutes.

## Bulk Processing/Authorizing Commission

The Bulk Processing/Authorizing Commission feature applies asynchronous processing to the authorization of multiple commission transactions, thereby increasing processing speed and eliminating time-outs.

The new Processed Partner Commissions and Processed Commissions pages display the status of the commission authorization process during the period in which the process is running. Information that displays includes the name of the partner or employee receiving the commission, status of the commission payment, any transaction number, amount of the commission payment, and any authorization processing error.

**Note:** You cannot authorize commission transactions for partners or employees whose commission transactions are currently being authorized.

At any time you can view the details of authorized partner or employee commission transactions. Go to Transactions > Commissions > Authorize Partner Commissions > Status or Transactions > Commissions > Authorize Employee Commissions > Status, respectively. Information that displays includes the identification number of the submitted commission, transaction process type, status of the commission authorization process, completion percentage, any error messages, and the authorization creation date and time stamp. For more information about commission status, see the help topics Viewing the Status of Authorized Partner Commissions and Viewing the Status of Authorized Employee Commissions.

## Employee Payroll Item History Report

The Employee Payroll Item Change History report lists payroll item changes made to existing employee records as well as the creation of a new employee records. This report provides the date and time changes were made to an employee record and by whom. Information that displays is based on the payroll items that are changed. For more information about the report, see the help topic Employee Payroll Item History Report.

## Charge Transaction Enhancements

The following enhancements have been made to the Charge-Based Billing feature in Version 2014 Release 1:

- [Custom Charge Types](#)
- [Grouping Charges for Invoices](#)

### Custom Charge Types

If you use the Charge-Based Billing feature, you can create custom charge types to categorize your charges. To create a charge type, go to Setup > Accounting > Setup Tasks > Accounting Lists > New and click Charge Type.

### Grouping Charges for Invoices

Now, you have more control over how charges are grouped on invoices when you use the Invoice Billable Customers transaction. This enhancement enables you to consolidate charges on invoices. The net result of this consolidation is a single invoice for each customer that combines all charges that share a category in common. For example, if you group by location, a single invoice will be created for each location associated with that customer's charges. If you have six charges, and three of these charges are associated with one location, and three are associated with a second location, when you invoice this customer, two invoices are created, one for each location.

A new field group has been added to the charge record that includes the Class, Location, and Department fields. You can also now create custom charge fields at Customization > Lists, Records, & Fields > Other Custom Fields.

These fields can be used to group charges on invoices by setting the preferences at Setup > Accounting > Preferences > Invoicing Preferences on the Charge subtab. To combine similar charges on the same invoice, select the field by which you want to group your charges. If you are grouping by a custom field, in the Map To field, select the invoice field you want to map the information from the custom field into on the invoice. When you group charges by class, department, location, or description, the value from that field on the charge record is set on the line on the invoice.

When you group charges on invoices, when you go to the Invoice Billable Customers page, a separate invoice is created for each grouping. These invoices created include line items for each charge that was grouped.

**Note:** If you create sales orders from charges and then bill the sales order through the Bill Sales Orders page, the class, location, department, and description are not used on the invoice. Instead, the class, location, department, and description from the sales order are used.

## Applying Deposits in the Customer Center

Now, customers with the standard Customer Center role can now apply deposits to invoices. The Deposit Application permission is set to Create by default for this standard role.

If you have custom Customer Center roles, you must edit those roles to grant this permission.

## Projects

Version 2014 Release 1 includes the following enhancements to Projects features:

- Job Costing and Project Budgeting
- Resource Allocations
- Generic Resource Records
- Advanced Project Templates
- Copy Project Tasks
- Project Dashboard
- Non-billable Project Tasks
- Project Task Manager

## Job Costing and Project Budgeting

**Note:** For information on the availability of Job Costing and Project Budgeting, please contact your account representative.

In Version 2014 Release 1, NetSuite offers new features to help track project profitability and relate that profitability back to your general ledger.

### Job Costing

Job Costing enables you to calculate costs for labor based on tracked time, and account for those costs in your general ledger.

Job Costing utilizes a new project expense type to determine the account to which project costs are attributed when time is posted for that project. Project expense types can be set by the project or by the service item used when entering time. By default, Regular and Overhead project expense types are set up with direct and indirect labor accounts respectively. You can set up or edit project expense types at Setup > Accounting > Project Expense Types.

When an employee enters time worked on a project in NetSuite, the cost of that time is calculated based on the employee's labor cost. After that time is approved, it can be posted to your general ledger. To post approved time entries, go to Transactions > Financial > Post Time. Posting time creates a journal entry debiting the account associated with the assigned project expense type and crediting the selected project cost variance account.

## **Project Budgeting**

Project Budgeting enables you to set cost and billing budgets for project labor and expenses at both the project and task level. On project and project task records, a new Budget tab has been added to set project and task budgets. Budgets are set on a monthly basis. Budgets set at the project task level are rolled up to the project level.

Cost and billing categories that are available on the Budget tab are defined at Setup > Accounting > Accounting Preferences > Projects. From the project or task record, you can choose to define budgets manually by entering values on the Budget tab or you can have budget amounts set using calculated values. If you also use Resource Allocations, you can choose to automatically calculate labor budgets based on allocated resources.

## **Profit and Loss Subtab**

When you enable Job Costing and Project Budgeting, a P&L subtab is added to project records. The P&L subtab displays the current revenue, cost, profit, and margin for your project. The information displayed is in real time and enables you to easily gauge the current profitability status of your project.

## **Reporting**

The following new reports are available for Job Costing and Project Budgeting:

- Project Cost Budget vs. Actual
- Project Billing Budget vs. Actual
- Project Task Cost Budget vs. Actual
- Project Task Billing Budget vs. Actual
- Project Profitability

Budget vs. Actual reports are available at the project and project task level for both cost and billing budgets. These reports enable you to analyze budgeted and actual project financials to

determine how closely your costs and billings compare to those you originally budgeted. The categories that appear on project level reports match those that are set up to appear on project budgets. Project task level reports include labor only. Both summary and detail reports are available at the Project level.

The Project Profitability Summary and Detail reports compare actual project revenue and costs to show each project's profitability. The report is organized by project and further broken down into categories.

Each of these reports are available to be customized with the NetSuite Report Builder. To view these reports, go to Reports > Projects.

## Resource Allocations

**Note:** For information on the availability of Resource Allocations, please contact your account representative.

NetSuite now offers a new Resource Allocations feature to help resource managers allocate the right resources to projects based on availability, skill sets, and other criteria. After a resource has been allocated, or reserved to a project, a project manager may then decide to assign that resource to a specific task. Resource Allocations can be enabled at Setup > Company > Enable Features, under Resource Management.

**Important:** When Resource Allocations is initially enabled, NetSuite creates resource allocation records for all existing project assignments using a work queue. Project records are not available during this time. After this process is complete, project records will be available.

With the new feature also comes a new Resource Manager role. This new role offers access to the standard Support Center with the addition of permission to access Resource Allocations. For more information about standard centers, see the help topic NetSuite Standard Centers.

Resource allocations enable companies to get a sense of employee utilization, a critical efficiency/productivity metric. NetSuite utilization reporting enables customers to select the metrics that matter most to them—worked hours, allocated hours, or assigned hours. These values are divided by available hours, taking into account work calendars and exempt time.

## Resource Allocation Record

A new resource allocation record type has been created for resource managers to allocate resources to projects for a specific number of hours over a defined period of time.

### To enter a resource allocation:

1. Go to Activities > Scheduling > Resource Allocations > New.
2. Select a resource for this allocation.

3. Select the project to which you want to allocate this resource.
4. Enter or select the start date and end dates for this allocation.

This is the period of time which the selected resource is available to work on the project.

5. In the **Allocate** field, enter the number of hours over the selected time period this resource is allocated to this project.

You can also select **Percent of Time** in the dropdown, and then enter the percent of time over the selected time period this resource is allocated to this project.

**Note:** When allocating a resource by percentage of time, NetSuite uses the resource work calendar and designated work hours to determine the number of hours per day in the given time period the resource is allocated to the project. For example, a resource that typically works 8 hours a day for a 5 day work week is allocated 50% for two weeks would work on the project 4 hours per day for a total of 40 hours.

6. In the **Allocation Type** field, select the type of allocation.
  - **Hard** – This allocation request is not flexible; the resource is committed to the dates and hours required on this request.
  - **Soft** – This allocation request is flexible; adjustments can be made to the date and hours if needed to accommodate other priorities.

**Note:** The allocation type pertains to project scheduling and staffing methodology and not an indication of the allocation record being unavailable for editing. Records with a hard allocation type can be edited. It is a recommended best practice to use the allocation types as previously suggested when creating resource allocations in NetSuite.

7. When you have finished, click **Save**.

After you have entered a resource allocation for a project, the resource is listed on the Resource Allocations subtab of the project record. The resource is now available to be assigned to project tasks and the allocated time appears on the Time Tracking subtab of the project record.

Allocated resources can also be permitted to enter time against project tasks even if they are not individually assigned to the tasks. You can set this preference on individual project records by checking the Allow Allocated Resources to Enter Time to All Tasks box on the Preferences subtab.

## Resource Allocations Chart

After you have enabled Resource Allocations, you can install the Resource Allocations Chart SuiteApp. This SuiteApp can be installed directly from Setup > Company > Enable Features by clicking the SuiteApp name in the Related SuiteApps section under Resource Management.

After the SuiteApp is installed, administrators and resource managers can access the Resource Allocations Chart at Lists > Services > Resource Allocations Chart. The Resource Allocations Chart offers visual management of your resource allocations with the ability to edit existing allocations and create new allocations directly from the chart.

**Note:** NetSuite users with administrator and resource manager roles can access the Resource Allocations Chart by default. Additional permissions are required for other roles to access the Resource Allocations Chart. For more information, see the help topic Resource Allocation Chart.

#### To enter a new allocation from the resource allocations chart:

1. Click **New Allocation** at the top of the Resource Allocations Chart.
2. Select a project for this allocation.
3. Select a start date and end date.
4. In the **Resource** field, select a resource for this allocation.

To search for a resource, click the search icon next to the **Resource** field. You can search by availability, required skills, billing class, labor cost, and years of experience.

5. In the **Allocate** field, enter the percentage or number of hours you want to allocate.

You can select how you want to allocate by clicking **Settings** at the top of the page.

6. In the **Allocation Type** field, select the type of allocation.
  - **Hard** – This allocation request is not flexible; the resource is committed to the dates and hours required on this request.
  - **Soft** – This allocation request is flexible; adjustments can be made to the date and hours if needed to accommodate other priorities.

**Note:** The allocation type pertains to project scheduling and staffing methodology and not an indication of the allocation record being unavailable for editing. Records with a hard allocation type can be edited. It is a recommended best practice to use the allocation types as previously suggested when creating resource allocations in NetSuite.

7. If you use approval routing for resource allocations, select the **Next Approver**.
8. When you have finished, click **OK**.

You can customize your chart by creating filters. Click Customize View to filter allocations by start date, resource type, billing class, department, class, or location if available. Click Settings to select how you want allocations to appear in the chart. Click Daily, Weekly, or Monthly to adjust how the allocations are displayed and then use the arrows to move the timeline forward and backward.



The chart is organized by resource and offers an at-a-glance picture of resource utilization to help managers make decisions about project staffing. Clicking an allocation bar opens a popup window where you can edit the allocation. You can also drag and drop a bar to reassign or adjust the length of an allocation. From the left pane, clicking a project name opens a popup window allowing you to reassign an allocation to another project or resource. When you have finished making adjustments, click Save at the top of the page to save your work.

## Resource Allocations Custom Approval Workflow

After you have enabled Resource Allocations, you can install the Resource Allocations Custom Approval Workflow SuiteApp. This SuiteApp can be installed directly from Setup > Company > Enable Features by clicking the SuiteApp name in the Related SuiteApps section under Resource Management.

**Important:** Approval Routing and SuiteFlow are also required to use the Resource Allocations Custom Approval Workflow SuiteApp. For more information on Approval Routing, see the help topic Approval Routing. For more information on SuiteFlow, see the help topic Workflows Overview.

This SuiteApp enables you to implement resource allocation approvals through NetSuite's SuiteFlow feature without building a workflow from scratch. The SuiteApp installs a default approval routing workflow that you can use as is, or copy and customize to suit your company's specific needs.

Before you can begin using this SuiteApp, you must enable approval routing for resource allocations. Go to Setup > Accounting > Accounting Preferences > Approval Routing and check the Resource Allocations box. Approval routing for Resource Allocations is now available in your account.

After the SuiteApp is installed and enabled, the workflow adds Approval Status and Next Approver fields to the resource allocation record. When an employee enters a resource allocation, the status is automatically set to Pending Approval, and the Next Approver field defaults to supervisor defined on the employee record. If a supervisor is not defined, the Next Approver field is required before submitting the resource allocation record.

When a resource allocation is submitted, the next approver receives an email notification that there are pending resource allocations for approval. The message contains a link directly to the record where it can be approved or rejected. Resource allocations can also be approved from the individual records or bulk approved.

### To bulk approve or reject resource allocations:

1. Go to Activities > Scheduling > Resource Allocations > Approve.
2. In the **Action** field, select **Approve** or **Reject**. The list of pending resource allocations will refresh.

3. Check the box in the **Select** column to select each resource allocation you want to approve or reject. You can also click **Mark All** to select all listed resource allocations.
4. Click **Submit**.

After a resource allocation has been approved or rejected an email is sent to the original requester with an updated status.

## Resource Skill Sets

Resource Skills Sets enables you to add information to employee and vendor records about skills and expertise and then search that information for the best matched project resource.

You define skill categories that are available on the new Skills & Expertise tab on employee and vendor records. Employee and vendor records are updated by selecting skills and setting a skill level for each individual skill. Skill categories are defined for your company at Setup > Services > Skill Category.

This SuiteApp can be installed directly from Setup > Company > Enable Features by clicking the SuiteApp name in the Related SuiteApps section under Resource Management. Resource Skills Sets is designed to work in tandem with the Resource Allocations feature; however, Resource Allocations is not required to use Resource Skill Sets.

After you have enabled the SuiteApp, if you also use Resource Allocations, you must first set the Resource Saved Search as the default search for the Resource Manager role.

### To define the default search for the Resource Manager role:

1. Go to Lists > Search > Saved Searches.
2. Click **Edit** next to Resource Search.
3. In the **Search Title** field, enter **Project Resource Search**.
4. On the **Roles** tab, find the Resource Manager role and check all the boxes in that row.
5. Click **Save As**.

Now, your resource managers can use the Project Resource saved search by default when searching within NetSuite. Next, you must create your skill categories.

### To create a skill category:

1. Go to Setup > Services > Skill Category > New.
2. Enter a name for this skill category.

For example, you could create a category named Software to record employees' skill levels with the types of software your company uses.

3. On the **Skill** tab, enter the names of each skill you want included in this category. Click **Add** after each skill.

4. On the **Skill Level** tab, there are three default skill levels provided. You can edit the existing levels by selecting the line you want to edit, making your changes and clicking **Done**. Add new levels by inserting a line or adding a new line to the bottom of the list. Skill levels should appear in this list from lowest to highest proficiency.

The level you enter here are available for each skill entered on the **Skill** tab.

5. When you have finished, click **Save**.

Each skill category is available as a subtab on the Skills & Expertise tab of the employee or vendor record.

#### To add skills to an employee or vendor record:

1. Go to Lists > Employees > Employees for an employee record or Lists > Relationships > Vendors to update a vendor record.
2. Click **Edit** next to the record you want to update.
3. Click **Skills & Expertise**.
4. On the subtabs, select skills for each skill category and set the skill level. Click **Add** after each added skill.
5. On the **Portfolio** subtab, you can enter social media information and upload a recent resume or work samples.

**Note:** The **Portfolio** subtab uses the NetSuite File Cabinet to store attachments. Administrators have permission to the File Cabinet by default. You must edit the permissions for any additional roles you want to access the documents on the Portfolio subtab to include access to the File Cabinet. For information on permissions, see the help topic Set Permissions.

6. When you have finished, click **Save**.

After you have updated your employee and vendor records with skill sets and set the default search form, your resource managers can search for project resources based on the skills required on their projects. Resource managers also have the ability to update skills for employees and vendors marked as Project Resources at Cases > Other Lists > Resources.

**Note:** The Project Resource box on employee and vendor records must be checked for the record to appear in a skill category search.

#### To search project resources based on skill categories using the resource allocations chart:

1. While logged in as an administrator, go to Lists > Services > Resource Allocations Chart.  
Resource Managers can go to Cases > Other Lists > Resource Allocations Chart.  
For more information on the resource allocations chart, see [Resource Allocations Chart](#).

2. Click **New Allocation**.
3. Click the **Search** icon next to the **Resource** field.
4. In the Availability section, select a date range and **% Available** required for this allocation.
5. In the Other section, enter additional required criteria, such as billing class, labor cost, and years of experience.
6. Under **Available Skills**, select the desired skill and click the arrow to move the skills to the **Required Skills** box.
7. When you have finished, click **Submit**.

Managers can now use the targeted search results to allocate resources more efficiently.

## Generic Resource Records

Generic resource records can be used as placeholders when project managers and resource managers are planning a project in NetSuite. This new feature enables resource allocations and project task assignments to be made when a specific resource may not yet be identified.

### To create a generic resource record:

1. Go to Lists > Employees > Generic Resources > New.
2. In the **Name** field, enter a name for your generic resource. For example, you could enter Software Developer to act as a placeholder for an unidentified development resource.
3. Select a billing class for this resource.
4. Enter a labor cost. This can be useful when creating budgets for projects when resources have not been identified.
5. Enter a price for this resource.
6. Select a work calendar for this generic resource. Work calendars are used when creating project schedules and resource allocations.
7. Click **Save**.

Your generic resource is now available for project task assignments and resource allocations. Generic resources can be useful when creating project templates. You can save a project template with generic resource task assignments and resource allocations. For more information about project templates, see [Advanced Project Templates](#).

## Advanced Project Templates

In Version 2014 Release 1, you can create project templates. Project templates enable you to easily create project records in NetSuite for projects your business performs repeatedly. Previously, you could only copy an existing project.

**Important:** Administrators automatically have access to use project templates. All other roles must first be customized to add the project template permission. For more information, see the help topic Project Templates.

**To create a project template:**

1. Go to Lists > Relationships > Project Templates > New.
2. In the **Custom Project Form** field, select a form for projects create from this template.
3. Enter a **Name** for this template.
4. On the **Financial** subtab, in the **Billing Type** field, select a billing type for this template and fill in any additional information.
5. Click **Save**.
6. On the **Schedule** subtab, click **New Project Task** to open the project task/milestone form in a new window.
7. Enter information for your project task and click **Save**.

For more information on creating project tasks, see the help topic Creating an Advanced Project Task Record.

**Note:** Specific project resources and task assignments cannot be added to project templates. Generic resources can be used as placeholders in project templates. For more information, see [Generic Resource Records](#).

8. Continue adding project tasks, milestones, and summary tasks to build your project plan.

If you also use Job Costing and Project Budgeting, you must select a project expense type for this template on the Financial subtab. To add budget information to this template, click edit on the template record and enter budget information on the Budget subtab.

If you also use Resource Allocations, you can create new resource allocations for generic resources from the Resources subtab. Resource allocations for specific resources cannot be created for project templates.

You can also create a project template from an existing project by clicking Create Template at the top of the project record. A project template cannot have any transactions, charges, actual time, resource allocations, project resources, or project task assignments.

To create a project from a project template, go to Lists > Relationships > Project Templates. Click View next to the template you want to use. Click Create Project at the top of the template record. Enter a name for your new project, and click OK. Your project record is created. You can click Edit to add a customer and any other information specific to your new project.

## Copy Project Tasks

You can now copy project tasks between projects and within projects. Previously, project tasks were not available for copying. When copying a project task, you can choose to also copy the task assignments, budgets, and any child tasks.

**Important:** Administrators automatically have access to copy project tasks. All other roles must first be customized to add permission to copy project tasks. For more information, see the help topic Copying Project Tasks.

### To copy a project task:

1. Go to Activities > Scheduling > Project Tasks.
2. Click **View** next to the project task you want to copy.
3. Under More Actions at the top of the page, click **Copy**. A new window opens.
4. In the **Target Project** field, select the project into which you want to copy this task.
5. If you want this task to be a child task, select the parent project task.
6. If you want to change the name of this task, enter a new name in the **Project Task** field.
7. Check the **Copy Assignments** box to copy any resource assignments on this task.
8. Check the **Copy Budget** box to copy any billing and cost budgets associated with this task.
9. If this task is a parent task, you can clear the **Copy Children** box if you do not want child tasks to be copied.
10. When you have finished, click **Copy**.

Your new task is now available on the target project.

## Project Dashboard

Similar to your main NetSuite Home dashboard, you can now access a project dashboard with information specific to an individual project. Previously, this information was available on several different tabs and subtabs within the project record.

The project dashboard offers portlets and quick links for creating project tasks, managing resources, viewing the Gantt chart, and entering time and expenses.

There are visual indicators to quickly give you an idea of the project's status. The % Complete Meter offers an at-a-glance look at where your project is along the timeline. Key Performance Indicators are available to show additional information about the health of your project.

You can also view a list of project tasks and resource allocations directly from the Project Dashboard. You can customize the dashboard with additional standard and custom portlets and rearrange how they appear by clicking Personalize Dashboard at the top of the page.

To view the project dashboard for a project, click the Dashboard icon at the top of the project record or in the Projects list.

## Non-billable Project Tasks

When creating project tasks, you can now create tasks that are non-billable by default. Previously, when time was entered against a project, individual time entries could be set as billable or non-billable by anyone with time entry privileges. Now, when a task is set to non-billable, any time entered against that task is automatically saved as non-billable and cannot be changed to billable on individual time entries.

To set a project task as non-billable, on the project task record, check the Non-billable box.

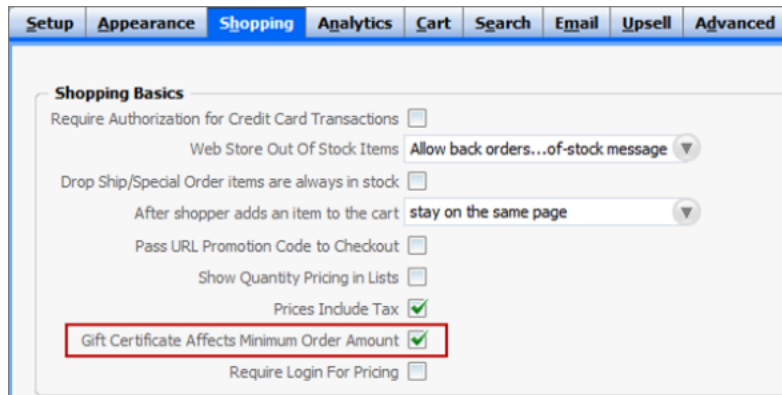
## General SuiteCommerce Settings

Version 2014 Release 1 includes the following enhancement to both Site Builder and SuiteCommerce Advanced web stores.

- [New Preference for Applying Gift Certificate Amount](#)
- [New Deploy to Domain Button on SSP Application Records](#)

### New Preference for Applying Gift Certificate Amount

The new preference is specifically for e-commerce merchants who require a minimum order amount on their web stores. As of Version 2014 Release 1, you can use the checkbox on the Web Site Setup page to set your preference for whether or not a gift certificate amount should affect the minimum order amount.



The screenshot shows the 'Shopping Basics' section of the SuiteCommerce Settings page. The 'Shopping' tab is selected. The 'Gift Certificate Affects Minimum Order Amount' checkbox is checked and highlighted with a red box. Other settings include 'Require Authorization for Credit Card Transactions' (unchecked), 'Web Store Out Of Stock Items' (set to 'Allow back orders...of-stock message'), 'Drop Ship/Special Order items are always in stock' (unchecked), 'After shopper adds an item to the cart' (set to 'stay on the same page'), 'Pass URL Promotion Code to Checkout' (unchecked), 'Show Quantity Pricing in Lists' (unchecked), 'Prices Include Tax' (checked), and 'Require Login For Pricing' (unchecked).

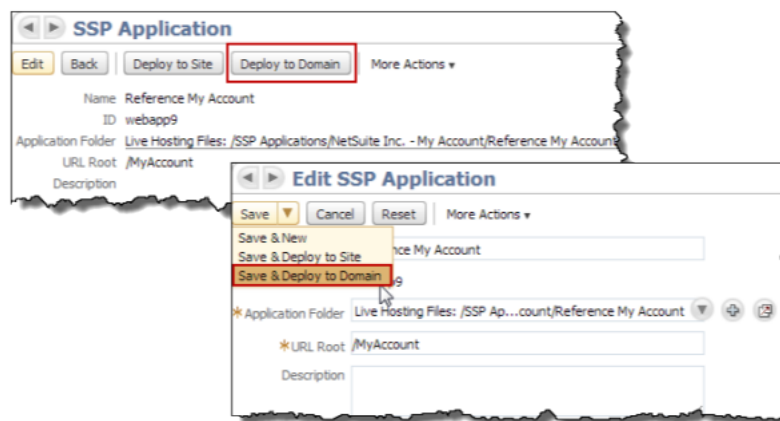
If the box is checked, then the gift certificate amount counts against the minimum order amount. This is the default shopping behavior prior to Version 2014 Release 1. For example,

if you set the minimum order amount for your web store to \$100, then orders under \$100 are not accepted. A shopper adds an item that costs \$110 to the cart. When the shopper proceeds to checkout, the shopper enters a gift certificate for \$50. The new shopping cart total is \$60. When the **Gift Certificate Affects Minimum Order Amount** box is checked, this shopper is not allowed to submit the order.

If you clear this box, then the gift certificate amount is not counted against the minimum order, and the shopper can successfully submit the order on your web site. When the box is cleared, then the gift certificate amount and other credits (such as coupons) are excluded from the calculation of the total order amount.

## New Deploy to Domain Button on SSP Application Records

The new button available on the SSP Application form, corresponds with the Save & Deploy to Domain button, when the SSP Application form is Edit mode.



Prior to Version 2014 Release 1, you could only deploy touch points to a site. In some cases it was difficult to determine whether touch points should be associated with a particular domain, or generally to all domains associated with a site. Now, you can choose to deploy touch points to a site or to a domain. The Domain subtab on the Web Site Setup page shows the touch points you associate with each domain.

## Site Builder

Version 2014 Release 1 includes the following change to Site Builder.

### Google Checkout Retirement Impact on NetSuite Web Stores

Google Checkout was scheduled for retirement by Google in November 2013. As a result, in September, 2013, NetSuite began a phased approach to removing Google Checkout integration.



Read the [official announcement](#) from Google, which includes end-dates for charging, shipping, and refunding orders taken via Google Checkout.

### **Timeline for Changes in NetSuite**

A series of changes have been implemented in NetSuite leading up to the end of support for Google Checkout. Details are listed below:

- In September 2013, the Google Checkout button was removed from all web sites.
- In November 2013, all tasks related to Google Checkout were removed from the NetSuite UI.
- In May 2014, Google Checkout online help topics will be removed.

### **Enhancement Voting for Payment Products**

In NetSuite, Google Checkout will not be immediately replaced by another Google or virtual wallet product. Because there are many new, competing payment products on the market, submit an enhancement request for the product integration you would like to see, or vote for one that has already been submitted, such as:

- Google Wallet Instant Buy Integration – Enhancement #254715
- V.me Wallet Integration – Enhancement #238912
- MasterCard Wallet Integration – Enhancement #238913
- Amazon Payments – Enhancement #215818

To vote for an enhancement, log in to your NetSuite Account Center, click the SuiteIdeas tab, and then click the link to launch the SuiteIdeas site. You can enter the Enhancement number in the search box on the SuiteIdeas site, and cast your vote.

## **SuiteCommerce Advanced**

Version 2014 Release 1 includes the following enhancements to SuiteCommerce Advanced features.

- [Ending Support for Web Site Tags in SuiteCommerce Advanced](#)
- [Reference Implementation Enhancements](#)

### **Ending Support for Web Site Tags in SuiteCommerce Advanced**

As of Release 2014 Version 1, Web Site Tags are no longer supported in SSP applications for rendering NetSuite-generated page elements on SuiteCommerce Advanced web sites. These tags will, however, continue to be supported in SSP applications on Site Builder sites.

## Reference Implementation Enhancements

For release notes describing recent versions of the ShopFlow, Checkout, and My Account Reference bundles see the help topic Reference Implementation Release Notes.

## SuiteCommerce Platform

SuiteCommerce Platform includes APIs and other platform capabilities that you can use to build and deploy a better and more interactive and engaging shopping experience for customers.

Version 2014 Release 1 includes the following enhancement to SuiteCommerce Platform.

- [Commerce API Support for Item-Specific Shipping Promotions](#)
- [Commerce API Enhancement for Logged In Status](#)
- [Commerce API Support for Lead Source in Customer Registration](#)
- [Enhancement of the setLoginCredentials\(\) API to Support Custom Fields](#)
- [Commerce API Support for Removing Billing and Shipping Addresses](#)

### Commerce API Support for Item-Specific Shipping Promotions

The Commerce API has been updated to support the exclusion of shipping charges for specific items on a web order. In this way, e-commerce merchants can offer free shipping promotions associated with certain products they sell online. For example, you can offer free shipping on bedding products. When the shopper places the order online, shipping cost is not charged for bedding products flagged as excluded from shipping.

Field Name	Field Type	Description	In Get Functions?	In Set Functions?
excludedfromshipping	Boolean	Indicates that the item in question ships for free for the currently-selected shipping method.	Yes	No

### Commerce API Enhancement for Logged In Status

The `isRecognized()` method has been added to handle scenarios where a user may not be logged in but is still recognized by the system. The method works in conjunction with the existing `isLoggedIn()` method as described in [Using isRecognized\(\) with isLoggedIn\(\)](#).

Method	Description	Parameters	Returns	Supported Domains	Login Req'd?
isRecognized()	Determines whether a user is recognized. This method can be used with the isLoggedIn() method. See the help topic Using isRecognized() with isLoggedIn()		Boolean	Checkout, Shopping	No

## Commerce API Support for Lead Source in Customer Registration

The registerCustomer() method has been enhanced to handle the leadsource field during customer registration. Now a leadsource value can be passed during customer registration to track the campaign source of the new customer.

Method	Description	Parameters	Returns	Supported Domains	Login Req'd?
registerCustomer (customer)	Registers the customer and logs them in.	<i>customer</i> [required]{object with values for fields} <ul style="list-style-type: none"> <li><i>firstname</i> [required]{String}</li> <li><i>lastname</i> [required]{String}</li> <li><i>companyname</i> [optional]{String}</li> <li><i>email</i> [required]{String}</li> <li><i>password</i> [required]{String}</li> <li><i>password2</i> [required]{String}</li> <li><i>passwordhint</i> [optional]{String}</li> <li><i>emailsubscribe</i> [optional]{String}</li> <li><i>leadsource</i> [optional]{String}</li> </ul>	Object with values for fields: <ul style="list-style-type: none"> <li><i>customerid</i> {String} - internal id of record for registered customer</li> <li><i>redirecturl</i> {String} - URL to which user is redirected after registering</li> </ul>	Checkout	No

## Enhancement of the setLoginCredentials() API to Support Custom Fields

Now there is support for custom fields in the setLoginCredentials() method of the Customer Object. When custom fields are mandatory on the Customer record, these values can now be passed through the setLoginCredentials() API.

Method	Description	Parameters	Returns	Supported Domains	Login Req'd?
setLoginCredentials (customer)	Sets login credentials for current guest customer	<i>customer</i> [required] {Object with values for fields} <ul style="list-style-type: none"> <li>• <i>internalid</i> [required]</li> <li>• <i>email</i> [required]</li> <li>• <i>password</i> [required]</li> <li>• <i>customfields</i> [Optional]  {Object with {customfield id : customfield value} }</li> </ul>		Checkout	Yes

## Commerce API Support for Removing Billing and Shipping Addresses

New `removeShippingAddress()` and `removeBillingAddress()` methods support the ability to remove the current Shipping and Billing address from a web store order.

Method	Description	Parameters	Returns	Supported Domains	Login Req'd?
<code>removeShippingAddress()</code>	Removes the current shipping address from the order			Checkout	Yes
<code>removeBillingAddress()</code>	Removes the current billing address from the order.			Checkout	yes

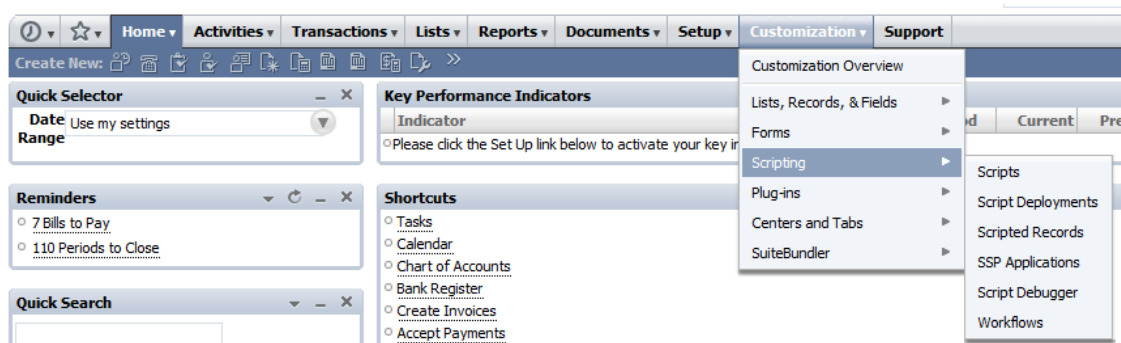
## General SuiteCloud Platform

Version 2014 Release 1 includes the following general SuiteCloud platform change:

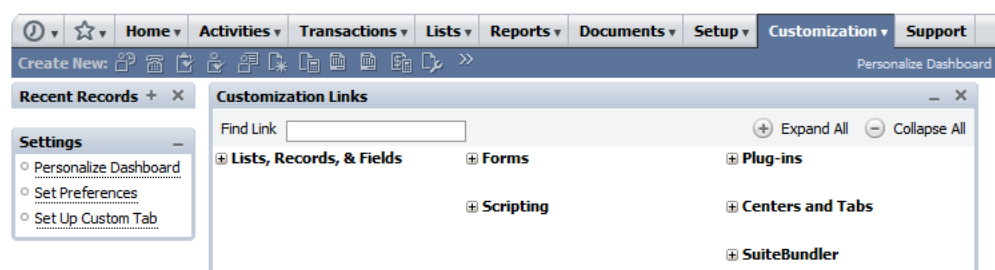
### New Customization Menu

Version 2014 Release 1 adds a new Customization tab to the NetSuite main menu. This new tab contains links to all menu options previously available under Setup > Customization, including: Custom Lists, Records & Fields, Custom Forms, Scripting, Custom Plug-ins, Custom Centers and Tabs, and SuiteBundler.

This new tab provides faster and more convenient access to customization tasks. Before this release, to find a customization task, users had to scroll through one long list of all of these tasks, and this list sometimes did not fit on users' screens. Now each subtype of customization tasks has its own separate, much shorter list, and these lists do not extend beyond the confines of users' screens.



The new Customization Overview page available from the Customization tab provides additional task links. This page also includes Recent Records and Settings portlets, and supports personalizations such as the addition of report snapshots and custom trend graphs.



The Customization tab is available in the Classic Center and in other centers containing the Setup tab, to account administrators and to other users with permissions for customization tasks.

**Important:** No new permissions are required for access to the Customization tab. Any users who previously had access to menu options under Setup > Customization should have access to these same menu options under the new Customization tab.

## SuiteBundler

Version 2014 Release 1 includes the following enhancements to SuiteBundler features:

- Support for Advanced PDF/HTML Templates
- Support for Charge Type
- Search for Popular SuiteApps

## Bundle Support During Release Phasing

Bundle support during phasing of Version 2014 Release 1 is consistent with the support provided during previous releases. Review the description below for a reminder of how bundles from different versions are handled during release phasing.

During phasing of Version 2014 Release 1, some accounts continue to use Version 2013 Release 2 during the time that other accounts are upgraded to Version 2014 Release 1, so you may be using a version different from some of the accounts where your bundles are installed.

- Bundles developed with Version 2013 Release 2 can be installed into accounts that are already using Version 2014 Release 1.
- Bundles developed with Version 2014 Release 1 can be installed into accounts that are still using Version 2013 Release 2, but note the following limitations:
  - When a user in a Version 2013 Release 2 account installs a bundle from a Version 2014 Release 1 account, any object types in the bundle that are not supported in Version 2013 Release 2 are not installed, resulting in potentially serious impact to bundle function.
  - A bundle with a SuiteScript that uses a new API available only in Version 2014 Release 1 can be installed into a Version 2013 Release 2 account, but the script may not function correctly because Version 2013 Release 2 does not support the API.

**Warning:** The only bundles that can be installed into a Release Preview account are those created in another Release Preview account. A bundle originally installed from a production account or the production repository can be updated in a Release Preview account, as long as the original account or the repository is also available in Release Preview. A bundle originally installed from a sandbox account cannot be accessed or updated in a Release Preview account. Also, any bundle created in a Release Preview account cannot be installed into a production or sandbox environment, even if it has been copied to the bundle repository.

## Support for Advanced PDF/HTML Templates

As of Version 2014 Release 1, you can create customization bundles with the Bundle Builder that include Advanced PDF/HTML Templates. You can include these templates in a bundle on the Select Objects page in the Bundle Builder. In addition, if you select a custom form in the Bundle Builder and the custom form has an advanced PDF/HTML template associated with it, SuiteBundler automatically includes the template in the bundle. The template is included even if you do not explicitly select it in the Bundle Builder.

**Note:** Unlike custom forms, you cannot set the Advanced PDF/HTML Template as the preferred template in a target account when you install it as part of the bundle.

## Support for Charge Type

As of Version 2014 Release 1, you can create customization bundles with the Bundle Builder that include the Charge Type accounting list. You can choose a Charge Type accounting list to be added to a bundle under Extensible Lists on the Select Objects page of the Bundle Builder.

If you include a Charge Type accounting list in a Version 2014 Release 1 bundle and then install the bundle in a Version 2013 Release 2 account, the bundle installation succeeds but NetSuite does not install the accounting list.

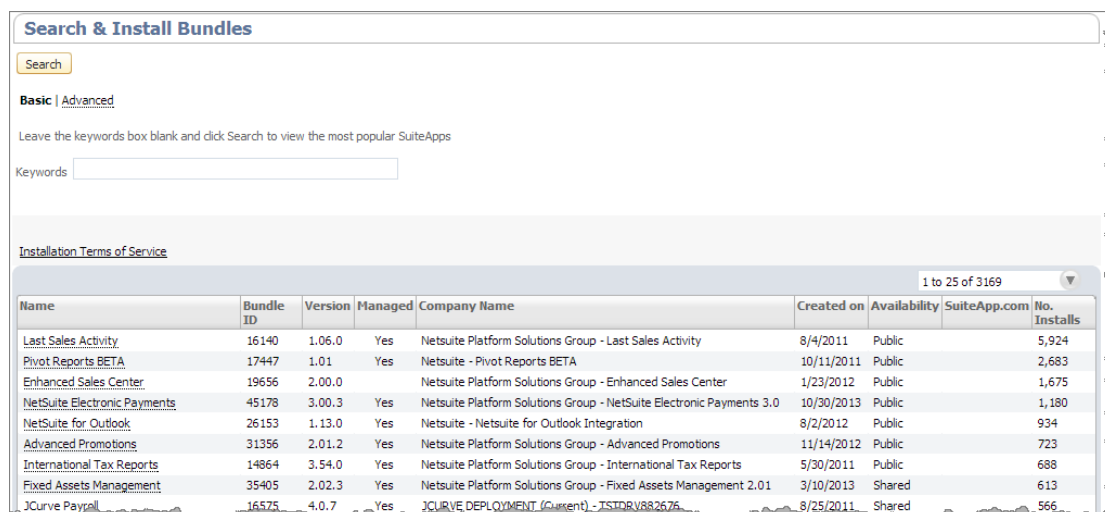
## Search for Popular SuiteApps

As of Version 2014 Release 1, you can use the Search & Install Bundles page to search for the most popular SuiteApps by the number of installations. To search for the most popular SuiteApps in either Basic or Advanced mode, leave the Keywords box empty and click Search.

Use this feature to discover the most popular SuiteApps according to the number of times those SuiteApps have been installed by other NetSuite accounts. This feature shows only those SuiteApps that are set to “Visible by All” or are available for your account.

**Note:** You can also visit SuiteApp.com to find additional SuiteApps.

The following screenshot shows the updated Search & Install Bundles page for a basic search:



Name	Bundle ID	Version	Managed	Company Name	Created on	Availability	SuiteApp.com	No. Installs
<a href="#">Last Sales Activity</a>	16140	1.06.0	Yes	Netsuite Platform Solutions Group - Last Sales Activity	8/4/2011	Public		5,924
<a href="#">Pivot Reports BETA</a>	17447	1.01	Yes	Netsuite - Pivot Reports BETA	10/11/2011	Public		2,683
<a href="#">Enhanced Sales Center</a>	19656	2.00.0		Netsuite Platform Solutions Group - Enhanced Sales Center	1/23/2012	Public		1,675
<a href="#">NetSuite Electronic Payments</a>	45178	3.00.3	Yes	Netsuite Platform Solutions Group - NetSuite Electronic Payments 3.0	10/30/2013	Public		1,180
<a href="#">NetSuite for Outlook</a>	26153	1.13.0	Yes	Netsuite - Netsuite for Outlook Integration	8/2/2012	Public		934
<a href="#">Advanced Promotions</a>	31356	2.01.2	Yes	Netsuite Platform Solutions Group - Advanced Promotions	11/14/2012	Public		723
<a href="#">International Tax Reports</a>	14864	3.54.0	Yes	Netsuite Platform Solutions Group - International Tax Reports	5/30/2011	Public		688
<a href="#">Fixed Assets Management</a>	35405	2.02.3	Yes	Netsuite Platform Solutions Group - Fixed Assets Management 2.01	3/10/2013	Shared		613
<a href="#">JCurve Payroll</a>	16575	4.0.7	Yes	JCURVE DEPLOYMENT (Current) - JSTDBV882676	8/25/2011	Shared		566

## SuiteBuilder - Customization

Version 2014 Release 1 includes the following enhancements to SuiteBuilder features:

- [Advanced PDF/HTML Templates \(Beta\) Enhancements](#)
- [SuiteBuilder Support for the Timesheets Feature](#)
- [Option to Encrypt New Custom Fields](#)
- [Enhanced Delete Behavior for Records Referenced by Custom Fields](#)
- [Support for Custom Note Forms](#)

### Important Note about New Fields and Custom Forms

Be aware that as part of a new release, new fields are sometimes added to NetSuite standard record types. Newly added fields for a record type are automatically added to any forms that you have customized for this record type, and these fields are set to show on customized forms. If you do not want new fields to show on any of your customized forms, after your upgrade you need to modify these forms to remove or hide these fields. Keep in mind that newly created fields are typically coupled with forms and may be needed for some forms to function properly. You should test any customized forms where you remove or hide fields, to ensure that the forms still function properly.

### Advanced PDF/HTML Templates (Beta) Enhancements

The Advanced PDF/HTML Templates (Beta) feature that was available in Version 2013 Release 2 has been enhanced for Version 2014 Release 1. This feature provides expanded customization capabilities over the previously supported transaction form layouts, also known as basic layouts. Note that basic layouts were previously known as legacy layouts.

When this feature is enabled, you can associate advanced templates with custom transaction forms, so that these templates are used to format printed and emailed versions of transactions. You can use advanced PDF/HTML templates to produce either PDF or HTML output, depending upon the settings of your print and email preferences. Standard templates are provided for each supported print type. You can create your own customized templates in a Template Editor that supports current industry standards for HTML-based editing, including rich text editing and HTML source editing. You also can use SuiteScript to produce HTML and PDF printed forms that take advantage of advanced template customization capabilities.

For information about this feature, see the following:

- [Setting a Custom Form to Use an Advanced Template](#)



- Using the Template Editor
- Enhancements to Advanced Templates for This Release
- Current Limitations for Advanced Templates

## Setting a Custom Form to Use an Advanced Template

The following screenshot shows how you can set a custom transaction form to use an advanced PDF/HTML template:

**Edit Custom Transaction Form**

Save Cancel Reset Save & Move Elements

\*Name Custom Purchase Order

Type Purchase Order

Printing Type ☒ Advanced ☐ Basic

Advanced PDF/HTML Template Custom Purchase PDF/HTML Template

Disclaimer

Address

Logo

Columns Width 12.75 Layout Space 7.5

Allow Add Multiple ☒

Inactive ☐

Form is Preferred ☒

Tabs Field Groups Screen Fields Actions Lists Custom Code Roles Linked Forms

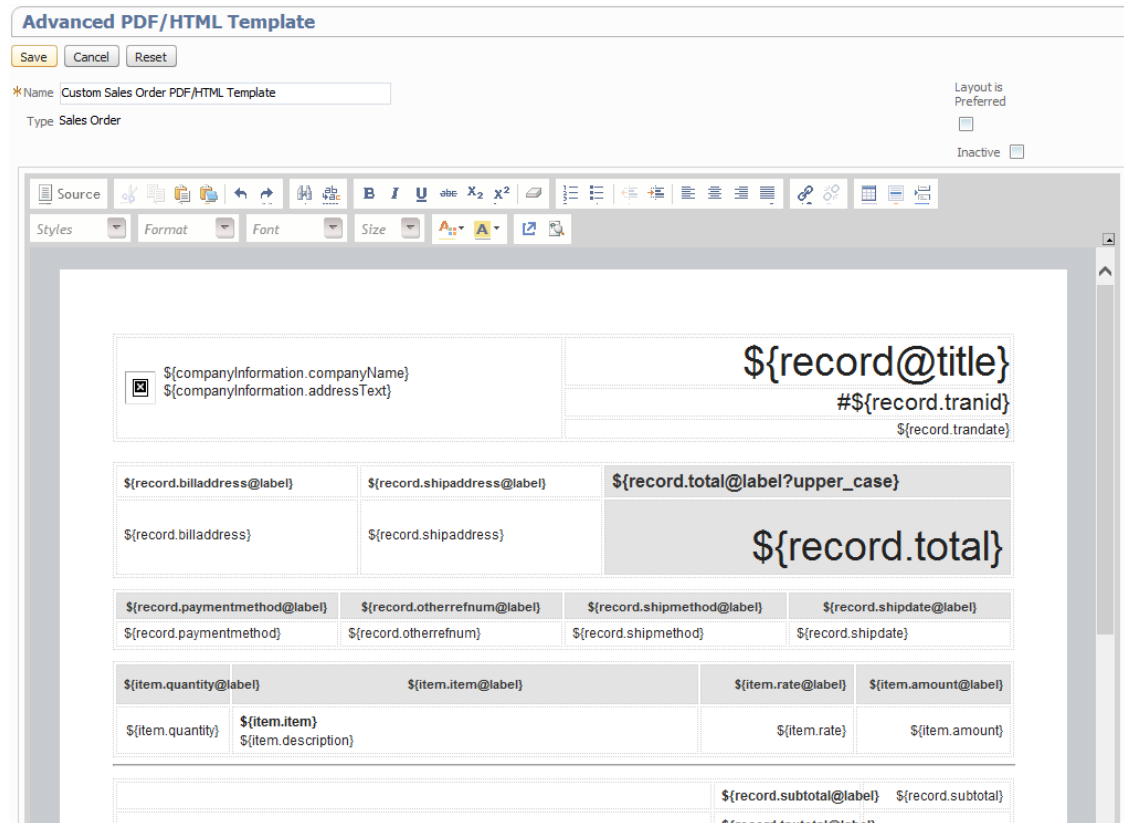
To create a new custom transaction form, go to Customization > Forms > Transaction Forms and click the Customize link for the transaction type's standard form. To edit an existing custom transaction form, go to Customization > Forms > Transaction Forms and click the Edit link for the form.

## Using the Template Editor

To see an advanced template in the template editor, go to Setup > Customization > Advanced PDF/HTML Templates and:

- Click the Customize link for a standard advanced template to review it in the template editor and create a customized version of it, or
- Click the Edit link for a custom advanced template to review it in the template editor and make further changes as desired.

The following screenshot shows the rich text edit mode for the template editor. You can click the Source button to view a template's HTML source code.



## Enhancements to Advanced Templates for This Release

Version 2014 Release 1 includes the following enhancements to the Advanced PDF/HTML Templates (Beta) feature:

- Support for Additional Transaction and Print Types
- Enhanced Look and Feel for Printed Transactions
- Automatic Inclusion of Bar Codes
- Ability to Print Field Values from Joined Records and Searches
- Support for Company Printing Preferences
- New Permission for Non-Administrator Users
- Ability to Add Advanced Templates to Bundles
- Enhanced Support for Chinese, Japanese, and Korean Fonts
- Template editor usability improvements, including display of images and enhancements to popup dialogs

## Support for Additional Transaction and Print Types

Advanced PDF/HTML templates now support all transaction and print types supported by basic layouts, including internationalized versions. You can now use advanced templates to format any printed transactions for which you previously used transaction form PDF layouts or transaction form HTML layouts.

Supported advanced template types are listed at Customization > Forms > Advanced PDF/HTML Templates:

Advanced PDF/HTML Templates			
Edit	Name	Type ▲	Preferred
<a href="#">Customize</a>	Standard US Vendor Payment PDF/HTML Template	Bill Payment	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard AU Vendor Payment PDF/HTML Template	Bill Payment	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Payment Voucher PDF/HTML Template	Bill Payment	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard UK Vendor Payment PDF/HTML Template	Bill Payment	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Cash Refund PDF/HTML Template	Cash Refund	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Cash Sale PDF/HTML Template	Cash Sale	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard UK Voucher Check PDF/HTML Template	Check	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Paycheck PDF/HTML Template	Check	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard UK Check PDF/HTML Template	Check	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard AU Voucher Check PDF/HTML Template	Check	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Check PDF/HTML Template	Check	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard US Voucher Check PDF/HTML Template	Check	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Credit Memo PDF/HTML Template	Credit Memo	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Customer Deposit PDF/HTML Template	Customer Deposit	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Packing Slip PDF/HTML Template	Packing Slip	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Picking Ticket PDF/HTML Template	Picking Ticket	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Item Detail Statement PDF/HTML Template	Invoice	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Invoice PDF/HTML Template	Invoice	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Price List PDF/HTML Template	Invoice	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Statement PDF/HTML Template	Invoice	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Shipping Label PDF/HTML Template	Invoice	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Item Label PDF/HTML Template	Item Label	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Customer Payment PDF/HTML Template	Payment	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Mailing Label PDF/HTML Template	Payment	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Purchase PDF/HTML Template	Purchase Order	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Quote PDF/HTML Template	Quote	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Return Authorization PDF/HTML Template	Return Authorization	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Sales Order PDF/HTML Template	Sales Order	<input checked="" type="checkbox"/>
<a href="#">Customize</a>	Standard Bill of Materials PDF/HTML Template	Work Order	<input checked="" type="checkbox"/>

Show Inactives ☐

Submit Print Export - CSV ▼


Advanced templates also support the following additional print types, when their related preferences are enabled:

- If the Print Return Form with Packing Slip preference is enabled, a return form is appended whenever a packing slip is printed. The return form is part of the packing slip advanced template. You can use custom packing slip advanced templates to modify default formatting for printed return forms.

- If the Print Remittance Form with Invoices & Statements preference is enabled, a remittance form is appended whenever an invoice or statement is printed. The remittance form is part of the invoice advanced template and statement advanced template. You can use custom invoice or statement advanced templates to modify default formatting for printed remittance forms.

### Enhanced Look and Feel for Printed Transactions

Printed transactions based on advanced templates have an enhanced look and feel, as shown in the following example:

		<b>Wolfe Electronics</b> 1500 3rd St San Mateo, CA 94403	<b>Invoice</b> <b>#1031</b> May 1, 2013																				
<b>Bill To</b> James A Sample 1234 Any Street Nowhere, ST 94000 USA	<b>Ship To</b> James A Sample 1234 Any Street Nowhere, ST 94000 USA	<table border="1"> <tr> <td> <b>TOTAL</b>   <b>\$5,717.50</b>          Due Date: May 31, 2013       </td> </tr> </table>		<b>TOTAL</b>  <b>\$5,717.50</b> Due Date: May 31, 2013																			
<b>TOTAL</b>  <b>\$5,717.50</b> Due Date: May 31, 2013																							
<table border="1"> <tr> <th>Terms</th> <th>Due Date</th> <th>PO #</th> <th>Sales Rep</th> <th>Ship Via</th> <th>Partner</th> </tr> <tr> <td>30 Days</td> <td>May 31, 2013</td> <td>21521487</td> <td>Clark Koozer</td> <td>FED EX</td> <td>Rockstar Beverages</td> </tr> </table>	Terms	Due Date	PO #	Sales Rep	Ship Via	Partner	30 Days	May 31, 2013	21521487	Clark Koozer	FED EX	Rockstar Beverages											
Terms	Due Date	PO #	Sales Rep	Ship Via	Partner																		
30 Days	May 31, 2013	21521487	Clark Koozer	FED EX	Rockstar Beverages																		
<table border="1"> <thead> <tr> <th>Qty</th> <th>Item</th> <th>Options</th> <th>Unit Price</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>3</td> <td> <b>Computer Systems: Desktop: Impressivo 1500</b>            Impressivo 1500 (Superion 1.5 GHz processor 640MB RAM, 40GB Hard Drive) w/17" CRT Monitor, Keyboard, Mouse         </td> <td></td> <td>\$1,299.00</td> <td>\$3,897.00</td> </tr> <tr> <td>1</td> <td> <b>Computer Systems: Laptop: Inertio 1600</b>            Inertio 1600 (Moblio 1GHz processor, 512 MB RAM, 40GB HD, DVD/CD-R)         </td> <td></td> <td>\$1,499.00</td> <td>\$1,499.00</td> </tr> <tr> <td>1</td> <td> <b>Computer Systems: Laptop: Gratio 1800</b>            Gratio 1800 (Moblio 1.3 GHz processor, 512 MB RAM, 40GB HD, DVD/CD-R)         </td> <td></td> <td>\$1,699.00</td> <td>\$1,699.00</td> </tr> </tbody> </table>	Qty	Item	Options	Unit Price	Amount	3	<b>Computer Systems: Desktop: Impressivo 1500</b> Impressivo 1500 (Superion 1.5 GHz processor 640MB RAM, 40GB Hard Drive) w/17" CRT Monitor, Keyboard, Mouse		\$1,299.00	\$3,897.00	1	<b>Computer Systems: Laptop: Inertio 1600</b> Inertio 1600 (Moblio 1GHz processor, 512 MB RAM, 40GB HD, DVD/CD-R)		\$1,499.00	\$1,499.00	1	<b>Computer Systems: Laptop: Gratio 1800</b> Gratio 1800 (Moblio 1.3 GHz processor, 512 MB RAM, 40GB HD, DVD/CD-R)		\$1,699.00	\$1,699.00			
Qty	Item	Options	Unit Price	Amount																			
3	<b>Computer Systems: Desktop: Impressivo 1500</b> Impressivo 1500 (Superion 1.5 GHz processor 640MB RAM, 40GB Hard Drive) w/17" CRT Monitor, Keyboard, Mouse		\$1,299.00	\$3,897.00																			
1	<b>Computer Systems: Laptop: Inertio 1600</b> Inertio 1600 (Moblio 1GHz processor, 512 MB RAM, 40GB HD, DVD/CD-R)		\$1,499.00	\$1,499.00																			
1	<b>Computer Systems: Laptop: Gratio 1800</b> Gratio 1800 (Moblio 1.3 GHz processor, 512 MB RAM, 40GB HD, DVD/CD-R)		\$1,699.00	\$1,699.00																			
				<table border="1"> <tr> <td><b>Subtotal</b></td> <td>\$5,396.00</td> </tr> <tr> <td><b>Tax (5.96%)</b></td> <td>\$321.50</td> </tr> <tr> <td><b>Total</b></td> <td>\$5,717.50</td> </tr> </table>	<b>Subtotal</b>	\$5,396.00	<b>Tax (5.96%)</b>	\$321.50	<b>Total</b>	\$5,717.50													
<b>Subtotal</b>	\$5,396.00																						
<b>Tax (5.96%)</b>	\$321.50																						
<b>Total</b>	\$5,717.50																						

### Automatic Inclusion of Bar Codes

Now printed transactions based on advanced templates automatically include bar codes, in the same manner as printed transactions based on basic layouts. Before this release, to include

a bar code on a printed transaction you had to manually edit the HTML source code of the associated advanced template.

The following types automatically include a bar code in printed transactions when the Bar Coding and Item Labels feature is enabled:

- Bill of Materials
- Cash Refund
- Cash Sale
- Credit Memo
- Invoice
- Item Label
- Packing Slip
- Picking Ticket
- Purchase Order
- Quote
- Remittance Form
- Return Form
- Return Authorization
- Sales Order

Most transaction types print the transaction ID along with the bar code. The following example shows a bar code from a printed sales order:



Item label is an exception. Printed transactions of this type include the UPC code, serial number of the item with the bar code, or both.

### **Ability to Print Field Values from Joined Records and Searches**

You can now modify advanced templates in the template editor to include fields from records directly joined to the current transaction. Previously, you could include fields only from the current transaction in advanced templates.

- For example, if you are editing a sales order template, you can add fields from records directly joined to sales order, such as items. Supported syntax is `${record.<related record>.<field ID>}`.
- To include Sales Description field values from related item records in a sales order template, use the syntax: `${record.item.salesdescription}`.

You also can include search results fields from searches directly joined to the current transaction.

- You can use the index number to indicate the search result row to be referenced to obtain a field value. For example, `[0]` would indicate that the field value from the first row returned in search results should be used.
- Full supported syntax is `${results[<search_result_line>].<related_record>.<field_ID>}`. For example, to include the first customer phone number from a sales order search, use the syntax: `${results[0].customer.phone}`.
- Or you could also use a list directive to include a list of search results, for example:

```
<#list results as salesOrder>

<p>${salesOrder.customer.phone}</p>

</#list>
```

You can use the index number to indicate the search result row to be referenced to obtain a field value. For example, `[0]` would indicate that the field value from the first row returned in search results should be used. Full supported syntax is `${results[<search_result_line>].<related_record>.<field_ID>}`. For example, to include the first customer phone number from a sales order search, use the syntax: `${results[0].customer.phone}`.

### Support for Company Printing Preferences

Before this release, advanced templates did not support company printing preferences, as defined at Setup > Company > Printing, Fax & Email Preferences, on the Printing subtab. These preferences were not applied to printed transactions that used advanced templates.

Now the following company printing preferences are applied to printed transactions that use advanced templates:

- Customers Default to Print Transactions
- Vendors Default to Print Transactions
- Print Return Form with Packing Slip
- Print Remittance Form with Invoices and Statements

- Print Transaction Forms Landscape
- Print Separate Voucher for Bill Payments
- Print Accounts on Vouchers
- Print Discount and Shipping Lines on Columns
- Use Location Address on Forms
- Check Printing — Default Type (Standard or Voucher)

Note that preferences listed in the Messages section of the Printing, Fax & Email Preferences page, such as disclaimers and other message text, are not applied to printed transactions that use advanced templates. You can define specialized message text on any custom advanced template. This alternative enables you to vary message text instead of having one standard message defined on the preferences page.

### **New Permission for Non-Administrator Users**

As of this release, a new Advanced PDF/HTML Templates permission is available. This permission can be assigned to roles other than account administrator, so that users with these roles can create and edit custom advanced templates. Account administrators have this permission by default. Before this release, only account administrators could customize advanced templates.

The new permission is a Setup type permission. It has only one level: Full.

### **Ability to Add Advanced Templates to Bundles**

Before this release, when you were creating a customization bundle, you could add transaction form PDF layouts and transaction form HTML layouts, but you could not add advanced PDF/HTML templates. Now advanced templates are available on the Select Objects page of the Bundle Builder.

Also see the SuiteBundler release note [Support for Advanced PDF/HTML Templates](#).

### **Enhanced Support for Chinese, Japanese, and Korean Fonts**

Before this release, advanced PDF/HTML templates did not support printing transactions in Chinese, Japanese, or Korean by default. To print a transaction in one of these languages, you were required to make manual edits to the associated advanced template's HTML source code. Now, advanced PDF/HTML templates support printing in these languages by default. Note that the user printing the transaction still needs to have the CJK font pack installed.

### **Current Limitations for Advanced Templates**

The Advanced PDF/HTML Templates feature has the following limitations in Version 2014 Release 1:

- Any custom advanced PDF/HTML template created in the UI must be based on a standard advanced template.
- The template editor does not provide a prepopulated selector for field names; users must obtain field IDs themselves. (See the help topic [Adding a Field to an Advanced Template](#) for tips for obtaining field IDs.)
- The Download PDF Files user preference, set at Home > Preferences on the General subtab's Defaults area, is not supported for transactions using advanced PDF/HTML templates.

## SuiteBuilder Support for the Timesheets Feature

NetSuite Version 2014 Release 1 introduces a new Timesheets feature, as an alternative to the existing Time Tracking feature. This feature allows tracking of employee time in weekly segments rather than individual time entries. For additional information about this feature, see the [Timesheets](#) release note.

**Important:** The Timesheets feature is not currently available at Setup > Company > Enable Features. You must contact NetSuite Customer Support to enable this feature.

The Time Tracking feature must be disabled before the Timesheets feature can be enabled. After the Time Tracking feature is disabled, any customizations made to time tracking forms are not available.

When the Timesheets feature is enabled, time tracking custom fields (along with time transactions) are automatically updated for use with the Timesheets feature. After this process is complete, you will receive a notification email and the Timesheets box will appear checked on the Enable Features page.

Similarly, if you later disable Timesheets and enable Time Tracking, any customizations made to timesheet and time entry forms are not available. Your Timesheets custom fields and time transactions are updated for use with the Time Tracking feature. After this process is complete, you will receive a notification email and the Time Tracking box will appear checked on the Enable Features page.

For details about using custom forms and custom fields after you have enabled the Timesheets feature, see the following:

- [Custom Forms and the Timesheets Feature](#)
- [Custom Fields and the Timesheets Feature](#)



## Custom Forms and the Timesheets Feature

The Timesheets feature includes two new entry forms to be used with the Timesheets feature, instead of the time tracking form used with the Time Tracking feature. Both new forms have a type of Other Record, unlike the time tracking form, which has a type of Time.

- The timesheet form represents the timesheet record. It includes body fields and a grid that displays time data by week. Note that the fields in this grid are populated from the time entry subrecord.
- The time entry form represents the time entry subrecord. It includes Primary Information fields that display in a popup dialog available from links on timesheet forms. This popup dialog displays data about the time worked in one day. The time entry subrecord also includes Grid fields that are displayed in the timesheet form's weekly grid.

**Important:** Any custom time tracking forms you used with the Time Tracking feature are not available to be used with the Timesheets feature. After this feature is enabled, you can create custom timesheet and time entry forms if you want to provide alternatives to the standard forms.

To create a custom timesheet or time entry form, go to Customization > Forms > Entry Forms, and click the Customize link for the form type you want to customize.

When you customize a time entry form, you can modify which standard subrecord fields display in the time entry popup dialog and which display in the timesheet form grid, by assigning fields a field group of Primary Information or Grid. Field groups are assigned on the Fields tab of the custom form definition. Note that custom time entry fields can only be displayed in the popup, not in the grid.

The following screenshot shows a standard timesheet form and a popup time entry dialog:

**Timesheet: Smith, Amy (8/4/2013 - 8/10/2013)** [✕](#) Status: **Open**

[Edit](#) [Back](#) [Previous Week](#) [Next Week](#) [More Actions](#)

**Primary Information**

Employee **Smith, Amy** [✕](#) Total Hours 12:00  
Start Date 8/4/2013

**Classification**

Subsidiary Parent Company

Customer	Case/Task/Event	Service Item	Location	Sun, 4	Mon, 5	Tue, 6	Wed, 7	Thu, 8	Fri, 9	Sat, 10	Total
	Product Naming - Orientation Session (Event)		East Coast		3:00						3:00
	Product Naming - Second Brainstorming Session (Event)		East Coast		3:00						3:00
	Product Naming - First Brainstorming Session (Event)		East Coast		3:00						3:00
	Product Naming - Final Selections (Event)		East Coast		3:00						3:00
				0:00	12:00	0:00	0:00	0:00	0:00	0:00	12:00

[Memo](#) [Pending Approval](#) [Approved](#) [Rejected](#)

**Close**

**Primary Information**

Duration 3:00 Department  
Billable ☐ Class  
Payroll Item Paid Externally ☐ Billing Class  
Memo Done offsite

## Custom Fields and the Timesheets Feature

Enabling the Timesheets feature causes an automatic update of any custom fields used with the Time Tracking feature. In this update, a copy is created of every transaction column field that was applied to the time record. The original transaction column fields are also maintained because they may be applied to records other than time records. Note the following characteristics of the copied fields:

- Copied fields are shown by default on all time entry forms, including the standard time entry form.
- Copied fields have a type of Other Custom Field (rather than Transaction Column Field), because the time entry subrecord has a type of Other Record.
- Each copied field has the same label as the original field.
- Each copied field's ID has a prefix of **custrecord** instead of **custcol**, and has a suffix of **\_ts**.

For example, if the original transaction column field has an ID of **custcol6**, the copied other custom field has an ID of **custrecord6\_ts**.

After the Timesheets feature is enabled, you also can create new custom fields for timesheet and time entry forms. To create a new custom field, go to Customization > Lists, Records, & Fields > Other Custom Fields > New, and select a Record Type of Time Entry or Timesheet.

Custom timesheet fields are added to the body area of the standard timesheet form and shown by default on custom timesheet forms. Custom time entry fields are added to the standard time entry popup dialog and shown by default on custom time entry popups. Custom time entry fields cannot be displayed in the timesheet form grid.

## Option to Encrypt New Custom Fields

Version 2014 Release 1 supports the ability to store custom fields in an encrypted format. As of this release, a Use Encrypted Format option is available for new custom field definitions with specific text types. When this option is enabled, field values are encrypted in the database. (Values are still displayed in the user interface.)

**New Other Custom Field**

Save Cancel Reset

\*Record Type [dropdown] Type Free-Form Text [dropdown]  
\*Label [text] List/Record [dropdown]  
ID [text] Store Value ☒ Use Encrypted Format ☐  
Owner Rahul [dropdown] Show In List ☐  
Description [text area]

Display Validation & Defaulting Sourcing & Filtering Access Translation

**Warning:** After you save a custom field definition, the Use Encrypted Format setting cannot be changed!

The encrypted format option is NOT available for existing custom field definitions created before Version 2014 Release 1, because this option can never be changed for a custom field definition that has already been saved. This option is not supported for Transaction Item Option, Suitelet, Workflow, or Workflow State custom field definitions. For custom field definitions where it is supported, this option is always disabled by default.

You can encrypt the following text types:

- Email Address
- Free-Form Text
- Long Text

- Phone Number
- Rich Text
- Text Area

For all other text types, the Use Encrypted Format box is grayed out.

Be aware of the following precautions for fields with encrypted stored values:

- Fields with encrypted stored values are not available to reporting, searches, SuiteAnalytics Connect, or for sourcing or filtering.
- The `nlapiLookupField` SuiteScript function is not supported for fields with encrypted stored values. Other SuiteScript API functions that rely on search may not be supported.
- Encryption of stored field values increases their size and may have performance implications.
- The data type of a field with encrypted stored values cannot be changed to a type that does not support encrypted stored values.

System notes for fields with encrypted stored values mask old and new field values, displaying asterisks only, for security reasons.

## Enhanced Delete Behavior for Records Referenced by Custom Fields

List/record and multiple select type custom fields provide a list for users to select value(s). The list of values is populated by records of the list/record type set in the custom field definition. Because list/record and multiple select custom fields are dependent on these referenced records, deletion of these records can be problematic. For example, a custom field called Color can be dependent on a custom record type called Color List. If a value is deleted from Color List, for example Purple, any records with a Color custom field value of Purple are impacted.

Before this release, the system handled deletion of records referenced by list/record and multiple/select custom fields according to the type of the record to be deleted. This behavior could not be customized.

- For entity, item, event, and transaction type records: the delete was allowed, and the custom field values that were dependent on the deleted record were set to null. No system notes were provided for the records with custom field values set to null.
- For other record types (including custom records): the delete was prevented, and an error was returned stating that the record could not be deleted because other records depended on it. No information was provided to the user about the dependent records.

Version 2014 Release 1 includes the following enhancements to delete behavior for records referenced by list/record or multiple select type custom fields:

- These types of custom fields include the ability to customize whether the delete of referenced records is prevented with an error or allowed with dependent custom field values set to null. See [Customizing Delete Behavior for Referenced Records](#).
- System notes are logged when delete is allowed and dependent custom field values are set to null. See [System Notes for Nulled Dependent Field Values](#).
- A link to dependent records is available from the error message when delete is prevented. See [Dependent Records Page for Prevented Record Deletes](#).

## Customizing Delete Behavior for Referenced Records

For custom field definitions that have a type of List/ Record or Multiple Select and have the Stored Value option enabled, a new **Allow Delete of List/Record Values** field is provided. This new field permits overriding the default system behavior when a delete is attempted of a record referenced by values in this custom field.

The screenshot shows the 'New Custom Entity Field' configuration window. The 'Validation & Defaulting' tab is selected. The 'Allow Delete of List/Record Values?' dropdown menu is open, showing three options: 'Prevent and Return Error' (selected), 'Prevent and Return Error', and 'Allow and Set Dependent Field Values to Null'. Other visible fields include Label (Account Type), ID, Owner (James McGyver), Type (Multiple Select), and List/Record (Account).

Default settings for this new field are based on the record type selected in the List/Record field, and follow the system behavior prior to this release:

- For entity, item, event, and transaction type records: default is **Allow and Set Dependent Field Values to Null**.
- For other record types (including custom records): default is **Prevent and Return Error**.

Note the following:

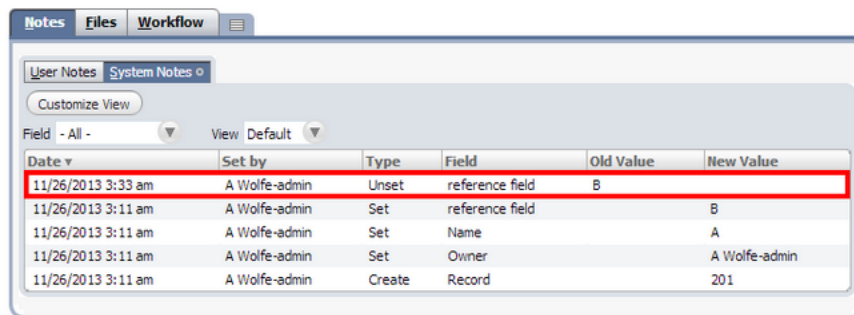
- The **Allow Delete of List/Record Values** setting is not available for Workflow or Workflow Action custom fields.
- The **Allow Delete of List/Record Values** setting for a custom field takes precedence over whether the field is mandatory, so a setting of **Allow and Set Dependent Field Values to Null** can produce nulled values even for mandatory fields. To avoid this issue, it is

recommended that you choose a setting of **Prevent and Return Error** for mandatory fields.

- SuiteBundler does not respect the **Allow Delete of List/Record Values** setting. If a referenced record is deleted as part of a bundle operation, such as uninstall, the treatment of dependent custom field values conforms to SuiteBundler rules.

## System Notes for Nulled Dependent Field Values

When a delete of a referenced record sets a dependent custom field value to null, a system note is logged on the record containing the dependent custom field value. The note specifies the user who deleted the referenced record as the Set by value, and Unset as the Type.



Date ▼	Set by	Type	Field	Old Value	New Value
11/26/2013 3:33 am	A Wolfe-admin	Unset	reference field	B	
11/26/2013 3:11 am	A Wolfe-admin	Set	reference field		B
11/26/2013 3:11 am	A Wolfe-admin	Set	Name		A
11/26/2013 3:11 am	A Wolfe-admin	Set	Owner		A Wolfe-admin
11/26/2013 3:11 am	A Wolfe-admin	Create	Record		201

## Dependent Records Page for Prevented Record Deletes

When a delete of a referenced record is prevented due to dependent custom field values, the error message includes a link to a page listing the dependent records.



### Notice

- This record cannot be deleted because it has [dependent records](#).

[Go Back](#)

The Dependent Records page includes the name of the referenced record at the top of the page. The list on this page includes a line for each dependent custom field, with the following details:

- Kind of custom field

- Name of custom field
- Name of record containing the custom field, with a clickable link to the record

## Support for Custom Note Forms

Version 2014 Release 1 supports customization of the note form. The note form displays as a popup dialog when a user adds a note to a record. Before this release, it was not possible to customize the note form, so this dialog was always the same. Now, you can vary note form fields, by hiding standard fields, adding custom fields, and changing field order. You can configure note form actions by setting actions to display as buttons or menus, changing labels, hiding standard actions, and adding custom actions. You also can attach form-level script to custom note forms. For information about custom note forms, see the following:

- [Creating a Custom Note Form](#)
- [Adding Custom Fields to Note Forms](#)
- [Using Custom Note Forms](#)

## Creating a Custom Note Form

To add a custom note form, go to Customization > Forms > Entry Forms, click the Customize link for the standard note form, and make changes on the Edit Custom Entry Form page.

Edit Custom Entry Form

Save Cancel Reset Save & Move Elements

Name Custom Note Form

Type Other Record

Subtype Note

Inactive

Store Form with Record

Form is Preferred

Use for Pop-ups

Popup Only

Fields Actions Custom Code Roles

Move To Top Move To Bottom New Field

	Description	Show	Mandatory	Display Type	Label	Column Break	Space Before	Same Row as Previous
	Custom Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal	Custom Form	<input type="checkbox"/>		<input type="checkbox"/>
	Title	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal	Title	<input type="checkbox"/>		<input type="checkbox"/>
	Type	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal	Type	<input type="checkbox"/>		<input type="checkbox"/>
	Direction	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal	Direction	<input type="checkbox"/>		<input type="checkbox"/>
	Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal	Date	<input type="checkbox"/>		<input type="checkbox"/>
	Time	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal	Time	<input type="checkbox"/>		<input type="checkbox"/>
	Memo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Normal	Memo	<input type="checkbox"/>		<input type="checkbox"/>

## Adding Custom Fields to Note Forms

The note record has a type of Other Record, so its custom fields must be of the type Other Custom Field.

To create a custom field that can be displayed on custom note forms, go to Customization > Lists, Records, & Fields > Other Custom Fields > New. On the New Other Custom Field page, select a Record Type of Note.

**New Other Custom Field**

Save Cancel Reset

\*Record Type **Note** Type **Free-Form Text**

\*Label **Reason for Note** List/Record

ID

Owner **Rahul** Store Value ☒ Use Encrypted Format ☐

Description Show In List ☐

**Display** Validation & Defaulting Sourcing & Filtering Access Translation

Insert Before

Display Type **Normal**

Display Width

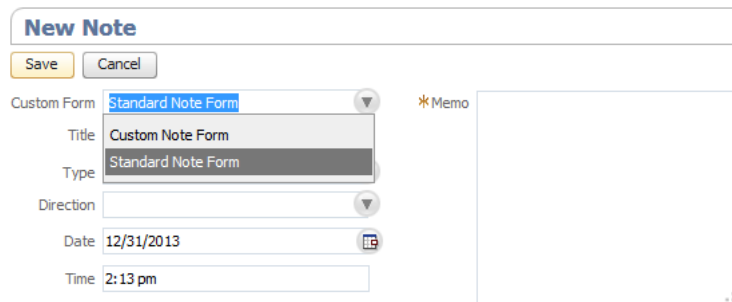
Help

After you save this type of custom field, the field is displayed by default on all custom note forms. You can clear the Show box for the custom field on any custom note form where you do not want it displayed.

## Using Custom Note Forms

The standard note form is used by default for all note dialogs. If at least one custom note form has been created in an account, this standard note form includes a Custom Form dropdown where the user can choose to use a custom form for a note dialog. You cannot remove this dropdown field from the standard note form as long as any custom note form exists.





You can set a custom note form to be used by default for the note dialog. You can either check the Preferred box for the custom note form in the Entry Forms list, or edit the custom note form and check the Form is Preferred box. If you want to allow users to choose among the standard note form and custom note forms each time they enter a note, you should leave the Custom Form field displayed on custom note form(s). To ensure users do not change the note form to anything other than the preferred custom form, on that form you can clear the Show box for the Custom Form field.

## SuiteAnalytics (Dashboards, Reporting and Search)

Version 2014 Release 1 includes the following enhancements to SuiteAnalytics features:

- Introduction to SuiteAnalytics Connect
- End of Support for NetSuite ODBC Driver 5.5
- ODBC Middleware Upgrade
- Enhancements to Balance Sheet and Trial Balance Reports
- Increase in Maximum Supported Report Size
- Support for Multi-Book Accounting in Reports, Searches, and KPIs
- Internal ID Fields Available as Report Columns and Filters
- Change of Sign for Expense Account Amounts in Transaction Saved Searches

### Introduction to SuiteAnalytics Connect

The SuiteAnalytics Connect Service, also referred to as the Connect Service, enables you to access your NetSuite data while connecting from any type of device that uses a Windows or Linux operating system. Version 2014 Release 1 now includes the following SuiteAnalytics Connect enhancements:

- ODBC Connections for Advanced Reporting is now the SuiteAnalytics Connect Feature

- New ODBC Drivers for Windows and Linux
- New JDBC and ADO.NET Drivers
- Authentication Enhancements for Connect Service
- Terminology Changes

## **ODBC Connections for Advanced Reporting is now the SuiteAnalytics Connect Feature**

As of July 2014, the feature formerly known as ODBC Connections for Advanced Reporting has been rebranded to SuiteAnalytics Connect. If this feature is enabled in your account, a driver download link is available in the Settings portlet of the NetSuite home page. The downloaded driver provides connectivity to NetSuite data for third party tools. For more information, see the help topic [Introducing SuiteAnalytics Connect](#).

### **New ODBC Drivers for Windows and Linux**

The SuiteAnalytics Connect feature supports the following ODBC drivers:

- 32-bit Windows ODBC driver
- 64-bit Windows ODBC driver
- 32-bit Linux ODBC driver
- 64-bit Linux ODBC driver

The additional ODBC drivers provide you with the option to install 32-bit or 64-bit drivers, offer Linux and Windows as supported operating systems, and simplify the installation process by using a bundled installation. These drivers are available at no extra charge to organizations that have a license for the SuiteAnalytics Connect module. For more information, see the help topic [Accessing the Connect Service Using an ODBC Driver](#).

### **New JDBC and ADO.NET Drivers**

In addition to ODBC drivers, the SuiteAnalytics Connect feature also supports JDBC and ADO.NET drivers at no extra charge. Adding these JDBC and ADO.NET drivers means that if you are developing Java or ADO.NET applications, you can now use a native driver without using a bridge to ODBC.

For more information about JDBC drivers, see the help topic [Accessing the Connect Service Using a JDBC Driver](#).

For more information about ADO.NET Data Providers, see the help topic [Accessing the Connect Service Using an ADO.NET Data Provider](#).

## Authentication Enhancements for Connect Service

New SuiteAnalytics drivers require you to enter your Account ID and Role ID to access the Connect Service for authentication. By default, the Account ID and Role ID are stored in the DSN. You have the option to change these default values. For more information, see the help topic [Connecting to the Connect Service](#).

**Note:** For previous versions of the ODBC driver 6.0 that were supported before this release, the new authentication process does not apply.

## Terminology Changes

The SuiteAnalytics Connect feature introduces new terms that differ from the terminology used for the ODBC Connections for Advanced Reporting feature.

- Views are now referred to as tables.
- Fields are now referred to as columns.
- The entire group of Connect Service tables are known as the Connect Schema.

## End of Support for NetSuite ODBC Driver 5.5

As of January 2014, NetSuite ODBC Driver 5.5 is no longer supported. You are no longer able to run queries of NetSuite data using this driver. To access NetSuite through ODBC, you must install and begin using NetSuite ODBC Driver 6.0.

If you are unsure which driver version you are currently using, see the help topic [Verifying Which ODBC Driver is Installed](#). For installation instructions for the upgraded driver, see the help topic [Downloading and Installing NetSuite ODBC Driver 6.0](#).

## ODBC Middleware Upgrade

NetSuite has upgraded its ODBC middleware to the latest supported version. This new version includes changes to SQL support and query processing that may impact some of your existing ODBC queries, causing query processing to fail. You may need to rewrite impacted queries to account for these changes. It is recommended that you review and run all of your business critical queries in the Version 2014 Release 1 Release Preview environment to determine whether they require updating. For information about changes that may impact your queries, see the help topic [Rewriting Queries for the ODBC Middleware Upgrade](#).

## Enhancements to Balance Sheet and Trial Balance Reports

Legal requirements for Balance Sheet and the Trial Balance report formats vary across countries. In some countries, only the current period balance must be included in these reports.

In others, the previous period balance, the total debits, and the total credits must also be included. In NetSuite Version 2014 Release 1, the Balance Sheet and Trial Balance reports support flexible new customization options. These options enable you to comply with different legal requirements and to address a broader set of user preferences.

The new options give you control over the number of balance columns to include in a custom Balance Sheet or Trial Balance report, the period range associated with each column, and whether each column displays the selected period balance or the balance carried forward. You can now also include total debit and total credit columns in custom Balance Sheet and Trial Balance reports.

The new options are as follows:

- **Alternate Period Range Type** – This dropdown, which has been available for Balance Sheet reports, is now also available for Trial Balance reports. It enables you to select a date range or period range for the column that is different from the range for the report's other columns. After you select the type, an Alternate Period Range dropdown appears so that you can select the relative date range or period.
- **Cumulative Value** – For an amount column, this box enables you to specify whether the amount includes balances carried forward. When the box is checked, all transactions posted through the end of the range selected are included. When the box is cleared, only transactions matching the range selected are included.
- **Amount (Debit) and Amount (Credit)** – These fields are now available in the Financial folder in Add Fields for all reports that use the Financial Report Builder. These fields have also been added to the Trial Balance folder for the Trial Balance report. Use the Amount (Debit) field to add columns that display the total debits posted to each account. Correspondingly, use the Amount (Credit) field to add columns that display the total credits posted to each account. Note that the new fields differ from the Amount (Debit/Credit) field in the Trial Balance report, which displays line balances as debits or credits.

For example, to add a previous period balance column to a Balance Sheet report, run the report and click the Customize button. Then follow familiar steps to add a second instance of the Financials:Amount field to your report. Set the alternate period range properties of the column to indicate that it should display the previous period balance. You can use the new Cumulative Value property to control whether the column displays the carried forward balance as of the selected alternate period range or the balance for the selected alternate period range. The steps and options to add additional balance columns to a Trial Balance report are the same.

## Increase in Maximum Supported Report Size

Version 2014 Release 1 increases the maximum supported size for NetSuite reports. Report size is measured by the number of rows retrieved for a report. Note that the number of rows that must be retrieved for a report may be greater than the number of rows displayed, for example when report results are segmented across multiple classifications.

Before this release, the maximum number of rows that could be retrieved for a report was either 25,000 or 75,000 rows, depending on the kind of report. Now, limits for retrieved rows are consistent across all kinds of reports, with higher limits for reports executed in the background, such as scheduled, emailed, and exported reports.

As of this release, the limits for retrieved rows per report are:

- 100,000 rows — for a report executed on demand (synchronously)
- 500,000 rows — for a report executed in the background (asynchronously)

## Support for Multi-Book Accounting in Reports, Searches, and KPIs

When the Multi-Book Accounting feature is enabled, a new footer filter called Accounting Book is added to standard reports that include book specific content and currency values. The filter enables you to select the accounting book context for the report. It includes both active and inactive accounting books. Custom reports that contain currency values also include the Accounting Book filter.

For an overview of the feature, see [Multi-Book Accounting](#). For more information about reports, searches, and KPIs with Multi-Book Accounting, see the help topic Reports, KPIs, and Saved Searches.

## Internal ID Fields Available as Report Columns and Filters

As of this release, internal ID fields can be added as results columns and filters to many NetSuite reports. Internal IDs are unique identifiers generated by the NetSuite system. The ability to include internal IDs as column values in reports makes it feasible to export report results out of NetSuite, edit the data in an external system, and then reimport the modified data back into NetSuite. Without the inclusion of internal ID values, this process would be difficult, if not impossible. The ability to use internal IDs as filters provides enhanced filtering capabilities.

Internal ID fields are now available for many different record types in a wide variety of reports, too many to list here. The following table lists some of the most highly requested record types and reports that now support the inclusion of internal ID fields.

Record Type	Reports
Account	Budget vs. Actual, Income Statement, Transaction Detail, Trial Balance
Customer	A/R Aging, Inventory Revenue Detail, Sales by Customer Detail, Sales by Customer Summary, Sales Order by Item, Transaction Detail
Item	Inventory Activity Detail, Inventory Profitability, Inventory Status, Inventory Valuation, Item Page Views and Sales Summary, Physical Inventory Worksheet, Sales by Item

Subsidiary	Balance Sheet
Transaction	A/R Aging, Balance Sheet Detail, General Ledger, Open Invoices, Transaction Detail

You can determine whether a report permits you to add an internal ID field by clicking the report's Customize link and looking for the internal ID field in the Add Fields section of the Edit Columns page. This field is labeled Transaction ID for transactions and Internal ID for other record types. The following screenshot shows a custom Sales by Customer report that includes the customer Internal ID field as a report column:

**Report Builder** Custom Sales by Customer Summary

● Edit Columns ● Filters ● Sorting ● More Options

Name: Custom Sales by Customer Summary

Search Fields

Add Fields

Add Formula Field

- Individual
- Internal ID**
- Is Project
- Job Title
- Last Sales Date

Help

Customer/Project > Internal ID

**Report Preview**

Internal ID	Customer	Sales	Internal ID
Internal ID 1	Customer 1	\$50000.00	Internal ID 1
Internal ID 2	Customer 2	\$40000.00	Internal ID 2
Internal ID 3	Customer 3	\$30000.00	Internal ID 3
Internal ID 4	Customer 4	\$20000.00	Internal ID 4
Internal ID 5	Customer 5	\$10000.00	Internal ID 5
Total		\$150000.00	

Move Move Right Group Remove Column

Column Label Internal ID

Preview Save Save And Create Snapshot

**Important:** The field labeled Internal ID or Transaction ID in the Report Builder may have a different label on NetSuite forms. For example, the internal ID for customer may be labeled Customer ID.

## Change of Sign for Expense Account Amounts in Transaction Saved Searches

Before this release, saved searches handled expense accounts as credit accounts instead of debit accounts. As a result, transaction saved searches displayed positive amounts for credit posting transactions and negative amounts for debit posting transactions. Note that this behavior impacted only saved searches; it did not impact reports or accounting processes.

As of Version 2014 Release 1, saved searches correctly handle expense accounts as debit accounts. Now, transaction saved searches display positive amounts for debit posting

transactions and negative amounts for credit posting transactions. This change ensures that expense accounts are consistently displayed throughout NetSuite.

It is recommended that you look at all of your transaction saved searches that include results amounts associated with Expense accounts to review how these amounts are displayed.

- If there is a transaction saved search where you need to maintain the behavior that existed before this release, you must edit the search to flip the sign of the impacted amount field(s) such as Amount, Amount (Alt.Sales), or Amount (Gross).
- You can flip the sign of an impacted amount field by replacing that field, for example Amount (Gross), with a formula field like the following:

```
DECODE({accounttype}, 'Expense', -1, 'Other Expense', -1, 'Cost of Goods Sold', -1, 1)
*{grossamount}
```

The following table provides suggested formulas that you can use as a reference if you need to flip the sign of impacted amount fields in your transaction saved searches.

Result Field	Formula Field	Suggested Formula
Amount	{amount}	DECODE({accounttype}, 'Expense', -1, 'Other Expense', -1, 'Cost of Goods Sold', -1, 1) *{amount}
Amount (Alt. Sales)	{altsalesamount}	DECODE({accounttype}, 'Expense', -1, 'Other Expense', -1, 'Cost of Goods Sold', -1, 1) *{altsalesamount}
Amount (Alt. Sales Net)	{altsalesnetamount}	DECODE({accounttype}, 'Expense', -1, 'Other Expense', -1, 'Cost of Goods Sold', -1, 1) *{altsalesnetamount}
Amount (Foreign Currency)	{fxamount}	DECODE({accounttype}, 'Expense', -1, 'Other Expense', -1, 'Cost of Goods Sold', -1, 1) *{fxamount}
Amount (Gross)	{grossamount}	DECODE({accounttype}, 'Expense', -1, 'Other Expense', -1, 'Cost of Goods Sold', -1, 1) *{grossamount}
Amount (Net)	{netamount}	DECODE({accounttype}, 'Expense', -1, 'Other Expense', -1, 'Cost of Goods Sold', -1, 1) *{netamount}
Amount (Net of Tax)	{netamountnotax}	DECODE({accounttype}, 'Expense', -1, 'Other Expense', -1, 'Cost of Goods Sold', -1, 1) *{netamountnotax}
Amount (Transaction Total)	{totalamount}	DECODE({accounttype}, 'Expense', -1, 'Other Expense', -1, 'Cost of Goods Sold', -1, 1) *{totalamount}

**Note:** To view saved searches in the Release Preview environment, be sure that the Show Inactives option is enabled on the saved search list page, at Reports > Saved Searches > All Saved Searches. All saved searches are inactive in Release Preview, to avoid the sending of emailed search results from this test environment.

## CSV Import

Version 2014 Release 1 includes the following changes to CSV Import:

- [CSV Import Support for Multi-Book Accounting](#)
- [Newly Supported Record Types for CSV Import](#)

**Warning:** Version 2014 Release 1 includes a new ERP feature called [Timesheets](#). This feature is being introduced as an alternative to the existing Time Tracking feature. However, be aware that the new Timesheets feature is not supported in CSV Import. If you switch to the new Timesheets feature, any strategy you have for importing time using the Import Assistant will break.

## CSV Import Support for Multi-Book Accounting

This release includes CSV support for several aspects of the Multi-Book Accounting feature, which is new in Version 2014 Release 1. In other words, if you have purchased, enabled, and configured the Multi-Book Accounting feature, you can use the CSV Import Assistant to interact with certain records that have been added in this release to support the feature. Similarly, this release will expose some new fields that have been added to existing records in support of Multi-Book Accounting.

Of the new records being introduced for Multi-Book Accounting, the following are being exposed to the Import Assistant:

- Global Account Mapping
- Item Account Mapping

For details on each record, see [Newly Supported Record Types for CSV Import](#).

For an overview of the feature, including details about its availability, see the [Multi-Book Accounting](#) release note.

## Newly Supported Record Types for CSV Import

The following table lists newly supported record types for CSV import as of Version 2014 Release 1:

Newly Supported Record Types	Category	Notes
Global Account Mapping	Accounting	<ul style="list-style-type: none"><li>• For accounts using Multi-Book Accounting, the global account mapping record enables you to configure secondary accounting books to post to different accounts than the primary book. These mappings are used by transactions where the user can select the account to which the transaction posts.</li></ul>



Newly Supported Record Types	Category	Notes
		<ul style="list-style-type: none"> <li>The Multi-Book Accounting feature is new in this release. For details on CSV support for this feature, see <a href="#">CSV Import Support for Multi-Book Accounting</a>.</li> <li>Using the global account mapping record requires that, as part of your Multi-Book configuration, you select the Chart of Accounts Mapping option at Setup &gt; Enable Features, on the Accounting subtab.</li> <li>In the UI, you access this record at Setup &gt; Accounting &gt; Global Account Mappings &gt; New.</li> </ul>
Item Account Mapping	Accounting	<ul style="list-style-type: none"> <li>For accounts using Multi-Book Accounting, the item account mapping record enables you to configure secondary accounting books to post to different accounts than the primary book, based on the item that is the subject of the transaction. These mappings are used by transactions where the item determines the account to which the transaction posts.</li> <li>The Multi-Book Accounting feature is new in this release. For details on CSV support for this feature, see <a href="#">CSV Import Support for Multi-Book Accounting</a>.</li> <li>Using the item account mapping record requires that, as part of your Multi-Book configuration, you select the Chart of Accounts Mapping option at Setup &gt; Enable Features, on the Accounting subtab.</li> <li>In the UI, you access this record at Setup &gt; Accounting &gt; Item Account Mappings &gt; New.</li> </ul>
Statistical Journal Entry	Transactions	<ul style="list-style-type: none"> <li>The statistical journal entry record lets you increase or reduce the balance of a statistical account.</li> <li>The Statistical Accounts feature is new in this release and is described further in the <a href="#">Statistical Accounts</a> release note.</li> <li>To use this record, the Statistical Accounts feature must be enabled at Setup &gt; Enable Features, on the Accounting subtab. Also, you must have already created at least one statistical account.</li> <li>In the UI, you access this record at Transactions &gt; Financial &gt; Make Statistical Journal Entries.</li> </ul>

## SuiteFlow (Workflow Manager)

Version 2014 Release 1 includes the following enhancements to SuiteFlow features:

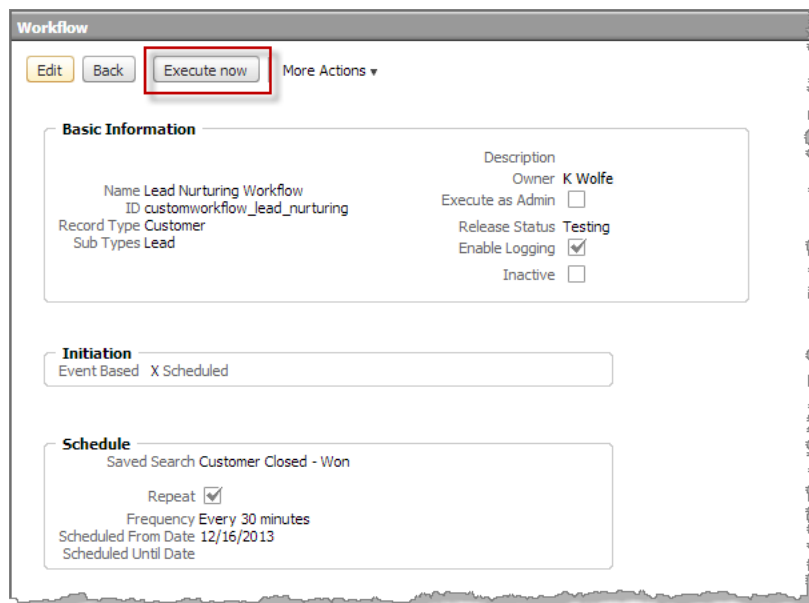
- Execute Scheduled Workflow On Demand
- Timesheet and Time Entry Records Supported in SuiteFlow
- Relocation of Active Workflows and Workflow History Subtabs
- Active Workflow Instances in Saved Searches
- Workflow History in Saved Searches

## Execute Scheduled Workflow On Demand

Before this release, a scheduled workflow could take up to 30 minutes to run during testing, depending on the workflow schedule and when the NetSuite scheduler ran to evaluate scheduled workflows. As of Version 2014 Release 1, you can run a scheduled workflow on demand and bypass the NetSuite scheduler. This feature enables workflow administrators to more quickly evaluate the logic in a workflow and increases the speed of workflow development and testing.

The workflow definition page for a scheduled workflow in View mode now includes an Execute now button. When you click Execute now, NetSuite places the workflow in the scheduling queue. NetSuite initiates the workflow in the order in which it was placed in the queue. The workflow must be set to initiate on a schedule and must have a Release Status of Testing. In addition, NetSuite processes only the first 20 records returned as a result of the saved search. For example, if the saved search for a scheduled workflow returns 1000 records, the workflow initiates on only the first 20 records returned by the saved search.

The following screenshot shows the Execute now button on the workflow definition page:



## Timesheet and Time Entry Records Supported in SuiteFlow

NetSuite Version 2014 Release 1 introduces a new Timesheets feature as an alternative to the existing Time Tracking feature. This feature provides the tracking of employee time in weekly segments rather than individual time entries. For additional information about this feature, see the [Timesheets](#) release note.

**Warning:** The Time Tracking feature must be disabled before the Timesheets feature can be enabled. After the Time Tracking feature is disabled, custom forms used with the Time Tracking feature are no longer available and cannot be recovered. Custom fields used with the Time Tracking feature are automatically updated for use with the Timesheets feature.

As of Version 2014 Release 1, SuiteFlow includes support for timesheet and time entry records. You can create workflows on both timesheet and time entry record types. Workflows based on the time entry record can include the definition of custom approval process for individual time entries. Be sure that you completely understand the Timesheets feature before you create workflows for timesheet and time entry records.

When you create a workflow, you can select the timesheet or time entry record on the workflow definition page. Although a time entry record is a subrecord of a timesheet record, you must create separate workflows for timesheets and time entries.

**Important:** The Timesheets feature is not currently available at Setup > Company > Enable Features. You must contact NetSuite Customer Support to enable this feature.

## Timesheet Record

Timesheet is a standard record and there are no specific limitations on workflows based on the timesheet record. You can use any relevant server or client trigger and any action.

The following screenshot shows the workflow definition page for a timesheet workflow:

The screenshot shows the 'Workflow' definition window in SuiteFlow. At the top are buttons for 'Save', 'Cancel', and 'Reset'. The 'Basic Information' section contains the following fields:

- Name:** Timesheet checker
- ID:** (empty text field)
- Record Type:** Timesheet (selected from a dropdown menu)
- Sub Types:** (empty list box)
- Description:** (empty text area)
- Owner:** A Wolfe-admin (selected from a dropdown menu)
- Execute as Admin:** ☐
- Release Status:** Released (selected from a dropdown menu)
- Enable Logging:** ☐
- Inactive:** ☐

The 'Initiation' section at the bottom has two radio buttons: 'Event Based' (selected) and 'Scheduled'.

## Time Entry Record

**Important:** The ability to create workflows based on time entry records is still under development. This feature is provided so you can get familiar with developing time entry workflows. Be aware that time entry workflows currently include a number of known limitations that are described below, and these workflows may exhibit inconsistent behavior.

The ability to use custom time entry approval workflows instead of the built-in approval process is targeted to be available in April, 2014. Until this capability is available, any custom time entry approval workflows that you create will run in parallel with the built-in approval process.

Time entry is a subrecord and there are some limitations on workflows based on the time entry record. You can use all client side actions and triggers and a subset of the available server triggers and server actions.

The following screenshot shows the workflow definition page for a time entry workflow:

The screenshot shows a 'Workflow' window with a title bar. Inside, there are buttons for 'Save', 'Cancel', and 'Reset'. Below these is a 'Basic Information' section. It contains fields for 'Name' (set to 'Time Entry Approval'), 'ID', 'Record Type' (set to 'Time Entry'), and 'Sub Types'. To the right of these are fields for 'Description', 'Owner' (set to 'A Wolfe-admin'), 'Execute as Admin' (checkbox), 'Release Status' (set to 'Released'), 'Enable Logging' (checkbox), and 'Inactive' (checkbox). At the bottom is an 'Initiation' section with two radio buttons: 'Event Based' (selected) and 'Scheduled'.

Note the following limitations for workflows based on the time entry record:

- You can create workflows for a Time entry record using all existing actions, except the Go To Page, Go To Record, and Transform Record actions.
- You can set up actions using the Before Record Submit and After Record Submit triggers with no other restrictions. The Before Record Load trigger is limited to a subset of actions. The Scheduled trigger is not supported.
- The following table lists the availability of actions for the Before Record Load trigger.

Actions Supported	Actions Not Supported
Add Button	Create Record
Remove Button	Initiate Workflow
Set Field Display Label	Lock Record
Set Field Display Type	Return User Error
Set Field Mandatory	Subscribe To Record
	Custom SS Action
	Set Field Value

- You cannot create scheduled workflows based on the time entry record.
- You can use any client trigger, including the Before User Edit, Before Field Edit, After Field Edit, After Field Sourcing, and Before User Submit triggers.
- You can use any client action, including the Confirm, Return User Error, Set Field Display Label, Set Field Display Type, Set Field Mandatory, Set Field Value, and Show Message actions.
- You can use the Set Field Display Label, Set Field Display Type, and Set Field Mandatory actions for fields available in the popup form for editing individual time entries, but this setting will not affect the fields available from the Timesheet form.

The following screenshot shows the popup for editing individual time entries:

The screenshot shows a 'Primary Information' popup window. It contains the following fields and controls:

- Duration:** 33:22 (with a refresh icon)
- Memo:** 2 (with a refresh icon)
- Billable:** checkbox (checked)
- Payroll Item:** dropdown menu
- Paid Externally:** checkbox (unchecked)
- Department:** dropdown menu
- Class:** dropdown menu
- Date:** 12/30/2013 (with a calendar icon)

- The Edit event type is sent to the workflow when you edit a time entry record and when the time entry is sent for approval after you submit the timesheet. The workflow cannot determine if the time entry was sent for approval, or if the record was only edited.
- The duration field for a time entry record is of type TimeTrack, but you cannot create a custom field or workflow field with this type. If you want to define a custom field or workflow field to manipulate or store values for the time entry duration field, use a type

of Decimal Number for the custom field. The following table describes the SuiteFlow conversion of TimeTrack values to Decimal Number:

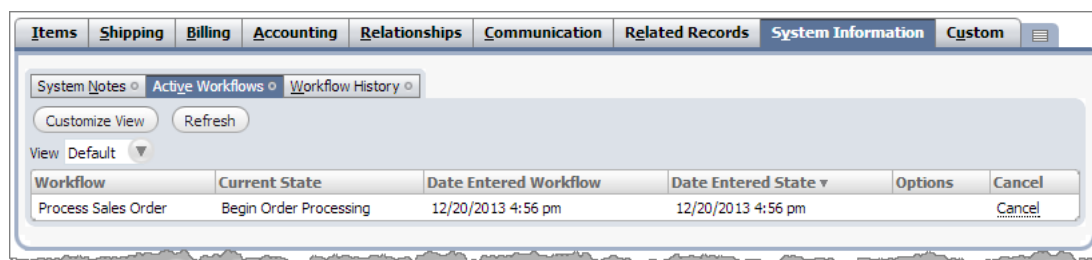
TimeTrack (hh:mm)	Decimal Number (hh + mm/ 60)
02:30	2.5
06:20	06.3333

## Relocation of Active Workflows and Workflow History Subtabs

As of Version 2014 Release 1, the Active Workflows and Workflow History subtabs appear as subtabs under the System Information tabs for standard NetSuite records. In addition, the information in the subtabs does not load until you click the Active Workflows or Workflow History subtabs. In previous releases, the Active Workflows and Workflow History subtabs appeared on the System Information > Workflow subtab.

This feature reduces the number of clicks required to access the workflow information. It also increases the speed at which individual records load, especially records with an extensive workflow history. To view this change, open any record on which a workflow is running or has previously run, and click the System Information subtab.

The following screenshot shows a Sales Order record with the Active Workflows and Workflow History subtabs under the System Information tab:



## Active Workflow Instances in Saved Searches

As of Version 2014 Release 1, if you include the Current State column in a saved search for workflow instances, the column value is available only for active workflow instances. Previously, the Current State column value also included the last state entered for finished (including cancelled) workflows. Version 2014 Release 1 includes a new column: Last State. This new column replaces the function of the Current State column in previous releases. You can use the new Last State column to get the current state for active workflows and the last state entered for finished workflows.

In addition, to incorporate this change into Version 2014 Release 1, the Current State column has been changed to the Last State column in any saved searches that previously used the

Current State column. This change ensures that the results of existing saved searches are not affected. However, this change has not been made in any saved searches created through scripting. NetSuite recommends verifying the results of any saved searches that were created through scripting and include the Current State column.

## Workflow History in Saved Searches

As of Version 2014 Release 1, if you include any Workflow History field, for example **Workflow History : Workflow**, in the Results columns of a saved search, the results are no longer restricted to only those records with at least one Workflow History entry, as in previous releases. Instead, the saved search returns all records that match the specified criteria, even if the records do not have a Workflow History.

In addition, to incorporate this change into Version 2014 Release 1, the filter **Workflow is none of (None)** has been added to existing saved searches with at least one Workflow History field in the Result column. This change ensures that only records with at least one Workflow History entry appear in the search results, as in previous releases.

## Single Sign-on

Version 2014 Release 1 includes the following enhancements to NetSuite single sign-on features:

- [SAML Single Sign-on for Web Store](#)
- [Ability to Set SAML IDP as Primary Authentication Method](#)

### SAML Single Sign-on for Web Store

Version 2014 Release 1 supports SAML single sign-on access to NetSuite web stores. Before this release, SAML single sign-on was supported only for the NetSuite application. Now you can set up SAML web site access so that users who have logged in to an external application using SAML can click a link to go directly to a NetSuite web store. Users do not need to log in separately to the web store, because authentication from the same third party identity provider (IDP) is used for login to both the external application and the web store. Any SAML 2.0-compliant application can serve as the IDP for SAML access to NetSuite web stores. SAML single sign-on access is supported for both SiteBuilder and SuiteCommerce Advanced web stores.

To set up SAML single sign-on for web store, first ensure that the SAML Single Sign-on feature is enabled at Setup > Company > Enable Features, on the SuiteCloud tab. You can then define the IDP and other configuration parameters on the SAML subtab of the SSO subtab of the Web Site Setup page.

**Web Site Setup**

Save Cancel Reset

\*Display Name NetSuite, Inc. Take Web Site Offline for Maintenance ☐

Setup Appearance Shopping Analytics Cart Search Email Upsell Advanced Legacy External Touch Points Domains SSO

SAML o

**NetSuite Configuration**

NetSuite Service Provider Metadata [https://\[redacted\]/saml2/sp.xml](https://[redacted]/saml2/sp.xml)

Logout Landing Page

Identity Provider Login Page

**Landing Page after login**

**Current Identity Provider**

Not set

**Set Up Identity Provider**

SAMLv2 Identity Provider Metadata

☒ Indicate IDP metadata URL

☐ Upload IDP metadata File

Browse... No file selected.

Most of the fields on this subtab are the same as those on the SAML Setup page for the NetSuite application available at Setup > Integration > SAML Single Sign-on. The **Landing Page after login** field is specific to SAML setup for web stores. By default, your site home page is the landing page for SAML users, but you can specify the URL for a different landing page in this field.

If the Multiple Web Sites feature is enabled, you can set up SAML for different web stores by completing the SAML subtab of the Web Site Setup page for each web store.

**Current Identity Provider**

Entity ID

[Delete IDP Configuration](#)

[Current Identity Provider Metadata](#)

You can use the same IDP for multiple web sites, as well as for the NetSuite application. You also have the option of defining different IDPs for each web site if needed. Click the links to view the Current Identity Provider Metadata, or to Delete IDP Configuration, if necessary.


## Ability to Set SAML IDP as Primary Authentication Method

The SAML Setup page includes a new option to set the external identity provider (IDP) defined on this page as the primary authentication method for users accessing NetSuite through SAML.



**SAML Setup**

Submit


**SAML Access Warning:** By enabling the SAML Single Sign-on feature, you allow users to access and use your NetSuite account directly from a third party service that may not have the same authentication and security features as NetSuite. This feature also extends NetSuite administration of user access to the administrators of the identity management system. You need to ensure that NetSuite account use through SAML meets all of your security, regulatory, and other compliance obligations, including Payment Card Industry (PCI) Data Security Standards.

**NetSuite Configuration**

NetSuite Service Provider Metadata

Logout Landing Page

Identity Provider Login Page

Primary Authentication Method ☐

**Current Identity Provider**

Not set

**Set Up Identity Provider**

SAMLV2 Identity Provider Metadata

☒ Indicate IDP metadata URL

☐ Upload IDP metadata File

**Permission Requirements**

Users must have the SAML Single Sign-on permission in order to access NetSuite through SAML single sign-on. You can edit users' assigned roles to include this permission at Setup > Users/Roles > Manage Roles.

Before this release, if SAML users clicked a link to access NetSuite when no active NetSuite session existed, they were redirected by default to the NetSuite login page. This redirect could cause issues for users who did not know their NetSuite credentials.

Now, if you enable the Primary Authentication Method option, users can be redirected to the external IDP login page, as defined in the Identity Provider Login Page field. This redirect is available if the access link includes the NetSuite account ID set as the **c** or **compid** URL parameter, formatted like the following:

<https://system.netsuite.com/app/crm/support/issuedb/issue.nl?id=14979835&compid=<accountid>&e=T>

**Warning:** The ability to set an IDP as the primary authentication method is not supported for SAML single sign-on for web store.

## SuiteScript

Refer to the following sections for details on all SuiteScript updates for Version 2014 Release 1:

- Undeployed Scheduled Scripts No Longer Added to the Work Queue
- Existing Message Records Can No Longer be Edited with SuiteScript

- RESTlets Can No Longer Include Multiple Forms of Authentication
- SuiteScript Support for Timesheets Feature
- XML Validation API
- Void Transaction API
- Email Bounceback Notification Support
- CSV Import Enhancements
- Custom Plug-in Type Support for RESTlets
- Expanded Administrator Access to Tasks, Events, and Phone Calls
- SuiteScript Support for Multi-Book Accounting
- API Additions and Enhancements
- Newly Supported Record Types for SuiteScript
- Redesigned Records Browser
- Script Queue Monitor (Beta)

## Undeployed Scheduled Scripts No Longer Added to the Work Queue

Prior to this release, NetSuite permitted undeployed scheduled script deployments to be added to the scheduled script queue. Although these script deployments were never executed because of their undeployed status, the behavior was potentially confusing. With Version 2014 Release 1, undeployed scheduled script deployments are no longer added to the scheduled script queue.

## Existing Message Records Can No Longer be Edited with SuiteScript

As of Version 2014 Release 1, users can no longer modify existing message records with SuiteScript; scripts that modify existing messages do not work with this release. NetSuite is facilitating this change to reconcile message handling within SuiteScript with message handling within the NetSuite UI. The UI does not currently, and did not prior to this release, permit users to edit existing messages.

**Note:** Existing message records can still be programmatically copied and deleted with SuiteScript.

## RESTlets Can No Longer Include Multiple Forms of Authentication

As of this release, RESTlet authentication can include either NLAAuth headers or a JSESSIONID, but not both. Please ensure that your RESTlet scripts use only one form of authentication. Attempting to use multiple forms of authentication returns an error message.

## SuiteScript Support for Timesheets Feature

**Important:** The Timesheets feature is not currently available at Setup > Company > Enable Features. You must contact NetSuite Customer Support to enable this feature.

NetSuite Version 2014 Release 1 introduces a new Timesheets feature as an alternative to the existing Time Tracking feature. This feature permits the tracking of employee time in weekly segments rather than individual time entries. For additional information about this feature, see the [Timesheets](#) release note.

**Warning:** The Time Tracking feature must be disabled before the Timesheets feature can be enabled. Scripts written on the old time record will not work with the new timesheet record. Please ensure that all affected scripts are updated or replaced before switching to the Timesheets feature.

To use SuiteScript with the new Timesheets feature, it is important to understand the structure of the timesheet record. The timesheet record consists of body fields and a sublist that is called the timesheet grid. The timesheet grid contains zero or more time entry subrecords, up to seven for each row on the grid (one per day). The time entry subrecord is viewed in the UI by clicking on the set icon.

**Timesheet: Brian K Wolfe (12/15/2013 - 12/21/2013)** Status: Rejected

Primary Information  
Employee: Brian K Wolfe  
Start Date: 12/15/2013

**Timesheet Grid**

Each timesheet record can contain an unlimited number of time entry subrecords. Each row on the timesheet grid can contain up to seven time entry subrecords, one for each day. This timesheet record contains six time entry subrecords.

**Set Icon**

Customer	Case/Task/Event	Service Item	Sun, 15	Mon, 16	Tue, 17	Wed, 18	Thu, 19	Fri, 20	Sat, 21	Total
Adley Electric Systems	Case # 70	Labor 1	2:00	1:00			2:00		1:30	6:30
Adley Electric Systems	Case # 70	Labor 1				4:00		7:00		11:00
			2:00	1:00	0:00	4:00	2:00	7:00	1:30	17:30

Memo Pending Approval Approved Rejected

The timesheet grid itself is a part of the timesheet record; the majority of the fields within the timesheet grid are part of the time entry subrecord. The time entry subrecord includes the fields accessed from the set icon, the hours field, and the fields to the left of the day of week columns. The total field is part of the timesheet record. See [Important Items to Note Before Scripting on the Timesheets Feature](#) for details regarding specific fields.

A row (line) on the timesheet grid does not represent a single item; it is a collection of field values that are shared across time entry subrecords. The line ordering on the timesheet grid is dynamic and can change after the timesheet record is submitted. The dynamic ordering allows lines that share the same field values to merge after the record is saved to the database. The merged lines are returned only after the timesheet record is re-loaded.

**Important:** Because the line merge occurs after the record is submitted, the line numbering on the timesheet grid may be inconsistent between beforeSubmit and afterSubmit user events. In addition, the line numbers of the timesheet grid in the UI may not correspond to the line numbers accessed by SuiteScript.

## Supported Script Types

See [Important Items to Note Before Scripting on the Timesheets Feature](#) for details regarding access to specific fields.

**Important:** Server-side scripts cannot deploy on subrecords. Server-side scripts can only access subrecords through the parent record. To accomplish this, a server-side script must be deployed on the parent record. The script can then create, edit, or delete the child subrecord with the Subrecord APIs. See the help topic [Working with Subrecords in SuiteScript](#) for additional information.

**Important:** nlapiCopyRecord is not supported on the timesheet record or the time entry subrecord.

### Timesheet Record

- Client and server-side scripts deployed on the timesheet record can read, create, edit, and delete timesheet fields.
  - Client scripts deployed on the timesheet record can read time entry subrecords with the Subrecord APIs.
- Important:** Client scripts deployed on the timesheet record cannot create, edit, or delete time entry subrecords. The delete function, nlapiRemoveCurrentLineItemSubrecord, is supported for other subrecords exposed to SuiteScript, but not for time entry.
- Server-side scripts deployed on the timesheet record can read, create, edit, and delete time entry subrecords with the Subrecord APIs.

### Time Entry Subrecord

- Client scripts deployed on the time entry subrecord can read and edit time entry subrecords with the standard APIs.
- Server-side scripts cannot deploy on the time entry subrecord; they must deploy on the timesheet record and access time entry through the Subrecord APIs.

## Important Items to Note Before Scripting on the Timesheets Feature

- The total hours field is part of the timesheet record. The employee and subsidiary fields appear on the time entry subrecord, but are sourced from the timesheet record. The Subrecord APIs should not be used to script on these fields.

- The total hours field is updated when the record is loaded and when changes are entered in the UI. When a time entry subrecord is created or edited with SuiteScript, the total hours value on the timesheet record is not guaranteed.
- The employee, subsidiary, and start date fields are initialized when a timesheet record is created and cannot be edited. When creating a new timesheet in SuiteScript, these fields can be passed in as initialization parameters. Note that in a OneWorld account, the subsidiary field is sourced from the employee field.
- Server-side scripts deployed on the timesheet record cannot access the timesheet grid fields to the left of the day of week columns.
- The customer, case/task/event, and service item fields display on the timesheet grid by default, but administrators can customize which fields display to the left of the day of week columns. Client scripts deployed on the timesheet record cannot access these fields if they are not configured to display in the UI.
- The day field on the time entry subrecord is read-only across all script types.

## Sample Code

The following sample client script updates a custom field for total billable time on the timesheet record. The script is deployed on the timesheet record and uses `nlapiViewLineItemSubrecord` to access field values on the time entry subrecord.

```
/**
 * Populates custom field 'custrecord_am_timesheet_billable_hours' with sum of time entry 'hours
 * values for time entries that are billable. Returns true to continue with record submit;
 * returns false to abort record submit.
 */
function timesheet_clientSaveRecord(){
    var intSumMinutes = 0;
    var intNumberLines = nlapiGetLineItemCount('timegrid');
    var arTimeGridColumns = ['sunday','monday','tuesday','wednesday','thursday',
                            'friday','saturday'];

    for(var intLineCounter = 1; intLineCounter <= intNumberLines; intLineCounter++){
        for (var intDayCounter = 0; intDayCounter < arTimeGridColumns.length; intDayCounter++){
            var srecTimeEntry = nlapiViewLineItemSubrecord('timegrid',
                arTimeGridColumns[intDayCounter], intLineCounter);

            if (srecTimeEntry)
            {
                var bBillable = srecTimeEntry.getFieldValue('isbillable') == 'T';

                if (bBillable)
                {
                    intSumMinutes += timeToMinutes(srecTimeEntry.getFieldValue('hours'));
                }
            }
        }
    }
}
```

```

        nlapiSetFieldValue('custrecord_am_timesheet_billable_hours', minutesToTime(intSumMinutes));

        return true;
    }

    /**
     * Utility to convert hh:mm format to a number of minutes.
     *
     * @param hhMM hh:mm format for time
     * @return {Number} The number of minutes represented by hhMM
     */
    function timeToMinutes(hhMM) {
        var hmArray, hours, minutes;
        var minutesTotal = 0;
        if (hhMM) {
            hmArray = hhMM.split(':');
            hours = parseInt(hmArray[0], 10);
            minutes = parseInt(hmArray[1], 10);
            if (hours) {
                minutesTotal += 60 * hours;
            }
            if (minutes) {
                minutesTotal += minutes;
            }
        }
        return minutesTotal;
    }

    /**
     * Utility to convert minutes to hh:mm format.
     *
     * @param minutes Number of minutes
     * @return {String} Time formatted as hh:mm
     */
    function minutesToTime(minutes) {
        var hours;
        minutes = minutes || 0;
        hours = Math.floor(minutes / 60);
        minutes = minutes % 60;
        return hours + ':' + (minutes < 10 ? '0' : '') + minutes;
    }

```

## XML Validation API

This release introduces a new SuiteScript function, `nlapiValidateXML(xmlDocument, schemaDocument, schemaFolderId)`, which validates a supplied XML document against a supplied XML Schema (XSD Document). This function is supported in all server-side script types.

**Note:** `nlapiValidateXML` only validates XML Schema (XSD); validation of other XML schema languages is not supported.

The supplied XML Document and XSD Document must be passed in the form of a W3C Document object. Use `nlapiStringToXML(text)` to convert both documents to Document

objects before calling `nlapiValidateXML`. The location of the source XML Document and XSD Document does not matter because the validation is performed with the Document objects.

## Parameters

`nlapiValidateXML(xmlDocument, schemaDocument, schemaFolderId)` takes in three arguments:

- `xmlDocument` — A required parameter; `xmlDocument` is a document object that represents the XML Document to be validated.
- `schemaDocument` — A required parameter; `schemaDocument` is a document object that represents the XML Schema to be validated against.
- `schemaFolderId` — An optional parameter; `schemaFolderId` is required only if the supplied XML Schema uses `<import>` or `<include>` tags that reference child schema(s) by file path (as opposed to reference by URL). To use this parameter, the child schema(s) must be uploaded to a folder in the NetSuite file cabinet. The folder internal ID is then passed as the `schemaFolderId` argument. SuiteScript ignores this argument if it is passed, but not needed.

## XML Validation Output

If the validation is successful, `nlapiValidateXML` returns void. If the validation is not successful, `nlapiValidateXML` throws an `nlobjError` object containing error messages for the first 10 errors encountered. Use `nlapiLogExecution(type, title, details)` within a try catch statement to view these error messages; they are not automatically listed in the Execution Log.

```
try {  
    nlapiValidateXML(xmlDocument, xsdDocument, '1234');  
}  
catch(e) {  
    nlapiLogExecution('ERROR', 'XML Validation Failed: ' + e.getCode(), e.getDetails());  
}
```

The log output will include up to three types of error messages: fatal errors, errors, and warnings. Note that `nlapiLogExecution` only logs warnings if errors are also logged. If `nlapiValidateXML` encounters warnings and no errors, the validation passes.

## Sample Log Output

```
Fatal Error: cvc-pattern-valid: Value '8812312319923' is not facet-valid with respect to  
pattern '[0-9]{6}' for type 'orderidtype'.  
Error: cvc-complex-type.3.2.2: Attribute 'bak' is not allowed to appear in element 'shiporder'.  
  
Error: cvc-complex-type.3.2.2: Attribute 'ban' is not allowed to appear in element 'shiporder'.  
  
Error: cvc-complex-type.3.2.2: Attribute 'binn' is not allowed to appear in element 'shiporder'.  
.  
Error: cvc-complex-type.3.2.2: Attribute 'dat' is not allowed to appear in element 'shiporder'.
```

```
Error: cvc-attribute.3: The value '8812312319923' of attribute 'orderid' on element 'shiporder'
is not valid with respect to its type, 'orderidtype'.
Error: cvc-complex-type.2.2: Element 'option' must have no element [children], and the value
must be valid.
Error: cvc-complex-type.2.4.a: Invalid content was found starting with element 'property'. One
of '{property_id}' is expected.
Error: cvc-complex-type.3.2.2: Attribute 'title' is not allowed to appear in element
'shiporder'.
Warning: cvc-complex-type.3.2.2: Attribute 'expire' is not allowed to appear in element
'shiporder'.
```

## Sample Code

```
//load an XML document from the file cabinet
var xmlFile = nlapiLoadFile('1234');
var xmlDocument = nlapiStringToXML(xmlFile.getValue());

//load an XSD document from the file cabinet
var xsdFile = nlapiLoadFile('4321');
var xsdDocument = nlapiStringToXML(xsdFile.getValue());

//validate that the XML document conforms to the schema
try {
    nlapiValidateXML(xmlDocument, xsdDocument, '5367');
}
catch(e) {
    nlapiLogExecution('ERROR', 'XML Validation Failed: ' + e.getCode(), e.getDetails());
}
nlapiLogExecution('ERROR', 'XML Validation Succeeded', xmlFile.getName());
```

## Errors Thrown

- **SSS\_XML\_DOES\_NOT\_CONFORM\_TO\_SCHEMA** — Thrown when the XML validation fails. Note that `nlapiLogExecution` must be used in a try catch statement to view the validation results. See [XML Validation Output](#) for additional information.
- **SSS\_XML\_SCHEMA\_MISSING\_DEPENDENCY\_FOLDER\_ID** — Thrown when an invalid `schemaFolderId` argument is passed; also thrown when `schemaFolderId` is required but missing.

## Void Transaction API

When a transaction is voided, its total and all its line items are set to zero, but the transaction is not removed from the system. NetSuite supports two types of voids: direct voids and voids by reversing journal. See the help topic [Voiding, Deleting, or Closing Transactions](#) for additional information.

Developers can now void transactions programmatically with a new SuiteScript API. The new API, `nlapiVoidTransaction(transactionType, recordId)`, voids a transaction and then returns an id that indicates the type of void performed. If a direct void is performed,



nlapiVoidTransaction returns the ID of the record voided. If a void by reversing journals is performed, nlapiVoidTransaction returns the ID of the newly created voiding journal.

The type of void performed depends on the targeted account's preference settings:

- If the Using Reversing Journals preference is disabled, nlapiVoidTransaction performs a direct void. See the help topic [Supported Transaction Types - Direct Void](#) for a list of transactions that support direct voids.
- If the Using Reversing Journals preference is enabled, nlapiVoidTransaction performs a void by reversing journals. See the help topic [Supported Transaction Types — Void by Reversing Journals](#) for a list of transactions that support voids by reversing journals.

**Important:** After a transaction is successfully voided, additional changes to the transaction that impact the general ledger are prohibited.

The use of nlapiVoidTransaction is supported in all client and server-side scripts. The governance on this API is 10 usage units.

## Parameters

nlapiVoidTransaction takes in two parameters:

- transactionType — A required parameter; transactionType represents the record type to be voided. See [Supported Transaction Types](#) for a list of valid arguments.
- recordId — A required parameter; recordId represents the internal ID of the specific record to be voided.

## Supported Transaction Types

See the help topics [Supported Transaction Types - Direct Void](#) and [Supported Transaction Types — Void by Reversing Journals](#).

## Example

The following code creates a new Cash Refund transaction and then voids the transaction. Note that if the Using Reversing Journals preference is enabled, the void will not be successful because Cash Refund is not a supported transaction type for voids by reversing journals.

```
var recordtype = 'cashrefund';
var rec = nlapiCreateRecord(recordtype);
rec.setFieldValue('entity', 48);
rec.setFieldValue('location', 1);
rec.setFieldValue('paymentmethod', 1);
rec.setLineItemValue('item', 'item', 1, 233);
rec.setLineItemValue('item', 'amount', 1, 150);
var id = nlapiSubmitRecord(rec);

var voidingId;
var errorMsg;
try {
```

```
voidingId = nlapiVoidTransaction(recordtype, id);  
} catch(e) {  
    errorMsg = e;  
}
```

## Errors Thrown

- CANT\_VOID\_TRANS — Thrown when a void is attempted on a transaction that is linked to other transactions (for example, customer payment).
- INVALID\_RCRD\_TYPE — Thrown when the transactionType argument is not valid.
- RCRD\_DSNT\_EXIST — Thrown when the recordId argument is not valid.
- THIS\_TRANSACTION\_HAS\_ALREADY\_BEEN\_VOIDED — Thrown when a void is attempted on a transaction that has already been voided.
- VOIDING\_REVERSAL\_DISALLWD — Thrown when a void is attempted on a transaction with inventory impact.

## Email Bounceback Notification Support

NetSuite Version 2014 Release 1 includes SuiteScript support for email bounceback notifications. To accommodate this feature, `nlapiSendEmail` now includes a new optional parameter that takes a true or false Boolean value. This new parameter, `notifySenderOnBounce`, causes bounce-back notifications to be sent to the original sender. If the user elects to use this option, the maximum allowed number of total emails passed for the recipient, CC and BCC arguments is 10.

**Note:** When `notifySenderOnBounce` is true, the governance for `nlapiSendEmail` increases from 10 to 20.

## Sample Code

```
nlapiSendEmail('jwolfe@netsuite.com', ['msample@netsuite.com', 'jdoe@netsuite.com'],  
    'hello world', 'your order has been completed',  
    ['sales@netsuite.com', account-management@netsuite.com'], mySalesOrder, myPdf, true);
```

## New Errors Thrown

SSS\_MAXIMUM\_NUMBER\_RECIPIENTS\_EXCEEDED — Thrown if more than 10 total emails are passed for the recipient, CC and BCC arguments.

## Internal Only Support for nlapiSendEmail

NetSuite Version 2014 Release 2 adds a new parameter to `nlapiSendEmail` that sets a new message record as internal only. When a message record is set to internal only, customers do not see the message from the customer center.

The new parameter, `internalOnly`, takes a true or false Boolean value. The use of `internalOnly` is optional.

## CSV Import Enhancements

This release includes the following SuiteScript enhancements for CSV import users:

### Import Queue Override Method

SuiteCloud Plus users now have the ability to override the CSV import queue preference with SuiteScript. This is accomplished with a new `nlobjCSVImport.setQueue` method. Users no longer need to create multiple CSV mappings that point to different queues; instead, they can specify different queues via SuiteScript. Note that the stored queue preference is not altered; `setQueue` must be called each time an override is needed.

The new method takes in a single argument: a string that represents the new queue number. Valid values range from '1' to '5', depending upon the SuiteCloud License. The error code `SSS_INVALID_CSV_QUEUE` is thrown for all invalid values passed.

```
var import1 = nlapiCreateCSVImport();
import1.setMapping('CUSTIMPORTImport1');
import1.setPrimaryFile(nlapiLoadFile(252)); //internal id of first csv file
nlapiSubmitCSVImport(import1); // run in queue defined on CUSTIMPORTImport1

var import2 = nlapiCreateCSVImport();
import2.setMapping('CUSTIMPORTImport1');
import2.setPrimaryFile(nlapiLoadFile(253)); //internal id of first csv file
import2.setQueue('2'); // run in queue 2
nlapiSubmitCSVImport(import2);

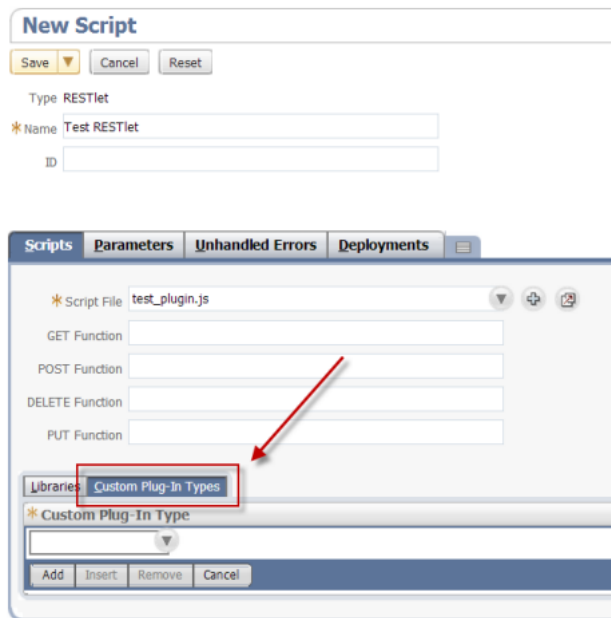
var import3 = nlapiCreateCSVImport();
import3.setMapping('CUSTIMPORTImport1');
import3.setPrimaryFile(253); // SSS_INVALID_CSV_CONTENT expected
import3.setQueue(6); // SSS_INVALID_CSV_QUEUE expected
nlapiSubmitCSVImport(import3);
```

### Changes to Existing Error Codes

In previous releases, `nlobjCSVImport.setPrimaryFile` and `nlobjCSVImport.setLinkedFile` threw the error code `CANT_FIND_SAVED_IMPORT` when invalid CSV content was passed as an argument. To clarify the error condition, both methods now throw the error code `SSS_INVALID_CSV_CONTENT` when invalid CSV content is passed.

## Custom Plug-in Type Support for RESTlets

This release includes custom plug-in type support for RESTlets. SuiteScript developers can now reference plug-in type implementations in their RESTlet scripts. This reference enables scripts to call the implementation's methods. To facilitate this feature, the RESTlet script record now includes a Custom Plug-In Types subtab.



For additional information on custom plug-in types, see the help topics [Getting Started with Custom Plug-in Types](#) and [Using Custom Plug-in Types in Other Scripts](#).

## Expanded Administrator Access to Tasks, Events, and Phone Calls

Prior to this release, administrators could not access other user's tasks, events, and phone calls when event access was set to show as busy. This caused several issues, including inaccurate results when administrators attempted to search these record types. With this release, administrators can now view, edit, and delete all tasks, events, and phone calls, regardless of the record's event access setting.

## SuiteScript Support for Multi-Book Accounting

This release includes SuiteScript support for several aspects of the Multi-Book Accounting feature, which is new in Version 2014 Release 1. In other words, if you have purchased, enabled, and configured the Multi-Book Accounting feature, you can use SuiteScript to interact with certain records that have been added in this release, including the following:

- Accounting book
- Global account mapping
- Item account mapping
- Multi-book accounting transaction search

For details on each record, see [Newly Supported Record Types for SuiteScript](#).

Additionally, existing records have been enhanced to support Multi-Book Accounting. For example, when the Multi-Book Accounting feature is enabled, you can create journal entries that are specific to one accounting book. To support this functionality, the SuiteScript exposure of the journal entry and intercompany journal entry records has been enhanced to include an `accountingbook` field. When you set a value for `accountingbook` on either of these records, the record becomes book specific. For examples, see the help topics [Journal Entry](#) and [Intercompany Journal Entry](#).

For an overview of the Multi-Book Accounting feature, including details about its availability, see the [Multi-Book Accounting](#) release note.

## API Additions and Enhancements

API	Note
<b>Updates to Existing APIs</b>	
<code>nlapiSendEmail</code>	See <a href="#">Email Bounceback Notification Support</a> for additional information.
<code>nlobjCSVImport</code>	See <a href="#">CSV Import Enhancements</a> for additional information.
<b>New APIs</b>	
<code>nlapiValidateXML</code>	See <a href="#">XML Validation API</a> for additional information.
<code>nlapiVoidTransaction</code>	See <a href="#">Void Transaction API</a> for additional information.

## Newly Supported Record Types for SuiteScript

Newly Supported Record Types	Category	Notes
Accounting Book	Lists	<ul style="list-style-type: none"><li>When the Multi-Book Accounting feature has been enabled, you can use this record to create secondary books.</li><li>The Multi-Book Accounting feature is new in this release. For details on SuiteScript support for this feature, see <a href="#">SuiteScript Support for Multi-Book Accounting</a>.</li><li>You can create accounting book records only when the Multi-Book Accounting feature has been enabled, at Setup &gt; Enable Features, on the Accounting subtab.</li><li>In the UI, you access the accounting book record at Setup &gt; Accounting &gt; Accounting Books &gt; New.</li><li>The internal ID for this record is <i>accountingbook</i>.</li></ul>
Amortization Schedule	Lists	<ul style="list-style-type: none"><li>Amortization schedules are automatically created by the system for purchase transactions that contain items or expense lines associated with amortization templates.</li><li>The amortization schedule record is available only when the Amortization feature is enabled, at Setup &gt; Enable Features, on the Accounting subtab.</li></ul>

Newly Supported Record Types	Category	Notes
		<ul style="list-style-type: none"> <li>In the UI, you can access existing amortization schedule records at Lists &gt; Accounting &gt; Amortization Schedules.</li> <li>As in the UI, you cannot manually create or delete an amortization schedule.</li> <li>As in the UI, you cannot use external ID values as part of your criteria when searching for amortization schedule records. You also cannot include external ID in search columns.</li> <li>The internal ID for this record is <i>amortizationschedule</i>.</li> </ul>
Amortization Template	Lists	<ul style="list-style-type: none"> <li>You use the amortization template record to define the terms of amortization schedules, which can be created automatically for certain transactions.</li> <li>The amortization template record is available only when the Amortization feature is enabled, at Setup &gt; Enable Features, on the Accounting subtab.</li> <li>In the UI, you access this record at Lists &gt; Accounting &gt; Amortization Templates &gt; New.</li> <li>If the Method field (recurrencetype) is set to Custom, then you must include at least one line in the recurrence sublist. In this case, the template cannot be deleted.</li> <li>As in the UI, you cannot use external ID values as part of your criteria when searching for amortization template records. You also cannot include external ID in search columns.</li> <li>The internal ID for this record is <i>amortizationtemplate</i>.</li> </ul>
Billing Schedule	Lists	<ul style="list-style-type: none"> <li>This record enables you to create a billing schedule that can be applied to a sales order, a line item on a sales order, or a project.</li> <li>To use the billing schedule record, you must enable the Advanced Billing feature, at Setup &gt; Enable Features, on the Transactions subtab.</li> <li>In the UI, you access this record at Lists &gt; Accounting &gt; Billing Schedules &gt; New. You can access a billing schedule of Fixed Bid Milestone type from the associated project record.</li> <li>To set a value for schedule type, which is a required body field, you must use <code>initializeValues</code>, not <code>setFieldValue</code>.</li> <li>If you choose a schedule type of Fixed Bid Milestone, you must identify an existing project record (or job record). You do so using <code>initializeValues</code>. Then, to create a link between the project and the new billing schedule, you must update the project record — this relationship is not established automatically when you create the billing schedule.</li> <li>The Recurrence sublist is available only when schedule type is set to Standard and frequency to Custom.</li> <li>The Milestone sublist is available only when schedule type is set to Fixed Bid Milestone.</li> </ul>

Newly Supported Record Types	Category	Notes
		<ul style="list-style-type: none"> <li>The internal ID for this record is <i>billingschedule</i>.</li> </ul>
Deposit	Transactions	<ul style="list-style-type: none"> <li>You use the deposit record to adjust the balance of an account.</li> <li>In the UI, you access this record at Transactions &gt; Bank &gt; Make Deposits.</li> <li>To add a new deposit record, you must include at least one line in one of the following three sublists: Payments, Other Deposits, or Cash Back.</li> <li>If you use the Multi-Book Accounting feature, note that the Accounting Book Detail sublist is read-only and not scriptable.</li> <li>The internal ID of this record is <i>deposit</i>.</li> </ul>
Global Account Mapping	Lists	<ul style="list-style-type: none"> <li>For accounts using Multi-Book Accounting, the global account mapping record enables you to configure secondary accounting books to post to accounts different from the primary book. These mappings are used by transactions where the user can manually select the account to which the transaction posts.</li> <li>The Multi-Book Accounting feature is new in this release. For details on SuiteScript support for this feature, see <a href="#">SuiteScript Support for Multi-Book Accounting</a>.</li> <li>Using this record requires that, as part of your Multi-Book configuration, you select the Chart of Accounts Mapping option at Setup &gt; Enable Features, on the Accounting subtab.</li> <li>In the UI, you access this record at Setup &gt; Accounting &gt; Global Account Mappings &gt; New.</li> <li>The internal ID for this record is <i>globalaccountmapping</i>.</li> </ul>
Group	Lists	<ul style="list-style-type: none"> <li>You use the group record to define groups of contacts, customers, employees, partners, or vendors.</li> <li>In the UI, you access this record at Lists &gt; Relationships &gt; Group &gt; New.</li> <li>The grouptype field is required and must be set either to "static" or "dynamic."</li> <li>If the grouptype is static, you can create lines in the Members sublist during the time that you are creating the record, but you cannot modify the sublist during updates. This behavior differs from the UI, which does allow manual updates once the record is created.</li> <li>If the grouptype is dynamic, you can never manually add to the Members sublist (because the group members are determined by a saved search). This behavior is the same as in the UI.</li> <li>The internal ID for this record is <i>entitygroup</i>.</li> </ul>
Inventory Count	Transactions	<ul style="list-style-type: none"> <li>To script to this record, the Inventory Count feature must be enabled at Setup &gt; Enable Features, on the Items &amp; Inventory subtab.</li> <li>In the UI, you access the inventory count record at Transactions &gt; Inventory &gt; Enter Inventory Count.</li> </ul>

Newly Supported Record Types	Category	Notes
		<ul style="list-style-type: none"> <li>The internal ID for this record is <i>inventorycount</i>.</li> </ul>
Item Account Mapping	Lists	<ul style="list-style-type: none"> <li>For accounts using Multi-Book Accounting, the item account mapping record enables you to configure secondary accounting books to post to accounts different from the primary book, based on the item that is the subject of the transaction. These mappings are used by transactions where the item determines the account to which the transaction posts.</li> <li>The Multi-Book Accounting feature is new in this release. For details on SuiteScript support for this feature, see <a href="#">SuiteScript Support for Multi-Book Accounting</a>.</li> <li>Using this record requires that, as part of your Multi-Book configuration, you select the Chart of Accounts Mapping option at Setup &gt; Enable Features, on the Accounting subtab.</li> <li>In the UI, you access this record at Setup &gt; Accounting &gt; Item Account Mappings &gt; New.</li> <li>The internal ID for this record is <i>itemaccountmapping</i>.</li> </ul>
Landed Cost	Subrecord	<ul style="list-style-type: none"> <li>The landed cost subrecord can be used in conjunction with the Items sublist of the check, item receipt, and vendor bill records, to show the landing costs associated with each line.</li> <li>As in the UI, this subrecord is available when the transaction's Landed Cost per Line option is enabled and you have added a sublist item that is configured to use the Track Landed Cost option.</li> <li>The landed cost subrecord supports the Landed Cost Allocation per Line feature, which was introduced in Version 2013 Release 2.</li> <li>The internal ID for this subrecord is <i>landedcost</i>.</li> </ul>
Multi-Book Accounting Transaction	Transactions	<ul style="list-style-type: none"> <li>For accounts using Multi-Book Accounting, this search record enables you to search for transactions using accounting book as a search filter or search column.</li> <li>The Multi-Book Accounting feature is new in this release. For details on SuiteScript support for this feature, see <a href="#">SuiteScript Support for Multi-Book Accounting</a>.</li> <li>This record is a search record only. You cannot create or copy this record.</li> <li>In the user interface, you can view the multi-book accounting transaction search by navigating to Reports &gt; New Search and clicking Multi-Book Accounting Transaction.</li> <li>The internal ID for this record is <i>accountingtransaction</i>.</li> </ul>
Project Expense Type	Lists	<ul style="list-style-type: none"> <li>The project expense type record lets you create expense classifications that you can apply to projects. These classifications determine the account to which project costs are attributed when time is posted for that project.</li> </ul>

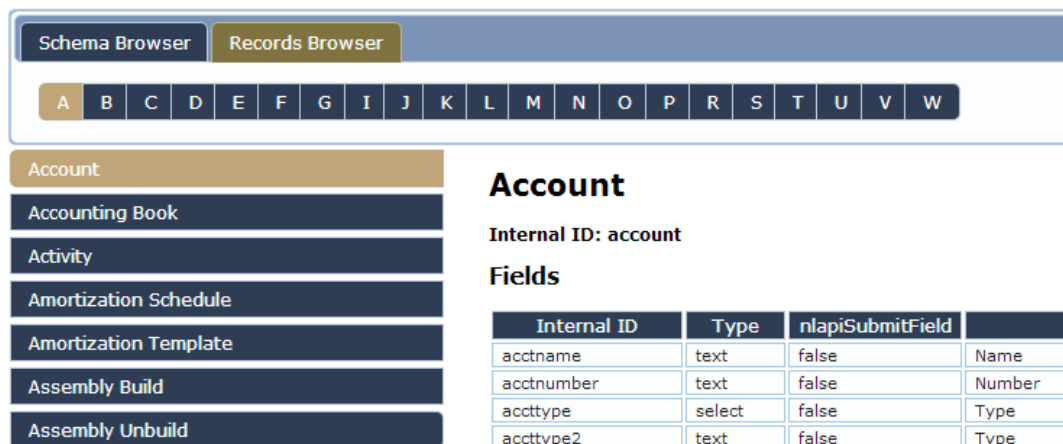


Newly Supported Record Types	Category	Notes
		<ul style="list-style-type: none"> <li>This feature, which is new in this release, is described further in the <a href="#">Job Costing</a> release note.</li> <li>This record is available when the Job Costing and Project Budgeting feature is enabled at Setup &gt; Company &gt; Enable Features, on the Company subtab.</li> <li>In the UI, you access the project expense type record at Setup &gt; Accounting &gt; Project Expense Types.</li> <li>The Language sublist is available only when the Multi-Language feature is enabled at Setup &gt; Company &gt; Enable Features, on the Company subtab. The sublist can be updated, but new lines cannot be added.</li> <li>The internal ID for this record is <i>projectexpensetype</i>.</li> </ul>
Requisition	Transactions	<ul style="list-style-type: none"> <li>You use the requisition record to initiate the purchase process for goods and services needed within your company.</li> <li>This record, which is new in this release, is described further in the <a href="#">Requisitions</a> release note.</li> <li>This record is available only when the Requisitions feature is enabled, at Setup &gt; Enable Features, on the Transactions subtab.</li> <li>In the UI, you access this record at Transactions &gt; Purchases/Vendors &gt; Enter Requisitions.</li> <li>The internal ID for this record is <i>requisition</i>.</li> </ul>
Resource Allocation	Activities	<ul style="list-style-type: none"> <li>The resource allocation record enables you to select particular employees to be available for a project.</li> <li>This record, which is new in this release, is described in greater detail in the <a href="#">Resource Allocations</a> release note.</li> <li>To use this record, the Resource Allocations feature must be enabled at Setup &gt; Company &gt; Enable Features, on the Company subtab.</li> <li>In the UI, you access this record at Activities &gt; Scheduling &gt; Resource Allocations &gt; New. Alternatively, you can view the resource allocations for a particular project through the project record's Resources subtab.</li> <li>The internal ID for this record is <i>resourceallocation</i>.</li> </ul>
Statistical Journal Entry	Transactions	<ul style="list-style-type: none"> <li>The statistical journal entry record lets you increase or reduce the balance of a statistical account.</li> <li>This record, which is new in this release, is described further in the <a href="#">Statistical Accounts</a> release note.</li> <li>To use this record, the Statistical Accounts feature must be enabled at Setup &gt; Enable Features, on the Accounting subtab. Also, you must have already created at least one statistical account.</li> <li>In the UI, you access this record at Transactions &gt; Financial &gt; Make Statistical Journal Entries.</li> </ul>

Newly Supported Record Types	Category	Notes
		<ul style="list-style-type: none"> <li>This internal ID for this record is <i>statisticaljournalentry</i>.</li> </ul>
Time Entry	Subrecord	<ul style="list-style-type: none"> <li>The internal ID for this subrecord is <i>timeentry</i>.</li> <li>Timesheet is the parent record for this subrecord.</li> <li>See <a href="#">SuiteScript Support for Timesheets Feature</a> for additional information.</li> </ul>
Timesheet	Transactions	<ul style="list-style-type: none"> <li>The internal ID for this record is <i>timesheet</i>.</li> <li>See <a href="#">SuiteScript Support for Timesheets Feature</a> for additional information.</li> </ul>

## Redesigned Records Browser

The 2014.1 [SuiteScript Records Browser](#) is now available. In this release, the Records Browser has been redesigned to include a new look and feel, as well as other enhancements.



See the following for more details:

- [Field-Level Help Text](#)
- [Easy Access to Schema Browser](#)
- [Links to the Records Browser](#)

For full details about the new Records Browser, see the help topic [Working with the SuiteScript Records Browser](#).

## Field-Level Help Text

Every record listed in the Records Browser now includes a **Help** column. For many fields, this column displays additional details about how to working with the field.

### Assembly Build

Internal ID: assemblybuild

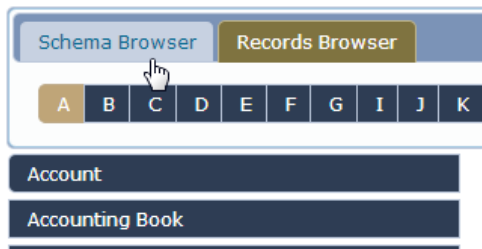
#### Fields

Internal ID	Type	nlapiSubmitField	Label	Required	Help
buildable	float	false	Buildable Quantity	false	Read only field that indicates the number of assembly items possible. This number is determined by the amount of member items in stock. If you use locations, this number only represents the number of assembly items that can be built at the selected location. The value for the quantity to build cannot be higher than the buildable number.
class	select	false	Class	false	References a value from a user defined list at Setup > Company > Classifications > Classes. This field is required when the Make Classes Mandatory preference is enabled at Setup > Accounting > Accounting Preferences.
createddate	datetime	false		false	
customform	select	false	Custom Form	true	
department	select	false	Department	false	Set a department to associate with this assembly item. For details on existing department records, in the UI go to Setup > Company > Departments.

The new Records Browser also now includes a **Required** column, which indicates whether the entry form in the user interface requires a value for the field.

## Easy Access to Schema Browser

When viewing a record within the Records Browser, you can easily see whether the same record is exposed to SuiteTalk by clicking the Schema Browser tab at the top of the window.



If the record is exposed to SuiteTalk, the corresponding page in the Schema Browser is displayed. If the record is not available, you are directed to the first page of the Schema Browser.

The Schema Browser has also been redesigned. For details, see [Redesigned Schema Browser](#).

## Links to the Records Browser

As in previous releases, you can find links to the SuiteScript Records Browser in many places. For example, in both the NetSuite Help Center and in the SuiteScript Developer and Reference Guide, links are provided in the following places:

- In the description of each supported record.
- In the topic titled Working with the SuiteScript Records Browser.

## SuiteCloud IDE

Version 2014 Release 1 includes the following enhancements to SuiteCloud IDE features:

- [Accessing the Records Browser from SuiteCloud IDE](#)
- [Support for New SuiteCloud IDE and Eclipse Versions](#)
- [Support for SuiteScript Functions](#)

### Accessing the Records Browser from SuiteCloud IDE

As of Version 2014 Release 1, you access the Records Browser from Help > Launch Records Browser. The Records Browser launches in an external browser window. You can still access the Records Browser using CTRL + mouse on the internal ID for a record, record field, or sublist in the SuiteCloud IDE.

In previous releases, you accessed the Records Browser from within the Eclipse help contents at SuiteCloud IDE > Records Browser.

### Support for New SuiteCloud IDE and Eclipse Versions

As of Version 2014 Release 1, NetSuite updated the SuiteCloud IDE to versions 2.4.0 and 3.0.0, and added support for Eclipse version 4.3.2. In addition, as of Version 2014 Release 1, NetSuite no longer provides an installer for the SuiteCloud IDE. Instead, you must update Eclipse from the SuiteCloud IDE update site.

The following table lists the supported versions of the SuiteCloud IDE and the associated Eclipse version:

SuiteCloud IDE Version	Eclipse Version	SuiteCloud IDE Update Site
2.4.0	3.7.2 (Existing version)	<a href="http://system.netsuite.com/download/ide/update">http://system.netsuite.com/download/ide/update</a>
3.0.0	4.3.2 (New version)	<a href="http://system.netsuite.com/download/ide/update_e4">http://system.netsuite.com/download/ide/update_e4</a>

For more information about updating the SuiteCloud IDE, see the help topic [Updating Eclipse for Use with the SuiteCloud IDE](#).

To upgrade to the latest version of Eclipse, download the 4.3.2 version of Eclipse and then update the application from the SuiteCloud IDE update site. For more information, see the help topic [Installing and Setting Up the SuiteCloud IDE](#).

For more information about Eclipse version 4.3.2, see the [Eclipse Project Release Notes](#).

## Support for SuiteScript Functions

As of Version 2014 Release 1, the SuiteCloud IDE includes support for the following SuiteScript functions:

- `nlapiSendEmail(author, recipient, subject, body, cc, bcc, records, attachments, notifySenderOnBounce, internalOnly)`
- `nlapiValidateXML(xmlDocument, schemaDocument, schemaFolderId)`
- `nlapiVoidTransaction(transactionType, recordId)`

**Note:** These functions are supported in only SuiteCloud IDE version 3.0.0.

For more information, see the SuiteScript documentation in the Help Center.

## SuiteTalk (Web Services) Integration

Refer to the following sections for details on all SuiteTalk Web Services updates for Version 2014 Release 1:

- [NetSuite to End Support for SuiteTalk 2009.2 and Earlier Endpoints](#)
- [SuiteTalk Support for Multi-Book Accounting](#)
- [Changes Related to Enhanced Credit Card Security](#)
- [Issue Record Is Enhanced](#)
- [New Fields Enable Creation of Work Order from Sales Order Line](#)
- [On Custom Record, altName and autoName Are Exposed](#)
- [New Search Objects for Pricing Levels](#)
- [ChargeType Changed From Enum to RecordRef](#)
- [Fields Deprecated on Subsidiary Record](#)
- [Newly Supported Record Types for SuiteTalk](#)
- [2014.1 WSDL Now Generally Available](#)
- [Araxis Merge Diff File for the 2014.1 Endpoint](#)
- [Redesigned Schema Browser](#)

## NetSuite to End Support for SuiteTalk 2009.2 and Earlier Endpoints

As of Version 2014 Release 1, NetSuite no longer supports SuiteTalk 2009.2 or earlier endpoints. NetSuite strongly encourages customers and partners using 2009.2 and earlier versions of the SuiteTalk WSDL to begin upgrading to later endpoints.

The end of support for these endpoints will enable NetSuite to focus maintenance on fewer versions, and will enable customers to benefit from more consistent record processing behavior in 2010.1 and later endpoints.

See the following for some tips:

- [Determining Endpoints that are Currently in Use](#)
- [Resources for Endpoint Upgrades](#)
- [Note About Record Processing Behavior in 2010.1 and Later Endpoints](#)

## **Determining Endpoints that are Currently in Use**

Use the following guidelines to determine whether any of your SuiteTalk integrations use the 2009.2 or earlier endpoints:

- For each partner application, work with the partner directly to find out the endpoint in use.
- For your own integrations:
  - You can check SOAP requests to see which endpoints they reference. You can find links to these requests at Setup > Integration > Web Services Usage Log, in the Request column.
  - You can contact NetSuite Support to ask for help in determining the endpoints used in your account.

## **Resources for Endpoint Upgrades**

To begin the process of upgrading your endpoint, refer to the following resources:

- For general information about using SuiteTalk, see the help topic [SuiteTalk Platform Overview](#).
- For upgrade tips, see the help topic [Upgrading WSDL Versions](#).
- If you have issues during your transition process, please contact NetSuite Technical Support.

## **Note About Record Processing Behavior in 2010.1 and Later Endpoints**

Be aware of the following change: When using the 2009.2 and earlier endpoints, most, but not all, of NetSuite's core business logic is executed when you modify a record. For integrations that use an endpoint later than 2009.2, *all* core business logic executes when the record is submitted. So you may notice some changes in SuiteTalk behavior for integrations that are upgraded to use an endpoint later than 2009.2. Following your upgrade, the behavior will more closely match the behavior when records are modified through the NetSuite user interface.

## SuiteTalk Support for Multi-Book Accounting

This release includes SuiteTalk support for several aspects of the Multi-Book Accounting feature, which is new in Version 2014 Release 1. In other words, if you have purchased, enabled, and configured the Multi-Book Accounting feature, you can use SuiteTalk to interact with certain records that have been added in this release to support the feature. Similarly, this release will expose new fields that have been added to existing records in support of Multi-Book Accounting.

Of the new records being introduced for Multi-Book Accounting, the following are being exposed to SuiteTalk:

- Global Account Mapping
- Item Account Mapping

For details on each record, see [Newly Supported Record Types for SuiteTalk](#).

For an overview of the feature, including details about its availability, see the [Multi-Book Accounting](#) release note.

## Changes Related to Enhanced Credit Card Security

Version 2014 Release 1 includes enhanced security for the handling of credit card data. This enhanced security may affect your integration in the following ways:

- When adding a transaction that uses a credit card number, you cannot identify the credit card number using a masked value such as \*\*\*\*\*5151. You must enter the full 16-digit number, or you can identify an existing credit card record through a RecordRef. (You can identify the full number using the ccNumber field. You can reference an existing record using the creditCard field.)
- Searches no longer work if they include the operator is or isNot in conjunction with the ccNumber field. The search operators that can apply to this field are only empty and notEmpty.

These changes affect you regardless of which endpoint you are using. Searching through the user interface is also affected by this enhancement. For details, see [Improved Credit Card Security](#).

## Issue Record Is Enhanced

The 2014.1 WSDL exposes additional body fields on the issue record. The newly exposed fields are:

- versionBroken
- buildBroken

- versionTarget
- buildTarget
- versionFixed
- buildFixed

However, be aware that these fields are used only when the `ISSUE_MULTIPLE_VERSIONS` preference is set to false. In the user interface, you can set this preference by checking the **Use Multiple Versions and Builds** box, at Setup > Issues > Issue Preferences. In order for the newly exposed body fields to be used, this box must be unchecked.

By contrast, when the preference is set to true, the system uses three sublists: `customFieldList`, `fixedInVersionList`, and `relatedIssuesList`. These sublists are exposed both in 2014.1 and in previous WSDLs.

## New Fields Enable Creation of Work Order from Sales Order Line

With the 2014.1 WSDL, it is now possible to create a work order by referencing a line on a sales order. To use this approach, you supply values for three newly exposed fields on the work order record:

- **sourceTransactionId** — Use this field to reference the internal ID of the sales order.
- **sourceTransactionLine** — Use this field to reference the line of the sales order for which you want to create the work order.
- **specialOrder** — Set this field to true to indicate that you want the previous two fields to be referenced as the work order is created.

This technique results in the creation of the following links between the sales order and the work order:

- On the line item of the sales order, a link to the work order is created in the Create WO column.
- On the work order, a link to the sales order is created in the Created From body field.

This approach to creating a work order is similar to the process of creating a work order through initialization. However, note that some body fields on the work order are not automatically populated. For example, you must manually populate the fields for assembly, subsidiary, and quantity.

## On Custom Record, altName and autoName Are Exposed

In the 2014.1 WSDL, the exposure of the custom record has been enhanced to include the `altName` and `autoName` fields. This enhancement is related to custom record types that are



configured to use auto-generated numbering. To configure a custom record type this way, check the Enable box on the custom record type's Numbering tab.

When you use this sort of custom record type as the basis for a new custom record, the altName field is required on the new custom record form. altName is a string field that simply represents a label you give the custom record, to be used in the list view. Be aware that the altName field maps to the field labeled Name in the user interface (which is different from the way the field names map when auto-generated numbers are not being used).

Further, the Web services field called name maps to the field labeled ID in the user interface. This field represents the auto-generated string assigned to the custom record.

Entry form for a new custom record of type "\_withNumberingEnabled."

Custom record type with **Enabled** box checked on Numbering tab

Save Cancel Reset

ID To Be Generated — Maps to Web services **name** field

\*Name — Maps to Web services **altName** field

In some cases, a custom record type may be set up with both the Enable and Allow Override boxes selected. In these cases, you have the additional option of using the boolean autoName field. The autoName field maps to the box labeled Auto in the user interface. This field lets you disable auto-generated numbering for your new custom record. If you set autoName to false, you must provide a value for the name field (which, again, in the user interface is labeled ID). Note that in this situation, altName is also still required.

Entry form for a new custom record of type "\_withNumbering-AndOverrides."

Custom record type with **Enable and Allow Override** boxes selected

Save Cancel Reset

\*ID To Be Generated Auto ☒ — Maps to Web services **autoName** field

\*Name — Maps to Web services **altName** field

Maps to Web services **name** field

## New Search Objects for Pricing Levels

The 2014.1 WSDL includes two new search objects that let you include pricing level data when searching for items and customers. PricingSearchBasic and PricingSearchRowBasic are both described in the common XSD. Joins to these objects have been added to the ItemSearch and CustomerSearch objects, which are described in the lists accounting and lists relationships XSDs.

Note that PricingSearchBasic is intended to be used as a join, not as a standalone search. For an example of how to use it, see the help topic [Sample 3 - Item Search With Pricing Join](#).

## ChargeType Changed From Enum to RecordRef

In the 2014.1 WSDL, the data type of the chargeType element has changed. Previously, chargeType was an enumeration. In this release, chargeType is a RecordRef. Therefore, if you upgrade to the 2014.1 WSDL from the 2013.2 WSDL, you must upgrade your integration to reflect this change.

By contrast, if you are upgrading to 2014.1 from 2013.1 or earlier, you can disregard this change (because the chargeType field was not added until 2013.2).

Note that chargeType is referenced by the following records:

- Cash refund
- Cash sale
- Credit memo
- Estimate
- Invoice
- Sales order

## Fields Deprecated on Subsidiary Record

In the 2014.1 WSDL, several fields have been removed from the subsidiary record. This change mirrors a change in the user interface — these fields were moved from the subsidiary entry form to a new record, as part of the enhancement described in [Support Case Profiles](#).

The fields that have been removed are:

- anonymousCustomerInboundEmail
- anonymousCustomerOnlineForms
- caseAssignmentTemplate
- caseAutomaticClosureTemplate
- caseCopyEmployeeTemplate
- caseCreationTemplate
- caseEscalationTemplate
- caseUpdateTemplate

- `companyNameForSupportMessages`
- `employeeCaseUpdateTemplate`
- `mainSupportEmailAddress`

## Newly Supported Record Types for SuiteTalk

Newly Supported Record Types	Category	Notes
Billing Schedule	Lists	<ul style="list-style-type: none"> <li>• This record enables you to create a billing schedule that can be applied to a sales order, a line item on a sales order, or a project.</li> <li>• To use this record, you must enable the Advanced Billing feature, at Setup &gt; Enable Features, on the Transactions subtab.</li> <li>• In the UI, you access this record at Lists &gt; Accounting &gt; Billing Schedules &gt; New. Additionally, you can access a billing schedule of Fixed Bid Milestone type from the associated project record.</li> <li>• If you choose a <code>scheduleType</code> of Fixed Bid Milestone, you must identify an existing project record (or job record). Then, to create a link between the project and the new billing schedule, you must update the project record — this relationship is not automatically established when you create the billing schedule.</li> <li>• The Recurrence sublist is available only when <code>scheduleType</code> is set to Standard and frequency to Custom. The key for this sublist is <code>recurrenceld</code>.</li> <li>• The Milestone sublist is available only when <code>scheduleType</code> is set to Fixed Bid Milestone. The key for this sublist is <code>milestoneld</code>.</li> <li>• The record is defined in the <code>listAcct XSD</code>, where it is called <code>BillingSchedule</code>.</li> </ul>
Deposit	Transactions	<ul style="list-style-type: none"> <li>• You use the bank deposit record to adjust the balance of an account.</li> <li>• In the UI, you access this record at Transactions &gt; Bank &gt; Make Deposits.</li> <li>• To add a new bank deposit record, you must include at least one line in one of the following three sublists: Payments, Other Deposits, or Cash Back. Of these, only one sublist — Payments — is keyed. The key is the internal ID of the transaction represented by the line.</li> <li>• If you use the Multi-Book Accounting feature, note that the Accounting Book Detail sublist is read-only.</li> <li>• This record is defined in <code>tranBank XSD</code>, where it is called <code>Deposit</code>.</li> </ul>
Global Account Mapping	Other Lists	<ul style="list-style-type: none"> <li>• For accounts using Multi-Book Accounting, the global account mapping record enables you to configure secondary accounting books to post to accounts different from the primary book. These mappings are used by transactions where the user can select the account to which the transaction posts.</li> <li>• The Multi-Book Accounting feature is new in this release. For details on SuiteTalk support for this feature, see <a href="#">SuiteTalk Support for Multi-Book Accounting</a>.</li> </ul>

Newly Supported Record Types	Category	Notes
		<ul style="list-style-type: none"> <li>Using this record requires that, as part of your Multi-Book configuration, you select the Chart of Accounts Mapping option at Setup &gt; Enable Features, on the Accounting subtab.</li> <li>In the UI, you access this record at Setup &gt; Accounting &gt; Global Account Mappings &gt; New.</li> <li>This record is defined in the listAcct XSD, where it is called GlobalAccountMapping.</li> </ul>
Item Account Mapping	Other Lists	<ul style="list-style-type: none"> <li>For accounts using Multi-Book Accounting, the item account mapping record enables you to configure secondary accounting books to post to accounts different from the primary book, based on the item that is the subject of the transaction. These mappings are used by transactions where the item determines the account to which the transaction posts.</li> <li>The Multi-Book Accounting feature is new in this release. For details on SuiteTalk support for this feature, see <a href="#">SuiteTalk Support for Multi-Book Accounting</a>.</li> <li>Using this record requires that, as part of your Multi-Book configuration, you select the Chart of Accounts Mapping option at Setup &gt; Enable Features, on the Accounting subtab.</li> <li>In the UI, you access this record at Setup &gt; Accounting &gt; Item Account Mappings &gt; New.</li> <li>This record is defined in the listAcct XSD, where it is called ItemAccountMapping.</li> </ul>
Resource Allocation	Activities	<ul style="list-style-type: none"> <li>The resource allocation record enables you to select particular employees to be available for a project.</li> <li>This record, which is new in this release, is described in greater detail in the <a href="#">Resource Allocations</a> release note.</li> <li>This record is available when the Resource Allocations feature is enabled at Setup &gt; Company &gt; Enable Features, on the Company subtab.</li> <li>In the UI, you access the resource allocation record at Activities &gt; Scheduling &gt; Resource Allocations. Alternatively, you can view the resource allocations for a particular project through the project record's Resources subtab.</li> <li>Searches are exposed for this record. That is, ResourceAllocationSearchBasic, ResourceAllocationSearch, and ResourceAllocationSearchAdvanced are all exposed.</li> <li>This record is defined in the actSched (scheduling) XSD, where it is called ResourceAllocation.</li> </ul>
Statistical Journal Entry	Transactions	<ul style="list-style-type: none"> <li>The statistical journal entry record lets you increase or reduce the balance of a statistical account.</li> <li>The Statistical Accounts feature is new in this release and is described further in the <a href="#">Statistical Accounts</a> release note.</li> </ul>

Newly Supported Record Types	Category	Notes
		<ul style="list-style-type: none"> <li>To use this record, the Statistical Accounts feature must be enabled at Setup &gt; Enable Features, on the Accounting subtab. Also, you must have already created at least one statistical account.</li> <li>In the UI, you access this record at Transactions &gt; Financial &gt; Make Statistical Journal Entries.</li> <li>This record is defined in the tranGeneral XSD, where it is called StatisticalJournalEntry.</li> </ul>
Timesheet	Transactions	<ul style="list-style-type: none"> <li>This timesheet record provides tracking of employee time in weekly segments rather than individual time entries.</li> <li>The Timesheets feature, which is new in this release, is intended as an alternative to the Time Tracking feature. For more details, see the <a href="#">Timesheets</a> release note.</li> <li>The timesheet record is available only when the Timesheets feature is enabled. This feature cannot be enabled concurrently with Time Tracking or Time Tracking for CRM.</li> </ul> <p><b>Important:</b> The Timesheets feature is not currently available at Setup &gt; Company &gt; Enable Features. You must contact NetSuite Customer Support to enable this feature.</p> <ul style="list-style-type: none"> <li><b>WARNING: If you move to the new Timesheets feature from the older Time Tracking feature, existing data is migrated to the new record. However, integrations created using the old time record will not work with the new timesheet record. Please ensure that all affected integrations are updated or replaced before switching to the Timesheets feature.</b></li> <li>The timesheet record is defined in the tranEmp XSD, where it is called TimeSheet. Note that this record uses a sublist called timeGridList and a subrecord called TimeEntry. Each TimeEntry subrecord stores data about hours worked on one day. The timeGridList sublist is used to display the time data.</li> <li>The timeGridList sublist is built dynamically when the record is retrieved through Web Services (or loaded in the UI). For this reason, line item numbers for each timeGridList entry are not fixed, and the sublist is not keyed. You can update the sublist only if you set replaceAll to True, which means the only way to edit data about hours worked is to overwrite the entire sublist with new values.</li> <li>In the UI, you access the timesheet record at Transactions &gt; Employees &gt; Enter Time.</li> <li>For more details on using SuiteTalk to interact with this record, see the help topic Timesheet.</li> </ul>

## 2014.1 WSDL Now Generally Available

The 2014.1 WSDL is now generally available and can be viewed at the following URL:

[https://webservices.netsuite.com/wsd/v2014\\_1\\_0/netsuite.wSDL](https://webservices.netsuite.com/wsd/v2014_1_0/netsuite.wSDL)

## Araxis Merge Diff File for the 2014.1 Endpoint

The [Araxis Merge Diff file](#) highlights 2013.2 - 2014.1 schema changes.

Depending on the scope of the release, these changes may include:

- New record types
- Elements (fields) that have been added, removed, or changed
- New sublists (lists)
- New joins
- New search filters and search return columns
- New platform operations

### Using the Araxis Diff File

**Important:** The figures in this section are **only** for illustrative purposes. They do NOT reflect schema changes related to any specific endpoint.

The SuiteTalk diff file is generated using Araxis Merge. The following screenshot shows an Araxis Merge Comparison Report, which is a summary page that highlights all schemas that have been modified for a release. Diff files that are attached to NetSuite Release Notes will always open to the summary page.

Schemas that are highlighted in blue have been modified. Click individual schema links or a Report link to see all changes to a particular schema.

This column represents the previous endpoint.	This column represents the newest endpoint.	Click the Report links to see the differences.
6. Comparison detail		
activities.scheduling.xsd	5  activities.scheduling.xsd	<a href="#">Report 1</a>
activities.schedulingTypes.xsd	0  activities.schedulingTypes.xsd	
documents.fileCabinet.xsd	4  documents.fileCabinet.xsd	<a href="#">Report 2</a>
documents.fileCabinetTypes.xsd	0  documents.fileCabinetTypes.xsd	
general.communication.xsd	2  general.communication.xsd	<a href="#">Report 3</a>
general.communicationTypes.xsd	0  general.communicationTypes.xsd	
lists.accounting.xsd	118  lists.accounting.xsd	<a href="#">Report 4</a>
lists.accountingTypes.xsd	1  lists.accountingTypes.xsd	<a href="#">Report 5</a>
lists.employees.xsd	5  lists.employees.xsd	<a href="#">Report 6</a>
lists.employeeTypes.xsd	0  lists.employeeTypes.xsd	

The following screenshot shows a snapshot of **documents.fileCabinet.xsd**. The elements highlighted in green are the changed elements. This screenshot shows:

- The **mediaFile** element has been added to the new endpoint.
- The **isFeatured** element that existed in the previous endpoint been deprecated in the new endpoint.

This column represents the previous endpoint.

```
<element name="url" type="xsd:string" minOccurs="0"/>
<element name="description" type="xsd:string" minOccurs="0"/>
<element name="encoding" type="docFileCabType:FileEncoding" minOccurs="0"/>
<element name="altTagCaption" type="xsd:string" minOccurs="0"/>
<element name="isOnline" type="xsd:boolean" minOccurs="0"/>
<element name="isInactive" type="xsd:boolean" minOccurs="0"/>
<element name="class" type="xsd:string" minOccurs="0"/>
<element name="department" type="xsd:string" minOccurs="0"/>
<element name="hideInBundle" type="xsd:boolean" minOccurs="0"/>
<element name="isPrivate" type="xsd:boolean" minOccurs="0"/>
<element name="owner" type="platformCore:RecordRef" minOccurs="0"/>
<element name="caption" type="xsd:string" minOccurs="0"/>
<element name="storeDisplayThumbnail" type="platformCore:RecordRef" minOccurs="0"/>
<element name="siteDescription" type="xsd:string" minOccurs="0"/>
<element name="featureDescription" type="xsd:string" minOccurs="0"/>
<element name="featureDescription" type="xsd:string" minOccurs="0"/>
```

This column represents the newest endpoint.

```
<element name="url" type="xsd:string" minOccurs="0"/>
<element name="mediaFile" type="platformCore:RecordRef" minOccurs="0"/>
<element name="description" type="xsd:string" minOccurs="0"/>
<element name="encoding" type="docFileCabType:FileEncoding" minOccurs="0"/>
<element name="altTagCaption" type="xsd:string" minOccurs="0"/>
<element name="isOnline" type="xsd:boolean" minOccurs="0"/>
<element name="isInactive" type="xsd:boolean" minOccurs="0"/>
<element name="class" type="xsd:string" minOccurs="0"/>
<element name="department" type="xsd:string" minOccurs="0"/>
<element name="hideInBundle" type="xsd:boolean" minOccurs="0"/>
<element name="isPrivate" type="xsd:boolean" minOccurs="0"/>
<element name="owner" type="platformCore:RecordRef" minOccurs="0"/>
<element name="caption" type="xsd:string" minOccurs="0"/>
<element name="storeDisplayThumbnail" type="platformCore:RecordRef" minOccurs="0"/>
<element name="siteDescription" type="xsd:string" minOccurs="0"/>
<element name="featureDescription" type="xsd:string" minOccurs="0"/>
<element name="featureDescription" type="xsd:string" minOccurs="0"/>
```

The diff file also includes data type changes. The following is a snapshot of **activities.scheduling.xsd**. This screenshot shows:

- The data types for the **estimatedTime**, **estimatedTimeOverride**, **actualTime**, and **timeRemaining** elements have changed from **dateTime** to **Duration**.

```
121 <element name="sendEmail" type="xsd:boolean" minOccurs="0"/>
122 <element name="timeEvent" type="xsd:boolean" minOccurs="0"/>
123 <element name="estimatedTime" type="xsd:dateTime" minOccurs="0"/>
124 <element name="estimatedTimeOverride" type="xsd:dateTime" minOccurs="0"/>
125 <element name="actualTime" type="xsd:dateTime" minOccurs="0"/>
126 <element name="timeRemaining" type="xsd:dateTime" minOccurs="0"/>
127 <element name="percentTimeComplete" type="xsd:double" minOccurs="0"/>
128 <element name="percentComplete" type="xsd:double" minOccurs="0"/>
150 <element name="sendEmail" type="xsd:boolean" minOccurs="0"/>
151 <element name="timeEvent" type="xsd:boolean" minOccurs="0"/>
152 <element name="estimatedTime" type="platformCore:Duration" minOccurs="0"/>
153 <element name="estimatedTimeOverride" type="platformCore:Duration" minOccurs="0"/>
154 <element name="actualTime" type="platformCore:Duration" minOccurs="0"/>
155 <element name="timeRemaining" type="platformCore:Duration" minOccurs="0"/>
156 <element name="percentTimeComplete" type="xsd:double" minOccurs="0"/>
157 <element name="percentComplete" type="xsd:double" minOccurs="0"/>
```

## Redesigned Schema Browser

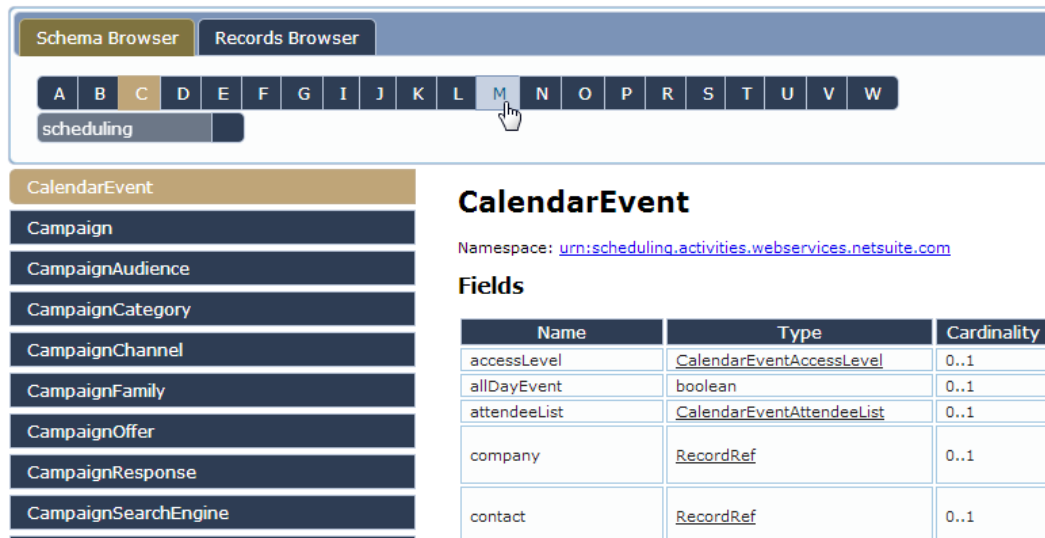
The 2014.1 [SuiteTalk Schema Browser](#) is now available. In this release, the Schema Browser has been redesigned to include a new look and feel, as well as enhancements that enable easier navigation. See the following for more details:

- New A-Z Record Index
- Optional Browsing by Namespace
- A Unique URL for Each Record
- Enhancements to the Summary of Fields
- Easy Access to Records Browser

For full details about the new Schema Browser, see the help topic [Working with the SuiteTalk Schema Browser](#).

## New A-Z Record Index

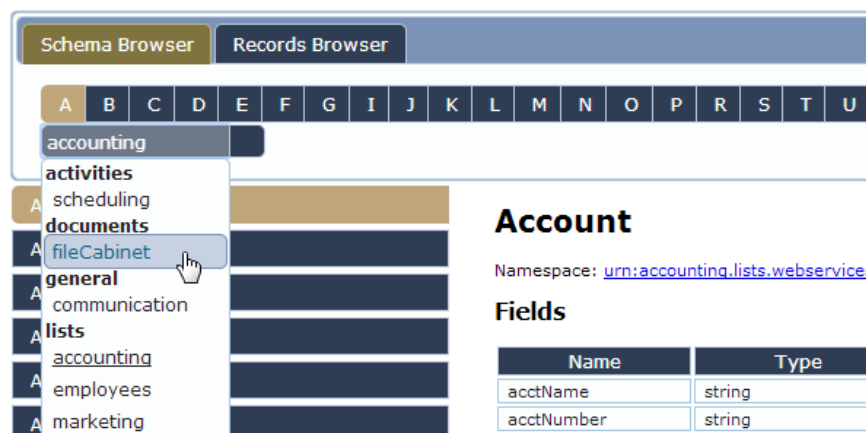
The new Schema Browser features an A-Z index. You can click any letter to see a list of the exposed records whose names begin with that letter. By contrast, in older versions of the Schema Browser, the only way to navigate to a specific record was by first selecting the appropriate namespace.



In the new browser, when you click a letter, the corresponding list of records is displayed in the pane at the left. In the center of the page, the browser displays details about the first record in the list — but you can click the name of any other record listed to view its details.

## Optional Browsing by Namespace

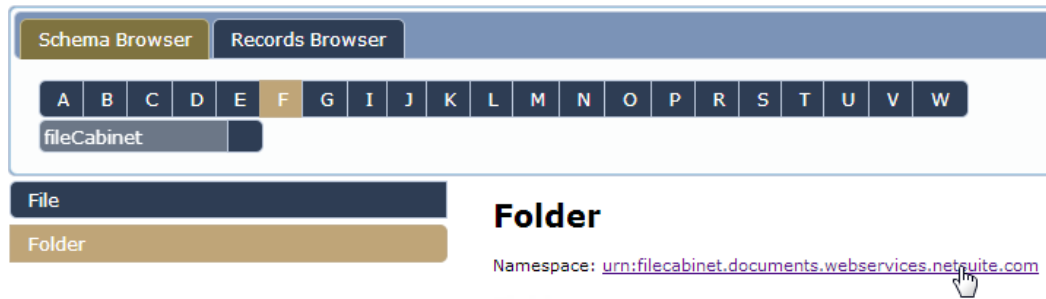
Although you can now browse by record name, you can still browse by namespace, if desired. A dropdown list of all namespaces is displayed below the A-Z index.



After you select a namespace, the pane at the left updates to include a tabbed list of objects associated with that namespace. Objects are grouped according to whether they are records, search objects, enumerations, and so on.



Each record's namespace is also identified by the link directly below the name of the record. You can click this link to update the pane at the left to show the tabbed list of all objects from the namespace, while keeping the center pane focused on the record you are currently viewing.



## A Unique URL for Each Record

In this version, each record has its own page and its own URL that is displayed in the address bar of the browser window. (In previous versions of the Schema Browser, records had their own URLs, but they were not displayed in the address bar during browsing.) Similarly, other elements, such as search objects, sublists, and enumerations, have their own pages and easy-to-find URLs.

Related advantages included the following:

- Because each page in the new Schema Browser is limited to one object, it is easier to use your web browser's search utility to find text just within that object. In previous versions of the Schema Browser, a single HTML page typically include details about many objects.
- For ease of navigation, the new Schema Browser features more links between related objects. For example, at the bottom of each record reference page is a list of all search objects directly related to that record. Click any of these links to see a page devoted to that search object. Similarly, at the bottom of the page describing the search object is a link back to the reference page for the record.

## Enhancements to the Summary of Fields

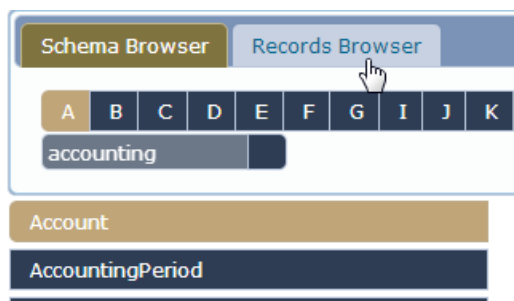
As in previous versions of the Schema Browser, the summary for each record, and for many other objects, includes a table summarizing the object's fields. Related to this table, note the following changes:

- Attributes are no longer grouped together with fields. Attributes (for example, internal ID and external ID), are now listed separately, below the list of fields.
- The fields in each table are now alphabetized by name. Note that sublists continue to be listed together with the parent record's fields but, because the list is alphabetized, sublists are no longer listed at the bottom of the table.

- The table summarizing the fields now includes a column labeled Cardinality. This column shows two values representing the “minimum occurs” and “maximum occurs” values for the field, as defined in the XSD file. For example, a Cardinality value of 0..1 means that the XSD does not require a value for the field and that the maximum number of occurrences is 1.

## Easy Access to Records Browser

When viewing a record within the Schema Browser, you can easily see whether the same record is exposed to SuiteScript by clicking the Records Browser tab at the top of the window.



If the record is supported in SuiteScript, the corresponding page in the Records Browser is displayed. If the record is not available, you are directed to the first page of the Records Browser.

The Records Browser has also been redesigned. For details, see [Redesigned Records Browser](#).

## Links to the Schema Browser

As in previous releases, you can find the URL for the [Schema Browser](#) in a few ways, including the following:

- In the NetSuite Help Center and in the SuiteTalk (Web Services) Records Guide, links to the Schema Browser are provided in the description of each supported record.
- The NetSuite Help Center also includes a topic titled SuiteTalk Schema Browser Version 2014.1. This topic includes a link to the Schema Browser.