Sales Orders and Cash Sales

and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described in this document remains at the sole discretion of Oracle.

This document in any form, software or printed matter, contains proprietary information that is the exclusive property of Oracle. Your access to and use of this confidential material is subject to the terms and conditions of your Oracle Master Agreement, Oracle License and Services Agreement, Oracle PartnerNetwork Agreement, Oracle distribution agreement, or other license agreement which has been executed by you and Oracle and with which you agree to comply. This document and information contained herein may not be disclosed, copied, reproduced, or distributed to anyone outside Oracle without prior written consent of Oracle. This document is not part of your license agreement nor can it be incorporated into any contractual agreement with Oracle or its subsidiaries or affiliates.

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Sample Code

Oracle may provide sample code in SuiteAnswers, the Help Center, User Guides, or elsewhere through help links. All such sample code is provided "as is" and "as available", for use only with an authorized NetSuite Service account, and is made available as a SuiteCloud Technology subject to the SuiteCloud Terms of Service at www.netsuite.com/tos.

Oracle may modify or remove sample code at any time without notice.

No Excessive Use of the Service

As the Service is a multi-tenant service offering on shared databases, Customer may not use the Service in excess of limits or thresholds that Oracle considers commercially reasonable for the Service. If Oracle reasonably concludes that a Customer's use is excessive and/or will cause immediate or ongoing performance issues for one or more of Oracle's other customers, Oracle may slow down or throttle Customer's excess use until such time that Customer's use stays within reasonable limits. If Customer's particular usage pattern requires a higher limit or threshold, then the Customer should procure a subscription to the Service that accommodates a higher limit and/or threshold that more effectively aligns with the Customer's actual usage pattern.

Beta Features

Oracle may make available to Customer certain features that are labeled "beta" that are not yet generally available. To use such features, Customer acknowledges and agrees that such beta features are subject to the terms and conditions accepted by Customer upon activation of the feature, or in the absence of such terms, subject to the limitations for the feature described in the User Guide and as follows: The beta feature is a prototype or beta version only and is not error or bug free and Customer agrees that it will use the beta feature carefully and will not use it in any way which might result in any loss, corruption or unauthorized access of or to its or any third party's property or information. Customer must promptly report to Oracle any defects, errors or other problems in beta features to support@netsuite.com or other designated contact for the specific beta feature. Oracle cannot guarantee the continued availability of such beta features and may substantially modify or cease providing such beta features without entitling Customer to any refund, credit, or other compensation. Oracle makes no representations or warranties regarding functionality or use of beta features and Oracle shall have no liability for any lost data, incomplete data, re-run time, inaccurate input, work delay, lost profits or adverse effect on the performance of the Service resulting from the use of beta features. Oracle's standard service levels, warranties and related commitments regarding the Service shall not apply to beta features and they may not be fully supported by Oracle's customer support. These limitations and exclusions shall apply until the date that Oracle at its sole option makes a beta feature generally available to its customers and partners as part of the Service without a "beta" label.

Table of Contents

Sales Orders and Cash Sales Overview

Sales orders and cash sales let you record the sale of goods and services. When you create a sales order, you record the intent to sell one or more items to a particular customer. A sales order can include many types of information such as sales information, shipping information, payment details, and accounting information. To bill a sales order, you create a cash sale or an invoice, depending on the type of sales order created originally. A cash sale requires immediate payment by the customer whereas a sales order typically lets the customer pay for the items at a later date. In your sales order workflow, you can set sales orders to be approved automatically or require approval before the sales orders can be fulfilled.

Cash sales record the sale of goods or services when payment is received immediately. You enter a cash sale by specifying the items purchased by the customer, as well as other related information such as shipping or billing details. You can print receipts in PDF format and refund cash sales as necessary.

> ⓘ **Note:** In NetSuite, the role you use has a set of permissions that give you access to pages, transactions, and records. Your role also determines the tabs and navigation menu in the application.
>
> Most of the tasks in this guide use the standard Sales Manager role. If a task or procedure cannot be completed with the Sales Manager role, instructions are provided using the Administrator role.
>
> If you have questions about your role and access permissions, speak with your account administrator. For more information on roles and permissions, see the help topic NetSuite Access Overview.

ORACLE® **NET**SUITE

Sales Orders

A sales order is a transaction that records a commitment to sell items or services to a customer. Sales orders have no accounting impact until items are shipped or services are completed.

Recording sales orders helps you track the following:

- What your customer has ordered
- What must be pulled from inventory
- What you have already shipped
- What still remains to be shipped

After items on sales orders are shipped, the sales orders can be turned into invoices or cash sales to bill the customer. When sales orders are converted into bills, they automatically show the items, quantities, and prices from the order without having to re-enter the information.

> ⚠️ **Important:** The total number of lines per transaction cannot exceed 500. Sales orders created by web services can have up to 1000 lines.

Sales orders can be created in two ways:

- **Create a sales order from an existing estimate.**

  If you have entered an estimate that contains information about a potential customer order, you can convert the estimate into a sales order. Then, the exact information from the estimate is used to create the sales order without re-entering the information.

  For more information, read the help topic Converting an Estimate.

  To view existing estimates, go to Opportunities > Transactions > Estimates.

- **Create a new, individual sales order.**

  You can enter information on a sales order form without an existing estimate.

  For more information, read Creating Sales Orders.

  To enter a sales order, go to Opportunities > Transactions > Sales Orders > New.

See Sales Order Entry Workflow Chart for more information about creating sales orders.

After you have created and approved sales orders for items and services, you can view or process the sales order at each stage to track the progress of the order:

- Billing Sales Orders
- Viewing the Status of Sales Orders
- Creating Invoices or Cash Sales from Sales Orders

Sales Order Entry Workflow Chart

In a typical sales order workflow, you create a sales order from an estimate or you create a new sales order. After the sales order is approved, it enters the fulfillment queue. The approval process of sales orders is determined by your company's accounting preferences.

ORACLE® **NETSUITE**
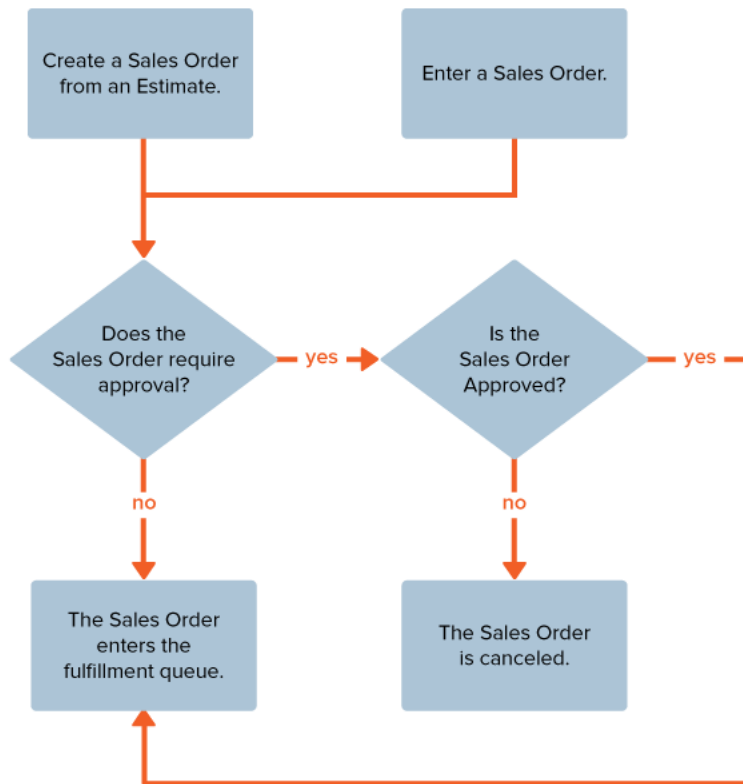
Creating Sales Orders

Enter sales orders to record items and services you promise to customers. Then, you can fulfill items on sales orders to track which items and services have already been delivered and which are yet to be delivered.

> ⓘ **Note:** This is a non-posting transaction.

> ⓘ **Note:** If the Recurring Billing SuiteApp is installed in your account, see Creating Sales Orders.

In NetSuite, there are several types of predefined sales order forms. You or an administrator can also create customized sales order forms.

- **Standard Sales Order** – A standard sales order lets you create an invoice or a cash sale, based on whether you enter billing terms or a payment method. See The Standard Sales Order Form for more information.
- **Standard Sales Order - Cash Sale** – When you bill this type of sales order, a cash sale transaction is created in the system.
- **Standard Sales Order - Invoice** – When you bill this type of sales order, an invoice is created.
- **Standard Sales Order - Progress Billing** – Progress sales orders can be billed at intervals according to the fulfillment progress of the goods or services. See Creating Progress Sales Orders for more information.

ORACLE® **NET**SUITE

If the **Automatic Location Assignment** feature is enabled and configured, NetSuite assigns locations automatically to lines in a sales order depending on the inventory available at each location and how the feature is configured. See the help topic Automating Order Fulfillment for more information. To enter a sales order with the feature enabled, see Assigning Locations Automatically in a Sales Order.

You can specify the fulfillment location for items on a sales order by selecting a location in the Location column on sales order lines. If you use the **Intercompany Cross-Subsidiary Fulfillment** feature, you can fulfill from locations in other subsidiaries in your company. In this case, use the Inventory Location column instead of the Location column on sales order lines to select a fulfillment location. The column shows locations in the customer subsidiary, as well as locations in all other subsidiaries that have a global inventory relationship with the transaction subsidiary. See the help topic Intercompany Cross-Subsidiary Fulfillment for more information.

Creating a Sales Order

Entering a sales order with the standard sales order form lets you create a basic sales order, which can then be billed as an invoice or a cash sale. The minimum information you must enter on a sales order is:

- Customer – The customer to whom you are selling the goods or services. If you use the Projects feature, you can select a project or job.
- Date – The date of the transaction. The current date is entered by default.
- Status – The sales order status indicates the stage in the fulfillment process. The sales order status can be either Pending Approval or Pending Fulfillment.
- Items – A sales order requires at least one item to be added in the Items tab.

For information about additional fields in the sales order header, see Sales Order Header Fields.

To create a standard sales order:

1. Go to Opportunities > Transactions > Sales Orders > New.
2. Select Standard Sales Order in the **Custom Form** field.

   The default form is the standard sales order form. For more information about how this form works, see The Standard Sales Order Form.
3. In the **Customer** field, select a customer.

   If you use the Projects feature, you can select a project or job.

   > (i) **Note:** If you add, edit, or delete a project after a sales order is billed, the sales order becomes a standalone sales order and is no longer associated with the invoice. Also, the invoice is removed from the Related Records subtab on the sales order.

4. Enter a date for the transaction. The current date is entered by default.
5. Select the status of the transaction. The default status is determined in your company's accounting preferences.
6. In the **Items** subtab, add items to the sales order.

   To add an item, select it in the Item column, enter the quantity, and click Add. You can enter additional details for each line item such as an inventory commitment setting, order priority, or expected ship date. See Adding Items on a Sales Transaction for more information.
7. Enter additional information as necessary. You can enter general information in the sales order header. You can also enter information related to shipping, billing, payments, accounting, relationships, and communication:

ORACLE® **NETSUITE**

- Sales Order Header Fields
- Entering Shipping Information on a Sales Transaction
- Adding Billing Information to a Transaction
- Entering Payment Information on a Transaction
- Entering Accounting Information on a Sales Transaction
- Entering Relationships on a Transaction
- Associating Sales Teams with Customers and Transactions
- Entering Communication Information on a Transaction

8. Click **Save**. You can also do one of the following:
   - Click **Save & Print** to save and print the form.
   - Click **Save & Email** to save the form and email it.
   - Click **Save and Fulfill** to save the information and immediately open a fulfillment form for this order.

> ℹ **Note:** The Save and Fulfill button shows on new sales orders only. It does not show when you edit an existing order.

Sales Order Header Fields

The sales order header fields let you specify additional information about a sales order transaction. You can enter general information, sales information, and information to classify the sales order for reporting purposes. The list of available fields might change depending on the features enabled in your company. The fields available for the standard sales order form are described in the following table.

Field	Description
Primary Information	
End Date	The date on which the sales order becomes invalid.
PO Number	A customer purchase order associated with the sales order.
Memo	A note used to describe the sales order. The memo appears on some sales order reports. When you use the Search Transactions feature, you can search for specific words and phrases in the **Memo** field.
Start Date	The date on which the first invoice will be created. The Advanced Billing feature must be enabled to create an invoice based on the start date.
Sales Information	
Exclude Commissions	Check this box to exclude the sales order amount, and all subordinate transactions, from commission calculations for all sales people.
Lead Source	The source of the lead associated with the sales order.
Opportunity	The opportunity related to the sales order. This field appears only when the Opportunities feature is enabled.
Partner	The partner associated with the sales order. If you use the Multi-Partner Management feature, you can associate partners with this transaction on the **Relationships** subtab.

ORACLE® **NET**SUITE

Field	Description
Sales Effective Date	A date that determines which commission plan and historical sales team the transaction applies to.
Sales Rep.	The sales representative associated with the sales order. If you use the Team Selling feature, you can set this on the **Sales Team** subtab.
Classification	
(OneWorld) Subsidiary	Defaults to the primary subsidiary of the customer if the customer record is not shared with multiple secondary subsidiaries. If the customer record is shared with multiple subsidiaries, choose the subsidiary by which to classify the sales order.
Class	The class by which to classify the sales order.
Department	The department by which to classify the sales order.
Location	The location by which to classify the sales order.

Adding Items on a Sales Transaction

A sales transaction must have at least one line item. You can enter additional details for each line item depending on the item added. Most line item columns in the Items subtab are optional. In the Items subtab, you can also apply a promotion to all items in the sales order – see Applying a Promotion on a Sales Order for more information.

To add items on a transaction:

1. Click the **Items** subtab in the form.
2. If you use the Multiple Shipping Routes feature, check the **Enable Item Line Shipping** box to enter multiple shipping addresses and shipping methods on a sales order. For more information, see the help topic Multiple Shipping Routes.
3. In the **Item** column, select the item you want to add.

   > (i) **Note:** Click the **Add Multiple** button to quickly add several items to this transaction. The Choose Item window opens and shows a list of items you can add. You can filter the list by item type or search for all or part of a name. When you click an item in the left pane, it is added to the right pane, where you can enter a quantity for the item. When you click Done, items and quantities shown in the right pane are added to the transaction.

4. If you use locations in your NetSuite account, select a fulfillment location in the **Location** column. Take the following into account:
   - If you use the Intercompany Cross-Subsidiary Fulfillment feature, select a fulfillment location in the **Inventory Location** column instead.
   - If you use the Automatic Location Assignment feature, you do not need to set a location because NetSuite will assign a location automatically.
   - If the Location column is not displayed and the location will not be assigned automatically, you will need to select the fulfillment location when fulfilling the sales order.
5. In the **Quantity** column, enter the quantity for this item.
6. In the **Serial/Lot Numbers** field, enter the serial or lot number of the item.

ORACLE® **NETSUITE**

- Separate each serial number with a space, a comma, or by pressing Enter after each one.

  You must enter a serial number for each serialized item. For example, if you enter a quantity of 2, then you must enter two serial numbers.

- Lot numbers must be entered in this format: **LOT#(Quantity)**

  For example, to enter a quantity of 100 items as Lot number ABC1234, enter **ABC1234(100)**.

> **ⓘ Note:** By entering a specific serial or lot number, you are designating a specific item and NetSuite attempts to allocate the specific item for this order. If you do not enter a specific serial or lot number, NetSuite allocates only the specified quantity of this item to the order. Then, you can designate the specific serial or lot number for the item at a later time.

7. If you use multiple prices, in the **Price Level** column, choose a price level for this item.

   If you choose **Custom**, you can enter a custom price for this item in the **Unit Price** column.

   This price applies to this transaction only.

   The tax code for this item is shown in the **Tax Code** column.

8. In the **Commit** column select one of the following:

   - **Available Qty** - Items for this line item are committed as available. Available items are shipped, and items that are not available are placed on backorder.
   - **Complete Qty** - This line item only ships when all items are committed.
   - **Do Not Commit** - Items are not committed to this line item until this setting is changed.

9. Set any options that apply to this item.

   If the item is a gift certificate and you do not see a Gift Certificate field, click this field to set the recipient's name and email address (required for gift certificate sales). To expand the options, click the **Set Options** icon next to the field.

10. In the **Expected Ship Date** field, enter the date you expect this item to be shipped from the vendor. This date is used for demand planning calculations.

    This defaults to show the transaction date.

11. If you use the Available to Promise feature, the **Check Item Availability** icon 🐷 shows next to the field.

    Click the **Check Item Availability** icon.

    - You can enter a new quantity in the popup. When you click OK, the new quantity populates the transaction.
    - You can select an alternative unit of measure in the popup. When you click OK, quantities are updated based on the alternative unit of measure.
    - The bottom portion of the popup displays the quantity available of the item based on future dates. The supply, demand, and balance quantities are shown for each date.

    Close the popup by clicking one of the following:

    - Click **Close** to close the popup without updating any data on the transaction.
    - Click **OK** to close the popup and update the transaction with the new data you entered.

12. If you use the legacy revenue recognition features Revenue Commitment and VSOE, four additional columns are included: **Rev. Rec. Schedule**, **Rev. Rec. Start Date**, **Rev. Rec. End Date**, and **VSOE**. Information for these columns is provided by revenue accountants. These columns are not included when your company uses the Advanced Revenue Management feature. For more information about the legacy features, see the help topics Using Revenue Commitments and Using the VSOE Feature.

ORACLE® **NETSUITE**

13. Check the **Exclude Item from Rate Request** box if you want to exclude the item when calculating shipping. The shipping rate total will not include this item. This box is available only for inventory and assembly items.

14. Click **Add** or press Enter to add the item to the order.

Applying a Promotion on a Sales Order

When creating a sales order, you can apply a promotion to items in the order.

To apply a promotion or discounts to items on a sales order:

1. To apply a promotion, on the Items subtab, do one of the following:

   - If the promotion uses a single-use coupon code, enter the promotion's coupon code in the **Coupon Code** field.

     The promotion this code used appears in the Promotion field.

   - For promotions with multi-use coupon codes, you can select the promotion in the **Promotion** field, and the coupon code is entered automatically.

     > **Note:** Single-use coupon codes must be entered manually in the **Coupon Code** field.

2. If a transaction discount applies to this order, select it in the **Discount Item** field.

3. In the **Rate** field, enter any other discounts you want applied to this order.

   To have the discount subtracted from your total, enter a negative amount or percentage. For example, if you want to offer a discount of ten percent, enter **-10%**.

Entering Accounting Information on a Sales Transaction

The Accounting subtab tracks the financial impact of sales transactions.

On this subtab, you can determine which account is impacted by the transaction and set the customer currency and exchange rate to use. If you use the Revenue Commitments feature, you can have a commitment created in place of the invoice or commitment reversal. If you use the VSOE feature, you can choose to create a VSOE bundle upon saving the transaction.

Depending on the type of transaction you are entering and which form you are using, some of the fields below might not apply.

To enter accounting information on a sales transaction:

1. Click the **Accounting** subtab.

2. For cash sales:

   - If you receive payment by cash or check, select **Undep. Funds**.

     After the money is deposited, go to **Transactions > Make Deposits** to record your deposit.

   - If you receive payment by credit card, select **Account**, and choose which account will be credited.

3. For invoices, in the **Account** field, select the Accounts Receivable account impacted by this transaction.

4. If the customer uses multiple currencies, in the **Currency** field, you can select the currency you want to use for this transaction. The customer's primary currency is selected by default. For more information, see the help topic Customers and Multiple Currencies.

ORACLE® **NETSUITE**

If you change the currency, prices and amounts are updated to the currency you select.

You can change the exchange rate for this transaction only, or you can update the currency record with the exchange rate you enter here.

5. If you use the Revenue Commitments feature, under **Revenue**, check the **Rev Rec on Rec Commit** box if you want to create a revenue commitment or revenue commitment reversal.

   On sales orders, the revenue commitment is created in place of an invoice. On a return authorization, the revenue commitment reversal is created in place of a credit memo or refund.

   NetSuite automatically creates all required revenue recognition schedules for the resulting commitment or commitment reversal.

6. If you use the VSOE feature:

   - Check the **Transaction is VSOE Bundle** box if you want a VSOE bundle created when you save this transaction that includes all the items on this transaction.

   - Check the **Auto Calculate VSOE Allocation** box if you want to calculate the VSOE allocation amount automatically when you save this transaction.

Assigning Locations Automatically in a Sales Order

When the Automatic Location Assignment feature is enabled and running in your account, NetSuite can automatically assign fulfillment locations to lines in a sales order. Locations are assigned according to assignment rules set up by an administrator or a fulfillment manager. See the help topic Automating Order Fulfillment for more information.

Typically, the automatic location assignment feature is configured to assign locations automatically when a sales order is approved. After you approve the sales order, NetSuite then assigns the locations asynchronously in the background. You can then check the locations assigned by waiting a few moments and returning to the sales order to view it or edit it.

If automatic location assignment is set up, but is not configured to run automatically in the background, you can still take advantage of the automatic location assignment engine, provided that:

- An automatic location assignment configuration is active for your company or your subsidiary.

- The Location column is displayed in the Items subtab in a custom sales order form.

If you use the **Intercompany Cross-Subsidiary Fulfillment** feature, you can fulfill from locations in the transaction subsidiary as well as from locations in other subsidiaries in your company. With this feature enabled, NetSuite sets the fulfillment location in the Inventory Location column on sales order lines.

To use automatic location assignment when creating a sales order:

1. Go to Opportunities > Transactions > Sales Orders > New.

2. Select the relevant custom form.

   To be able to use automatic location assignment, you must select a custom sales order form in which the Location column is displayed in the Items subtab.

3. In the **Items** subtab, add the order items and their quantity.

4. If you don't want NetSuite to assign a location automatically for a particular line, do one of the following:

   - Check the **Do Not Auto Assign Location** box.

   - Manually select a location in the Location column. Doing this automatically checks the Do Not Auto Assign Location box.

ORACLE® **NET**SUITE

5. If the Automatic Location Assignment Configuration field is displayed on the sales order form, verify that a configuration is selected.

> **Note:** If the Automatic Location Assignment Configuration field is hidden on the sales order form, an administrator might have selected a default configuration for the form or might have created a workflow in SuiteFlow that selects a configuration. For more information about configurations, see the help topic Automatic Location Assignment Configurations.

6. Click the **Auto Assign Locations** button. If NetSuite is able to assign locations to the items, the locations appear in the Location column. Otherwise, the Location column remains blank.

> **Note:** NetSuite assigns locations in the background. It might take a few moments for the locations to appear on each line in the column.

> **Note:** If the automatic location assignment configuration for the sales order includes rules that have a line item saved search, NetSuite is unable to assign locations until after the sales order is saved.

7. Fill in any other details for the sales order and click **Save**.

If you edit a sales order by changing the quantity of a line, changing the item on a line, or adding a new line, you must click the Auto Assign Locations button again to rerun the automatic location assignment process.

Understanding the Automatic Location Assignment Configuration Field

When the Automatic Location Assignment Configuration field is displayed on the sales order form, you can choose the configuration you want NetSuite to use when assigning locations. For example, on a sales order for a business-to-business (B2B) customer, you might use a configuration designed for large volume sales orders. In such a configuration, rules might be set up so that larger warehouses with higher inventory quantities are assigned before smaller warehouses with less inventory.

The Automatic Location Assignment Configuration field might sometimes be hidden on the sales order form. In this case, the configuration can be set in one of the following ways:

- An administrator can set a default configuration for all sales order in a subsidiary.
- A script (SuiteScript) or workflow (SuiteFlow) can set the configuration.

> **Note:** Even if you select a configuration on the sales order form, a script or workflow can be created that overrides the selected configuration.

Creating Store Pickup Sales Orders

If you use the Store Pickup feature, you can enter a sales order for store pickup. The Store Pickup feature lets you create store pickup orders at store locations and fulfill the orders. By using the Store Pickup feature with the Fulfillment Request feature, you can also manage the workload at stores and enter fulfillment exceptions if there are problems fulfilling the order. NetSuite recommends using fulfillment requests with store pickup orders.

ORACLE® **NET**SUITE

> **ⓘ Note:** Using the Store Pickup feature requires a number of setup steps to be completed before you are able to create a store pickup order. See the help topic Setting Up Store Pickup for more information.

Entering a store pickup order is similar to entering a standard sales order, except you specify the fulfillment method for each line item as Store Pickup and choose the store at which the customer wants to pick up the order.

To enter a sales order for store pickup

1. Go to Opportunities > Transactions > Sales Orders > New.
2. Select a custom sales order form for store pickup.
3. In the **Customer** field, select the customer. Enter other information such as the transaction date and the status. See Creating Sales Orders for more information.
4. On the **Items** subtab, add the items for the store pickup order:
   a. Select the item in the **Item** column.

      If an item does not appear in the dropdown list, it might not be allowed for store pickup. You can check this by viewing the item record.

   b. In the **Fulfillment Choice** column, select Store Pickup as the fulfillment method.

   c. In the **Location** column select the store at which the customer wants to pick up the order.

      If the Intercompany Cross-Subsidiary Fulfillment feature is enabled, select the store in the **Inventory Location** column instead of the Location column. Cross-subsidiary fulfillment lets you fulfill orders from locations in the transaction subsidiary as well as locations in other subsidiaries. The list of locations can include store locations from other subsidiaries. See the help topic Intercompany Cross-Subsidiary Fulfillment for more information.

      If a particular location does not appear in the dropdown list, store pickup might not be allowed at the location for the item. You can check this by viewing the item record.

5. Click **Save**.

After a sales order is entered, you can edit it. However, in the case of a store pickup order, the Fulfillment Choice field becomes read only if another transaction has already been created from the sales order. For example, if a fulfillment request already exists for a line in the sales order, the Fulfillment Choice cannot be changed for that line in the sales order. Other transactions that prevent changing the Fulfillment Choice field include the Store Pickup Fulfillment transaction and the Item Fulfillment transaction.

Getting Credit Card Authorization Automatically on Sales Orders

You can customize sales orders to always get credit card authorization by default. This eliminates the need to manually check the Get Authorization box on each individual order.

To customize sales order forms, go to Setup > Customization > Transaction Forms (Administrator) and click Customize next to the standard sales order form. On the custom form, click the Screen Fields subtab and then click Payment. Check the boxes as follows:

- Check the **Get Authorization** box to use the Get Authorization box on the form.
- Check the **Show** box to display the field on the form. Clear the Show box to hide the field.

- Check the **Default Checked** box to set the default value for the Get Authorization box. The Get Authorization box is now automatically checked on this form unless you manually clear it.

If the Default Checked box is checked but the Show box is not checked, orders that use this form and have credit card information entered still attempt to authorize the charge when saved.

If the Display Type field is set to Inline Text, then the Get Authorization field shows Yes or No, depending on your setting for Default Checked.

When the customization is complete, when you save an order that uses the custom form set to Default Checked and includes the customer's credit card information, the credit card is automatically authorized by the merchant account gateway. If the authorization fails, you are notified and must change the payment information on the order to resubmit it.

Please note the following about using the Get Authorization box:

- When you customize a form, if you set both of the fields Get Authorization AND Credit Card Approved to **Default Checked**, the setting for Get Authorization does override the setting for Credit Card Approved. In such a case, the Get Authorization box is the only one of the two fields checked on the form.

- The Get Authorization box is not displayed when you view a transaction, only when you edit it.

- On a transaction, if both the Get Authorization AND Credit Card Approved boxes are checked AND a credit card number is not entered on the order before it is saved, when you edit the order later, the Get Authorization field is unchecked.

- For orders created through your Web Store, the preference to Require Authorization for Credit Card Transactions does override the setting for Default Checked.

The Standard Sales Order Form

The Standard Sales Order form automatically creates the appropriate billing transaction based on whether you enter a payment method or select payment terms on the sales order.

If you enter terms on a sales order, an invoice is automatically generated when it is billed. If you enter a payment method, a cash sale is automatically generated when it is billed. If you enter neither terms nor a payment method, it generates an invoice.

> ⚠ **Important:** On a sales order, if you enter both a payment method and terms, the payment method takes precedence, and a cash sale is generated upon billing.

When payment terms are selected on a sales order, NetSuite does assess the credit limit if one is listed for the customer. When you select a payment method on a sales order, NetSuite does not assess the credit limit.

In NetSuite, there are several types of predefined sales order forms. You or an administrator can also create customized sales order forms.

- **Standard Sales Order** – A standard sales order lets you create an invoice or a cash sale, based on whether you enter billing terms or a payment method. See The Standard Sales Order Form for more information.

- **Standard Sales Order - Cash Sale** – When you bill this type of sales order, a cash sale transaction is created in the system.

- **Standard Sales Order - Invoice** – When you bill this type of sales order, an invoice is created.

ORACLE® **NET**SUITE

- **Standard Sales Order - Progress Billing** – Progress sales orders can be billed at intervals according to the fulfillment progress of the goods or services. See Creating Progress Sales Orders for more information.

Approving Sales Orders

If a sales order has the status of Pending Approval, the order must be approved by someone with authorization before it can be processed.

If you operate a Web store or use online ordering, you can quickly approve sale orders that are automatically generated when your customers order online.

To approve a sales order:

1. Go to Opportunities > Transactions > Approve Sales Orders.
2. A list of orders shows at the bottom of the page.
3. In the **Supervisor** field, select a name to filter the sales order list by supervisor.

   Clear this field to show all sales orders pending approval.
4. Check the box in the **Approve** column for each sales order you want to approve.
5. In the **Date** field, select the date range for the transactions you want to show in the list. The date range you select is reflected in the From and To fields. If you enter a different range in the From and To fields, the Date field automatically shows Custom.
6. To approve a specific order, enter an order number in the **Select Order** number field, either manually or by scanning a bar code.
7. The Security Match column verifies that the credit card was properly matched for the following:
   a. Address Verification Service (AVS) street address match
   b. Address Verification Service (AVS) postal zip code match
   c. 3- or 4-digit Card Security Code match
8. The **Amount** field shows the total amount of orders you have checked for approval.
9. Click **Submit**.

You can now process your sales orders and turn them into cash sales or invoices. To do this, go to Transactions > Sales > Fulfill Orders (Administrator).

Resetting Approval Status

The status of an order that is approved and pending fulfillment can be reset to Pending Approval. If you have permission to approve and edit sales orders, the Status field appears when you edit a sales order that has not been fulfilled. When a sales order is partially fulfilled, the status cannot be changed back to pending approval.

To reset the status, select Pending Approval in the Status field, then click Save. To edit an existing sales order, go to Opportunities > Transactions > Sales Orders and click Edit next to the order.

Requiring Re-approval

You can also require re-approval when someone edits a sales order that was previously approved. However, partially fulfilled sales orders are not affected by this preference. When a sales order is partially fulfilled, the status cannot be changed back to pending approval.

ORACLE **NET**SUITE

To enable this preference, go to Setup > Accounting > Preferences > Accounting Preferences (Administrator) and click the Order Management subtab. Check the Require Re-approval on Edit of Sales Order box and click Save.

Closing a Sales Order

You have two options for closing a sales order. You can close all the line items on a sales order or you can use the Close Order button. For information on closing lines on a sales order, see Closing Line Items on Sales Orders.

> ℹ️ **Note:** You must bill the sales order before you can manually close the line. When all lines on a sales order are fulfilled or closed manually, the sales order is removed from the billing and receiving queues.

To close a sales order using the Close Order button, the following conditions must be met for the button to show on the sales order:

- The sales order must have been created using a standard sales order form.
- The sales order has an amount remaining to bill.
- The sales order must be in one of the following statuses:
  - Pending fulfillment
  - Partially fulfilled
  - Pending billing

When these conditions are met, the Close Order button shows on the sales order in view mode. Click the Close Order button to close the sales order.

Billing Sales Orders

Billing a sales order turns an approved sales order into an invoice or cash sale.

When you bill sales orders, NetSuite defaults to use standard invoice and cash sale forms.

> ℹ️ **Note:** If you use custom sales orders, you also need to create custom invoices and custom cash sales.

To bill sales orders:

1. Go to Transactions > Sales > Bill Sales Orders (Administrator).
2. To filter the list of billable sales orders displayed, do the following:
   - To view the list of sales orders for a particular customer, select a customer. Otherwise, select All to view sales orders of all customers.
   - In the **Next Bill On Or Before** field, enter a date to filter the list by the billing date on the orders.
3. Set basic billing information for the sales orders you want to bill:
   a. In the **Posting Period** field, select the accounting period to which you want to post the transaction. If a period is closed, you cannot post to that period.

ORACLE® **NET**SUITE

b. In the **Date** field, enter the billing date for the transactions. The current date is entered by default.

c. In the **To Be Printed** field:

- Select **Yes** if you want to save this form in a queue to print.

- Select **No** if you do not want to print this form.

- Select **Respect Customer Preference** to print based on the default preference on the customer record. Set the preference on the Info subtab of a customer record in the Send Transactions Via field.

d. In the **To Be Emailed** field:

- Select **Yes** if you want to email this form.

- Select **No** if you do not want to email this form.

- Select **Respect Customer Preference** to send email based on the default preference on the customer record. Set the preference on the Info subtab of a customer record in the Send Transactions Via field.

e. Check the **Credit Card Approved** box if the transactions you select have already had credit card charges performed outside NetSuite, such as by a card-swipe terminal.

> **Note:** If you check this box and submit this transaction, NetSuite automatically checks the Credit Card Approved box and sets the Account field on Cash Sales you process.

> **Note:** You can also set the billing information for other fields in the transaction. See Bulk Update Fields
>
> for more information

4. Check the box under the Invoice column for the sales orders you want to bill.

   The Order Type column shows whether the sales order becomes an invoice or a cash sale. Whether you create an invoice or cash sale for the sales orders depends on the form you originally used to enter the orders. The cash sale form generates a cash sale and the invoice form generates an invoice.

5. > **Important:** In this step, the selected sales orders will enter the processing queue and will be billed with the data you selected or entered.

   Click **Submit** to bill the sales orders.

   The Process Status page is displayed with the status of the sales orders submitted for billing. Click the Refresh button to view updates to the status.

If you converted the sales order into an invoice, go to Transactions > Customers > Accept Customer Payments (Administrator) to apply a payment to the open invoice.

If you turned the sales order into a cash sale, you can choose to place the payment into Undeposited Funds or directly into a bank account. If you select Undeposited Funds, after the payment is approved, click Make Deposits to deposit the money from Undeposited Funds into a bank account.

If you use advanced shipping, you can track sales orders separately from invoices. To use advanced shipping, go to Setup > Company > Enable Features (Administrator), click the Transactions subtab, check the Advanced Shipping box, and then click Save.

If you use advanced shipping and want to create invoices for a whole order even if the order hasn't been completely fulfilled, go to Setup > Accounting > Preferences > Accounting Preferences

(Administrator), click the Order Management subtab, check the Invoice in Advance of Fulfillment box, and then click Save.

Bulk Update Fields

The bulk billing page includes a Set Fields subtab where you can enter updates to enter for orders being billed.

For example, if you bulk bill a group of sales orders, you may want to update the memo field on all of the orders to say "Q1 Rush processing." You are able to enter the memo text on the Set Fields subtab and all orders processed show the new text.

To update fields during a bulk process:

1. Go to Transactions > Sales > Bill Sales Orders (Administrator).
2. Click the **Set Fields** subtab to choose the fields to update and select the data for entry.
3. In the **Field** column, choose a field to update.
4. Depending on the field you select, data can be entered in one of the following fields:
   - In the **Selection** column, choose a setting for the field.
   - In the **Checked** column, define whether a box is checked or cleared.
   - In the **Text** column, enter text to be entered in the chosen field.
   - In the **Date** column, choose a date to be entered in the chosen field.
5. Click **Add**.
6. Repeat these steps for each field you want to update during this bulk process.
7. Complete other fields on the billing form as necessary.
8. Click **Submit**.

When you submit the form, the invoices are generated and the fields are updated as you have specified.

> ⓘ **Note:** Only fields in the header of the form are available to be updated during bulk fulfillment or invoicing.

Closing Line Items on Sales Orders

On sales orders, you are able to close line items manually when you do not intend to fulfill open items on the order.

For example, you sell ten widgets to a customer and have already fulfilled five of them. Then, you discontinue the item and cannot fulfill the remaining five. If you close the line manually instead of changing the quantity, you retain a record of how many were ordered originally.

To close a line item on a sales order manually:

1. Go to Opportunities > Transactions > Sales Orders.
2. Click **Edit** next to the sales order with the line you want to close.
3. On the **Items** subtab of the sales order, click the line you want to close.
4. Check the box in the **Closed** column, and click **Done**.

ORACLE® **NET**SUITE

5. Click **Save**.

> **Note:** If you are going to manually close a partially fulfilled line item on sales order, you must bill the sales order **BEFORE** you close the line. When all line items on a sales order are fulfilled or closed manually, the sales order is removed from the billing queue and the receiving queue.

Viewing the Status of Sales Orders

With advanced shipping, your shipping and accounting departments use separate processes for fulfilling and billing sales orders. You can fulfill all or part of sales orders separately from invoices. Your sales orders have statuses that reflect where the orders are in the fulfilling and billing process.

To enable the Advanced Shipping feature, an administrator can go to Setup > Company > Enable Features (Administrator). On the Transactions subtab, check Advanced Shipping, and then click Save.

To view the status of a sales order:

1. Go to Opportunities > Transactions > Sales Orders.
2. The status of each sales order shows in the **Status** column.

The status of a sales order could be as described below.

- With the Advanced Shipping Feature OFF:
  - **Closed** – The sales order was closed and will not be fulfilled or billed.
  - **Pending Approval** – The sales order has not been approved.
  - **Pending Fulfillment** – The order is pending creation of an invoice or cash sale, including partially billed shipping orders.
  - **Partially Fulfilled** – The order is partially shipped.
  - **Fulfilled** – The order is completely shipped and billed
  - **Canceled** – The sales order has been canceled. Canceled is a terminal status and cannot be undone. You must copy or recreate the sales order if it is needed again.
- With the Advanced Shipping Feature ON:
  - **Closed** – The sales order was closed and will not be fulfilled or billed.
  - **Pending Approval** – The sales order has not been approved.
  - **Pending Fulfillment** – The sales order is approved and pending shipment of items ordered.
  - **Partially Fulfilled** – The sales order is partially shipped, regardless of billing status.
  - **Pending Billing** – The sales order is pending the creation of an invoice or cash sale, including partially billed sales orders.
  - **Billed** – The sales order is completely shipped and billed.
  - **Canceled** – The sales order has been canceled by clicking Cancel Order. Canceled is a terminal status and cannot be undone. You must copy or recreate the sales order if it is needed again.

On the sales orders page, click View next to a sales order to view it. You can click Edit next to a sales order to make changes to the order.
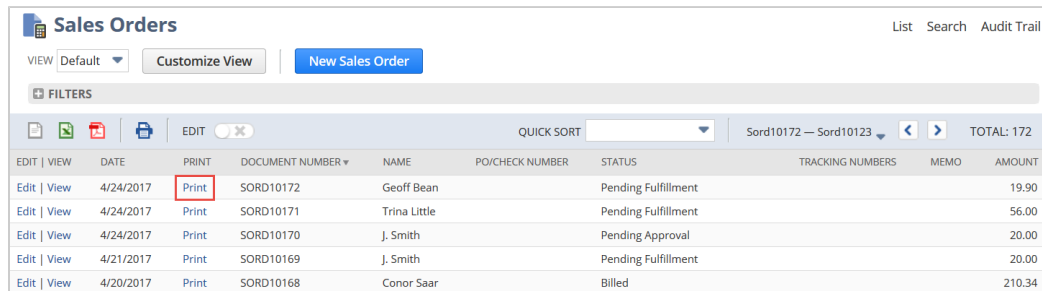
To see what has already been fulfilled and invoiced for a sales order, go to a sales order and click the Items subtab. The Fulfilled and Invoiced columns show the quantity fulfilled and invoiced for each line item.

Printing a Sales Order

To print sales orders in PDF format, you need a PDF viewer such as Adobe® Acrobat® Reader. Visit the Adobe website to download the latest version at no charge.

To print a single sales order:

1. When creating a new sales order, enter all the sales order information and then click **Save & Print**. To enter a sales order, go to Opportunities > Transactions > Sales Orders.

2. When viewing an existing sales order, click the Print button 🖶.

3. If you are viewing the sales orders list, click Print next to the sales order you want to print. To view the sales orders list, go to .

When you enter a sales order, you can add it to a print queue, which you can then print at a later stage. On the Sales Order page, click the Communication subtab, select Messages, and then check the To Be Printed box. When you go to the Print Sales Order page, the sales orders you added to the print queue are displayed on the page.

To print multiple sales orders:

1. Go to Customers > Transactions > Print Checks and Forms.

2. On the Print Checks & Forms page, click **Sales Orders**.

3. In the **Form** field, choose the transaction form you want to use to print these orders.

4. Check the **Allow Reprinting** box to be able to reprint previously printed transactions.

   When you check this box, all documents appear at the bottom of the page in segments.

5. Check the box in the **Print** column for each sales order you want to print.

6. Click **Print**.

   If you have not enabled the Download PDF Files preference on the Set Preferences page, a preview of your sales orders pops up in the default Adobe application.

   If you have enabled the Download PDF Files preference, you must first save your sales orders and then open them with the Adobe application.

7. Click the printer button in the Adobe application frame.

8. If you want to print multiple copies, specify the number on the print message that appears.

9. Click **OK**.

Creating Invoices or Cash Sales from Sales Orders

A sales order expresses a commitment to ship goods and or perform services. It has no accounting impact until items are shipped and an invoice or cash sale is created from the sales order to bill the customer for the items.

ORACLE® NETSUITE

A cash sale is a transaction that records the sale of goods or services for which you receive immediate payment. An invoice transaction records the sale of goods and services when payment is not received at the time of delivery.

> **Note:** Whether you create an invoice or cash sale for the sales order depends on the sales order form you originally used to enter the order. The cash sale form generates a cash sale and the invoice form generates an invoice.

The steps used to convert a sales order into an invoice or cash sale depend on whether you have enabled the Advanced Shipping feature.

- **Without advanced shipping**, you use a single process to fulfill and bill sales orders. Fulfilling a sales order automatically creates an invoice or cash sale from the sales order.
- **Using advanced shipping**, there are separate processes for fulfilling sales orders and creating corresponding invoices or cash sales. For more information on advanced shipping, read the help topic Order Fulfillment.

If you use the Multiple Currencies feature, when you create a cash sale or invoice from a sales order, the currency on the sales order is applied to the new transaction. For more information, see the help topic Currency Management.

You can choose to fulfill a single sales order or multiple sales orders.

Error Messages

When you are creating an invoice or cash sale from a sales order, NetSuite displays an error message when the following occurs:

- If there are two browser windows open and two users bill a sales order at the same time.
- If one user tries to bill an individual sales order at the same time another user is bulk billing sales orders.

  (If the individual instance is processed before the bulk instance, the bulk processing status displays an error requesting an item to be selected for the transaction.)
- If a user accidentally double-clicks the Save button on an invoice and submits two requests to the server.

If these conditions occur, NetSuite displays the following error message: "[Transaction #001] has already been processed in another browser instance or by another user. Please re-open the transaction to view the current status."

> **Note:** This error does not show in the following circumstances:

- If you are creating an invoice from an opportunity.
- If you are creating a new invoice or cash sale.
- If you are editing an existing invoice or cash sale.
- If you make a copy of an invoice and then save it again.

To create an invoice or cash sale from a single sales order:

1. Go to Transactions > Sales > Fulfill Orders (Administrator).
2. On the Fulfill Orders page, select the customer you want to create an invoice or cash sale for.

   A list of open sales orders for that customer shows.

ORACLE® **NET**SUITE

3. In the **Process** column, click **Fulfill** next to the sales order you want to create an invoice or cash sale for.

4. Click **Save**.

   The sales order you have selected appears as an invoice or cash sale.

5. Make any changes you need to the invoice or cash sale.

   > ⓘ **Note:** To generate deferred revenue for billable time, you must manually select revenue recognition schedules on the **Billable Time** subtab located on the **Items** subtab.

6. Click **Save**.

   Now, there is an invoice or cash sale for the sales order.

To accept a customer payment for the invoice, go to Transactions > Customers > Accept Customer Payments (Administrator).

> ⓘ **Note:** You cannot include a partially processed sales order when fulfilling multiple orders. Partially processed sales orders must be fulfilled individually.

To create invoices or cash sales from multiple sales orders:

1. Go to Transactions > Sales > Fulfill Orders (Administrator).

2. On the Fulfill Sales Order page, select the customer you want to create an invoice or cash sale for, or select **All** to list all open sales orders.

3. In the **Fulfill** column, check the boxes next to the sales orders you want to fulfill.

4. Click **Submit**.

   The Processed Orders list appears. It lists the transactions created when the sales orders are fulfilled.

You can edit the transactions created from the Processed Orders list. Click the number in the Processed Number column next to the transaction you want to edit. When the transaction appears, click Edit. Make any changes, and click Save.

Creating Progress Sales Orders

Many service businesses use progress billing to bill for portions of projects as they are completed.

When using progress billing, a progress sales order is created and approved. When a portion of the project has been completed, the progress sales order is fulfilled. Then, a progress invoice is created for a percentage of the total cost.

To create a progress sales order:

1. Go to Opportunities > Transactions > Sales Orders > New.

2. In the **Custom Form** field, choose Standard Sales Order - Progress Billing.

3. In the **Customer** field, select a customer.

4. Enter a date for the transaction. The current date is entered by default.

5. Select the status of the transaction: Pending Approval or Pending Fulfillment.

   The default status is determined in your company's accounting preferences.

6. On the **Items** subtab, add items to the sales order.

To add an item, select it in the Item column, enter the quantity, and click Add. You can enter additional details for each line item such as an inventory commitment setting, order priority, or expected ship date. See Adding Items on a Sales Transaction for more information.

7. On the **Billing** subtab, select billing terms for this order in the **Terms** field.

8. Enter additional information as necessary. You can enter general information in the sales order header. You can also enter information related to shipping, billing, payments, accounting, relationships, and communication:

   - Sales Order Header Fields

   - Entering Shipping Information on a Sales Transaction

   - Adding Billing Information to a Transaction

   - Entering Payment Information on a Transaction

   - Entering Accounting Information on a Sales Transaction

   - Entering Relationships on a Transaction

   - Associating Sales Teams with Customers and Transactions

   - Entering Communication Information on a Transaction

9. Click **Save**. You can also do one of the following:

   - Click **Save and Accept Deposit** to save the sales order and open the customer deposit transaction.

   - Click **Save & Print** to save the sales order and print it.

   - Click **Save & Email** to save the sales order and email it.

   - Click **Save and Fulfill** to save the sales order and open a fulfillment transaction.

You can approve a pending sales order at Opportunities > Transactions > Approve Sales Orders. When a portion of the approved sales order has been completed, you can invoice for the percent completed by going to Transactions > Sales > Fulfill Orders (Administrator).

ORACLE® **NET**SUITE

Cash Sales

A cash sale is a transaction that records the sale of goods or services for which you receive immediate payment. Enter a cash sale when payment for goods or services has been received at the time of delivery.

Record cash sales by adding each item sold from your Items list. Then, cash sale line-items specify the goods and services sold and their sales amounts. The sum of all sales amounts plus any applicable tax equals the total amount paid for this sale.

Entering a Cash Sale

To enter a cash sale:

1. Go to Opportunities > Transactions > Cash Sales.
2. Under Primary Information:
   a. In the **Custom Form** field, select a sales receipt form.
   b. Accept or enter the sale number in the **Sale #** field
   c. In the **Customer** or **Project** field, select a customer or project.
   d. Accept or enter the date in the **Date** field.
   e. If you use the Advanced Billing feature, enter the date for the first bill to be created in the **Start Date** field.

      If a cash sale is created from a sales order that includes a Start Date and End Date, those dates autofill on the cash sale when the order is billed.
   f. Enter or pick the date for this cash sale.
   g. Select the period you want this cash sale to post to.
   h. If the customer is paying by check, enter the check number.
   i. In the **Memo** field, enter a memo to identify this cash sale.

      When you use the Search Transactions feature, you can search for specific words and phrases in the Memo field.
3. Under Sales Information:
   a. In the **Opportunity** field, select the opportunity for this cash sale.

      You can change the sales effective date for this transaction. The sales effective date determines which commission plan and historical sales team this transaction applies to.
   b. Check **Exclude Commissions** to exclude this transaction and its subordinate transactions from inclusion in all commission calculations. For example, selecting this box on a sales order excludes the sales order and the resulting invoice from all commission calculations for all sales people.
   c. The partner associated with this customer appears in the **Partner** field. You can choose a different partner for this opportunity.

      If you have enabled the Multi-Partner Management feature, you can associate partners with this transaction on the **Partners** subtab. For more information, see the help topic Associating Partners With Customers and Transactions.
   d. Associate sales reps with this transaction in one of the following ways:
      - If you do not use the Team Selling feature, select the sales rep or sales group in the **Sales Rep** field.

The sales rep or sales group associated with the customer on this transaction is chosen by default.

- If you use the **Team Selling** feature, click the **Sales Team** subtab.

    Select the sales team for this transaction. For more information, see the help topic Associating Sales Teams with Customers and Transactions.

4. Under **Classification**, select a department, class, or location if you track them.

> (i) **Note:** If you use NetSuite OneWorld and the selected customer is shared with multiple subsidiaries, you can choose any subsidiary assigned to the selected customer. For information about sharing customer records with multiple subsidiaries, see the help topic Assigning Subsidiaries to a Customer.

5. Select an account for the sales amount to post to:

- Click **Undeposited Funds** if you receive payment by cash or check and your bank account will not be credited until you actually deposit the check.

- Click **Deposit To** and select a bank account if payment is by credit card and your bank account is automatically credited.

The page for entering a cash sale has several subtabs. The subtabs that display on the page are determined by the setting and options you have enabled. The following list includes possible subtabs.

- The Adding Items on a Sales Transaction subtab.
- The Entering Shipping Information on a Sales Transaction subtab.
- The Adding Billing Information to a Transaction subtab.

    Depending on you settings, billing information may display on the Payments subtab.

- The Payments subtab.
- The Entering Accounting Information on a Sales Transaction subtab.
- The Entering Relationships on a Transaction subtab.
- The Associating Sales Teams with Customers and Transactions subtab.
- The Entering Communication Information on a Transaction subtab.

Printing a Sales Receipt

To print receipts in PDF format, you need Adobe® Reader®. Visit the Adobe Web site to download the latest version at no charge.

To print a single sales receipt:

1. Go to Opportunities > Transactions > Cash Sales.
2. On the **Cash Sale** page, complete the information as appropriate.
3. Click **Save & Print**.

    NetSuite opens the printout for your receipt in an Adobe application document.

4. Click the printer button in the Adobe application frame.
5. Click **OK**.

You can also print sales receipts by going to the Opportunities > Transactions > Cash Sales. Then, on the Cash Sales page, click Print next to the receipt you want to print.

ORACLE® **NET**SUITE

If you enter multiple cash sales before printing, you can print all the receipts at once. Check the **To Be Printed** box on each transaction you enter.

To print sales receipts for multiple transactions:

1. Go to Customers > Transactions > Print Checks and Forms.
2. On the Print Checks and Forms page, click **Sales Receipts**.
3. On the Print Receipts page, if you use locations, choose the location you want to print receipts from.
4. Check the **Print** box by each receipt you want to print.
5. Click **Print**.

   If you have not enabled the Download PDF Files preference at Home > Set Preferences page, a preview of your receipts pops up in the Adobe application.

   If you have enabled the Download PDF Files preference, you must first save your receipts and then open them with the Adobe application.
6. Click the printer button in the Adobe application frame.
7. If you want to print multiple copies, specify the number on the print message that appears.
8. Click **OK**.

You can print a list of cash sale receipts by creating a search and printing the results page. This enables you to filter the list to a specific customer or date range.

Refunding a Cash Sale

A cash sale refund is a transaction that gives money back to a customer who immediately paid for goods or services using cash, a check or a credit card.

To refund a cash sale:

1. Go to Transactions > Customers > Refund Cash Sales.
2. Under Primary Information:

   a. In the **Custom Form** field, select a cash refund form.

   b. Accept the next consecutive refund number, or enter another.

   c. In the **Customer** or **Project** field, select the customer whose sale you are refunding.

   d. Check the **Create Check** box if you want to refund the money by check.

   e. Check the **Print Check** box to print it later from the checks queue.

   > (i) **Note:** This is the only way to print this check. If you click Print after you fill in the appropriate information on this page, it prints the refund form rather than your check.

   f. Select the bank account you are using for this refund.

   The currency associated with this bank account is shown here.

   g. If you use the Multiple Currencies feature, select the currency you want to use for this transaction. Only the currencies set on the customer's record are available in this field. The customer's primary currency is selected by default. For more information, see the help topic Customers and Multiple Currencies.

If you change the currency on the record, prices and amounts are updated to the currency you select.

h. You can change the exchange rate for this transaction only or update the rate on the currency record.

i. Accept today's date, or enter another.

j. Select the period you want to post this refund to.

k. If your customer paid by check, enter the check number.

l. Enter a memo with notes on the transaction.

You can change the sales effective date for this transaction. The sales effective date determines which commission plan and historical sales team this transaction applies to.

3. Under Sales Information:

a. Associate sales reps with this transaction by doing one of the following:

- If you do not use the Team Selling feature, select the sales rep or sales group in the **Sales Rep** field.

  The sales rep or sales group associated with the customer on this transaction is chosen by default.

- If you use the Team Selling feature, click the **Sales Team** subtab.

  Select the sales team for this transaction. For more information, see the help topic Associating Sales Teams with Customers and Transactions.

b. Select a partner to associate with this order. If you use the Multi-Partner Management feature, you can associate partners with this transaction on the Entering Relationships on a Transaction subtab.

c. Check **Exclude Commissions** to exclude this transaction and its subordinate transactions from inclusion in all commission calculations. For example, selecting this box on a sales order excludes the sales order and the resulting invoice from all commission calculations for all sales people.

d. You can change the sales effective date for this transaction. The sales effective date determines which commission plan and historical sales team this transaction applies to.

4. Under Classification, select a subsidiary, department, class, and location you want this order associated with.

> **Note:** If you use NetSuite OneWorld and the selected customer is shared with multiple subsidiaries, you can choose any subsidiary assigned to the selected customer. For information about sharing customer records with multiple subsidiaries, see the help topic Assigning Subsidiaries to a Customer.

The page for refunding a cash sale has several subtabs. The subtabs that display on the page are determined by the setting and options you have enabled. The following list includes possible subtabs.

- The Adding Items on a Sales Transaction subtab.
- The Entering Shipping Information on a Sales Transaction subtab.
- The Adding Billing Information to a Transaction subtab.

  Depending on you settings, billing information may display on the Payments subtab.
- The Payments subtab.
- The Entering Accounting Information on a Sales Transaction subtab.
- The Entering Relationships on a Transaction subtab.
- The Associating Sales Teams with Customers and Transactions subtab.

- The Entering Communication Information on a Transaction subtab.

If you refunded your customer in the form of a check and click Print, it prints your refund form rather than your check. To print this check, go to Customers > Transactions > Print Checks and Forms.

Approving Cash Sales that Have a Payment Hold

Cash sales that have a payment hold are saved with the Unapproved Payment status and are non-posting until they are approved.

> ⚠️ **Important:** Cash sale transactions flagged with a payment hold are not saved if the Preserve Transactions when Payment is on Hold preference is disabled. You can find this preference on the Items/Transactions subtab at .

View payment event details of the unapproved cash sale and determine how to proceed. You can delete the cash sale or override the payment hold after reviewing the cash sale.

Cash sales that have a payment hold can be approved in one of the following ways:

- Manually

  To approve a cash sale, open the cash sale, and then click the Override Payment Hold button. The ledger account on the transaction is determined depending on the account selected on the payment method record.

  Only users with a role that includes the Override Payment Holds permission can access the Override Payment Hold button on a cash sale transaction.

  > ❌ **Warning:** When you approve a transaction with the Override Payment Hold button, NetSuite does not send another request to the gateway to validate the payment. Before you click this button, make sure you have validated the payment outside of NetSuite. For example, check your bank account or contact the gateway back office.

- Automatically

  In some cases, the gateway may later confirm the payment by sending a new request to NetSuite:

  - If the request contains the Accept status, the transaction status automatically changes to Deposited or Not Deposited. The ledger account on the transaction is determined depending on the account selected on the payment method record.

  - If the request contains the Reject status, the transaction remains non-posting and has the Unapproved Payment status.

Viewing Cash Sales that Have a Payment Hold

To view cash sale transactions that have a payment hold, create a saved transaction search as follows:

1. Go to Opportunities > Transactions > Manage Payment Holds.
2. Click **Transaction**.
3. In the **Filter** field on the Criteria subtab, do the following:
   - Set **Payment Event Result** to **Payment Hold**.
   - Set **Type** to **Cash Sale**.

For more information about saved searches, see the help topic Defining a Saved Search.

ORACLE® **NET**SUITE

Managing Undeposited Cash Sales

If you receive payment by cash or check, your bank account is not credited until you deposit the funds.

To enter a cash sale and place it in Undeposited Funds:

1. Go to Opportunities > Transactions > Cash Sales.
2. On the Cash Sale page, select a customer and enter the transaction information.
3. Select **Undep. Funds**.
4. Click **Save**.

Then, when you go to Transactions > Bank > Make Deposits (Administrator), this sale will appear on the Payments subtab as an item ready to be deposited to your bank account.

If payment is by credit card, and your bank account is automatically credited, then you will place the funds into a bank account.

To enter a cash sale and place it in a bank account:

1. Go to Opportunities > Transactions > Cash Sales.
2. On the Cash Sale page, select a customer and enter the transaction information.
3. In the **Account** field, select a bank account from the list.
4. Click **Save**.

When you view cash sales you have entered previously, they are marked **Deposited** or **Not Deposited** at the top of the page. To view a cash sale, go to Opportunities > Transactions > Cash Sales, and click **View** next to the sales order you want to see.

ORACLE® **NET**SUITE

Grid Order Management

Grid Order Management Overview

The Grid Order Management SuiteApp provides the ability to use a grid format for entering and printing orders for inventory items or assembly items, with attributes such as color and size. The Grid Order Management SuiteApp also provides the ability to create custom grid print templates and assign them to transactions.

Use grid templates when creating your order transaction. As you create a grid order, you can view item information such as the item name, location, available quantity, and price. This streamlined grid format can save order entry time, increase the accuracy of orders for like items, and give users the opportunity to sell or fulfill orders faster.

Grid order entry is available for sales orders, purchase orders, transfer orders, and quotes.

Standard grid order printing is available for sales orders and purchase orders.

For transactions where grid entry or standard grid printing is not available, you can set up grid print templates to enable you to print items in grid format.

Grid print templates can be used for sales orders, purchase orders, quotes, cash sales, invoices, picking tickets, and packing slips.

ORACLE® NETSUITE

Bulk grid printing is available for transfer orders, quotes, cash sales, invoices, picking tickets, and packing slips.

See the following table of features available for each transaction or form:

Transactions	Available Features			
	Grid order entry	Standard grid order printing	Printing using grid print templates	Bulk grid printing
Sales order	Y [1]	Y	Y	N
Purchase order	Y	Y	Y	N
Transfer order	Y	N	N	Y
Inventory adjustment	Y	N	N	N
Quote	Y	N	Y	Y
Cash sale	N	N	Y	Y
Invoice	N	N	Y	Y
Picking ticket	N	N	Y	Y
Packing slip	N	N	Y [2]	Y [2]

[1] Multi-grid order entry is available for sales orders only.

[2] Grid print templates can be used to print packing slips for item fulfillments that were created from sales orders or transfer orders only.

For a video introduction to Grid Order Entry, see Grid Order Entry for Sales Orders and Grid Purchase Order. For more information about the grid printing options, see the help topic Grid Printing.

> ⓘ **Note:** For better performance of Grid Order Management, use Mozilla Firefox or Google Chrome.

Grid Order Management SuiteApp Availability

To purchase the Grid Order Management SuiteApp, contact your NetSuite account manager.

To install the SuiteApp, see the help topic Installing the Grid Order Management SuiteApp.

Limitations of Grid Order Management

Be aware of the following limitations of Grid Order Management:

- Grid Order Management supports the following item types only:
  - Inventory items (Lot Numbered and Serialized)
  - Assembly items (Lot Numbered and Serialized)
  - Matrix items (Assembly, Inventory)

    > ⓘ **Note:** Matrix items for Non-Inventory, Other Charge, and Service items are not supported.

- Customizations on order transaction forms are not reflected on the Grid Order Entry form.

ORACLE® **NETSUITE**

- If you use the Advanced Bin/Numbered Inventory Management feature, grid matrix templates for inventory adjustments cannot support serialized and lot numbered items.
- If you use Multiple Currencies, the selected currency is applied across all order related transactions. Therefore, it cannot be changed. For more information, see the help topic Multiple Currencies and Vendors.
- After installing Grid Order Management, you can use grid print templates to print new transactions and forms. For existing transactions, you must edit and save the record to display the Print Grid option. You do not need to perform this step for standard grid order printing. For more information, see the help topic Grid Printing.
- Grid order printing is not available for inventory adjustments.
- Multi-Grid Order Entry is available for sales orders only.
- The Grid Order Entry form does not display on a mobile device.
- Only the use of the **%** wildcard character is supported to search for locations on the **Grid Matrix Information** subtab of parent matrix item records and for templates on the Grid Order Entry form of transactions. See the following examples to search for column values that begin, end, or contain the characters you specify:
  - **str%** – Retrieves values that begin with **str**
  - **%str** – Retrieves values that end with **str**
  - **%str%** – Retrieves values that contain **str**

Other limitations and considerations are included in the following topics:

- Setting Up Grid Templates
- Applying Grid Attributes to Items
- Creating Grid Orders
- Grid Printing
- Bulk Grid Printing
- Viewing Matrix Items in Grid Format

Setup Requirements for Grid Order Management

See the following topics for information on how to setup the Grid Order Management SuiteApp:

- Installing the Grid Order Management SuiteApp
- Roles and Permissions for Grid Order Management

Checking Prerequisites for Grid Order Management

Before installing Grid Order Management, ensure that the required features are enabled in your account. Go to Setup > Company > Setup Tasks > Enable Features.

- General features
  - On the **Items & Inventory** subtab, check the box for the following options:
    - Inventory
    - Assembly items
    - Matrix items
  - On the **SuiteCloud** subtab, check the box for the following options:
    - Custom Records

ORACLE® **NETSUITE**

- Client SuiteScript
- Server SuiteScript

> ℹ️ **Note:** If you want to use standard grid order printing or grid print templates, you must enable the **Advanced PDF/HTML Templates** feature.

For the following prerequisites, enable the features for transactions where you want to enter grid orders and use grid print templates.

- Features for grid sales orders
  - On the **Transactions** subtab, check the **Sales Orders** box.
  - If the Demand Planning feature is enabled in your account, the ship date you entered in the Grid Order Entry form is assigned as ship date for all items in the grid. This condition only applies to items that are submitted for the first time. For more information, see the help topic Creating Grid Orders.

- Features for grid purchase orders
  - On the **Transactions** subtab, check the **Purchase Orders** box.
  - On the **Order Management** subtab, check the **Allow Purchase of Assembly Items** box.

- Features for grid transfer orders
  - On the **Transactions** subtab, check the **Transfer Orders** box.
  - For OneWorld accounts, check the **Multi-Location Inventory** box on the **Items & Inventory** subtab.

- Features for grid inventory adjustments
  - On the **Transactions** subtab, check the **Inventory Adjustment** box.
  - For OneWorld accounts, check the **Multi-Location Inventory** box on the **Items & Inventory** subtab.

- Features for estimates

  On the **Transactions** subtab, check the **Estimates** box.

For more information about enabling required features, see the help topic Enabling Features.

Installing the Grid Order Management SuiteApp

> ⚠️ **Important:** The Grid Order Management SuiteApp is a shared bundle. To install the SuiteApp, your NetSuite account must be listed as a Shared Account ID for the bundle. Only administrators can install this SuiteApp. To purchase the SuiteApp, contact your NetSuite sales representative.

To review the required features and preferences before you install the SuiteApp, see the help topic Checking Prerequisites for Grid Order Management.

To install the Grid Order Management SuiteApp:

1. Go to Customization > SuiteBundler > Search & Install Bundles.
2. On the Search & Install Bundles page, use the following information to search for the SuiteApp:
   - Bundle Name: **Grid Order Management**
   - Bundle Id: 41296
   - Availability: Shared

ORACLE® **NET**SUITE

3. Optionally, click the Grid Order Management name link to display its Bundle Details page.

   - To review documentation for the SuiteApp, click the Documentation link.
   - The **Overview** subtab displays the SuiteApp abstract and description.
   - The **Components** subtab lists bundle objects, including their custom script Ids, referencing objects, and lock status.

   For more information, see the help topic Bundle Details.

4. Click **Install**.

   If asked, indicate your agreement to allow NetSuite to automatically upgrade the SuiteApp in your account when new updates become available.

   During the installation, you can click **Refresh** to get the latest status.

After installing the SuiteApp, you can set the roles and preferences according to your company's requirements. For instructions, see the following topics:

- Roles and Permissions for Grid Order Management
- Setting Grid Order Management Preferences

> ⓘ **Note:** Grid Order Management is a managed SuiteApp. When a new version of this SuiteApp becomes available, it is automatically updated in accounts where it is installed.

Roles and Permissions for Grid Order Management

- Grid Order Management Custom Roles
- Grid Order Management Permissions

Grid Order Management Custom Roles

After you install the Grid Order Management SuiteApp, the following grid custom roles become available:

- CEO - Grid Order Entry
- CFO - Grid Order Entry
- Sales Manager - Grid Order Entry
- Sales Vice President - Grid Order Entry
- Sales Administrator - Grid Order Entry
- Sales Person - Grid Order Entry

These roles are already configured with a default set of permissions required to use Grid Order Management. Administrators can assign the roles. The grid custom roles can also be used as templates for creating new roles or modifying existing ones. For more information, see the help topics Assigning Roles to an Employee and Customizing or Creating NetSuite Roles.

NetSuite center views can vary depending on your role. The following are role-specific views of the NetSuite center for Grid Order Management:

- **Administrator** – Lists > Grid Order Entry
- **Executive** – Sales/Marketing > Grid Order Entry
- **Sales or Accounting** – Customer > Grid Order Entry

The following list shows the different navigation paths to create a grid template, depending on the role:

Role	Navigation
Administrator	Lists > Grid Order Entry > Grid Templates
CEO - Grid Order Entry	Sales/Marketing > Grid Order Entry > Grid Templates
CFO - Grid Order Entry	Customers > Grid Order Entry > Grid Templates
Sales Manager - Grid Order Entry	Customers > Grid Order Entry > Grid Templates
Sales Vice President - Grid Order Entry	Customers > Grid Order Entry > Grid Templates
Sales Administrator - Grid Order Entry	Customers > Grid Order Entry > Grid Templates
Sales Person - Grid Order Entry	Customers > Grid Order Entry > Grid Templates

Grid Order Management Permissions

You can use the Mass Update feature to add, remove, or change the level of permission for multiple roles at the same time, instead of editing roles individually. For more information, see the help topic Mass Updating a Permission on Custom Roles.

To view the default permissions assigned to these roles, go to Setup > Users/Roles > Manage Roles and click the link for the role.

The following table lists the record permissions required to use Grid Order Management:

Permission	Subtab	Minimum Permission Level
Apply Attribute	Custom Record	Full
GOE - Grid Item	Custom Record	Full
GOE - Grid Item Template	Custom Record	Full
GOE - Grid Matrix	Custom Record	Full
GOE - Grid Matrix Template	Custom Record	Full
GOE - Grid Order Item	Custom Record	Full
GOE - Grid Order Template	Custom Record	Full
GOE - Preferences	Custom Record	Full
Grid Attribute	Custom Record	Full
Grid Attribute - Value	Custom Record	Full
Grid Template	Custom Record	Full
Custom Record Types	Setup	Edit
Custom Item Fields	Setup	Edit
Custom Record Entries	Lists	Edit

The following table lists the specific record permissions required to use grid order printing:

Permission	Subtab	Minimum Permission Level
Subsidiaries (applicable to OneWorld accounts)	Lists	View

ORACLE® **NET**SUITE

Permission	Subtab	Minimum Permission Level
GOE - Grid Order Template	Custom Record	Full
GOE – Grid Order Item	Custom Record	Full

To use grid print templates, the role must have access to the File Cabinet.

Permission	Subtab	Minimum Permission Level
Documents and Files	Lists	Full

On the role record of the **Forms** subtab, click the **Custom Record** subtab. In the **Enabled** column, verify that all Grid Order Entry forms are set to **Yes**. See the following table for the complete list of forms:

Type	Form Name	Notes
Apply Attribute	Standard Apply Attribute Form	-
Apply Attribute	GOE - Apply Attribute Form	Set as preferred
GOE - Grid Item	Standard GOE - Grid Item Form	-
GOE - Grid Item Template	Standard GOE – Grid Item Template Form	-
GOE - Grid Matrix	Standard GOE – Grid Matrix Form	-
GOE - Grid Matrix Template	Standard GOE – Grid Matrix Template Form	-
GOE - Grid Order Item	Standard GOE – Grid Order Item Form	-
GOE - Grid Order Template	Standard GOE – Grid Order Template Form	-
GOE - Grid Template	Standard GOE - Grid Template Form	-
GOE - Preferences	Standard GOE - Preferences Form	-
GOM Apply Attribute Log	Standard GOM Apply Attribute Log Form	-
GOM Background Process Request Log	Standard GOM Background Process Request Log Form	-
Grid Attribute	Standard Grid Attribute Form	-
Grid Attribute	GOE - Grid Attribute Form	Set as preferred
Grid Attribute - Value	Standard Grid Attribute - Value Form	-
Grid Attribute - Value	GOE - Grid Attribute - Value Form	Set as preferred

Setting Grid Order Management Preferences

In Grid Order Management, you can set preferences for the Grid Order Entry form and Grid Printing feature. The navigation paths used in the following procedures are based on the Administrator role. If you are not an administrator, you might see a different view of the NetSuite center. For more information, see the help topic Roles and Permissions for Grid Order Management.

Setting Grid Order Preferences

Grid order preferences enables you to modify the settings of the Grid Order Entry form.

ORACLE® **NET**SUITE

To set grid order preferences:

1. Go to Lists > Grid Order Entry > Set Grid Preferences.
2. In the **Grid Order** tab, set the following preferences:
   - **Default No. of Decimal Places** – Enter the number of decimal places for percentages in grid templates and Grid Order Entry form. The default value is 2 and the maximum value that can be specified is 5 decimal places.
   - **Percentage Tolerance** – Enter the tolerance value that is used when the total percentage is not equal to 100%. You must enter the value in decimal form. The value you entered is applied to the minimum and maximum tolerance.

     By default, the tolerance is set to 0.01 which limits the total percentages from exceeding by 1% above or below 100%. For example, the total is either 104.3% or 97.03%. You cannot submit the grid order because it exceeds the specified percentage tolerance.

     > **ⓘ Note:** The Percentage Tolerance preference does not apply to inventory adjustments.

   - **Enable Quantity Distribution** – Check this box to enable automatic distribution of the total quantity across the items on a Grid Order Entry form. The distribution is based on percentages defined on your grid template. This preference is selected by default.
   - **Show Percentage Column** - Check this box to show the percent columns on the Grid Order Entry form. This preference is enabled by default.
   - **Enable Multi-Grid Order Entry** – Check this box to enter grid orders using multiple templates in one Grid Order Entry form. The Order Summary table in the Grid Order Entry form lists the orders you entered in the grid templates. For more information, see the help topic Entering Multi-Grid Orders.
3. Click **Save**.

Setting Grid Printing Preferences

Grid printing preferences enables you to modify the settings for printing grid orders or templates.

To set grid printing preferences:

1. Go to Lists > Grid Order Entry > Set Grid Preferences.
2. In the **Grid Printing** tab, specify an email address for bulk grid printing notifications in the **Email Recipients for Errors** field. If you leave this field blank, the email notifications are sent to administrators.

   > **✔ Tip:** To send notifications to multiple recipients, enter a group email address.

3. Select a grid print template for each transaction or form. You can select a default print template or customized print template that you can use for grid printing. If you do not want to set up grid printing, select the **No Grid Template** option from the list.

   By default, the default grid templates provided by the Grid Order Management SuiteApp are selected as preferences for the following transactions and forms:
   - **Quote** - wd_gom_template_qtgridprintout.xml
   - **Cash sale** – wd_gom_template_csgridprintout.xml
   - **Invoice** – wd_gom_template_ivgridprintout.xml
   - **Picking Ticket** – wd_gom_template_ptgridprintout.xml

ORACLE® NETSUITE

- **Packing Slip** – wd_gom_template_psgridprintout.xml
- **Purchase Order** – wd_gom_template_pogridprintout.xml
- **Sales Order** – wd_gom_template_sogridprintout.xml

4. Click **Save**.

You can use advanced print templates that have been customized for grid printing. For more information about customizing print templates, see the help topic Customizing Advanced Print Templates for Grid Printing.

For customizing the grid for printing purchase orders and sales orders, see the help topic Customizing the Grid for Printing Purchase Orders and Sales Orders.

Custom templates must be uploaded to a specific File Cabinet folder. For more information, see the help topic Customizing the Grid for Printing Purchase Orders and Sales Orders. When you delete a template used for grid printing, you must edit your Grid Printing preferences.

Setting Up Grid Templates

You can set up a grid matrix or grid item template depending on the item type. Use grid matrix templates for inventory and assembly matrix items. Use grid item templates for inventory and assembly items, both lot numbered and serialized types. See the following topics for more information about each of these templates:

- Setting Up Grid Matrix Templates
- Setting Up Grid Item Templates

Note the following when setting up grid templates:

- Grid Order Management can optimally handle up to 1000 matrix templates and 1000 item templates.

  > ⚠ **Important:** In NetSuite OneWorld accounts where items can be shared by multiple subsidiaries, you can set up a maximum of 1000 grid templates for better performance of the grids.

- Grid templates can support a maximum product of 200 values as grid attributes. To identify if a grid template exceeds the maximum number set for grid attributes, multiply all values specified for each grid attribute. You cannot create grid templates for parent items with a product of more than 200 grid attributes.

  For example, a parent matrix item that has 195 subitems contains the following attributes:

  - 26 colors
  - 3 sizes
  - 3 fabrics

  In this example, a total of 234 attributes can be derived from multiplying all values specified for each grid attribute. The total exceeds the maximum product number of grid attributes for a matrix template. Therefore, you cannot create a grid matrix template for this parent matrix item. The system displays an error message when the matrix template you want to create exceeds the maximum number set for grid attributes.

- Only matrix items with two or more attribute sets are supported. You can update an item record to add more attributes or values to a parent matrix item. For more information, see the help topic Editing Matrix Items.

- You cannot create grid matrix templates for matrix parent items with no subitems.

ORACLE® **NET**SUITE

- Creating and updating grid matrix and item templates on orders using CSV import and Web services are not supported.

- To maintain accuracy, avoid updating the name of used grid templates because the template name on associated transactions are not updated automatically. However, the new grid line items that you add to associated transactions use the updated name. This behavior results in transactions where line items use the same template but display either the previous or updated name. Names that are displayed in line items are also used for printouts generated through standard grid order printing only.

For limitations of Grid Order Management in general, see the help topic Limitations of Grid Order Management.

Setting Up Grid Matrix Templates

Grid matrix templates define how matrix items are organized on a transaction form. When you select a parent matrix item on the template, the row and column attribute fields are populated with properties that define the matrix item. When the matrix item is retrieved, the child matrix items are organized in the grid according to the row and column value combinations.

You can create grid matrix templates in bulk or one at a time. For instructions, see the following topics:

- Creating a Single Grid Matrix Template
- Creating Grid Matrix Templates in Bulk
- Creating a Copy of the Grid Matrix Template

You can view the list of grid matrix templates in Lists > Grid Order Entry > Grid Templates. To edit a template, click the Edit link for the template record. You can modify the settings and percentages assigned to the attribute values. If you update a template, existing orders that use the template are not updated automatically. For more information, see the help topic Editing Grid Orders.

> ⚠️ **Important:** You cannot inactivate a parent matrix item or delete a matrix item that is assigned to a grid matrix template. Additionally, you cannot delete a grid matrix template that is used on an order transaction.

> ℹ️ **Note:** The navigation paths used in the following procedures are based on the Administrator role. If you are not an administrator, you might see a different view of the NetSuite center. Users with the Sales Person role cannot delete grid matrix templates. For more information, see the help topic Roles and Permissions for Grid Order Management.

Creating a Single Grid Matrix Template

Use the following procedure to create a grid matrix template. To create multiple grid matrix templates in bulk, see the help topic Creating Grid Matrix Templates in Bulk.

To create a single Grid Matrix Template:

1. Go to Lists > Grid Order Entry > Grid Templates.
2. On the Grid Template page, click **New Grid Matrix Template**.

   > ℹ️ **Note:** If the **Matrix Items** feature is not enabled in your account, the **New Grid Matrix Template** button is not displayed. For more information, see the help topic Checking Prerequisites for Grid Order Management.

3. On the Grid Matrix Template page, enter values in the fields in the Matrix Item Definition section:

ORACLE® **NET**SUITE

1. In the **Matrix Item** field, select the item matrix you want to configure.

   When an item matrix is selected, the system populates the **Category** field with the item's properties, and sets default values in the **Column Attribute** and **Row Attribute** fields. If the matrix item is defined by more than two properties or categories, one property is automatically assigned as column attribute and the other properties as row attributes.

2. (Optional) In the **Description** field, provide a description for the template up to 300 characters.

3. In the **Column Attribute** field, select the property you want as column attribute.

   When you change the column attribute, the attribute you replaced is automatically assigned in the **Row Attribute** field.

4. In the Grid Template section, select the transactions where you want the grid template to be available. This enables you to open the Grid Order Entry form on the selected transactions.

   > ⓘ **Note:** If you use the Advanced Bin/Numbered Inventory Management feature, you cannot select the Inventory Adjustments transaction for lot numbered and serialized items. For more information, see the help topic Limitations of Grid Order Management.

5. Click **Get Item**. The items are placed in a grid, along with the matrix child items mapped to the row and column values.

6. In the grid, enter the percentage of the total order quantity you want for each column and row value. For example, you can use the distribution of percentages to control the distribution of item quantities across customers.

ROW PERCENTAGE 100.00	COLUMN PERCENTAGE 100.00			
COLOR - SIZE		SMALL 25.00	MEDIUM 50.00	LARGE 25.00
COLOR	PERCENT			
Ocean	20.00	Skinny Jeans -O-S	Skinny Jeans -O-M	Skinny Jeans -O-L
Midnight	50.00	Skinny Jeans -M-S	Skinny Jeans -M-M	Skinny Jeans -M-L
Honey	30.00	Skinny Jeans -H-S	Skinny Jeans -H-M	Skinny Jeans -H-L

   The row and column percentages are automatically adjusted as you enter the percentage for each attribute value. The total percentage should be equal to 100.

   The percentages defined on the matrix template are used when you enter the total quantity in your grid order. If you do not set the percentages, the total quantity is equally distributed across the items in your grid order.

7. Click **Save**.

   Clicking **New** clears the current template settings and displays a new blank template.

The grid matrix templates can now be used for grid order entry. For more information about creating grid orders, see the following topics:

- Entering Single Grid Orders
- Entering Multi-Grid Orders

Creating Grid Matrix Templates in Bulk

Grid matrix templates created in bulk can be automatically used in all supported transactions. You can edit a template to update its availability. In the **Available In** field of the template record, select the transactions where you want the template to be used. For more information, see the help topic Creating a Single Grid Matrix Template.

ORACLE® **NETSUITE**

To create grid matrix templates in bulk:

1. Go to Lists > Grid Order Entry > Grid Templates.
2. On the Grid Templates list, click **Bulk Create Grid Matrix Templates**.
3. On the Bulk Create Grid Matrix Templates page, click the Select Multiple icon located beside the Parent Matrix Items list box
4. On the pop up list, click an item name from the left pane to select it.

    Selected items are transferred to the right pane. On the right pane, click the **x** icon beside the item name to remove it from the Current Selections list.
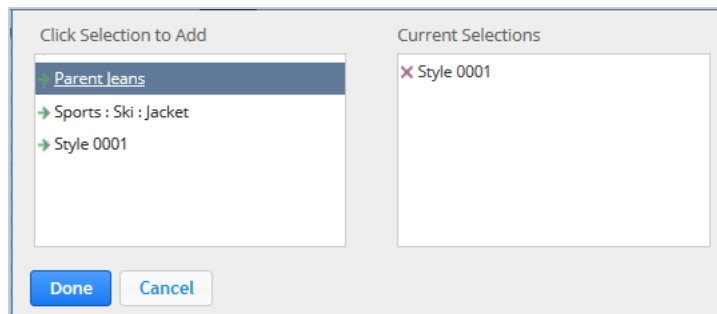
5. Click **Done** to close the popup window.
6. In the **Column Attribute** field, select the attribute that you want to display as column header in the grid matrix template.

    After you select the column attribute, the other attributes become row attributes in the grid template.
7. Click **Submit** to start the process and open the Grid Template Creation Log: Results page.

    The bulk creation of grid matrix templates may take some time to process. On the Grid Template Creation Log: Results page, you can monitor the processing status:

    - In the **Status** column, view the latest processing status.
    - In the **Error Details** column, view the total number of generated templates.

    > **(i) Note:** If not all templates have been generated successfully, view the matrix items without grid templates in the **Failed Items** column.
    >
    > The system does not generate templates for parent matrix items that do not have the selected column attribute.

Creating a Copy of the Grid Matrix Template

You can create copies of a grid matrix template for the same item. All template and item details are copied, except for the template name. You can edit some details of the copy before saving the template.

To create a copy of a grid matrix template:

1. Go to Lists > Grid Order Entry > Grid Templates.
2. On the Grid Templates list, click the View link for the grid template to be copied.
3. On the Grid Matrix Template page, click **Make Copy**.

    This button is available only in view mode.
4. On the template copy, enter a name for the grid matrix template.

ORACLE **NET**SUITE

You can update the description, selected transactions, and item percentages. For more information about the editable fields, see the help topic Creating a Single Grid Matrix Template.

5. Click **Save**.

Setting Up Grid Item Templates

To enter orders for multiple inventory and assembly items in the grid order, you must first configure items in a grid item template. Like grid matrix templates, grid item templates determine the categories and quantity distribution that are shown in the grid for an item. To create grid item templates, the following procedures must be completed:

1. Defining Grid Attributes and Creating Attribute Values
2. Applying Grid Attributes to Items
3. Creating a Grid Item Template

To review specific guidelines and limitations, see the help topic Setting Up Grid Templates. For limitations related to Grid Order Management in general, see the help topic Limitations of Grid Order Management.

Defining Grid Attributes and Creating Attribute Values

Grid attributes define product categories or the dimensions of items. For example, a company that sells apparel can set up items by creating attributes common to them like size, color, style, and cut. Values are created for each attribute to represent the range of options available (for example, small and medium for size). Finally, items are mapped to its attributes.

To help create well-defined grid item templates, create attributes for the hierarchical structure of categories, properties, characteristics, and dimensions of your items. Duplicate grid attributes are not allowed.

> **Note:** The navigation paths used in the following procedures are based on the Administrator role. If you are not an administrator, you might see a different view of the NetSuite center. For more information, see the help topic Roles and Permissions for Grid Order Management.

To define a grid attribute and create its values:

1. Go to Lists > Grid Order Entry > Define Grid Attribute > New.

   Alternately, click **New Grid Attribute** if you are on the Grid Attribute List page.

2. On the Grid Attribute page, enter a name for the attribute.

3. Click **Save**.

   The new grid attribute record is created and displayed. If you click **Save & New**, the system displays a new blank Grid Attribute page.

   The succeeding instructions show you how to add attribute values to the new grid attribute.

4. On the Grid Attribute page, click **New Grid Attribute - Value**.

5. On the Grid Attribute - Value page, enter a name for the attribute value.

ORACLE **NET**SUITE

Grid Attribute - Value

Beverage : Soda

[Save ▾] [Cancel] [Reset] | Actions ▾

GRID ATTRIBUTE
Beverage

VALUE *
Soda

6. Click **Save**.

   The new attribute value is added to the list on the Grid Attribute page.

   Alternately, click **Save & New** if you need to save and define another attribute.

> ⚠ **Important:** You can use Import Assistant to create and update grid attributes. The **Run Server SuiteScript and Trigger Workflows** option (Setup > Import/Export > CSV Import Preferences) must be enabled to correctly set the name of the values during record creation. For more information, see the help topic Importing CSV Files with the Import Assistant.

Editing grid attribute records

New grid attribute records are added to the Grid Attribute List. To view the list, go to Lists > Grid Order Entry > Define Grid Attribute. On the Grid Attribute List, you can edit a grid attribute if it is not mapped to items that have been used in a grid template.

To edit a grid attribute record:

1. Go to Lists > Grid Order Entry > Define Grid Attribute.
2. On the Grid Attribute List page, click the Edit link for the grid attribute you want to modify.

   Alternately, click **Edit** if you are already viewing the specific Grid Attribute page.
3. On the Edit Grid Attribute page, you may do any of the following:
   - In the **Name** field, change or correct the grid attribute name.
   - To delete the grid attribute record, select **Delete** from the Actions submenu.

     > ℹ **Note:** You cannot delete the record if the grid attribute is mapped to an item that is assigned to a grid template.

   - To add an attribute value, click **New Grid Attribute - Value**.

     Alternately, you can click the name link of any attribute value in the list. On the Grid Attribute – Value page, select **New** from the Actions submenu. Duplicate grid attribute values are not allowed.

   - To delete an attribute value, click the Edit link next to the attribute value. On the Edit Grid Attribute – Value page, select **Delete** from the Actions submenu.
4. Click **Save**.

After defining grid attributes and assigning attribute values, you can map the attributes to items. For mapping instructions, see the help topic Applying Grid Attributes to Items.

Applying Grid Attributes to Items

To configure items in a grid item template, an item must first be mapped to its attributes. The attributes are used to search for and organize the items in the grid item template. You can apply grid attributes to child matrix items if you want to assign item options to grid item templates.

ORACLE® **NET**SUITE

There are three ways to apply grid attributes to items. The following instructions show you how to map attributes using Apply Attribute to Item page and through the item record. The third way is to use the Import Assistant. For instructions, see the help topic Importing CSV Files with the Import Assistant.

Note the following guidelines and limitations specific to mapping of grid attributes:

- You can only apply grid attributes to inventory, assembly, and child matrix items.
- When using the Apply to Attribute Item page, the setup of your items might affect how they are displayed on the Apply to Attribute popup list:
  - Item names that exceed the recommended maximum of 180 characters might be displayed incorrectly.
  - Complete item names are used, including all ancestors of an item. A sample of a complete item name is displayed in this pattern – Parent 1: Child 1: Grand Child 1. Avoid using long names with minimal variation across parent and subitems, which causes duplicate items to be displayed. For example – LongItemName1: LongItemName2: LongItemName3.

For limitations of Grid Order Management in general, see the help topic Limitations of Grid Order Management.

> ⓘ **Note:** The navigation paths used in the following procedures are based on the Administrator role. If you are not an administrator, you might see a different view of the NetSuite center. For more information, see the help topic Roles and Permissions for Grid Order Management.

Applying Multiple Grid Attributes to Items

To apply multiple grid attributes to items:

The Apply Attribute to Item screen enables you to map several attributes to items in one transaction.

1. Go to Lists > Grid Order Entry > Apply Attribute to Item.
2. On the Apply Attribute to Item page, click the Select Multiple icon that is located beside the **Grid Attribute** area.
3. On the Apply Attribute to Item popup list, click the grid attributes from the left pane.

   If there are too many attributes on your left panel, use the **Search** field to narrow down the list. On the sample screenshot, only the attributes with the word "size" to their name are displayed on the left pane.
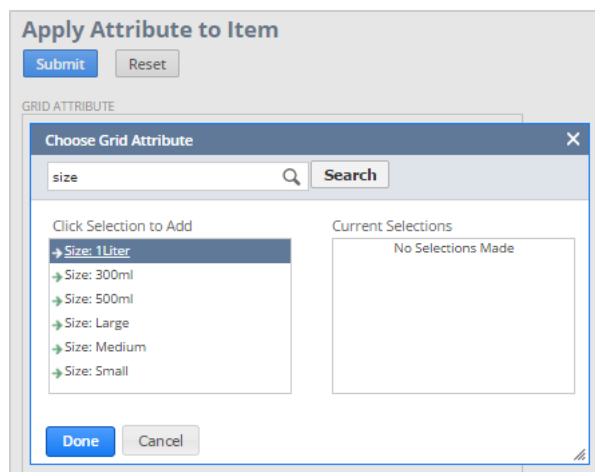
Grid attributes that you select are automatically displayed on the right pane. To remove a selection, click the **x** icon for the attribute.

4. After selecting the grid attributes, click **Done** to close the popup list.

5. For selecting the items, repeat Steps 2 – 4 in the **Items** area. On the popup list, select the items you want the attributes to be mapped to.

6. After selecting both attributes and items, click **Submit**.

   Clicking **Reset** removes the selections made to clear the two areas.

The mapping of attributes to items may take some time to process, especially if you need to map multiple attributes to items. After the mapping has been completed, you can see the attributes listed in each item record.

> ⓘ **Note:** Mapping jobs cannot be queued. If you have access to the Script Deployment page, you can check the status of mapping in the **Status** field.

Applying a Grid Attribute to an Item

To apply a grid attribute to an item:

On the Item page, you can map a grid attribute – value to an item, one at a time. You can also change or delete the mapping, if the item has not been used in a grid template.

1. Go to Lists > Accounting > Items.

2. On the Items list, click the link for the item to be mapped.

3. On the item page, click the **Grid Attribute** subtab.

   The attributes mapped to the item are displayed in the list.

4. Click **New Apply Attribute**.

5. On the Apply Attribute page, select a grid attribute and attribute-value.

When you select a grid attribute, only the associated attribute-values are included in the **Value** list. If you want to add a new attribute or value, select **New** from the list. The corresponding Grid Attribute or Grid Attribute-Value form is displayed in a popup window. For instructions on filling out either of the forms, see the help topic Defining Grid Attributes and Creating Attribute Values.

6. Click **Save**.

   Click **Save & New** if you want to apply another attribute to the item.

   If you need to change or delete a mapping, you can do the following on the **Grid Attribute** subtab:

   - Click the Edit link for the attribute to be updated. On the Apply Attribute page, you can select another attribute or attribute-value.

   - If an item has not been assigned to a grid template, you can delete the grid attribute value applied to it. To remove the mapping, select **Delete** from the Actions submenu. If the Apply

ORACLE® **NET**SUITE

Attribute List is displayed depending on your role, you should not see the mapping from the list.

- Save your changes to the record.

Creating a Grid Item Template

After you apply attributes to items, you can use the items in a grid item template. To place items in the grid, search for items by categories and assign grid attributes to the rows and columns. You can enter percentages for each item to be used in calculating the distribution of quantities across all items in the grid item template.

You can assign matrix item options to a grid item template if the items are mapped to grid attributes. For more information, see the help topic Applying Grid Attributes to Items. For guidelines and limitations when creating grid templates, see the help topic Setting Up Grid Templates.

> ℹ️ **Note:** The navigation paths used in the following procedures are based on the Administrator role. If you are not an administrator, you might see a different view of the NetSuite center. For more information, see the help topic Roles and Permissions for Grid Order Management.

To create a Grid Item Template:

1. Go to Lists > Grid Order Entry > Grid Templates.
2. On the Grid Template page, click **New Grid Item Template**.
3. On the Grid Item Template page, enter values in the fields in the Grid Item Definition section:
   a. For OneWorld accounts, select a subsidiary in the **Subsidiary** field.
   b. Enter a name for the grid item template.
   c. In the **Description** field, enter up to 300 characters for a description of the grid item template.
   d. In the **Select Filter** field, select the grid attributes you want to use as filters for the items

> ⚠️ **Important:** The **Select Filter** field lists all grid attributes. The values you select in this field are the first categories used to designate items on the template. These may be the primary requirements for the items you want to assign to the template. For example, if you want to create a grid item template for dresses and skirts of the same brand, select the attribute for the brand, as well as attributes for dresses and skirts. Sample grid attributes that you select as filters are Brand: Brand A, Apparel Category: Dresses, and Apparel Category: Skirts.

4. In the Grid Template section, enter the values in the fields.
   a. In the **Column Attribute** field, select the attribute you want to use as category for the grid columns. When an attribute is selected, the associated attribute values are listed in the **Column Values** field.
   b. In the **Column Values** field, select the attribute values for the grid columns. The attribute values are used to search for items that are mapped to them. The names of the attribute values are displayed in the grid as the column labels.
   c. In the **Row Attribute** field, select the attribute you want to use as category for the grid rows. When an attribute is selected, the associated attribute values are listed in the **Row Values** field.
   d. In the **Row Values** field, select the attribute values for the grid rows. The attribute values are used to search for items that are mapped to them. The names of the attribute values are displayed in the grid as the row labels.

ORACLE® **NET**SUITE

> **ℹ Note:** The column and row attributes you select can be any of those selected in the **Select Filter** field. These further define the items you assign to the template. These values may designate a subset of the items that are initially defined by the attributes you selected as filter

> **⚠ Important:** There is no limit to the number of attributes or attribute values you can select. When selecting atributes, ensure that the number of items returned does not exceed the limit defined for the grid item template. If the number of retrieved items exceeds the limit, consider setting up more than one grid template to set up subsets of the items defined by the attributes in the **Select Filter** field

5. Select the transactions where you want the grid template to be available.

   This enables you to open the Grid Order Entry form on the selected transactions.

6. Click **Get Item**.

   The retrieved items are displayed in the grid in the following manner and limitations:

   - The row and column attribute values are arranged in alphabetical order by default. You can rearrange the columns by drag and drop.

   - Where multiple items are mapped to a cell, you can select the item you want from the dropdown list. You can also select a blank value.

   - A maximum product of 200 values as grid attributes can be saved in the grid template. For more information, see the help topic Setting Up Grid Templates.

   - Same items in multiple cells are not allowed.

   - Item records that have been assigned to a grid template cannot be deleted.

7. In the grid, enter the percentage of the total order quantity for each attribute value in the column and row heading.

   As you enter a percentage, the **Row** and **Column Percentage** fields display the total percentage. The computed total should be equal to 100 percent. The percentages defined on the item template are used when you enter the total quantity in your grid order. If you do not set the percentages, the total quantity is equally distributed across the items in your grid order.

   If multiple items are retrieved for the attributes you selected, click the item on the grid cell to view the other options, and then select the item you want.

SIZE - COLOR		BLUE 50.00	RED 50.00	WHITE 0.00
SIZE	PERCENT			
Large	0.00	-	-	-
Medium	60.00	-	Girls T-Shirt V Neck -R-M	-
Small	40.00	Girls T-Shirt V Neck -B-S ▼	Girls T-Shirt V Neck -R-S	-
		-		
		Girls T-Shirt V Neck -B-S		
[Save] [Cancel] [New]		Netsuite T Shirt -B-S		
		T-Shirt V Neck-B-S		

8. Click **Save**.

   Clicking **New** clears the fields and displays a blank form.

Editing grid item templates

To view the list of existing grid item templates, go to Lists > Grid Order Entry > Grid Templates. From the Grid Template list, you can update a template by clicking the **Edit** link for the specific template. On the grid item template, you can change the description, settings, and percentages. Save the updated item template.

Deleting grid item templates

- You cannot delete a grid item template that has been used on an order transaction.
- Users with the Sales Person role cannot delete grid matrix templates. For more information, see the help topic Roles and Permissions for Grid Order Management.

Creating Grid Orders

Use the grid templates that you have set up to add orders to your transactions. Grid order entry follows the standard procedures for creating order transactions. You can use one or more templates in a grid order. For more information, see the following topics:

- Entering Single Grid Orders
- Entering Multi-Grid Orders

Use the following guidelines for creating grid orders:

- For better performance, add a maximum of 500 line items per transaction. You may encounter errors or slow processing when there are more than 500 line items in the transaction.
- Grid order entry does not include validation or autopopulation of values in standard mandatory fields, such as the Tax Code. This applies on the sales order form and custom mandatory fields for other SuiteApps.
- Item inventory count is based on the location that has been set in the transaction header if line-item locations is not used. Otherwise, item inventory count is based on line-item locations even if a location has been set in the transaction header. For more information about line-item locations, see the help topic Setting a Location on a Transaction.
- If you use Multiple Currencies, values for the rate and amount of line items are initially based on the base price set as currency of the parent company. When grid items are added as line items, the values follow applicable multicurrency rules and are reflected on the Grid Order Entry form.
- On the Grid Order Entry form, row level price totals and price totals use the pricing assigned at the item level. The total order, including all items, is priced on the **Items** subtab and incorporates order level discounts. To view actual price totals on the Grid Order Entry form, click the **Open** link for the template on the **Items** subtab.
- If you use Demand Planning for grid sales orders that are submitted for the first time, the ship date that you entered on the Grid Order Entry form is assigned to all items in the grid.
- For grid inventory adjustments:
  - If you use Advanced Bin/Numbered Inventory Management, you cannot use grid item templates that only have lot numbered or serialized items. When you use grid item templates with different item types, the grid cells for serialized and lot numbered items are disabled.
  - If you enter **0** in a grid cell for a specific item, the item is not added to the transaction line item.

For general guidelines and limitations of Grid Order Management, see the help topic Limitations of Grid Order Management.

Entering Single Grid Orders

You can add orders to transactions using one template per Grid Order Entry form. To do this, ensure that the item price for all price levels and currencies have been set up in the item record. Items with no

price cannot be added to the item sublist of a transaction. To review the guidelines for grid order entry, see the help topic Creating Grid Orders.

If you want to use multiple templates in one Grid Order Entry form for sales orders, see the help topic Entering Multi-Grid Orders.

To enter a grid order:

1. Go to Transactions > (Transaction type).

   Follow the standard path for creating the transaction. For example, to create a sales order, go to Transactions > Sales > Enter Sales Orders.

2. On the order page, enter values in the Primary Information and Classification sections as you would in a standard order transaction. On a sales order page, you can also enter values in the Sales Information section.

   For instructions on creating each of the order transactions, see the following topics:

   - Creating Sales Orders
   - Entering a Purchase Order
   - Entering a Transfer Order
   - Adjusting Inventory
   - Preparing an Estimate

3. Click the **Items** subtab, and then click **Open Grid**.

   Alternatively, you can add the parent matrix item on the **Items** subtab if the matrix item is already assigned to a grid matrix template. Ensure that your browser is set to enable popup lists from **system.netsuite.com** to use the Grid Order Entry popup form.

   > ⓘ **Note:** The **Open Grid** button is not available to users that do not have access to the custom record types supported by Grid Order Management. For more information, see the help topic Roles and Permissions for Grid Order Management.

4. On the Grid Order Entry form, enter values in the Grid Order Information section.

   > ⓘ **Note:** The following steps apply to single grid and multi-grid order entry.

   a. In the **Name** field, select the name for the grid item or grid matrix template.

      To use the **%** wildcard in the **Name** field, see the help topic Limitations of Grid Order Management for the supported combinations. Results might not be displayed due to incorrect values or role restrictions. For Administrators, you can view the execution logs for error details.

      Based on your selected template, the **Type** and **Grid Attribute** fields are populated.

      > ⓘ **Note:** In OneWorld accounts, only the grid templates for items that are available to the transaction subsidiary are available for selection.

   b. Enter or select values based on the type of transaction.

      - **Sales orders and estimates** - In the **Expected Ship Date** field, enter the date you expect this item to be shipped from the vendor. You must enable the Demand Planning feature in your account to display this field.

      - **Inventory adjustments** - Select a location from the list of options, which are based on the subsidiary. You must enable the Multi-Location feature in your account to display this field.

ORACLE® **NETSUITE**

- **Transfer orders** - In the **Expected Receipt Date** field, enter the date when you expect to receive the item at the warehouse.

  If the Demand Planning feature is enabled in your account, enter the date in the **Expected Ship Date** field.

c. Specify a value for the order priority in the **Order Priority** field.

- For sales orders, the default order priority set for the customer is initially displayed. To assign an order priority to a transaction item, replace the default value in the **Order Priority** field.

- If you edit the items of a sales order through Grid Order Entry, the default order priority set for the customer is used for added items. To change the order priority of added items, specify a value in the **Order Priority** column of the **Items** sublist.

> ⓘ **Note:** Default order priority applies to sales orders and transfer orders only.

5. Enter values in the Order Details section.

> ⓘ **Note:** The following steps apply to single grid and multi-grid order entry.

If the **Enable Quantity Distribution** preference is selected on the Grid Preference page, perform steps **a** and **b**. For more information, see the help topic Setting Grid Order Management Preferences.

Changes to values in the line items are reflected when you reopen the Grid Order Entry form. For more information, see the help topic Editing Grid Orders.

a. In the **Order Quantity** field, enter your total order quantity.

b. Click **Calculate**.

The quantities are displayed for each row and column cell based on the percentages set in the grid template, as well as all totals and inventory levels. Any order quantity that is more than the available quantity for the item is indicated in red.

c. In the grid, click a cell to review information for that item.

The Item Information section displays selected details from the item record, including the grid attribute values that display for the item.

d. Review and specify rates.

Sales Orders:
For sales orders, the **Price Level** field on the Grid Order Entry form and the **Price Level** column in the Items sublist are available if the Multiple Pricing feature is enabled in your NetSuite account.
By default, the **Edit Rate** box or **Edit Rate and Price Level** box is **not** checked. This means that the system will use the NetSuite pricing hierarchy to populate the **Price Level** and **Rate** columns in the Items sublist (customer item pricing, group pricing, and customer pricing):
■ In accounts with the Multiple Pricing feature enabled, the **Estimated Rate** field shows the item price based on the selected price level: Price = Item Price Level starting from Base Price down to the Last Price Level (whichever has the first value)
■ In accounts without the Multiple Pricing feature: Price = Item.Base Price field (baseprice)
If the NetSuite item pricing hierarchy is used, it is possible that the values in the **Price Level** and **Estimated Rate** fields on the Grid Order Entry form do not match the values in the **Price Level** and **Rate** columns in the Items sublist.

ORACLE® **NETSUITE**

If you check the **Edit Rate** box or **Edit Rate and Price Level** box, then the system uses the value in the **Price Level** and **Estimated Rate** fields to populate the price level and rate values in the Items sublist.

To override the estimated rate:

- In accounts with Multiple Pricing enabled:
    1. Check the **Edit Rate and Price Level** box.
    2. Select a price level.
    3. To enter a custom rate, select **Custom** in the **Price Level** field, then enter a rate in the **Estimated Rate** field.

- In accounts without the Multiple Pricing feature
    1. Check the **Edit Rate** box.
    2. Enter a rate in the **Estimated Rate** field.

> ℹ️ **Note:** If you change the currency in the **Accounting** tab of the transaction, the **Estimated Rate** field displays the currency rate set in the item record.
>
> If the currency rate is not available, the exchange rate applies to the base currency of the customer record. The Quantity Pricing feature is not considered for the rate value.

Purchase Orders:

For purchase orders, the **Estimated Rate** field on the Grid Order Entry form shows the value that was saved in the **Purchase Price** field of the item record:

Price = Item.Purchase Price field (cost)

By default, the **Edit Rate** box is **not** checked. This means that the system will use the NetSuite pricing hierarchy to populate the **Rate** column of the Items sublist.

If the NetSuite item pricing hierarchy is used, it is possible that the value in the **Estimated Rate** field does not match the value in the **Rate** column in the Items sublist. For example, if the vendor has a preferred purchase price on the item record, the system uses that price to populate the **Rate** column.

If the **Edit Rate** box is checked, the **Estimate Rate** field becomes available for editing. The system then uses the value in the **Estimated Rate** field to populate the rate values in the Items sublist.

To override the estimated rate:

Check the **Edit Rate** box and enter a rate in the **Estimated Rate** field.

> ℹ️ **Note:** If you change the currency in the **Accounting** tab of the transaction, the **Estimated Rate** field displays the currency rate set in the item record.
>
> If the currency rate is not available, the exchange rate applies to the base currency of the customer record. The Quantity Pricing feature is not considered for the rate value.

e. To change an item quantity, click the cell, then enter the new value. Computed values on the grid are automatically recalculated when you change item quantities.

> ℹ️ **Note:** If you select the **Enable Quantity Distribution**, you cannot edit the item quantities in the grid. Percentages must be changed in the grid template. For more information, see the help topics Setting Up Grid Matrix Templates and Creating a Grid Item Template.

6. Click **Submit** to enter the grid order and return to the order transaction.

- Click **Submit & New** if you want to save the grid order and then enter another one.

- Click **Submit & Save** to enter the grid order and save the transaction. Use this option to enter transactions with large grid orders.

ORACLE® **NET**SUITE

7. Verify the line items on the **Items** subtab of the Order Transaction page. Ensure that you understand the following conditions when editing grid items in the sublist:

   ■ Changing the percentage in the **Quantity** field of a line item overrides the percentages defined in the grid template.

   ■ For grid inventory adjustments:

     □ The new quantity value is automatically computed and displayed in the line items.

     □ You cannot enter the unit cost for new orders. The unit cost automatically reflects the average cost when you have saved a new order. You can change the default value of the unit cost.

     □ If you use the Multi-Locations feature, changing the location of a grid line item automatically updates the location on the Grid Order Entry form.

8. After completing the order, click **Save** on the order page.

Entering Multi-Grid Orders

Multi-Grid Order Entry preference enables you to enter orders in multiple grid templates on one Grid Order Entry form. You can combine grid matrix and item templates on a form. Orders are listed in the Order Summary, which is available only when creating multi-grid orders. For more information about the preference, see the help topic Setting Grid Order Management Preferences.

Review the following guidelines when entering multi-grid orders:

■ You can enter multi-grid orders on sales orders only.

■ If you use the Demand Planning feature, you can enter the expected ship date on the Grid Order Entry form. This date applies to all items across all grid templates used on the form.

  □ If you want to combine orders in one form, it is best that they have the same expected ship date.

  □ You can change the expected ship date of items in the line items of the sales order. Change the dates one item at a time.

■ If you enter 0 in a grid cell when entering new orders in the grid, it is not added to the Order Summary. If you enter 0 or leave a grid cell blank when editing orders, the corresponding items are deleted from the Order Summary.

■ Duplicate templates cannot be added to the Order Summary. When you enter new orders using a template that has been added to the Order Summary, the quantities in the existing template are updated. However, in the transaction sublist, items are submitted as new orders and not added to existing templates that have been used in other grid orders.

■ After you have submitted a multi-grid order, you cannot view or edit it as a whole. You can edit submitted orders per template. For more information, see the help topic Editing Grid Orders.

■ For limitations and guidelines when entering grid orders, see the help topic Creating Grid Orders.

Other sections in this topic:

■ Viewing Order Summary Details

■ Updating Multi-Grid Orders

To enter multi-grid orders:

1. Go to Transactions > Sales > Enter Sales Orders Transactions > Sales > Enter Sales Orders.

2. On the Sales Order page, enter the details in the following sections: Primary Information, Sales Information, Classification. Specify the details as you would in a standard sales order transaction.

ORACLE **NET**SUITE

For detailed instructions, see Creating Sales Orders.

3. On the **Items** subtab, click **Open Grid**.

4. On the Grid Order Entry popup form, enter or select the values in the following sections: Grid Order Information and Order Details.

   For detailed instructions, see steps 4 and 5 of Entering Single Grid Orders.

5. After entering the quantity of your orders in the grid template, click **Add to Order**. Your order is entered in the Order Summary table.

6. To enter orders in another template, select the grid template from the list in the **Name** field. Every time you change the template selection, the grid cells are cleared. For each grid template that you use, you must enter the orders in the Order Summary by clicking **Add to Order**.

7. Click **Submit** to enter your grid orders and return to the sales order.

   On the Sales Order page, you can review the items from the grid on the **Items** subtab. You can update the details for specific items or add more items to the transaction.

8. After completing the sales order, click **Save**.

Viewing Order Summary Details

You can view multi-grid orders in the Order Summary table before submitting them in the sales order. When you add orders to the table, each item option from the grid template is listed with the subtotal quantity of your order and estimated price. Refer to the following table for the list of Order Summary details:

Column Name	Description
No.	Line number of the row item option
Template	Name of the grid template where you entered the order for the item option
Item Options	Row item option listed in the **Matrix Item Options** column of the grid template
Quantity per Row	Subtotal quantity of your order per row item option
Estimated Price per Row	Estimated subtotal price of your order per row item option

For reference, you can view the rate and quantity details of an item on the Item Information table. For more information about the Order Summary table, see the help topic Viewing Order Summary Details. If you want to edit or delete orders from the Order Summary, see the help topic Updating Multi-Grid Orders.

ORACLE **NET**SUITE

NO.	TEMPLATE	ITEM OPTIONS	QUANTITY PER ROW	ESTIMATED PRICE PER ROW	EDIT	DELETE
1	Matrix item 3x3	Small	4	12.00		
2	Matrix item 3x3	Medium	8	24.00		
3	Matrix item 3x3	Large	9	27.00		
TOTAL			21	63.00		

Updating Multi-Grid Orders

Before submitting a multi-grid order, you can edit or delete orders that have been added to the Order Summary. Quantity and price values are automatically recalculated based on your updates. After you have submitted a grid order to the transaction, you can open and edit orders per template. For more information, see the help topic Editing Grid Orders.

In the Order Summary table, the edit and delete icons for each item option are located in their respective columns.

NO.	TEMPLATE	ITEM OPTIONS	QUANTITY PER ROW	ESTIMATED PRICE PER ROW	EDIT	DELETE
1	Matrix item 3x3	Small	4	12.00		
2	Matrix item 3x3	Medium	8	24.00		
3	Matrix item 3x3	Large	9	27.00		
TOTAL			21	63.00		

- To edit a row item option, click its corresponding pencil icon in the **Edit** column.

  When you edit a row item option, the complete order is displayed in the grid in edit mode. Before editing a row item, ensure that there no entries in the grid that have not been added to the Order Summary table. All grid cells are cleared and replaced with values from the complete order.

  - Update the quantity of the row item, including other items in the order. If you change the value of a grid cell to 0 or leave it blank, the corresponding items in the Order Summary are deleted when you enter the updates.

  - To enter your updates in the Order Summary, click **Add to Order**.

- To delete a row item option, click its corresponding delete icon in the **Delete** column. The system displays a confirmation message. When you delete a row item option, the complete order is displayed in the grid. In case you deleted the row item option by mistake, you can add it again to the Order Summary table.

  To delete the selected row item only, click **Delete Row**.

  To delete all rows that belong to the selected template, click **Delete Template**.

For more information about the Order Summary table, see the help topic Viewing Order Summary Details.

Editing Grid Orders

Orders that have been submitted through single or multi-grid order entry can be edited per template.

Review the following guidelines when editing grid orders:

- Grid inventory adjustments cannot be edited.
- Changes to a grid template do not automatically reflect in the grid orders where the template is used. You must edit the grid order and reload the grid template or manually enter the changes in the line items.
- Users with no grid access cannot edit items that have been added through grid orders. When they edit other items and details on the transaction, the grid item details are retained.
- The Order Summary table is not displayed on the Grid Order Entry form in edit mode.
- When you create sales orders from estimates with grid orders, the grid order is carried over. You can edit the item quantities in the grid of the sales order. When you convert estimates to transactions not supported by grid ordering, you can edit the order in the item sublist of transactions. For the list of transactions supported by grid order entry, refer to the table on Grid Order Management.

To view other guidelines for grid order entry, see the help topic Creating Grid Orders. To view specific guidelines when updating multi-grid orders, see the help topic Updating Multi-Grid Orders

To edit a grid order:

1. Go to Transactions > (Transaction type).

   Follow the standard path for editing the transaction. For example, to edit a sales order, go to Transactions > Sales > Enter Sales Orders > List.
2. In the list of orders, click the Edit link for the specific order.
3. In the **Items** subtab of the order page, perform any of the following:
   - To enter a new grid order, click **Open Grid**.

     For instructions, see the following topics:
     - Entering Single Grid Orders
     - Entering Multi-Grid Orders

     > **Note:** The **Open Grid** button is not available to users that do not have access to at least one of the supported custom record types. For more information, see the help topic Roles and Permissions for Grid Order Management.

   - To edit an existing grid order, perform the following steps:
     1. In the **Grid Template** column, look for the grid template name used in the grid order.
     2. In the **Link** column, click the Open icon to display the existing grid order.

3. On the Grid Order Entry form, you can make the following changes depending on the grid preferences defined in your account.

   ▫ If you use the Enable Quantity Distribution preference, you can change the total order quantity. Enter the new value in the **Order Quantity** field, then click **Calculate**.

   ▫ To change specific item quantities, click the cell, then enter the value. Percentages and total values are automatically recalculated.

   > ⓘ **Note:** For grid inventory adjustments, setting the value of the cell to zero removes the corresponding grid line item from the transaction.

   For more information about grid preferences, see the help topic Setting Grid Order Management Preferences.

4. Click **Submit**.

   ▫ Click **Submit & New** if you want to save the grid order and then enter another grid order.

   ▫ Click **Submit & Save** to enter the grid order in the transaction and save the transaction. Use this option to enter transactions with large grid orders.

- Click a line item to change or add values.

  Changing the percentage in the **Quantity** field of a line item updates the percentage in its associated grid template when you open the grid.

- Apply line item discounts.

- Remove line items. To remove all transaction lines from the order, click **Clear All Lines**.

4. After completing the changes, click **Save** on the order page.

Grid Printing

Before you use grid printing, ensure that your account is updated with the required features and permissions. For the list of requirements, see the following topics:

- Checking Prerequisites for Grid Order Management
- Roles and Permissions for Grid Order Management

You can set preferences for printing grid orders and templates for each transaction or form. For instructions on how to set the preferences, see the help topic Setting Grid Printing Preferences.

Grid Printing Options

The following options are available for grid printing:

- Standard Grid Order Printing – Use this option to print grid orders in sales order, purchase order, and transfer order transactions.

- Using Grid Print Templates – Use this option to print matrix items in grid format for the following records:
  - cash sale
  - quote
  - invoice

ORACLE **NET**SUITE

- packing slip

  > **Note:** Only packing slips for item fulfillments created from sales orders and transfer orders are supported by grid print templates.

- picking ticket
- purchase order
- sales order
- transfer order

Review the following key points for the grid printing options:

- Printouts are created in PDF. There is a 10 MB limit for each PDF file.
- Items must be set up in grid templates. To use grid print templates in particular, items must be set up in grid matrix templates.
- Unlike grid print templates, printouts for grid order printing cannot be customized.
- The number format for the printout follows the user preference settings in your account. For more information, see the help topic General Personal Preferences.
- Grid printing is available on transaction pages only. This option is not available on the Print Checks & Forms page.
- By default, printouts include items that are not entered in a grid template. These items are displayed in the main item table.

For other considerations and limitations, see the help topic Limitations of Grid Order Management.

Standard Grid Order Printing

Ensure that you understand the following key points when using standard grid order printing:

- The printout of the grid order is optimized for the Landscape page orientation and standard A4 size. You may have to update your display or printer settings to view and print the complete page.
- There is a 4-column limit with 2 subcolumns each, for the attributes per table. Columns that exceed the limit are displayed in a separate table to prevent overlapping of text when too many columns are displayed in one table.
- Expense items are not included in the printout of a grid purchase order.
- For OneWorld accounts, the currency of the tax code summary is based on the currency of the subsidiary. The tax summary currency may be different from the transaction currency.
- Transaction columns on the printout that are specific to Grid Order Management are displayed only on transactions supported by grid printing.

Using Grid Print Templates

Before you print matrix items in grid format, you must consider the following guidelines in your account setup:

- Grid print templates must be assigned to the specific transactions and forms. For more information, see the help topic Setting Grid Order Management Preferences.
- The matrix items must be set up in grid matrix templates. For more information, see the help topic Setting Up Grid Matrix Templates.

Ensure that you understand the following key points when using grid print templates:

ORACLE® **NET**SUITE

- Grid printouts are optimized for the Portrait page orientation and for matrix items with 4 column attributes, having 2 subcolumns each. Overlapping of text might occur when you have too many attributes to display in the grid table.
- Blank rates in transaction line items are displayed with a value of zero in the grid table.
- The total value in the grid table is calculated based on rate and quantity. It may be different from the total value of the whole transaction, especially in cases where you use line item discounts, custom price levels, and blank rates.
- Line items for the same matrix item are consolidated in the grid table. If there are different rates for the same item in the sublist, only the rate of the last entered line item is displayed in the grid. For example, you entered two line items for Item A. If the first line item has a rate of 10 and the second line item has a rate of 15, the grid displays Item A with a rate of 15.

Customizing the Grid for Printing Purchase Orders and Sales Orders

You can use custom grid print templates for sales orders and purchase orders. The standard grid print template is selected by default in the Purchase Order and Sales Order fields on the Grid Printing subtab of the Grid Preferences page.

To select a different template, custom templates must first be uploaded to the Grid Templates folder in the file cabinet. After uploading, the templates are available for selection in the dropdown list on the Grid Printing subtab.

An administrator or developer with knowledge of FreeMarker and JSON can customize the standard grid print template, including the grid.

To customize the grid for printing purchase orders and sales orders:

The Grid Order Management SuiteApp provides standard grid print templates. You can create your custom grid print templates for purchase orders and sales orders based on the standard templates. The following table describes the recommended steps and procedures.

Step	Procedure
1. Download the standard templates provided by the Grid Order Management SuiteApp.	a. Go to Documents > Files > File Cabinet. b. Click **SuiteBundles**. c. Click the **Bundle 41296** folder. d. Click the **src** folder. e. Click the **template** folder. f. Click the **Grid Printing** folder. g. Click the Download link of the following templates: - **wd_gom_template_pogridprintout.xml** (for purchase order) - **wd_gom_template_sogridprintout.xml** (for sales order)
2. Edit the templates and save them with new names.	Grid customization for printing is currently available for purchase order and sales order only. For information on editing the grid, see the following topics: - Record Types Used as References in Grid Print Templates - Example of a 2x2 Grid Printout

ORACLE® **NET**SUITE

Step	Procedure
	■ Sample 2x2 Grid in JSON Format as Seen in record.custbody_gridoe_productgrpdata
	■ Sample Conversion of JSON Format to a 2x2 Grid
	■ Sample FreeMarker Code Snippet for a 2x2 Grid Printout
3. Upload the new templates to the File Cabinet.	a. Go to Documents > Files > File Cabinet. b. Click the **Templates** folder. c. Click the **Grid Printing Templates** folder. d. Click **Add File** to select a file from your computer.
4. To use the new template for printing, select the template names in the **Grid Print** subtab of the Grid Preferences page.	See the help topic Setting Grid Order Management Preferences.
5. To display the grid in a custom Advanced PDF/HTML template, use the same FreeMarker snippet as seen from the custom grid printout template.	See the help topic Setting Custom Forms to Use Advanced Templates. ⚠️ **Important:** Advanced PDF/HTML templates can access the field `record.custbody_gridoe_productgrpdata`. However, other references available for Grid Order Management custom grid printout templates may not be accessible in Advanced PDF/HTML templates. See also Sample FreeMarker Code Snippet for a 2x2 Grid Printout.

Record Types Used as References in Grid Print Templates

Reference in FreeMarker Template	Record Type
record	Transaction
parameters	Contains the following: ■ **barcode** - Returns true if the Barcoding and Item Labels feature is enabled. ■ **multiunitofmeasure** – Returns true if the Multiple Units of Measure feature is enabled. ■ **itemoptions** – Returns true if the Item Options feature is enabled.
subsidiaryRec	Subsidiary of the transaction
employeeSubsidiaryRec	Subsidiary of the logged in user
companyInformation	Company Information

Example of a 2x2 Grid Printout

Sample 2x2 Grid in JSON Format as Seen in record.custbody_gridoe_productgrpdata

The following JSON format represents the 2x2 grid in the example, as seen in the
`record.custbody_gridoe_productgrpdata field`.

```
[
  {
    "type": "MI",
    "nameId": "4",
    "name": "Basic Crew Neck Tee"
    "grid": {
      "rowlabel": "Color",
      "collabel": "Size",
      "rowcollabel": "Matrix Item Options",
      "header": [
        {
          "id": "Column1",
          "colAttr": "1",
          "name": "Small"
        },
        {
          "id": "Column2",
          "colAttr": "2",
          "name": "Medium"
        }
      ],
      "data": [
        {
          "id": "Row1",
          "rowattributeid": "1",
          "rowattribute": "blue"
          "columnids": [
            "Column1",
            "Column2"
          ],
          "Column1": {"internalid": 6316},
          "Column2": {"internalid": 6318},
        },
        {
          "id": "Row2",
          "rowattributeid": "2",
          "rowattribute": "red",
          "columnids": [
            "Column1",
            "Column2"
          ],
          "Column1": {"internalid": 6317},
          "Column2": {"internalid": 6319}
        }
      ]
    }
  }
]
```

Sample Conversion of JSON Format to a 2x2 Grid

The following table shows the conversion of the sample JSON format to the 2x2 grid printout example.

Matrix Item Option	Small	Medium
`(record.custbody_gridoe_ productgrpddata[0].grid. rowcollabel)`	`(record.custbody_gridoe_ productgrpddata[0].grid. header[0].name)`	`(record.custbody_gridoe_ productgrpddata[0].grid. header[1].name)`
Blue `(record.custbody_gridoe_ productgrpddata[0].grid. data[0].rowattribute)`	**Row 1 Col 1 Item ID:** `(record.custbody_gridoe_ productgrpddata[0].grid. data[0].`Column1`)`	**Row 1 Col 2 Item ID:** `(record.custbody_gridoe_ productgrpddata[0].grid. data[0].`Column2`)`
Red `(record.custbody_gridoe_ productgrpddata[0].grid. data[1].rowattribute)`	**Row 2 Col 1 Item ID:** `(record.custbody_gridoe_ productgrpddata[0].grid. data[1].`Column1`)`	**Row 2 Col 2 Item ID:** `(record.custbody_gridoe_ productgrpddata[0].grid. data[1].`Column2`)`

Important Notes

- The index of the grid in `record.custbody_gridoe_productgrpddata` is the same as the item's grid id column in the item sublist.
- It is possible to have an empty `record.custbody_gridoe_productgrpddata` field.
- It is possible to have an empty `{}` entry member in `record.custbody_gridoe_productgrpddata`. This means that the whole template and its items are deleted in the item sublist.

Sample FreeMarker Code Snippet for a 2x2 Grid Printout

The following FreeMarker code snippet represents the 2x2 grid printout example.

```
<#--- UTILITY FUNCTIONS -->
<#function parseJSON json>
       <#local null = 'null'> <#-- null is not a keyword in FTL -->
       <#return json?eval>
</#function>


<#--- PREP ITEM DATA FOR GRID-->
<#assign itemdetails = {}>
    <#list record.item as item>
        <#assign itemdetails = itemdetails + { "${item.olditemid}" : {"rate": item.origrate, "quantity": item.quantity}}>
    </#list>
<#--- START GRID---->
    <#assign gridfield = "{\"grids\": ${record.custbody_gridoe_productgrpdata} }">
    <#assign gridjson = parseJSON(gridfield)>
    <#assign counter = 0>
    <#list gridjson.grids as gridData>
            <table width="100%" id="gomp_templateid_1"}" class="grid_title_table">
        <tr>
          <td id="gomp_lbl_templateid" class="gridtemplate_label">Grid ID</td>
          <td id="gomp_inf_templateid" class="gridtemplate_info">1 - ${gridData.name}</td>
        </tr>
        </table>
    <#assign subcolumns = ['Rate', 'Quantity']>
    <table class="grid_table" id="grid_table1_1">
```

ORACLE® **NET**SUITE

```
        <thead class="grid_table_header">
            <tr>
                <th  rowspan="2" id="gomp_inf_th_attnames" width="150px">${gridData.grid.rowlabel} /
  ${gridData.grid.collabel}</th>
                <#list gridData.grid.header as column>
                    <th colspan="2" id="gomp_inf_th_colatt_${column.colAttr}">${column.name}</th>
                </#list>
                <th rowspan="2" id="gomp_lbl_th_qtypl" width="100px">Quantity<br/>per line</th>
            </tr>
             <tr id="gomp_lbl_tr_rateqty">
              <#list gridData.grid.header as column>
                    <#list subcolumns as subcolumn>
                        <th width="70px">${subcolumn}</th>
                    </#list>
              </#list>
            </tr>
        </thead>

        <tbody class="grid_table_body">
        <#list gridData.grid.data as row>
        <#assign qtypline = 0>
            <tr>
                <td class="grid_row_attribute">${row.rowattribute}</td>
                 <#list row.columnids as colid>
                    <#list subcolumns as subcolumn>
                        <td>
                        <#assign tmpid = row[colid]['internalid']?c>
                        <#if tmpid?has_content>
                          <#if itemdetails[tmpid]?has_content>
                                <#if subcolumn?lower_case == 'quantity'>
                              <#assign qtypline = qtypline+(itemdetails[tmpid][subcolumn?lower_case])?number>
                                ${itemdetails[tmpid][subcolumn?lower_case]}
                                <#else>
                                  ${itemdetails[tmpid][subcolumn?lower_case]?string[",##0.00"]}
                                </#if>
                          <#else>
                            <#if subcolumn?lower_case == 'quantity'>
                                ${0}
                            <#else>
                                ${0?string[",##0.00"]}
                             </#if>
                          </#if>
                        </#if>
                    </td>
                </#list>
            </#list>
            <!-- QUANTITY PER LINE -->
                <td>${qtypline}</td>
            </tr>
         </#list>
        </tbody>
   </table>
</#list>
<#--- END GRID ---->
```

Important Notes

- Convert `null` to `string` `"null"` when evaluating `record.custbody_gridoe_productgrpdata`. This is necessary because FreeMarker is unable to recognize null values. See the `parseJson` function in the sample code snippet.

- The field `record.custbody_gridoe_productgrpdata` does not contain details about the item in the grid. Added information about the item must be gathered from the item sublist of the transaction record. See `record.item` in the code snippet.

- You must include the following code when accessing the grid data.

```
<#assign gridfield = "{\"grids\": ${record.custbody_gridoe_productgrpdata} }">
```

Customizing Advanced Print Templates for Grid Printing

You can customize advanced print templates to enable grid printing of matrix items for the following transactions:

- quote
- cash sale
- invoice
- picking ticket
- packing slip
- purchase order
- sales order

After customizing the templates, you must store them in the File Cabinet. For more information, see the following topics:

- Using Grid Print Templates.
- Using Advanced PDF/HTML Templates to Customize Grid Printing Templates
- Uploading Customized Grid Printing Templates

Using Advanced PDF/HTML Templates to Customize Grid Printing Templates

Perform the following steps to use the Advanced PDF/HTML Templates feature for creating custom grid printing temlpates.

> ℹ️ **Note:** To update advanced PDF/HTML templates, you must have sufficient CSS and HTML knowledge. For more information, see the help topic Source Code Editing in the Template Editor.

To customize advanced print templates for grid printing:

1. Go to Customization > Forms > Advanced PDF/HTML Templates.
2. On the Advanced PDF/HTML Templates list, click the Customize or Edit link for the advanced print template that you want to update.
3. On the Advanced PDF/HTML Template page, click **Source Code** to transfer to this mode.
4. Insert the following codes:

ORACLE® **NETSUITE**

1. `{cssContent}`

   Insert this within the `<style> </style>` tags. This is for the formatting display of the grid table.

2. `{GOM_GRIDS}`

   Insert this within the `<body> </body>` tags, where you want to display the grid table. This is the placeholder for the grid table. In the default grid print templates, the grid table is displayed below the main item table.

5. Click **Save**.

   Click **Preview** if you want to view the changes before saving. For more information about advanced templates, see the help topic Advanced PDF/HTML Templates.

   After editing the advanced template, you must copy its contents to an XML file.

6. Create an XML file and copy all the contents of the advanced print template into this file.

   You now have an XML file of the grid print template. Refer to the following instructions for storing your grid print templates in the File Cabinet.

Uploading Customized Grid Printing Templates

Perform the following steps to upload your customized grid printing templates in the correct folder in the File Cabinet.

To add grid print templates to the Grid Printing Templates folder:

1. Go to Documents > Files > File Cabinet.
2. On the File Cabinet page, click Templates, then click Grid Printing Templates.
3. Click **Add File**.
4. On the File Upload popup window, select your custom XML file, and then click **Open** to add the file to the folder.

After you have stored your custom grid print templates in the File Cabinet, the templates become available for selection on the Grid Print subtab of the Grid Preferences page. To assign grid print templates to transactions, see the help topic Setting Grid Order Management Preferences.

Single Transaction Grid Printing

You can print transactions or forms with grid orders or with assigned grid print templates. The printout contains select company details, basic order information, and ordered items on the grid template. At the end of the printout is a summary of the totals, including a tax summary if applicable to the type of account. If your order has more than one grid template, all grid templates are included in the printout.

To print single transactions with grid orders:

1. Go to Transactions > (Transaction type).

   Follow the standard path for viewing or printing the transaction or form. For example:

   - To view a purchase order, go to Transactions > Purchases/Vendors > Enter Purchase Orders > List.
   - To print a picking ticket, go to Transactions > Sales > Enter Sales Orders > List.

2. On the list page, click the View link for the transaction.

3. On the transaction page, click **Print Grid**.

   For picking tickets, click **Print Grid Picking Ticket.** For packing slips, click **Print Grid Packing Slip.**

   The system displays a preview of the printout.

> (i) **Note:** The **Print Grid** option does not display in edit mode.

Bulk Grid Printing

Bulk grid printing is available only for transactions where you use grid print templates. You can generate a file in PDF that contains multiple transactions for printing. For information about grid print templates, see the help topic Using Grid Print Templates.

Key points when using bulk grid printing:

- File generation for more than 200 transactions might take more than an hour to complete. To lessen the processing time, reduce the number of transactions.

- To avoid exceeding the allowed script governance and PDF file size limit of 10MB, separate files are generated automatically when printing a large number of transactions. For more information, see the help topic Script Usage Unit Limits.

- On the Bulk Grid Printing page, the maximum number of rows displayed in the sublist per page depends on your general preference setting for list segments. For more information, see the Optimizing NetSuite section in the topic, General Personal Preferences.

- Email notifications about the outcome of the generated files are routed based on your email recipient preference. For information about this preference, see the help topic Setting Grid Order Management Preferences.

To print transactions in bulk:

1. Go to Lists > Grid Order Entry > Bulk Grid Printing.

2. In the **Document Type** field in the Bulk Grid Printing page, select the form or transaction type of the records to be printed.

   Use the available filtering and printing options:

Field Name	Description
Date From / Date To	Enter the start and end of the date range in their respective fields. The order date is used for filtering the documents, except for packing slips where the ship date is used. - Use Date From without Date To, if you want to retrieve all documents based on or later than the start date. - Use Date To without Date From, if you want to retrieve all documents based on or earlier than the end date.
Location	Select the location of the documents you want to retrieve. Only locations in the transaction header are available for selection. > (i) **Note:** Filtering by location is not applicable to packing slips. - Selecting **All** retrieves documents across all locations and includes those without location settings in the transaction header. - Selecting **None** retrieves only documents without location settings in the transaction header.

Field Name	Description
Allow Reprinting	Check the box to retrieve documents that have been previously printed. Otherwise, these documents are not included in your search results.

> **Note:** Changing filtering options automatically displays new results and clears any selected records from your previous results. View the number of retrieved records in the **Total** field, located above the sublist header.

3. Check the box for the records you want to include in the bulk grid printing file.

> **Tip:** Click the **Mark All** button to select all records on the current page. You can do the same for records on any succeeding pages. Click the **Unmark All** button to clear records across all pages.

   View the number of currently selected records in the **Selected Records** field.

4. Click **Print**.

   To clear the filter and any selected records across all pages, click **Reset**.

   The scheduled script that generates the bulk grid printing files is queued for processing. On the information banner at the top of the page, you can click the link to view the processing status. You are redirected to the Bulk Grid Printing Status page where you can monitor the progress. After the files have been generated, look for the log record in the sublist to view the PDF file and processing details:

   ▪ In the **File Link(s)** column, click the link to view and print the PDF file.

   ▪ In the **Error Detail(s)** column, you can view information about errors encountered during processing.

   For more information about bulk grid printing logs, see the help topic Viewing and Maintaining Bulk Grid Printing Logs.

Viewing and Maintaining Bulk Grid Printing Logs

▪ Viewing bulk grid printing logs

▪ Viewing bulk grid printing files

▪ Deleting bulk grid printing logs and files

Viewing bulk grid printing logs

You can view the bulk grid printing log records that contain links to the PDF file and processing details.

> **Note:** In case of errors encountered during bulk grid printing file generation, a user with the Administrator role can view the log records for any error details. To see more information about a specific error, administrators can view the script execution logs by going to Customization > Scripting > Scripts Customization > Scripting > Scripts.

To view bulk grid printing logs:

1. Go to Lists > Grid Order Entry > Bulk Grid Printing Status.

   On the Bulk Grid Printing Status page, all existing log records are displayed.

2. Use the available filtering options to narrow down the list of bulk grid printing logs.

ORACLE® **NET**SUITE

Field Name	Description
Document Type	Select the form or transaction type of the files associated with the bulk grid printing logs.
Status	Select the bulk grid printing status of the files associated with the logs.
Date From / Date To	Enter the start and end of the date range in their respective fields. The date in the print timestamp is used to filter the bulk grid printing logs. ■ Use Date From without Date To, if you want to retrieve all records based on or later than the start date. ■ Use Date To without Date From, if you want to retrieve all records based on or earlier than the end date.
Printed By	For Administrators, you can click one or more users from the list to retrieve all associated logs. Only users, both active and inactive, who have submitted bulk grid printing requests are included in the list. ⓘ **Note:** Non-administrators cannot use the **Printed By** filter. They can only view the logs for PDF files printed by themselves.

ⓘ **Note:** Changing filtering options automatically displays new results and clears any selected records from your previous results. View the number of retrieved records in the **Total** field, located above the sublist header.

To reload the bulk grid printing logs and clear the selected records, click **Refresh**.

After filtering and viewing the bulk grid printing logs, you can view the files for printing or delete log records.

Viewing bulk grid printing files

The generated PDF files are attached to their log records. In the **File Link(s)** column of a log record, click one or more PDF files to view and print.

Use the PDF filename to help you find which files to print. PDF filenames have the following format:

■ `Printout_<document type>_<print timestamp>.pdf`
■ If multiple files are generated, the following suffix is added to the filename: `_<file sequence number>`.

Deleting bulk grid printing logs and files

On the Bulk Grid Printing Status page, do either of the following:

■ To delete selected logs and files, check the box beside each record and then click **Delete**.
■ To delete all retrieved logs and files displayed on the current page, click **Delete All Logs & Files**.

Bulk grid printing logs and files that are already being processed cannot be deleted.

Viewing Matrix Items in Grid Format

Grid Order Management enables you to view item quantities and stock levels in grid format. On parent matrix item records, the **Grid Matrix Information** subtab displays the following item details

ORACLE® **NET**SUITE

for the parent and its child items: Quantity on hand, Quantity available, and Quantity on order. For information about these item quantities, see the help topic Assessing Stock Levels.

ITEM OPTIONS	SMALL			MEDIUM		
	QUANTITY ON HAND	QUANTITY AVAILABLE	QUANTITY ON ORDER	QUANTITY ON HAND	QUANTITY AVAILABLE	QUANTITY ON ORDER
Gold	25	25		17		
Silver	25	25		25	25	

Select Column View: Size — Select Location: - All -

Key points for the grid view:

- The **Grid Matrix Information** subtab is available on parent matrix item records for inventory items only.

- In the grid, take note of the following behaviors:
  - Items with no quantities are left blank.
  - Quantities or grid cells that are shaded gray indicate that the items are inactive or do not exist. For OneWorld accounts, this could indicate that items cannot be accessed within your subsidiary.
  - If you use Multiple Units of Measure and a stock unit setting, grid item quantities are displayed in base unit.
  - There is a maximum limit of 500 items that can be displayed in the grid. Exceeding this limit causes values in columns to overlap.

- Considerations for matrix item options:
  - Item options are assigned to rows and columns in alphabetical order. The first and any succeeding item options are assigned as rows. The last item option is assigned as the column. To replace the default column, see the help topic Changing the item column display.
  - Item option values are arranged based on settings and order of entry on the custom list of matrix options. For more information, see the help topic Setting Up an Item Matrix.

  > ✔ **Tip:** If you use numerical values for an item option, add a **0** to single digits to retain the order.

  - If only one item option has been set up for the parent matrix, no grid information can be displayed.
  - Updates to matrix item options are automatically reflected in the grid.

Changing the item column display

You can change the item option displayed in the column headers. From the list in the **Select Column View** field, select the item option you want to assign. The replaced item option is automatically assigned to the row and quantities.

Filtering items by location

If you use Multi-Location Inventory, you can view items from multiple locations available in your account. For OneWorld accounts, subsidiary locations are included. If your role does not have access to a subsidiary, you can view items based on the subsidiary on your employee record.

By default, item quantities from all locations are displayed in the grid. To narrow the results, select the specific location of items to be displayed in the **Select Location** field.

> **Note:** To use the **%** wildcard in the **Name** field, see the help topic Limitations of Grid Order Management for the supported combinations. Results might not be displayed due to incorrect values or role restrictions. For Administrators, you can view the execution logs for error details.

> **Tip:** If you want to switch to another location, click the double down arrows to see the list of all locations. Alternatively, you can enter the location name in the field to display the list of matching locations.

Importing Data for Grid Sales Orders and Purchase Orders

You can import the data of a transaction to your account by using the following methods:

- CSV Imports for Grid Sales Orders and Grid Purchase Orders
- Web Services Support for Grid Sales Orders and Grid Purchase Orders

CSV Imports for Grid Sales Orders and Grid Purchase Orders

When you use CSV Import for sales orders and purchase orders, you can do the following options in the imported transaction record:

- View the templates associated to the item record - See the help topic Viewing the Template of the Item Record.
- Print the grid from the transaction record - See the help topic Printing the Template from CSV Import.

You must follow these guidelines in importing sales orders and purchase orders:

- The CSV file must contain a Grid Item ID and Grid Template columns. These columns must correspond to an existing grid template. The Grid Template column must contain the internal ID of the grid template instead of the template name.

  To identify the template IDs, go to List > Grid Order Entry > Grid Templates. Use the internal ID that corresponds to the grid template. The values in the Grid Item ID column are used to identify the order of the templates.

- Add the Grid Template and Grid Item ID in the field mapping step when importing CSV records.

For more information on CSV imports, see the help topic Importing CSV Files with the Import Assistant.

> **Note:** You can only import up to 100 distinct grid templates.

Viewing the Template of the Item Record

When the CSV import is finished, it becomes available in the transaction type. You can view the templates associated to the sales order or purchase order CSV import. You can also apply changes to the CSV import by editing the item record.

ORACLE® **NETSUITE**

To view the template of the item record:

1. Go to Transactions > (Transaction type).

    Follow the standard path for viewing the list for a specific transaction type. For example, to view the list of sales orders, go to Transactions > Sales > Enter Sales Orders > List.

2. On the transaction type list, search for the CSV import.

3. Click **View**. The item is displayed with the templates associated to that record.

4. To edit the template, click the link of the template in the **Link** column.

Printing the Template from CSV Import

After the import is finished, you can print the grid directly from the CSV import that you created.

To print the grid from the CSV import:

1. Go to Transactions > (Transaction type).

    Follow the standard path for viewing the list for a specific transaction type. For example, to view the list of sales orders, go to Transactions > Sales > Enter Sales Orders > List.

2. Click **Print Grid**.

Best Practices for CSV Imports of Sales Orders and Purchase Orders

To successfully import sales orders and purchase orders transactions, you must apply certain conditions in the CSV file that you create. If the CSV file do not meet these conditions, the import results to a Failed status.

Before you start importing your records, ensure that the following conditions are applied:

- The Grid Item ID and Grid Template must be specified. Ensure that the values specified in the Grid Template column are valid template IDs.
- A grid item ID must be assigned to one grid template only.
- The items specified in the CSV file must belong to the correct grid template.
- An item can only be used once for each grid template.
- Grid templates with the same grid item ID must be grouped and arranged in sequence.
- You can only import up to 100 distinct template per transaction.
- The Grid Template must be in numeric format.
- The Grid Item ID must have a value of 1 or higher.

Web Services Support for Grid Sales Orders and Grid Purchase Orders

Web Services is another method to import transactions to your account. Similar to CSV Import, ensure that the Grid Item ID and Grid Template values are available to successfully import transactions to your NetSuite data.

For more information on using Web Services, see the help topic SOAP Web Services.

ORACLE® **NET**SUITE

Sales Order Reports

To view open customer orders that have not yet been billed, see Open Sales Orders Report.

To view backordered items, see Sales Back Order Report.

To view all orders per customer, see Sales Order Register Report.

To view all open transaction lines for items that are ready to be fulfilled, see Sales Orders Pending Fulfillment Report.

Open Sales Orders Report

The Open Sales Orders report lists open customer orders that have not yet been billed. The report includes the date of each sales order, order number, customer, status, and amount.

To view the Open Sales Orders report:

Go to > > Open Sales Orders.

A message appears indicating that your report is loading. The status bar indicates the progress as your report loads. You can click **Cancel Report** to stop the report from loading.

> ⓘ **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

For more information on reporting, see the help topic Reporting Overview.

Sales Back Order Report

The Sales Back Order report shows items that are backordered grouped by transaction.

For each transaction, the report shows:

- transaction number
- transaction date
- item name
- customer name
- quantity ordered
- quantity fulfilled
- quantity back ordered
- quantity on hand
- quantity on order

To view the Sales Backorder report:

Go to > > Sales Back Order Report.

A message appears indicating that your report is loading. The status bar indicates the progress as your report loads. You can click **Cancel Report** to stop the report from loading.

When using reports that display item quantities you should be aware of how kits and kit parts can affect the quantities displayed on reports. Using the filter Sold as a Kit/Assembly Member, you can modify reports to not display quantities for kit parts. See the help topic How Kits and Kit Parts Affect Quantities Displayed in Reports

> ⓘ **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

Sales Order Register Report

The Sales Order Register report lists all orders for a customer, giving the status and amount for each order.

If you are operating an online store with NetSuite, this report can help you keep track of the orders from your online store.

> ⓘ **Note:** The Orders and the Sales (Orders) key performance indicators (KPI) can be added to your dashboard to provide at-a-glance views of totals from the Sales Order Register. For more information on KPIs, see the help topic Key Performance Indicators Overview.

To view the Sales Order Register report:

Go to > > Sales Order Register.

A message appears indicating that your report is loading. The status bar indicates the progress as your report loads. You can click **Cancel Report** to stop the report from loading.

> ⓘ **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

Sales Orders Pending Fulfillment Report

The Sales Orders Pending Fulfillment report shows all open transaction lines for items committed and ready to be fulfilled on sales orders, grouped by sales order.

To view the Sales Orders Pending Fulfillment report:

Go to > > Sales Orders Pending Fulfillment.

A message appears indicating that your report is loading. The status bar indicates the progress as your report loads. You can click **Cancel Report** to stop the report from loading.

When using reports that display item quantities you should be aware of how kits and kit parts can affect the quantities displayed on reports. Using the filter Sold as a Kit/Assembly Member, you can modify reports to not display quantities for kit parts. See the help topic How Kits and Kit Parts Affect Quantities Displayed in Reports

ORACLE® **NET**SUITE

> **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

Software Vertical Contract Renewals

ORACLE® NETSUITE

Contract Renewals Overview

Software Vertical Contract Renewals SuiteApp gives your software company unprecedented ease in managing contract renewals of your install base.

This SuiteApp is designed for software companies who offer perpetually-licensed and term-licensed products, enabling you to effectively manage the recurring billing of both on-premise and on-demand software licenses and entitlements.

This SuiteApp offers:

- A flexible and powerful automated renewal process that lets you track renewable assets and maximize renewal revenue
- Seamless tracking of upsell and returns
- Complete visibility into your install base
- Multi-tier channel sales management

The Software Vertical Contract Renewals SuiteApp enables you to manage your renewable products and services as well as non-renewable items like training and consulting. In addition, maintenance and support fees can be applied and included in the renewal contract.

A flexible, automated renewal process generates a transaction at the end of a contract term that is, in turn, used to generate the renewal contract. This new contract includes items that you have set as renewable, such as products and module licenses, user licenses (or seats), and support and maintenance entitlements. One-time, non-renewable items like training and consulting are not typically renewed.

Availability

Software Vertical Contract Renewals is provided as a SuiteApp (a software vertical add-on module) developed by NetSuite. For information about this SuiteApp, contact your NetSuite account representative.

Read the following topics for more information about the features offered by this SuiteApp:

- Contracts and Renewals
- Upsell and Returns
- Support for Multiple Sales Channels
- Discounts

Contracts and Renewals

With Contract Renewals, when you create an initial sales order for a customer, the information from that order is used to generate a contract. The overall start and end dates of the sales order define the contract term, and items on the sales order generate contract items on the resulting contract.

The contract and contract items make up the install base of the customer. Contracts are listed on the Contracts subtab on customer records. You can also click the contract ID link on the original sales order to view a specific contract.

Prior to the end of the contract term, a renewal transaction is generated based on your setting for the Transaction Type to Create preference at Contract Renewals > Setup > Contract Renewals Preferences. When saved and billed, this order generates a new contract that includes the items from the customer's install base that are configured as renewable.

ORACLE NETSUITE

If you are using the channel management fields on customer records to track indirect sales relationships (including resellers and distributors), a single renewal transaction is generated for each combination of End User and Bill To Customer.

Contract Billing Flow
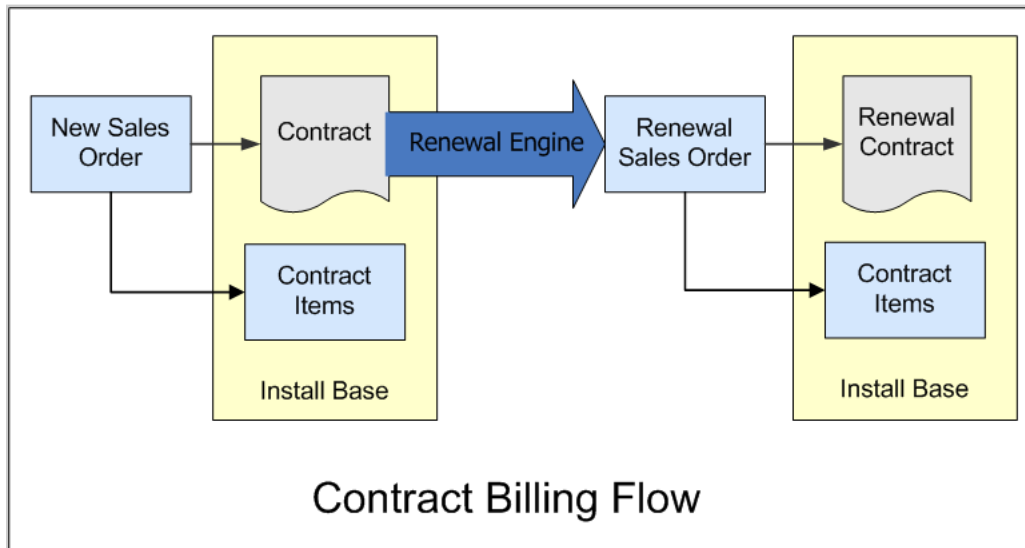
For more information on creating contracts, see Creating a New Contract. For information on renewals, see Contract Renewals Process.

Upsell and Returns

During the term of a contract, you can make changes by entering sales orders for additional items (upsell) or by issuing returns (downsell).

When you want to add items to an existing contract, you create another sales order for the customer and attach it to the existing contract. You can also create a new order from the contract by selecting the contract items for upsell and clicking the Create Upsell Order button.

Items added to a contract must have start and end dates within the contract term. To add items that extend beyond the existing contract's start and end dates, you need to create a separate contract. For more information, see Contract Upsell.

If the customer reduces their service during the contract term, you create a return authorization tied to the contract. These items are then offset from the contract and are not renewed. For more information, see Contracts and Returns.

Support for Multiple Sales Channels

The Software Vertical Contract Renewals SuiteApp enables you to track and manage multi-tiered sales interactions with distributors, resellers, and end users.

The Channel Tier field on the customer record defines the relationship each customer has with your company. You can choose one of the following:

- **End User** - The end user is the customer who uses or registers the product. The end user may purchase the product from you or from a reseller or a distributor.
- **Reseller** - The reseller purchases the product from you and resells it to an end user. The product can be delivered from you either through the reseller or directly to the end user.

ORACLE® **NET**SUITE

- **Distributor** - Distributors purchase from your company and sell the product to a reseller or end user. The distributor delivers the product and bills the purchaser.

> ⚠️ **Important:** Every end user of your products needs a customer record in your NetSuite account even if they purchase through a distributor or a reseller.

With Contract Renewals, these channels are managed through two fields on sales transactions: End User and Bill To Customer.

On the Channel subtab of the transaction form, do the following:

- If you are creating a contract for an end user who purchased through a reseller, on the Channel subtab of the transaction form, select the reseller or distributor for the transaction, and select Reseller in the Bill To Tier field.
- If the contract is for an end user who purchased through a distributor, select Distributor in the Bill To Tier field.
- Select the end user in the End User field.

> ℹ️ **Note:** For transactions submitted through web services, the SuiteApp throws an error if the Bill To Customer value is not the same as either the End User, Reseller, or Distributor specified on the web service request. If a Distributor is specified on the request, the Bill To Tier field on the transaction is set to Distributor. If a Reseller is provided on the request instead of a Distributor, the Bill To Tier field on the transaction is set to Reseller. If neither Distributor nor Reseller is provided on the request, the Bill To Tier field on the transaction is set to End User.

If you have partners who sell your products, you can track them with partner records in your NetSuite account. You can associate partners with customers and with sales transactions. For more information, see the help topic Associating Partners With Customers and Transactions.

A variety of channel-based reports are available on the Contract Renewals tab.

Discounts

There are three types of discounts available in the Software Vertical Contract Renewals SuiteApp:

- Transaction body discounts affect all transaction lines and cannot be renewed.
- Transaction line discounts affect the line above the discount in a transaction and also cannot be renewed.
- In-line discounts affect an individual transaction line and are stored in the corresponding contract item. These discounts can be renewed.

> ℹ️ **Note:** When a contract is renewed, if there is a customer discount set on the customer record, this customer discount is applied to the renewal contract items in place of any in-line discounts set on the original contract.

Setting Up Contract Renewals

For information on how you can add the Software Vertical Contract Renewals SuiteApp to your NetSuite account, contact your account representative.

Read the following topics for information about installing and setting up the Software Vertical Contract Renewals SuiteApp:

- Installing the Contract Renewals SuiteApp

- Roles and Permissions for Contract Renewals
- New Forms, Fields, and Records for Contract Renewals
- Other Initial Setup Tasks for Contract Renewals
- Setting Up Contract Renewals Preferences
- Setting Up Multiple Script Queues or Processors to Process Contract Renewals
- Setting Up Install Base Field Mapping

After installing the SuiteApp, you can configure the feature to work according to your company's contract and renewal workflow. Before you begin using the Software Vertical Contract Renewals SuiteApp, you should set up the following records that you will use when creating contracts:

- Creating Uplift Types for Contract Renewals
- Setting Up Maintenance/Support for Contract Renewals
- Setting Up Product Lines for Contract Renewals
- Setting Up Items for Contract Renewals

Installing the Contract Renewals SuiteApp

Prerequisites

Make sure that the following features are enabled in your account prior to installing Contract Renewals:

- Custom Records
- Client SuiteScript
- Server SuiteScript

For information on enabling these features, see the help topic Enabling Features.

Installing the Contract Renewals SuiteApp

Install the following bundle for the Contract Renewals SuiteApp:

- Bundle Name: SWV Contract Renewals Module
- Bundle ID: 187488
- Location: Production Account
- Account ID: 4858195
- Availability: Shared

For information on purchasing the Software Vertical Contract Renewals SuiteApp, contact your account representative.

For information on installing SuiteApps, see the help topic Installing a Bundle.

The Software Vertical Contract Renewals SuiteApp is a managed SuiteApp and is automatically updated whenever there are updates. These issue fixes and enhancements are available after the SuiteApp is updated in your account.

Roles and Permissions for Contract Renewals

The following custom roles are included in the Software Vertical Contract Renewals SuiteApp:

- Renewals Manager

ORACLE® NETSUITE

- Customer Center - Distributor
- Customer Center - End User
- Customer Center - Reseller
- CEO
- CFO
- Marketing Executive
- PS Executive
- PS Person
- Sales Executive
- Sales Rep
- Support Manager
- Support Person

These roles are pre-configured with a default set of associated permissions required to use the Contract Renewals SuiteApp. A NetSuite administrator can assign them to users or use them as templates when creating new roles or modifying existing roles. For more information, see Assigning Roles to an Employee and Customizing or Creating NetSuite Roles.

To view the default permissions assigned to these roles, go to Setup > User/Roles > Manage Roles, and then click the link for the role.

The following table lists the record permissions required to use the Contract Renewals SuiteApp:

> ⚠️ **Important:** Make sure to add the Contract Renewals Preferences permission to non-administrator roles to allow them to view or edit Contract Renewals transaction forms.

Permission	Subtab	Permission Level
Contract	Custom Record	Full
Contract Item	Custom Record	Full
Contract Renewals Preferences	Custom Record	Full
Deleted Contract Audit	Custom Record	Full
Deleted Contract Item Audit	Custom Record	Full
Install Base Field Mappings	Custom Record	Full
Maintenance/Support Types	Custom Record	Full
Product Lines	Custom Record	Full
Renewal Tran Form Mapping	Custom Record	Full
Transaction Status	Custom Record	Full
Uplift Cap Types	Custom Record	Full
Uplift Types	Custom Record	Full

New Forms, Fields, and Records for Contract Renewals

The Software Vertical Contract Renewals SuiteApp uses forms, fields, and records that are only available when this SuiteApp is installed.

ORACLE® **NET**SUITE

The following objects are created in your NetSuite account when you install this SuiteApp:

Contract Renewals tab	The Software Vertical Contract Renewals SuiteApp creates a custom center tab named Contract Renewals. This tab contains reports and other links related to Contract Renewals. You can customize this tab to show the KPIs and other metrics that you use in managing your software business. For more information, see Contract Renewals Reports and KPIs.
Contract record	The contract record holds all of the install base information including start and end dates, customer and end user, renewal date, and each contract item. You can access contract records from the sales transaction or customer record that is associated with the contract. You can also view a list of contracts when logged in as an administrator by going to the Contract List page. For more information, see Viewing a Contract. For information about contracts, see Contract Creation Process and Managing Contracts.
Contract Item records	Contract items are created from the line items of transactions. You can access contract item records from the contract or customer record, or by going to the Contact Item List page. On the Contract Items subtab of item records, you can also view a list of contracts that is associated with the item.
Platform transaction forms	The SuiteApp includes platform forms for each transaction type that can generate contracts and contract items: quote, opportunity, sales order, cash sale, credit memo, and return authorization. You can customize these forms. For more information, see Setting Preferred Forms for Contract Renewals.
Platform item fields	Item records define how contracts and contract items are generated. For more information, see Setting Up Items for Contract Renewals.
Channel subtab on transactions	If you manage reseller and distributor relationships, you can track this on the Channel subtab of transaction forms. For more information, see Support for Multiple Sales Channels.
Contract Items script (R03)	This script generates contract items from transactions at scheduled times. The following script deployment records are included with this script: - R3: Create Contract Items - R03: Create Contract Item hourly Both script deployments are initially set to Not Scheduled. You can use the R03: Create Contract Item hourly script deployment record to set a regular schedule for contract item creation. For information on setting the timing of this script, see Setting Up Schedules for Contract Item Creation and Contract Renewal.
Contract Renewals script (R05)	This script creates contract renewal transactions some time before the end of contract terms. By default, renewal transactions are generated based on the value of the Days Before Renewal preference. For more information, see Setting Up Contract Renewals Preferences. The following script deployment records are included with this script: - Create Renewal Transactions - R05: Create Renewal Trans nightly Both script deployments are initially set to Not Scheduled. You can use the R05: Create Renewal Trans nightly script deployment record to set a regular schedule for contract renewal. For information on setting the timing of this script, see Setting Up Schedules for Contract Item Creation and Contract Renewal.

ORACLE® **NET**SUITE

For a complete list of objects that are included in the Software Vertical Contract Renewals SuiteApp, go to Customization > SuiteBundler > Search & Install Bundles > List. Click the SWV Contract Renewals SuiteApp, and click the Components subtab.

Default Forms for Contract and Contract Item Records

Enhanced contract and contract item forms are available in Software Vertical Contract Renewals version 16.1. The enhanced forms display the Contract Items subtab as the default subtab for contract records, and the Contract Item Details subtab as the default subtab for contract item records. The following table shows the details of the old standard forms and the enhanced forms for contract and contract item records.

Record Type	Standard Form	Enhanced Form
Contract	Form Name: **Standard Contract Form** Subtabs: - Notes - Files - Contract Items - Transactions - Renewal Contracts - Deleted Contract Items	Form Name: **Contracts Form** Subtabs: - Contract Items - Transactions - Renewal Contracts - Notes - Files - Deleted Contract Items
Contract Item	Form Name: **Standard Contract Item Form** Subtabs: - Notes - Files - Contract Item Details	Form Name: **Contract Item Form** Subtabs: - Contract Item Details - Notes - Files

By default, these enhanced forms are assigned as the default form for contract and contract item records for users with a Renewals Manager [SWE] or Sales Person role. If you want to set these forms as the preferred forms for custom roles, do the following.

To set the preferred contract and contract item forms for custom roles:

1. Go to Setup > User/Roles > Manage Roles.
2. Edit the role.
3. Click the **Forms** subtab.
4. Click the **Custom Records** subtab.
5. Check the box in the **Preferred** column for **Contracts Form** and **Contract Item Form**.
6. Click **Save**.

Other Initial Setup Tasks for Contract Renewals

Before using the Software Vertical Contract Renewals SuiteApp, complete the following tasks:

- Setting Preferred Forms for Contract Renewals
- Creating a Zero Price Item
- Setting Initial Renewals Preferences
- Setting the Order of Contract Renewal Scripts on Transaction Records

ORACLE® **NET**SUITE

Setting Preferred Forms for Contract Renewals

Before you begin using the Software Vertical Contract Renewals SuiteApp, set the custom forms you want to use as Preferred.

To set your preferred forms:

1. Go to Customization > Forms > Entry Forms.
2. Check the box in the **Preferred** column for the following entry forms (from Bundle 53236):
   - Customer Form - Contract Renewals
   - Item Group - Contract Renewals
   - Inventory Item - Contract Renewals (available only if the Inventory feature is enabled)
   - Non-Inventory Item - Contract Renewals
   - Project Form - Contract Renewals
   - Vendor Form - Contract Renewals
3. Click **Submit**.
4. Go to Customization > Forms > Transaction Forms.
5. Check the box in the **Preferred** column for the following transaction forms (from Bundle 53236):
   - Cash Sale - Contract Renewals
   - Credit Memo - Contract Renewals
   - Invoice - Contract Renewals
   - Opportunity - Contract Renewals
   - Quote - Contract Renewals
   - Return Authorization - Contract Renewals
   - Sales Order - Contract Renewals
6. Click **Submit**.

Alternatively, you can also create copies and customize these locked forms to meet the specific needs of your business. For more information, see the help topic Creating Custom Entry and Transaction Forms.

> ℹ **Note:** When you customize transaction forms, make sure that the **Renewals Exclusion** column is shown in the item sublist. On the **Screen Fields** tab on the custom transaction form, make sure that the **Show** box for **Renewals Exclusion** on the **Columns** subtab is checked. This field is used by the contract item creation script (R03) to determine whether to set the contract's **Renewals Exclusion** field to true or false.

Creating a Zero Price Item

A zero price item is needed when there is a problem renewing an item on a renewal transaction. To create a zero price item, go to Lists > Accounting > Items > New (Administrator). Enter a name for the item, and set the base price to **0**.

Setting Initial Renewals Preferences

After you have created the zero price item, go to Contract Renewals > Setup > Contract Renewals Preferences. Click Edit to set the following preferences:

ORACLE **NET**SUITE

- On the Contract Items Creation subtab:
  - Search: CI Pending Creation = Contract Item Pending Creation
- On the Contract Renewals Creation subtab:
  - Default Renewal Form ID = Sales Order - Contract Renewals
  - In the Zero Dollar Item field, select the zero-price item you created in the previous section.
  - In the Assign to Employee/Default field, select an employee who has been marked as a sales rep.
- On the Item "Renew With" Sync subtab:
  - Contract Item Search = Contract Item Renew With Sync

For more information on these preferences, see Setting Up Contract Renewals Preferences.

Setting the Order of Contract Renewal Scripts on Transaction Records

To do set the order of the Contract Renewal scripts on transaction records:

1. Go to Customization > Scripting > Scripted Records (Administrator).
2. Click the **Record** column heading to sort the list by record.
3. Click **Edit** next to a record, and then do the following:
   - On the **User Event Scripts** subtab, make sure the scripts are listed in the following order:
     - R02A-UES-1: Check Tran Into Log
     - R02A-UES-2: Calculate Tran Lines
     - R02A-UES-3: Calc In-Line Discounts

     > **(i) Note:** By default, these user event scripts are only deployed in the Sales Order transaction. If you want to use CSV import and web services on the Estimate record, you must deploy these scripts in the Estimate transaction record.

     > **(i) Note:** The old scripts R01C-SS: Calculate Tran Lines and R01D-SS: Calc In-Line Discounts are no longer supported by the Contract Renewals SuiteApp, hence they are disabled by default (Status = Testing, Deployed = Not Checked). These scripts are replaced by R02A-UES-2: Calculate Tran Lines and R02A-UES-3: Calc In-Line Discounts. Make sure that you are using the new user event scripts on your transaction records.

   - On the **Client Scripts** subtab, make sure the scripts are listed in the following order:
     - R01A-CS: HeaderAutomate&Validate
     - R01B-CS: TranLinesAutomate&Validate

     > **(i) Note:** Make sure the client scripts are also deployed in these transaction records: Credit Memo, Invoice, Opportunity, Quote, Return Authorization, Sales Order, and Estimates.

4. Click **Save**.

Setting Up Contract Renewals Preferences

Before using Contract Renewals for the first time, you should set your preferences according to Setting Initial Renewals Preferences.

ORACLE® **NET**SUITE

To set your Software Vertical Contract Renewals SuiteApp preferences, go to Contract Renewals > Setup > Contract Renewals Preferences, and click Edit. When you are finished making changes, click Save.

- Auto Place Decimal
- Transactions Validation
- Contracts Creation & Validation
- Contract Items Creation
- Contract Renewals Creation
- Item "Renew With" Sync
- Item Fields Validation
- Contract Item Fields
- Setting Up Schedules for Contract Item Creation and Contract Renewal

Auto Place Decimal

Go to Home > Set Preferences > General. In the Formatting section, make sure the Auto Place Decimal box is cleared. Enabling this preference may cause unwanted updates to transaction amounts calculated by Contract Renewals transaction processing.

Transactions Validation

The following preferences determine how transaction lines operate with the Software Vertical Contract Renewals SuiteApp:

Field	Description
Enable Script R01A	Check this box to enable the script that validates transaction start and end dates.
Item Cats for Tran Line Automation	Select the item categories that automatically update with start and end dates from the transaction body when you enter line items on a transaction. ⓘ **Note:** **Service - Perpetual** and **License - Perpetual** items are automatically updated with contract start dates but have no end dates.
Enable Script R01B	Check this box to enable the script that validates the channel tiers on transactions.
Enable Script R01C	Check this box to enable the script that calculates the rate of each item on transactions.
Default M/S Pricing Option	Select the default pricing option for maintenance and support items. - **Itemized M/S Price** – This option enables you to set maintenance or support rates on transactions. - **M/S as a % of License List Price** – Maintenance and support are calculated as percentage of the total of the lines on the transaction. Discounts are not considered in this calculation. This is the default setting. - **M/S as a % of License Net Price** – Maintenance and support are calculated as a percentage of the total of the lines on the transaction. Discounts are considered. When you create an item record for an M/S item, the value that you set in this field will be the default selection in the **M/S Pricing Option** field on the item record. This value will also be the default pricing option for M/S items with a blank **M/S Pricing Option** field on the item record. For more information, see Setting Up Items for Contract Renewals.
Item Cats Skipped on Renewal Calcs	Select the item categories that should not use a price level other than Custom. This is important for maintenance/support item categories that are based on a percentage of license on the original order but exist alone on renewal orders.

ORACLE® **NET**SUITE

Field	Description
Item Category = For Custom Price Block	Select the item categories that you do not want to apply the custom price level to. This allows sales reps to discount line rates but not change them.
Default Customer Discount on Trans	Check this box if you want the customer's discount applied to transactions by default. You can remove this discount on individual transactions.
M/S Customer In-Line Discount	Check this box if you want to apply customer discounts to the cost of maintenance and support.
Enable Script R01D	Check this box to enable the script that validates items with inline discounts.
Inline Discounting on Trans	Check this box to enable inline discounts on transaction lines.
Enable Script R01E	Check this box to enable the script that validates, obtains the contract details such as channel tier and renewal terms, and populates the corresponding fields on transactions.
No. of Decimal Places for List Rate	Enter your preferred number of decimal places for list rates. Maximum number of decimal places allowed is 8, which is the core NetSuite limit for list rate. ⓘ **Note:** Value for list rate is rounded to the nearest decimal place specified in this preference before it is used for rate calculation.
No. of Decimal Places for Rate	Enter your preferred number of decimal places for rates. Maximum number of decimal places allowed is 8, which is the core NetSuite limit for rate.
Auto-select Single Contract	Check this box if you want to automatically select the open contract if there is only a single active contract for the **Bill To** and **End User** customers that you select on transactions. This ensures that you always upsell to an existing contract instead of creating a new one.
Override Default Ship To Address	Check this box if you want to override the shipping address on transactions with the default shipping address of the entity selected in the **Ship To Tier** field.
Entry Forms to Deploy Scripts	If you want only certain entry forms to execute the Contract Renewals scripts, select the entry form or forms here.
Transaction Forms to Deploy Scripts	If you want only certain transaction forms to execute the Contract Renewals scripts, select the transaction form or forms here. ⓘ **Note:** The **Make Copy** button is hidden on forms selected in this preference. If no form is selected, the **Make Copy** button is hidden on all transaction forms where Contract Renewals user event scripts are deployed.
Enable Flexible Start Date for Renewal Transactions	Check this box if you want to enable flexible start dates for contract items on renewal transactions. If this preference is enabled, you can set up contract items to start earlier than the renewal contract start date. This feature is applicable only for renewal transactions and for upsell sales orders for renewal contracts. For more information, see Editing a Renewal Transaction.

Contracts Creation & Validation

The following preferences affect contract creation and validation of contract items:

Field	Description
Enable Script R02A	Check this box to enable the script that validates items before creating contracts.

ORACLE® NETSUITE

Field	Description
Enable Script R02B	Check this box to enable the script that creates contracts.
Sales Order Status to Create Contract	Select the minimum sales order status to be processed for contract creation. ■ **Sales Order: Pending Approval** – Select this option if you want to create a contract upon saving of the sales order, even if the status of the order is still Pending Approval. This is the default setting. ■ **Sales Order: Pending Fulfillment** – Select this option if you want to create a contract when a sales order is approved. You can manually create a contract for specific sales orders by clicking the **Create Contract** button on the transaction record. This button is available on sales orders with no associated contract record yet. For more information, see Creating a New Contract. This preference is applicable only to new sales orders. For renewals, a renewal contract is automatically generated if the renewal transaction is a sales order or when a renewal opportunity or estimate is converted to a sales order. For more information, see Renewing a Contract.

Contract Items Creation

The following preferences affect how contract items are generated:

Field	Description
Enable Script R03	Check this box to enable the script that creates contract items. **ⓘ Note:** The R03 script does not support multiple queues. To prevent unexpected behavior, make sure that all R03 deployments are assigned to the same queue.
Search: CI Pending Creation	This search defines which transactions are used to create contract items. You can override the default with a saved search that you created for this.
Transaction Status to Process	Select which transactions by status are used to create contract items.
Item Category to Process	Select the item categories that generate contract items. **ⓘ Note:** For service items, select **Service - Perpetual** to generate perpetually-licensed service items that have no expiration date and no renewal action is required or select **Services** to generate term-licensed service items.
Require License for M/S Items (Renewal)	Check this box if you want the contract item creation script (R03) to require product license items in transactions. Clear this box if you want to enable creation of contracts from transactions with no product license.

Contract Renewals Creation

The following preferences affect how renewal transactions are created:

Field	Description
Enable Script R05	Check this box to enable the script that creates renewal transactions.
Restrict to Customer	Check this box to create renewal transactions only for a single customer. This setting is used for testing purposes. Clear this box when you are finished testing.

ORACLE® **NET**SUITE

Field	Description
Default Renewal Form ID	Select the custom transaction form that is used when creating renewal transactions. For more information on contract renewals transaction forms, see Setting Preferred Forms for Contract Renewals.
Renewal Form Based From	If you are using multiple renewal transaction forms, choose whether you want the form chosen based on subsidiary or channel tier. If this field is blank, the form selected in the **Default Renewal Form ID** field will be used.
Zero Dollar Item	Select the item record that is used by the Software Vertical Contract Renewals SuiteApp to generate a renewal transaction for testing in the event that issues arise. NetSuite requires at least one item be present on a transaction.
Renewals License Pricing Model	Select the pricing model that will be used for contract value calculation as well as in pricing of renewed items. For information about how contract values are calculated for each pricing model, see Contract Value Calculation. ■ **Current License List Rate – Price Level on Customer Record** — This pricing model calculates the contract value based on the price level set on the customer record and its corresponding price specified on the item record. If there is no price level specified on the customer record, the base price on the item record is used to calculate the contract value. ■ **Historical License List Rate – From Tran Line** — This pricing model calculates the contract value based on the price level and list rate specified on the contract's source transaction. ■ **Current License List Rate – Price Level on Contract** — This pricing model calculates the contract value based on the price level set on the contract's source transaction and its corresponding price specified on the item record. If a custom price level is specified on the source transaction (that is, contract price level is blank), the base price on the item record is used to calculate the contract value. ■ **Current License List Rate – Price Level on Contract with Custom Price Handling** — This pricing model calculates the contract value based on the price level set on the contract's source transaction and its corresponding price specified on the item record, with the option to set a custom price on the source transaction. If a custom price level is specified on the source transaction (that is, contract price level is blank), the original list rate specified on the source transaction is used to calculate the contract value. When a custom price is set on the contract and the Renew With item is the same as the original item, the renewal contract uses the custom price for the item on the source transaction. If the Renew With item is different, the renewal contract uses the base price of the renewal item.
Days Before Renewal	Enter the number of days prior to a contract's end date when a renewal transaction is generated. The default value is 90. You can override this preference for specific contracts by specifying a value in the **Contract Days Before Renewal** field on the contract record. For more information, see Editing a Contract.
Default Renewal Period	Enter the default number of months of a renewal contract's term.
Transaction Type to Create	Select the kind of transaction that is created by the renewal process. ⓘ **Note:** When creating a renewal transaction form mapping, the transaction type on the mapping must match the value set in this preference. Otherwise, the contract will not be renewed. To create a renewal transaction form mapping, go to Setup > Custom > Renewal Tran Form Mapping > New.
Assign To	Choose whether a sales rep or an employee is assigned to the renewal transaction. If you select **An Employee**, choose an employee in the **Assign to Employee/Default** field.

Field	Description
Assign to Employee/ Default	Select the employee to be assigned to renewal transactions by default.
Transaction Department Based On	Select how the department is set on the renewal transaction: ■ **None** — Department is not set on the transaction. ■ **Sales Rep (Department, Location, and Class)** - The sales rep's department is set on the transaction.
Transaction Location Based On	Select how the location is set on the renewal transaction: ■ **None** - Location is not set on the transaction. ■ **Sales Rep (Department, Location, and Class)** - The sales rep's location is set on the transaction.
Transaction Class Based On	Select how the class is set on the renewal transaction: ■ **None** — Class is not set on the transaction. ■ **Order Type** — If the class is set with all order types. ■ **Sales Rep (Department, Location, and Class)** — The sales rep's class is set on the transaction.
Include Tran Line Description	Check this box to copy transaction line descriptions to contract items and to renewal transaction lines.
Default Customer Discount Renewals	Check this box to apply customer discounts on renewal transactions by default.
M/S In-Line Discount	Check this box to apply a line-item discount to maintenance and support items.
Combine Like Items	Check this box to combine line items on renewal transactions. Items are combined if the item, end date, and the item list rate all match. > **Note:** When items have different discount rates, the lowest discount rate will be applied to the combined item. > **Note:** When the original transaction contains same items that use custom price levels with different list rates, these items are not combined if the Renewals License Pricing Model is either **Current License List Rate — Price Level on Contract with Custom Price Handling** or **Historical License List Rate — From Tran Line**. Otherwise, the said same items are combined.
Require Same Discount when Combining Like Items	Check this box to combine like items only when the items have the same discount rates.
Apply Upsell and Downsell on Renewal Transaction	Check this box to enable the classification of upsell and downsell contract items by order type in renewal transactions.

Item "Renew With" Sync

Field	Description
Enable Script R09	Check this box to enable the script that obtains the value in the **Renew With** field from the item record.

ORACLE® **NET**SUITE

Field	Description
Contract Item Search	Select the search used in the process that updates the **Renew With** field on contract items based on updated item records.

Item Fields Validation

Field	Description
Enable Script R10	Check this box to enable the script that validates item details in item records.

Contract Item Fields

Field	Description
Enable Script R12A	Check this box to enable the script that validates contract item details.
Enable Script R12B	Check this box to enable the script that calculates the contract's current value and its renew value.

Setting Up Schedules for Contract Item Creation and Contract Renewal

You can also set up the timing of the scripts that generate contract items and renewal transactions.

To change the timing of the contract items script (R03):

1. With the Administrator role, go to Customization > Scripting > Script Deployments.
2. Set the filters to show only script deployment records for the **R03-SS: Create Contract Items hrly** script.
3. Click the **Edit** link next to the **R03: Create Contract Item hourly** script deployment record.
4. On the **Schedule** subtab, set the frequency with which you want the script to run.
5. Click **Save**.

To change the timing of the contract renewal script (R05):

1. With the Administrator role, go to Customization > Scripting > Script Deployments.
2. Set the filters to show only script deployment records for the **R05-SS: Create Renewals nightly** script.
3. Click the **Edit** link next to the **R05: Create Renewal Trans nightly** script deployment record.
4. On the **Schedule** subtab, set the frequency with which you want the script to run.
5. Click **Save**.

Setting Up Multiple Script Queues or Processors to Process Contract Renewals

You can use multiple script queues or processors to divide contract renewals processing and run it in parallel. As of 2017.2, the SuiteCloud Processors feature supports a new system based on script processors rather than queues. It is possible to change script deployments to use processors instead of queues. With this feature, even queue-based processing runs on processors on the back end. For more information about this feature, see the help topic SuiteCloud Processors.

You can increase the number of queues or processors available to your account by purchasing SuiteCloud Plus licenses. For information, see SuiteCloud Plus Settings.

To run the contract renewal scheduled script on multiple script queues or processors, you can create a new deployment definition. You must be logged in with the Administrator role to create new script deployments.

When you create new deployments of the contract renewal script (R05-SS: Create Renewals nightly), you can specify a custom contract search in the **Custom Search** field on the **Parameters** subtab of the deployment record. Take note of the following when using custom searches on R05 script deployments:

- You must use the same custom search on all R05 deployments. If there is no custom search specified for one deployment, all other deployments must also have a blank **Custom Search** field.
- The custom search must be sorted by contract ID in ascending order.

> (i) **Note:** The R03 script does not support multiple queues. For deployments that continue to use queues, make sure that all R03 deployments are assigned to the same queue to prevent unexpected behavior.

Setting Up Install Base Field Mapping

> ⚠ **Important:** Make sure that you have created the corresponding custom fields before mapping them. No validation is done during the setup process. If you are mapping from or to an invalid field (for example, a field ID that does not currently exist or an incorrectly spelled field ID), all field mappings will not be executed.

To set up an install base field mapping:

1. Go to Setup > Custom > Install Base Field Mappings > New.
2. Enter a name for the field mapping.
3. Select a mapping direction:
   - **Orig Tran > Install Base** – Maps field values from the original transaction to the install base. Field values will be mapped to the install base on creation of the contract.
   - **Install Base > Renewal Tran** – Maps field values from the install base to the renewal transaction. Field values will be mapped during the renewal process.
   - **Orig Tran > Install Base > Renewal Tran** – Maps field values from the original transaction to the install base and the renewal transaction. Field values will be mapped during contract creation and during the renewal process.
   - **Orig Tran > Renewal Tran** – Maps field values from the original transaction to the renewal transaction.
4. In the **Install Base Type** field, select whether you want to map the custom field to or from the **Contract** or **Contract Item**.
5. In the **Transaction Field Type** field, select whether you want to map the custom field to the **Body Field** or **Line Field** of the transaction.
6. In the **Transaction Field ID** field, enter the field ID of the transaction field that you want to map.
7. In the **Install Base Field ID** field, enter the field ID of the install base field that you want to map.
8. Click **Save**.

> (i) **Note:** Mapping to multi-select fields is currently not supported.

The Install Base Field Mappings list is loaded in alphabetical order.

ORACLE® **NET**SUITE

Creating Uplift Types for Contract Renewals

Specifying uplift values enables you to maintain a consumer price index (CPI) or similar uplift. If you use an "original list rate" contract renewals pricing model, assigning an uplift type to your customers is important since the per-customer pricing on contract items is static in that pricing model.

To create uplift types:

1. Go to Contract Renewals > Setup > Uplift Types > New.
2. Enter a name for the uplift type.
3. In the **Uplift** field, enter the percentage the contract prices increase with renewal.
4. Click **Save**.

You can set the uplift type on the Contracts subtab of customer records. When the customer's contracts renew, the price will be increased by the percentage of the uplift type on the record.

Setting Up Maintenance/Support for Contract Renewals

Before you begin using the Software Vertical Contract Renewals SuiteApp, you should set up your maintenance and support items. Maintenance and support is often abbreviated as M/S on preferences and in other settings.

By default, maintenance and support costs ignore any discounts. If you want to consider customer discounts when calculating the cost of maintenance or support, you can enable the M/S Customer In-Line Discount preference on the Contract Renewals Preferences page. The M/S Customer In-Line Discount preference applies in-line discounts before calculating maintenance and support costs.

First, set your maintenance and support preferences at Contract Renewals > Setup > Contract Renewals Preferences:

- Default M/S Pricing Option
- Item Categories Skipped on Renewal Calculations
- M/S Customer In-Line Discount
- M/S In-Line Discount

For information on these preferences, see Setting Up Contract Renewals Preferences.

Next, an administrator can create maintenance and support types to represent the tiers of maintenance and support that you offer.

To create a maintenance and support type:

1. Go to Setup > Custom > Maintenance/Support Types > New.
2. Enter a name for the maintenance and support tier.
3. If you calculate maintenance or support as a percentage of license, enter the percentage for this tier.
4. Click **Save**.
5. Repeat these steps for each tier that you offer.

Finally, set up your support and maintenance items.

To create a maintenance or support item:

1. Go to Lists > Accounting > Items > New.
2. Select the item type for the M/S item that you want to create.

3. On the item form, make sure that the Contract Renewals custom form is selected in the **Custom Form** field. For more information, see Setting Preferred Forms for Contract Renewals.

4. Enter values in the fields on the Primary Information and Classification sections as you would in a standard item form. For more information, see the help topic Creating Item Records.

5. On the Vertical Classification section:

    1. In the **Term/Contract Pricing Type** field, select a pricing type for the item.

    2. In the **Product Line** field, select which product line this item belongs to.

    3. In the **Item Category** field, select the item category where this item should be included in. Choose one of the following categories for M/S items:

        - Maintenance - New

        - Maintenance - Renewal

        - Support - New

        - Support - Renewal

    4. In the **Quantity Type** field, select **M/S Entitlement**.

    5. In the **Renew With** field, select an item to replace the current item when it is renewed. If this item renews with itself, you can select this item in this field after you saved the item record.

    6. In the **Maintenance/Support Type** field, select the tier this item belongs to. The **Maintenance/Support %** field shows the percentage of the maintenance or support type that you selected.

        If your role grants you permission, click the plus sign icon to create a new maintenance or support tier.

6. In the **M/S Pricing Option** field, select the pricing option that you want to use for this M/S item. By default, this field shows the value that you set in the Default M/S Pricing Option preference. If you set this field to blank, the value in the Default M/S Pricing Option preference will be applied whenever this item is used on contracts.

7. On the **Pricing** subtab, enter the price of this item:

    - If the M/S pricing option is set to either **M/S as a % of License List Price** or **M/S as a % of License Net Price**, enter the base price as 0.00.

    - If the M/S pricing option is set to **Itemized M/S Price**, enter the price of this item.

8. Enter other information related to this item. For information about setting up items for Contract Renewals, see Setting Up Items for Contract Renewals.

9. Click **Save**.

> **Note:** If a contract includes a maintenance item and support item from the same product line, only one of these items will be renewed. The Contract Renewals SuiteApp renews the item that appears first on the item sublist. After the SuiteApp determines the M/S item type to be renewed (maintenance or support), if there are multiple items of that type, only the item with the highest percentage amount will be renewed and the other items will be disregarded.

Setting Up Product Lines for Contract Renewals

Tracking product lines gives you another level of reporting beneath the item. Product lines also determine which transaction lines are considered when calculating support or maintenance costs if you charge maintenance or support as a percentage of license. For example, you might have a software product line that includes individual items for product licenses, module licenses, and maintenance/support contracts. You can also inactivate any product lines at any time.

ORACLE® **NET**SUITE

An administrator can create product lines that reflect your company's product offerings.

To create product lines:

1. Go to Customization > List, Records, & Fields > Record Types.
2. Click the **New Record** link for Product Lines.
3. Enter a name for the product line.
4. Click **Save**.

You can set the product line in the **Product Line** field of item records. For information about setting up items for Contract Renewals, see Setting Up Items for Contract Renewals.

Setting Up Items for Contract Renewals

Item records define how renewal transactions and contracts are generated. If an item is set up for automated renewal, it is automatically included in contracts and renewal transactions.

Typically, contract items are defined with an item type of Non-inventory Item for Sale in NetSuite. The renewal behavior is determined by the fields under the Vertical Classification section on item records.

To set up items for Contract Renewals

1. Go to Lists > Accounting > Items > New.
2. Select the item type for the contract item that you want to create. Most contract items are defined with an item type of Non-inventory Item for Sale. For more information about NetSuite item types, see the help topic Creating Item Records.
3. On the Item form, make sure that a Contract Renewal custom form is selected in the **Custom Form** field. For more information about setting preferred forms, see Setting Preferred Forms for Contract Renewals.
4. Enter values in the fields on the Primary Information and Classification sections as you would in a standard item form. For more information, see the help topic Creating Item Records.
5. On the Vertical Classifications section, specify values for the fields that will determine the renewal behavior of the item.

Field Name	Description
Term/Contract Pricing Type	Select a contract pricing type for the item. The contract pricing type determines how the rate will be calculated for an item. The following contract pricing types are available: ■ **Monthly** – Item price entered on the **Pricing** subtab is treated as a monthly price. ■ **Annually** – Item price entered on the **Pricing** subtab is treated as an annual price. ■ **Actual Item Price** – Item price entered on the **Pricing** subtab is considered as the actual rate. If you select this option, the term will not be considered in the rate calculation. ■ **Not Applicable** – Select this option if none of the other options are applicable for the item. For example, for Perpetual Licenses or non-renewing items.
Product Line	Choose which product line this item belongs to. A product line is a family of items that are organized around one flagship product. For more information, see Setting Up Product Lines for Contract Renewals.

Field Name	Description
Item Category	Select the item category where this item should be included in. The item category determines whether or not an item is renewed and also when it is billed.
	The following item categories are available:
	- License - Perpetual - License - Term - Maintenance - New - Maintenance - Renewal - Support - New - Support - Renewal - Services - Services - Perpetual - Training - Other - Hardware - Parent Item
	ⓘ **Note:** The Item Categories custom list is locked and cannot be edited.
	Perpetual items are not renewed and are paid in full up front. Examples of perpetual items are License - Perpetual, Services - Perpetual, Trainings, Hardware, and Other. For a perpetual item to appear on a renewal contract record, it must be accompanied by a corresponding maintenance item on the original contract. Both the perpetual item and the maintenance item must belong to the same product line. On a renewal contract record, perpetual items are listed in the Perpetual Contract Items field on the Contract Items subtab.
	Term-based items have start and end dates, and must have the **Term/ Contract Pricing Type** field set to **Monthly** or **Annually** to be priced correctly in new and renewal transactions based on the Term In Months of the transaction line. Examples of term-based items are License - Term, Support - New, Support - Renewal, and Services. Term licenses are always renewed.
	Maintenance entitlements include software updates and support, are associated with perpetual licenses, and are always renewed. Support entitlements provide support for software only, are associated with term licenses, and are renewable.
Quantity Type	Select the quantity type that defines this item's units. The quantity type affects the renewal behavior of an item.
	⚠ **Important:** The Quantity Type must match the selected Item Category for the item. An incorrect combination may cause unprocessed renewals for the item.
	The following quantity types are available:
	Product License – This refers to core licensed items. You should have at least one product set up in your account per product line. A product license creates a Product and an Install Base record to represent a new sale. A follow-on sale creates an Install Base record tied to the existing Product record. Product License quantity type is used for items under the following item categories:

Field Name	Description
	□ License - Perpetual
	□ License - Term
	□ Services
	■ **Module License** – This refers to add-on items related to products. A module license cannot exist without a corresponding Product, and should not be sold this way. Module License quantity type is used for items under the following categories:
	□ License - Perpetual
	□ License - Term
	□ Services
	■ **M/S Entitlement** – This quantity type is used for items with item category of maintenance or support. Maintenance and support items require start and end dates that are a key part of the renewals automation. If the Require License for M/S Items (Renewal) preference is enabled, transactions with an M/S item must also have an item with a license quantity type for it to be processed for renewal.
	■ **User License - Production**, **User License - Other** – This represents the seats sold for the products and modules within the product line. Production Users can be differentiated from Other Users for reporting purposes. User License quantity type is used for items under the following item categories:
	□ License - Term
	□ Training
	■ **CPU License** – This refers to the number of Central Processing Units or CPU Cores that are licensed to the customer. CPU License quantity type is used for items under the following item categories:
	□ Hardware
	□ License - Term
	■ **Other** – This quantity type can be used for any item that does not fit in any of the preceding quantity types.
Renew With	Select an item to replace the current item when it is renewed. This setting is for renewable items only, that is, items with an item category of License - Term, Maintenance, or Support. Often, an item is renewed with itself, but you can choose any item in this field. You can also use this setting for versioning. For example, Version 1 can renew with Version 2.
Maintenance/Support Type	For maintenance or support items, if you offer tiered maintenance or support, choose the tier in this field. For information about maintenance and support types, see Setting Up Maintenance/Support for Contract Renewals.
Maintenance/Support %	This field shows the percentage price of the maintenance or support type that you selected.
Opt-Out M/S	Check this box if this item is not considered when calculating the cost of support or maintenance. For example, you do not count a sandbox license when determining the cost of support.
Replaced With	If the item has an end of life date after which it is no longer offered, choose the item that replaces the current item. The item you select here is added to future renewals in place of the item you are entering.
End of Life Date	Enter the date after which this item is no longer offered.

ORACLE® **NET**SUITE

Field Name	Description
End of M/S Date	Enter the date after which support and maintenance will no longer be offered for this product. This is often some time after the end of life date.
Renewals Exclusion	Check this box if you do not want this item to be renewed.
M/S Pricing Option	If you are creating a maintenance or support item, select the pricing option that you want to use to determine the M/S item price. When you are creating a new item record, this field defaults to the value that you selected in the Default M/S Pricing Option preference. For more information, see Setting Up Contract Renewals Preferences. When you use this M/S item on transactions, the pricing option that you set on the item record is saved on the transaction and on the generated contract item record. If you set this field to blank, the value in the Default M/S Pricing Option preference will be applied whenever this item is used on contracts. If the item is set to renew with itself, the stored M/S Pricing Option value on the contract item record will be used for the renewal item. If the item is set to renew with a different item, the M/S Pricing Option value on the item record for the Renew With item will be used for the renewal item.

6. Specify the item price on the **Pricing** subtab.

> ℹ️ **Note:** When you enter pricing for percentage based maintenance and support items, you must set the base price to zero so that pricing is calculated correctly.

If you use the Project Management feature, be sure to enter a base price on the service item record or enter zero (instead of leaving the Base Price field blank) if the service item does not have a base price. For information on setting the base price of a service item see, Setting Up Item Pricing. For more information on the Project Management feature, see the help topic Using Project Management.

7. Enter values in the fields on the other subtabs as you would in a standard item form. For more information, see the help topic Creating Item Records.

If you use the Advanced Billing and Advanced Shipping features and you do not want to fulfill orders, be sure to clear the **Can be Fulfilled/Received** box on the **Preferences** subtab for items that you include in contracts.

You must not use kits or assemblies for renewable software items because these item types do not include the derived information required to generate contract items. You can, however, use item groups to make entering transaction line renewable items easier. For more information on item groups, see the help topic Item Groups.

Contract Workflow

The following diagram shows the different states of a contract.

ORACLE **NET**SUITE
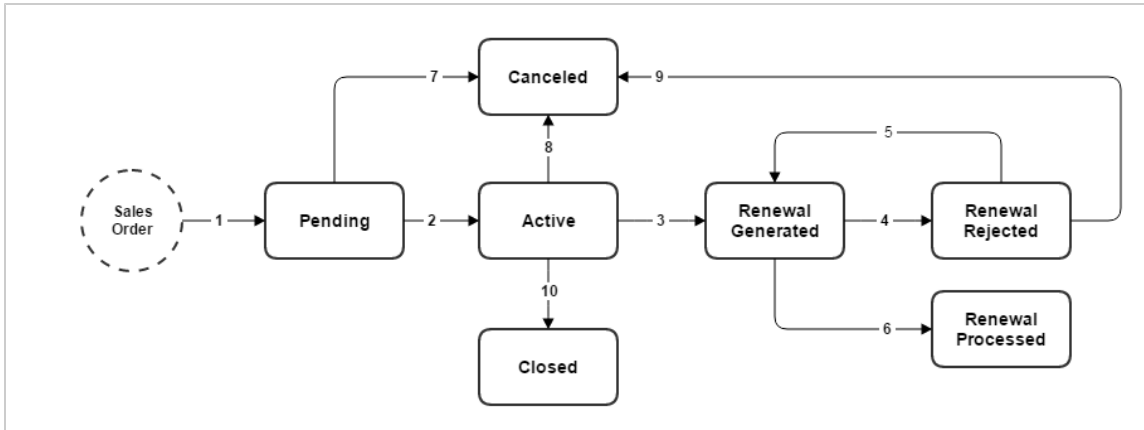
The contract's status is shown in the **Status** field on the contract record. For information about contract fields, see Contract Fields.

Non-perpetual items have the same status as the contract where they belong, while perpetual items always have a status of Active. The contract item's status is shown in the **Contract Item Status** field on the contract item record.

The following table describes the contract lifecycle. For information about what processes or actions are applicable for each contract status, see Managing Contracts.

Contract Status	Action ID	Description	Automated and Manual Processes That Affect Contract Status
Pending	1	When a contract record is created, its initial status is set to Pending. A contract remains in this state until its contract items are generated. For information about creating contracts, see Creating a New Contract.	Contracts are automatically generated by the R07 script (R07-MR: Create New Contracts) for new sales orders that match the Sales Order Status to Create Contract preference. To manually generate a contract for a new sales order, click the Create Contract button on the transaction record. For renewals, a renewal contract is automatically generated if the renewal transaction is a sales order, or when a renewal opportunity or estimate is converted to a sales order.
Active	2	When contract items are generated for the contract, its status changes from Pending to Active.	Contract items are generated by the R03 script (R03-SS: Create Contract Items hrly).
Renewal Generated	3	When a renewal transaction is generated for the contract, its status changes from Active to Renewal Generated. A contract remains in this state until contract items are generated for the renewal contract. A renewal contract is automatically generated with an initial status of Pending if the renewal transaction is a sales order, or when a renewal quote or opportunity is converted to a sales order. The renewal contract's status remains in Pending until its contract items are generated.	Renewal transactions are generated by the R05 script (R05-SS: Create Renewals nightly) for active contracts with a target renewal date that is on or before the current date. To manually generate a renewal transaction, click the Renew Now button on the contract record. You can also perform batch renewals by going to Contract Renewals > Renewals

ORACLE® **NET**SUITE

Contract Status	Action ID	Description	Automated and Manual Processes That Affect Contract Status
		For information about renewing contracts, see Renewing a Contract.	Automation > Renew Now: Batch Process.
Renewal Rejected	4	When a contract's renewal transaction is rejected, its status changes from Renewal Generated to Renewal Rejected. You can reject a renewal transaction (opportunity, estimate, or sales order in Pending Approval status) if contract items are not yet generated for the renewal contract (that is, renewal contract is still in Pending status). For more information, see Rejecting a Renewal Transaction. When a renewal transaction is rejected, the status of the renewal contract changes from Pending to Canceled.	To reject a renewal transaction, click the Reject Renewal button on the transaction record.
	5	When you generate a new renewal transaction for a contract record with a status of Renewal Rejected, its status changes back to Renewal Generated.	To generate a new renewal transaction for a contract with a Renewal Rejected status, click the Renew Now button on the contract record.
Renewal Processed	6	When contract items are generated for the renewal contract, the preceding contract's status changes from Renewal Generated to Renewal Processed. Meanwhile, the renewal contract's status changes from Pending to Active after its contract items are generated.	Contract items are generated by the R03 script (R03-SS: Create Contract Items hrly) for renewal contracts.
Canceled	7 8 9	When a contract with a status of Pending, Active, or Renewal Rejected is canceled, its status changes to Canceled. Also, when a renewal transaction is rejected, the renewal contract's status changes from Pending to Canceled. Canceled contracts will not be processed for contract item creation, renewal, upsell, or downsell. For information about canceling contracts, see Canceling a Contract.	To cancel a contract, click Cancel Contract button on the contract record.
Closed	10	When you run the script that closes contracts, it searches for expired contracts and changes its status from Active to Closed. Expired contracts are contracts with a current status of Active and an end date that is before the current date. For information about closing expired contracts, see Closing Expired Contracts.	To set the status of expired contracts to Closed, manually run the R08 script (SWV CR MR R08 Close Contracts).

Contract Creation Process

With the Software Vertical Contract Renewals SuiteApp, contracts are generated from sales orders. When you enter a sales order using the Sales Order - Contract Renewal form, you define the term

ORACLE **NET**SUITE

of the contract by setting the contract term and start date. For information about contract term, see
Contract Term Calculation.

By default, line items added to the order are given the same start and end dates as the body of the
transaction. You can modify the term length and the dates for individual line items.

> ⚠️ **Important:** The total number of lines per transaction cannot exceed 200. The following item
> types are excluded from the limit: Discount, Markup, Description, Subtotal, Kit, Payment, Group,
> and End Group.

The value that you selected in the **Sales Order Status to Create Contract** preference determines when
a new contract is generated for a sales order. If you selected **Sales Order: Pending Approval**, a contract
is generated and associated with the order after the sales order is saved (even if the sales order is
not yet approved). If you selected **Sales Order: Pending Fulfillment**, a contract is generated when
the sales order is approved. For information about this preference, see Setting Up Contract Renewals
Preferences.

You can also create a contract for a specific sales order by clicking the **Create Contract** button on the
transaction record. This button is available on sales orders with an empty **Contract** field (that is, a
contract is not yet created for the order).

When a contract is generated for the order, a link to the contract record is shown in the **Contract** field
on the **Items** subtab of the sales order.

When the order is fully billed (which is the default preference setup), contract items are added to the contract based on the line items on the sales order. By default, these contract items are set to be generated on an hourly basis, but you can change the frequency of this process by setting the schedule on the deployment record. For information about setting the timing of the contract item script (R03), see Setting Up Schedules for Contract Item Creation and Contract Renewal. For information about billing sales orders, see Billing Sales Orders.

On the contract record, the value of the contract is shown in the following fields:

- **Contract Value (Base Curr)** – For NetSuite OneWorld accounts, this field displays the value of the contract in the base currency of the customer's subsidiary. Otherwise, this field displays the value of the contract in the currency of your company.

- **Contract Value (Customer Primary Curr)** – This field displays the value of the contract in the primary currency of the customer.

For information about contract values, see Contract Value Calculation.

By default, 90 days prior to the end date of the contract, a renewal transaction is automatically generated for the contract. You can change when contract renewals are processed by setting the **Days Before Renewal** preference on the Contract Renewals Preferences page. For more information, see Setting Up Contract Renewals Preferences.

You can also override the **Days Before Renewal** global preference for specific contracts by specifying a value in the Contract Days Before Renewal field on the contract record. For more information, see Editing a Contract.

Any items that are set up as renewable are automatically included on the renewal contract. For more information, see Contract Renewals Process.

Creating a New Contract

With Software Vertical Contract Renewals SuiteApp, contracts and their contract items are generated from sales transactions: opportunities, estimates, and sales orders. Opportunities and estimates must be converted to a sales order before a contract record can be generated. Contracts are created from sales orders using the Sales Order – Contract Renewals form or any customized version of this form.

You can choose when a contract record will be generated from a sales order in the **Sales Order Status to Create Contract** field on the Contract Renewals Preferences page. For more information, see Setting Up Contract Renewals Preferences.

> **ⓘ Note:** Contracts and contract items cannot be created manually, but you can import contracts using CSV import. For more information, see Importing Contracts.

To create new contract from a sales order:

1. Go to Transactions > Sales > Enter Sales Order.

2. In the **Custom Form** field, select **Sales Order - Contract Renewals**.

3. In the **End User** field, select a customer. If necessary, on the **Channel** subtab, define who this end user is relative to the customer in the **Bill To Customer** field.

4. In the **Contract Term** field, enter the number of months this contract runs. You can enter decimal numbers if you need to represent a term in days.

5. In the **Start Date** field, enter the start date for this contract. The end date is calculated automatically based on the contract term and start date values. For information about contract term, see Contract Term Calculation.

   > **ⓘ Note:** By default, transactions created from an opportunity do not have a start date. You must manually enter the start date for these transaction records.

6. Enter values in the other fields on the transaction header as you would in a standard sales order. For more information, see Creating Sales Orders.

7. On the **Items** subtab:

   1. If this is an order for a new contract, leave the **Contract** field blank.

      If this is an upsell order for an existing contract, select a contract in the **Contract** field. For more information, see Contract Upsell.

   2. In the **Item** column, select items that you want to include in the contract. If you are creating a sales order from an estimate or opportunity, the items are populated from that transaction.

      If you want to apply a percentage uplift for a renewable item, enter the value in the Contract Item Uplift column. For more information, see Contract Item Uplift.

> 🛈 **Note:** You may need to edit these items to ensure that the dates are set properly. The start and end dates for each item are populated from the transaction body. You can change these dates for items that do not apply to the full contract term.

> 🛈 **Note:** If the sales order status is Pending Fulfillment, you will not be able to edit the line item dates after adding the item. Also, after adding the first line item, the start date column will be grayed out for succeeding line items. If you want to be able to modify the dates for each line item, change the status of the sales order to Pending Approval.

> ⚠️ **Important:** Items that do not co-terminate with the end of the contract are not renewed even if they are set up to be renewable.

8. Click **Save**.

The value in the **Sales Order Status to Create Contract** preference determines when a new contract is generated for a sales order based on its status.

- If you selected **Sales Order: Pending Approval**, a contract is generated upon saving of the sales order (even if the order is not yet approved).

- If you selected **Sales Order: Pending Fulfillment**, a contract is generated upon approval of the sales order. In this case, a contract will not be automatically generated for sales orders with a status of Pending Approval. However, you have the option to create contracts on demand for sales orders with no contract yet by clicking the **Create Contract** button on the transaction record.

When a contract is saved or approved (depending on the preference set), a user event script saves the transaction record and creates a contract in the background. After the contract is created, the user event script triggers a workflow action that attaches the contract record to the sales order.

To improve performance, the contract creation user event script does not wait for the workflow action to finish attaching the contract to the sales order. For this reason, there may be instances when the **Contract** field on the **Items** subtab displays an incomplete contract ID and the **Check Log Status** field on the **Options & Log** subtab is empty after a sales order is saved.

To check if the workflow action has successfully attached the contract to the sales order, refresh the Sales Order page and check if the **Contract** field is displaying the complete contract ID and the value in the **Check Log Status** field on the **Options & Log** subtab is **Pending**.

Contracts are given an ID in the following format: **ID_<Start Date>_<End Date>**. Click the link in the **Contract** field on the sales order to go to the contract record.

Guidelines for Creating New Contracts

- Contract items are generated from the line items on the sales transaction. By default, contract items on new contracts are generated on an hourly basis, during the scheduled run of the R03 script. You can change the frequency of the contract item creation process by setting the schedule on the script deployment record. For more information, see Setting Up Schedules for Contract Item Creation and Contract Renewal.

  Alternatively, you can create contract items for a contract on demand. For more information, see On-Demand Create Contract Items.

- When Install Base Field Mapping contains conflicting field types, for example, from Date to Percent, no contract will be created upon saving the transaction.

ORACLE® **NET**SUITE

- If the workflow action fails, the initial incomplete contract ID remains displayed on the Sales Order page in View mode. To completely attach the contract to the sales order, edit or update the page. When edited, the final contract name that is based on the initial contract record is assigned to the sales order and the **Check Log Status** field on the **Options & Log** subtab is set to **Pending**. If the sales order is updated through CSV import or Web service, a final contract record that is different from the initial record is assigned to the sales order, the **Check Log Status** field on the **Options & Log** subtab is set to **Pending**, and the initial contract record becomes an orphan.

- When creating a transaction saved search, do not include **Contract Field: Target Renewal Date** on the **Criteria** or **Results** subtab for transactions other than contracts. Doing so will result in error.

On-Demand Create Contract Items

You can create contract items on demand by clicking the **Create Contract Items** button on the contract record. This button is available for contracts that satisfy the following conditions:

- Contract is not Inactive.
- Contract status is Pending.
- Contract has no contract items.

To create contract items for a contract:

1. Go to Contract Renewals > View Records > Contracts.
2. Click the **View** link next to the contract that you want to create contract items for.
3. Click the **Create Contract Items** button.

A confirmation message is shown at the top of the contract record to confirm the creation of contract items. If contract items are successfully created, the status of the contract changes to Active and the **Check Log Status** field on the **Options & Log** subtab of the originating transaction is set to Processed.

The SuiteApp implements a validation logic to prevent contract items from being processed simultaneously, which may result to duplicate contract items on contracts. An error message is shown at the top of the contract record if you click the **Create Contract Items** button when an instance of the contract items script (R03) is already running.

Importing Contracts

You can import your existing contract and contract items using the CSV Import Assistant. For information on CSV files, see the help topic General CSV File Conventions

To import contracts into your NetSuite account, you must import both contracts and the associated contract items.

To import contract records:

1. Prepare a CSV file with your contract data.

   The following contract fields are required:
   - Name
   - End User
   - Bill To Customer
   - Contract Start Date
   - Contract End Date
   - Currency (if the Multiple Currencies feature is enabled)

- Renewal Terms

  For more information about contract fields, see Contract Fields.

2. Go to Setup > Import/Export > Import Tasks > Import CSV Records.

3. In the **Import Type** field, select **Custom Records**.

4. In the **Record Type** field, select **Contract**.

5. Select the CSV import file with your contract data.

6. Click **Next**.

7. Follow the rest of the steps in Import Assistant. For more information, see the help topic CSV Imports.

To import contract item records:

1. Prepare a CSV file with your contract item data.

   The following contract item fields are required:

   - Bill To Customer
   - End User
   - Contract
   - Item
   - Contract Item Start Date
   - Contract Item End Date
   - Quantity
   - Original List Rate
   - Owner

2. Go to Setup > Import/Export > Import Tasks > Import CSV Records.

3. In the **Import Type** field, select **Custom Records**.

4. In the **Record Type** field, select **Contract Item**.

5. Select the CSV import file with your contract item data.

6. Click **Next**.

7. Follow the rest of the steps in Import Assistant. For more information, see the help topic CSV Imports.

Important things to note when importing transactions for contract renewals:

- When an imported sales order record (of Import Type: Transactions) includes conflicting contract term and end date values, the contract term value overwrites the end date's value with the calculated value. For information about contract term, see Contract Term Calculation.

- In transaction imports, line items for non-Perpetual item categories must have contract term and end date values to generate the end date for each item. If the values are missing, the import fails. The end date value can be mapped for a line item if the date is prior to or the same as the contract's end date.

Contract Renewals Process

On the scheduled run of the script that creates renewal transactions, a renewal sales order is generated for contracts that are within 90 days of its end date. The renewal sales order includes any renewal contract items from the expiring contract that extend to the contract end date. For information about editing renewal transactions, see Editing a Renewal Transaction.

ORACLE® **NET**SUITE

> **Note:** You can change when renewal transactions are generated (Days Before Renewal) and the type of renewal transaction created (Transaction Type to Create) on the **Contract Renewals Creation** subtab of the Contract Renewals Preferences page. To set the these preferences, go to Contract Renewals > Setup > Contract Renewals Preferences. For more information, see Setting Up Contract Renewals Preferences.
>
> You can also override the Days Before Renewal preference for specific contracts by specifying a value in the **Contract Days Before Renewal** field on the contract record. For more information, see Editing a Contract.

If contract items on the expiring contract are the same, they are combined on the renewal contract. This occurs when additional items are added to a contract some time during its contract term. For items to be combined, the rates on each line must match. For more information, see Contract Upsell.

If you need to remove an item from a renewal transaction, change the quantity for the line item to 0 (zero) rather than removing the line item. This ensures that downsell is tracked properly and that any invoices created do not include 0 quantity line items.

If you are provisioning based on fulfillment transactions, transaction line items with zero quantity can be a signal to de-provision those items. If you are provisioning based on contract items, you can signal items to de-provision with negative-quantity contract items.

If there are return authorizations associated with a contract that are not approved before the active contract renewal, those return authorizations are not reflected in the renewal. For more information, see Contracts and Returns.

You can create reminders or saved searches for your dashboard to alert you when renewal transactions are generated. You can base your reminder on transactions with the Order Type set to **Renewal**. For more information, see the help topic Setting Up Reminders.

Software Vertical Contract Renewals SuiteApp also supports renewing contracts on demand by clicking the **Renew Now** button on a contract record. For more information, see Renewing a Contract.

Example

A software company sells a twelve-month software product license, a support entitlement, and 100 seats. Additionally, the contract includes a professional services item that ends three months into the contract.

When a contract is created from the sales order, the contract ID is shown in the Contract field on the saved sales order.

Initial Sales Order (Details of the Original Contract)

By default, 90 days prior to the end date of the contract, a renewal sales order is created automatically.

In this example, the product license, the seats, and the support entitlement are all renewable items. The term of these items extends to the contract end date, so all three of these line items appear on the renewal order.

The professional services item is not renewable and ends prior to the contract end date, so this item is not included in the renewal order.

Renewal Transaction (Details of the Renewal Contract)

Managing Contracts

Read the following topics for information about managing contract records.

- Viewing a Contract
- Editing a Contract
- Updating Contracts using Mass Update
- Renewing a Contract
  - Editing a Renewal Transaction
- Rejecting a Renewal Transaction
- Canceling a Contract
- Closing Expired Contracts
- Contract Upsell
- Contracts and Returns

The following table shows which actions are applicable to a contract based on its current status. For information about contract states, see Contract Workflow.

Contract Status	Available Actions (Contract Record Buttons)				
	Edit	Upsell [1] (Edit Mode)	Downsell [1] (Edit Mode)	Renew Now (View Mode)	Cancel Contract (View/Edit Mode)
Pending	Yes	Yes	Yes	No	Yes
Active	Yes	Yes	Yes	Yes	Yes
Renewal Generated	Yes	Yes	Yes	No	No

ORACLE® **NET**SUITE

Contract Status	Available Actions (Contract Record Buttons)				
	Edit	Upsell [1] (Edit Mode)	Downsell [1] (Edit Mode)	Renew Now (View Mode)	Cancel Contract (View/Edit Mode)
Renewal Processed	Yes	Yes	Yes	No	No
Renewal Rejected	Yes	Yes	Yes	Yes [2]	Yes
Canceled	No	No	No	No	No
Closed	No	No	No	No	No

[1] Contract is also available for selection in the Contract field on a standalone upsell sales order or downsell RMA.

[2] Contract is renewable only through the Renew Now button. Renewal rejected contracts will not be renewed by the contract renewal script (R05) or by Renew Now: Batch Process.

Viewing a Contract

You can access a contract record from the sales transaction or customer record that is associated with the contract. A list of all contracts is also available on the Contract List page.

To view a contract record:

- From the Sales Order – Go to Transactions > Sales > Enter Sales Orders > List. View the sales order that is associated with the contract. On the **Items** subtab, click the link in the **Contract** field.

- From the Customer record – Go to Lists > Relationships > Customers. View the customer record that is associated with the contract. On the **Contracts** subtab, click the name of the contract.

- From the Contract List page – Go to Contract Renewals > View Records > Contracts. You can also access the Contract List page from Lists > Custom > Contract. Click the **View** link next to the contract.

Editing a Contract

To edit a contract, go to the contract record and click the Edit button. You can access the contract record from the sales transaction or customer record that is associated with the contract. A list of all contracts is also available on the Contract List page. For more information about viewing contract records, see Viewing a Contract.

You can edit a contract to make any of the following changes:

- Create an upsell order for the contract by clicking the **Create Up-Sell Order** button. For more information, see Contract Upsell.

- Create a downsell RMA for the contract by clicking the **Create Down-sell RMA** button. For more information, see Contracts and Returns.

- Cancel the contract by clicking the **Cancel Contract** button. For more information, see Canceling a Contract.

- Modify the renewal term for the contract by specifying a value in the **Renewal Terms** field.

- Override the Days Before Renewal preference for the contract by specifying a value in the **Contract Days Before Renewal** field.

- Override the customer uplift for the contract by specifying a value in the **Contract Uplift** field.

- Override the customer uplift, contract uplift, or both by specifying a value in the **Contract Item Uplift** field on the contract item record. For more information, see Contract Item Uplift.

For information about contract fields, see Contract Fields.

Contracts can also be updated using CSV import or mass update. For more information, read the following help topics.

- Importing Contracts
- Updating Contracts using Mass Update

Contract Fields

The following table provides descriptions for the fields on contract records.

Field Name	Description
Name [1]	This field displays the name of the contract in the following format: **ID_<Start Date>_<End Date>**.
ID	This field displays the internal ID of the contract.
Inactive	On edit mode, check this box to set the contract to inactive.
Status	This field shows the status of the contract. Depending on the contract's current state, the status can be one of the following: - Pending - Active - Renewal Generated - Renewal Processed - Renewal Rejected - Canceled - Closed For information about contract states, see Contract Workflow.
Contract Start Date [1]	This field displays the date when the contract starts. This value is set in the **Start Date** field of the sales order from which the contract is created.
Contract End Date [1]	This field displays the date when the contract is due for termination. This value is set in the **End Date** field of the sales order from which the contract is created. On the sales order, the end date is determined by the values in the **Contract Term** and **Start Date** fields, if not entered manually. Items with a perpetual license do not have contract end dates. For information about contract term, see Contract Term Calculation.
Contract Days Before Renewal	On edit mode, enter the number of days before the contract's end date when a renewal transaction will be generated. This value applies only to the contract where it is specified. If a value is specified in this field, it overrides the Days Before Renewal preference that sets the target renewal date for existing contracts. You can also update this field through contract mass update. For more information, see Updating Contracts using Mass Update. If this field is blank, the value in the **Days Before Renewal** field on the Contract Renewals Preferences page is used to determine the target renewal date for the contract. For more information about this preference, see Setting Up Contract Renewals Preferences. This field is disabled when a renewal transaction has been created for the contract.
Contract Type	This field displays the contract type.
Bill To Customer [1]	This field displays the name of the customer who buys the product.

ORACLE® **NET**SUITE

Field Name	Description
	This value is set in the **Bill To Customer** field of the sales order from which the contract is created.
End User [1]	This field displays the name of the customer who uses or registers the product.

This value is set in the **End User** field of the sales order from which the contract is created. |
| Distributor | If the contract is created for a multi-tiered sales transaction, this field displays the name of the distributor from which the reseller or end user purchased the product.

This value is set on the **Channel** subtab of the sales order from which the contract is created. For more information, see Support for Multiple Sales Channels. |
| Reseller | If the contract is created for a multi-tiered sales transaction, this field displays the name of the reseller from which the end user purchased the product.

This value is set on the **Channel** subtab of the sales order from which the contract is created. For more information, see Support for Multiple Sales Channels. |
| Bill To Tier | If the contract is created for a multi-tiered sales transaction, this field displays the channel tier of the customer to be billed.

This value is set on the **Channel** subtab of the sales order from which the contract is created. For more information, see Support for Multiple Sales Channels. |
| Ship To Tier | If the contract is created for a multi-tiered sales transaction, this field displays the channel tier of the customer to whom the product will be shipped to.

This value is set on the **Channel** subtab of the sales order from which the contract is created. For more information, see Support for Multiple Sales Channels. |
| Currency [1] | This field shows the currency used by the contract. This field is available only if the Multiple Currencies feature is enabled in your account.

This value is set in the **Currency** field of the sales order from which the contract is created. |
| Contract Value (Base Curr) | For accounts that are not OneWorld, this field displays the value of the contract in the currency of the company.

For OneWorld accounts, this field displays the value of the contract in the base currency of the customer's subsidiary.

For information about contract values, see Contract Value Calculation. |
| Contract Value (Customer Primary Curr) | This field displays the value of the contract in the primary currency of the customer.

For information about contract values, see Contract Value Calculation. |
| Annual Contract Value (Gross) | This field displays the average annual value of the contract before deducting item discounts.

For information about contract values, see Contract Value Calculation. |
| Annual Contract Value (Net) | This field displays the average annual value of the contract after deducting item discounts.

For information about contract values, see Contract Value Calculation. |
| Contract Document | On edit mode, select a document related to the contract or sales transaction from the NetSuite File Cabinet. For more information, see the help topic Working with the File Cabinet. |
| Contract Uplift | On edit mode, enter a percentage uplift for the contract. This value applies only to the contract where it is specified. When the contract is renewed, the price on the renewal contract will be increased by the percentage uplift set in this field.

If a value is specified in this field, it overrides the uplift value set on the **Contract** subtab of the customer record. This field accepts positive values from 0 to 100. A contract uplift value set to zero means that you do not want to apply an uplift, even if a value is set on the |

ORACLE® **NETSUITE**

Field Name	Description
	customer record. You can also update this field through contract mass update. For more information, see Updating Contracts using Mass Update. If this field is blank, the percentage uplift specified on the customer record will be applied on the renewal contract. If there is no uplift specified on the contract and on the customer record, no uplift will be applied on the renewal contract. This field is disabled when a renewal transaction has been created for the contract. **Note:** If a value is specified in the **Contract Item Uplift** field on a contract item, it overrides the uplift value set on the contract or customer record. For more information, see Contract Item Uplift.
Target Renewal Date	This field displays the date when a renewal transaction is automatically generated for the contract. Upon creation of the contract, the value in this field is determined by the value in the **Days Before Renewal** field on the Contract Renewals Preferences page. The default value in the **Days Before Renewal** field is 90 days before the contract's end date. For more information about this preference, see Setting Up Contract Renewals Preferences. If you want to override the Days Before Renewal global preference for a specific contract, edit the contract and specify a value in the **Contract Days Before Renewal** field. Upon saving the contract, the value in the **Target Renewal Date** field is adjusted based on the value in the **Contract Days Before Renewal** field.
Contract Renewed On	This field displays the date when the contract is renewed. This field is blank if the contract is not yet renewed.
Renewal Transaction	This field displays the link to the renewal transaction generated for the contract. This field is blank if the contract is not yet renewed.
Original Contract	This field displays the link to the original contract. On the original contract, this field is blank.
Renewal Terms [1]	This field displays the duration of the renewal contract in months. This value is set in the **Renewal Terms** field of the sales order from which the contract is created. On edit mode, you can update the value of the term for the renewal contract.
Annual Renew Value (Gross)	This field displays the average annual value of the renewal contract prior to deducting item discounts. For information about contract values, see Contract Value Calculation.
Annual Renew Value (Net)	This field displays the average annual value of the renewal contract after deducting item discounts. For information about contract values, see Contract Value Calculation.
Renewal Term Renew Value (Gross)	This field displays the average per term value of the renewal contract prior to deducting item discounts. For information about contract values, see Contract Value Calculation.
Renewal Term Renew Value (Net)	This field displays the average per term value of the renewal contract after deducting item discounts. For information about contract values, see Contract Value Calculation.

[1] This field is required if you are creating a contract using CSV import. For more information, see Importing Contracts.

ORACLE **NETSUITE**

Contract Item Uplift

In Software Vertical Contract Renewals 17.1, a **Contract Item Uplift** field is available on the contract item record.

When a value is set in this field, it overrides the uplift value set in the Contract Uplift field on the contract or the Uplift value set on the **Contract** subtab of the customer record. This field accepts positive values from 0 to 100.

A contract item uplift value set to zero means that you do not want to apply an uplift to the contract item, even if a value is set on the contract or customer record. If this field is blank, the percentage uplift specified on the contract will be applied to the renewal contract. If no uplift value is set on either the contract item or contract, the uplift specified on the customer record will be applied on the renewal contract.

You can specify percentage uplift only to Active contract items of an Active contract.

You can also specify percentage uplift for renewable items on the Item subtab of custom transaction forms. See also Creating a New Contract.

Updating Contracts using Mass Update

You can update specific fields on a contract record through mass update.

The following updates are supported:

- Update the contract level days before renewal setting
- Apply a contract level uplift

To update contract fields using mass update:

1. Go to Lists > Mass Update > Mass Updates.
2. Click **General Updates** to expand.
3. Under Custom Records, click **Contract**.
4. On the **Criteria** subtab, select filters that you want to use to set the criteria for contracts that will be updated.
5. On the **Mass Update Fields** subtab, check the box in the **Apply** column and specify a value in the **Value** or **Formula** field for the contract fields that you want to update. Only the following contract fields are currently supported for mass update:

   - Contract Days Before Renewal
   - Contract Uplift

   For information about these fields, see Contract Fields.

   > **(i) Note:** Although there are other fields shown on the **Mass Update Fields** subtab, only the **Contract Days Before Renewal** and **Contract Uplift** fields are supported and tested for contracts mass update. Do not update other contract fields.

6. Click **Preview** to select which contracts will be included in the update.
7. On the Mass Update Preview Results page, check the box in the **Apply** column for the contracts that you want to include in the update.

ORACLE® **NET**SUITE

8. Click **Perform Update** to execute the mass update.

For more information about mass update, see the help topic Defining a Mass Update.

Renewing a Contract

On the scheduled run of the contract renewals script (R05), renewal transactions are automatically generated for active contracts that have a target renewal date that is earlier than or equal to the current date.

The Software Vertical Contract Renewals SuiteApp also lets you generate renewal transactions for specific contracts on demand. The Renew Now feature enables you to renew contracts without any dependency on the Days Before Renewal and Restrict to Customer preferences. This feature supports single and batch renewals. For more information, see Renew Now and Renew Now: Batch Process.

The generated renewal transaction is based on the value that you set in the Transaction Type to Create field on the Contract Renewals Preferences page. You can set this preference to Opportunity, Quote (Estimate), or Sales Order. If the renewal transaction is a sales order, or when the renewal opportunity or estimate is converted to sales order, a renewal contract with a Pending status is automatically created. For information about Contract Renewals preferences, see Setting Up Contract Renewals Preferences.

After a renewal transaction is generated for the original contract, its status changes from Active to Renewal Generated. The original contract's status changes from Renewal Generated to Renewal Processed when the status of the renewal contract becomes Active (that is, contract items are generated for the renewal contract). For more information about contract states, see Contract Workflow.

Renew Now

You can generate a renewal transaction for specific contracts on demand by clicking the **Renew Now** button on the contract record. This button is available for contracts that satisfy the following conditions:

- Contract is not inactive.
- Contract status is Active or Renewal Rejected.
- Contract has at least one item that is not perpetual.
- Contract has at least one item that is not excluded from renewal.
- Contract has at least one item with an end date that matches the contract end date.

To generate a renewal transaction for a contract:

1. Go to Contract Renewals > View Records > Contracts.
2. Click the **View** link next to the contract that you want to generate a renewal transaction for.
3. Click the **Renew Now** button.

A confirmation message is shown at the top of the contract record to confirm the contract renewal status. If the renewal transaction is successfully generated, the status of the contract changes to Renewal Generated. To view the renewal transaction, click the link in the **Renewal Transaction** field. To view the renewal contract, go to the **Renewal Contracts** subtab of the original contract.

ORACLE® **NET**SUITE

> **Note:** Contract Renewals SuiteApp implements a locking mechanism to prevent contracts from being processed for renewal simultaneously, which may result to duplicate renewal transactions. When a contract is processed for renewal either by Renew Now button or by R05 script, the renewal process locks the contract by setting its Queued for Renewal (hidden field) value to True to prevent the contract from being picked up again for renewal. If an error is encountered while the contract is being renewed, the renewal process sets the Queued for Renewal value back to False so that the contract can be processed again for renewal.

Renew Now: Batch Process

Software Vertical Contract Renewals supports bulk renewal of contracts.

First, you need to create a saved search that defines the contracts to be renewed. The saved search must be Contract type and set to Public. Then, you can select this saved search on the Renew Now: Batch Process page to process the bulk renewal of contracts.

By default, only users with an administrator role have access to the Renew Now: Batch Process page. Administrators can edit the Renew Now: Batch Process script deployment record to give access to other roles who will perform bulk renewals.

To set up the roles for Renew Now: Batch Process:

1. Using an Administrator role, go to Customization > Scripting > Scripts.
2. Click the plus icon on the Filters to expand, and select **Suitelet** in the **Type** field.
3. Look for **SWE R05 Renew Now Batch Process**, and click the **Deployments** link.
4. Click the **Edit** link for **customdeploy_swe_r05_batch_renew_now**.
5. On the **Audience** subtab, select the roles that will perform batch processing of renewals in the **Roles** field. Users with the roles that you selected in this field will have access to the Renew Now: Batch Process page. To select multiple roles, hold down the CTRL key on your keyboard while clicking each role.
6. Click **Save**.

To renew contracts by bulk:

1. Create a contract saved search that defines the list of contracts that you want to renew.
   1. Go to Lists > Search > Saved Search > New.
   2. Select **Contract**.
   3. On the saved search definition page, enter a title for the contract saved search and check the **Public** box.
   4. On the **Criteria** subtab, specify the criteria for the contracts that you want to renew.
   5. On the **Results** subtab, set the **Sort By** field to **ID** and keep the **Descending** box cleared.
   6. Click **Preview** to preview the list of contracts that will be processed for renewal based on the criteria that you specified for this saved search. Review the list of contracts. Click **Return to Criteria** to modify the search criteria or to save the contract search.
   7. When you are done setting the criteria for the saved search, click **Save**.

   For more information about defining a saved search, see the help topic Defining a Saved Search.
2. Go to Contract Renewals > Renewals Automation > Renew Now: Batch Process.
3. On the Renew Now: Batch Process page, select the contract saved search that you created. The **Saved Search** field shows only Contract type saved searches that are set to Public.

4. Click **Submit**.

   A message appears at the top of the page to confirm the status of the bulk renewal. If your role permits, you can click the link on the confirmation message or go to Customization > Script > Scheduled Script Status to check the status of the renewal script.

   For information about the contracts processed, check the script execution logs.

Editing a Renewal Transaction

On the scheduled run of the contract renewal script (R05), a renewal transaction is automatically generated for a contract when its target renewal date is earlier than or equal to the current date. You can also manually generate a renewal transaction for specific contracts on demand using the Renew Now feature. For information about generating renewal transactions, see Renewing a Contract.

Any contract items from the preceding contract that are set up as renewable are automatically included on the renewal transaction when the transaction it is generated. The term of the renewal transaction is based on the renewal terms set on the preceding contract, and the start date is set to one day after the preceding contract's end date. By default, contract items on the renewal transaction are set up with the same term, start date, and end date as the body of the transaction.

If the renewal transaction is not yet processed by the contract item creation script (R03), you can edit the renewal transaction to modify the contract items that you want to include on the renewal contract.

> **Note:** If the renewal sales order has been processed by the R03 script and contract items have been generated for the renewal contract, any changes to the renewal transaction will not be applied to the renewal contract. If you want to modify the items for the renewal contract, you can create an upsell sales order. For more information, see Contract Upsell.

To edit a renewal transaction:

1. Open the renewal transaction record in edit mode.
   - To open the renewal transaction from the transaction list page:
     - From the Opportunities list page: Go to Transactions > Sales > Create Opportunities > List.
     - From the Estimates list page: Go to Transactions > Sales > Prepare Estimates > List.
     - From the Sales Orders list page: Go to Transactions > Sales > Enter Sales Orders > List.

     Then, click the **Edit** link for the renewal transaction that you want to edit.
   - To open the renewal transaction from the contract record:
     1. Go to Contract Renewals > View Records > Contract.
     2. Click the **View** link for the contract that you want to edit the renewal transaction for.
     3. On the contract record, click the link in the **Renewal Transaction** field to open the renewal transaction.
     4. On the renewal transaction, click the **Edit** button.
2. Go to the **Items** subtab to modify the contract items on the renewal transaction.
   - To remove an item, select the line that contains the item that you do not want to renew and click **Remove**.
   - If necessary, make any changes to the current items on the renewal transaction.
   - To add an item, select the item in a new line.
     - Set the quantity and price level.
     - Specify the item start and end dates. If you did not specify any, the item will be given the same term, start date, and end date as the body of the transaction.

Click **Add** to add the item. Repeat this step for each item that you want to add.

- If you want to modify the start and end dates for the contract items on the renewal transaction, take note of the following:

    - If you did not check the **Enable Flexible Start Date for Renewal Transactions** preference, you can set start date of the contract items to any date between the renewal contract's start and end dates.

    - If you checked the **Enable Flexible Start Date for Renewal Transactions** preference, you can set up the items on renewal transactions to start earlier than the renewal contract start date. If this preference is enabled, you can set the start date of contract items to any date between the current date and the contract end date.

        This feature is applicable only for renewal transactions and for upsell sales orders for renewal contracts. To set this preference, go to Contract Renewals > Setup > Contract Renewals Preference and check the **Enable Flexible Start Date for Renewal Transactions** box on the **Transactions Validation** subtab. For more information, see Setting Up Contract Renewals Preferences.

    - Items with end dates that are earlier than the contract end date will not be renewed.

3. Click **Save**.

When the renewal transaction is processed by the R03 script, the items set up on the transaction are added as contract items on the renewal contract. The **Check Log Status** field on the **Options & Log** subtab of the sales order changes from **Pending** to **Processed** when the sales order is successfully processed for contract item creation.

Also, when the contract items have been generated for the renewal contract, the renewal contract's status changes to Active and the preceding contract's status changes to Renewal Processed. For more information, see Contract Workflow.

Rejecting a Renewal Transaction

On the scheduled run of the contract renewal script (R05), a renewal transaction is automatically generated for a contract when its target renewal date is earlier than or equal to the current date. You can also manually generate a renewal transaction for specific contracts on demand using the Renew Now feature. For information about generating renewal transactions, see Renewing a Contract.

You can reject a renewal transaction if you do not want to process the renewal of a specific contract. When you reject a renewal transaction, the status of the contract changes from Renewal Generated to Renewal Rejected. For information about contract states, see Contract Workflow.

The **Reject Renewal** button is available on a renewal opportunity, estimate (quote), or sales order (in Pending Approval status) when the following conditions are true:

- The preceding contract where the renewal transaction is generated from has a status of Renewal Generated.

- The renewal transaction has no renewal contract yet, or has a renewal contract in Pending status (that is, contract items are not yet created for the renewal contract).

To reject a renewal transaction:

1. Open the renewal transaction record that you want to reject in view or edit mode.

    - From the Opportunities list page: Go to Transactions > Sales > Create Opportunities > List.

    - From the Estimates list page: Go to Transactions > Sales > Prepare Estimates > List.

ORACLE **NET**SUITE

- From the Sales Orders list page: Go to Transactions > Sales > Enter Sales Orders > List.

- From the contract record: Go to Contract Renewals > View Records > Contract. Click the **View** link for the contract that you want to reject the renewal transaction for. On the contract record, click the link in the **Renewal Transaction** field to open the renewal transaction.

2. On the renewal transaction, click the **Reject Renewal** button.

3. On the pop-up window, enter the reason why you are rejecting the renewal transaction in the **Reason** field.

4. Click **OK** to continue with the renewal rejection.

When you reject a renewal transaction, the status of the preceding contract where the renewal transaction is generated from changes to Renewal Rejected. If a renewal contract has been created before the transaction is rejected, the pending renewal contract is canceled (that is, the status of the renewal contract changes from Pending to Canceled).

Rejected renewal contracts will not be processed by the contract renewal script (R05). However, if you want to renew the contract again, you can click the **Renew Now** button on the contract record to generate a new renewal transaction. When you click this button, the status of the contract changes from Renewal Rejected to Renewal Generated. For information about the Renew Now feature, see Renewing a Contract.

Renewal rejected contracts can still be processed for upsell or downsell. You can perform a contract upsell or downsell by clicking the **Create Upsell Order** or **Create Downsell RMA** button on contract edit mode, or by creating a standalone sales order or return authorization. For more information, see Contract Upsell and Contracts and Returns.

For information about contract states and processes, see Contract Workflow and Managing Contracts.

Canceling a Contract

You can cancel a contract if you do not want it to be processed by Contract Renewals scripts.

The **Cancel Contract** button is available on contract records with a status of Pending, Active, or Renewal Rejected. When you click this button, the status of the contract changes to Canceled. For information about contract states, see Contract Workflow.

To cancel a contract:

1. Go to Contract Renewals > View Records > Contracts.

2. Click the View or Edit link next to the contract that you want to cancel.

3. On the contract record, click the **Cancel Contract** button.

Canceled contracts cannot be edited, and will no longer be processed for the following:

- Contract item creation – Canceled contracts are ignored by the R03 script.

- Contract renewal – Canceled contracts are ignored by the R05 script. Also, the Renew Now button is not available on the contract record.

- Contract upsell – Canceled contracts are not available for selection in the Contract field on an upsell order. Also, Create Upsell Order (which is available only on edit mode) will no longer be available on the contract record.

- Contract downsell – Canceled contracts are not available for selection in the Contract field on a downsell RMA. Also, Create Downsell RMA (which is available only on edit mode) will no longer be available on the contract record.

Closing Expired Contracts

When a contract is not renewed or canceled, it remains in active state even if its end date has passed. You can run a script to set the status of expired contracts from Active to Closed. For information about contract states, see Contract Workflow.

To close expired contracts:

1. Go to Customization > Scripting > Scripts.
2. Filter the list to show only Map/Reduce script types.
3. Look for SWV CR MR R08 Close Contracts (customscript_swv_cr_mr_r08_closecontract) and click the **Deployments** link next to it.
4. Click the **Edit** link for customdeploy_swv_cr_mr_r08_closecontract.
5. Make sure that the **Status** is set to **Not Scheduled**, and the **Deployed** box is checked.
6. Click **Save and Execute** in the Save button dropdown menu.

The script searches for contracts with a current status of Active and an end date that is before the current date. Then, it sets the status of these expired contracts to Closed.

Closed contracts cannot be edited and will no longer be processed for the following:

- Contract renewal – Closed contracts are ignored by the R05 script. Also, the Renew Now button is not available on the contract record.

- Contract upsell – Closed contracts are not available for selection in the Contract field on an upsell order. Also, Create Upsell Order (which is available only on edit mode) will no longer be available on the contract record.

- Contract downsell – Closed contracts are not available for selection in the Contract field on a downsell RMA. Also, Create Downsell RMA (which is available only on edit mode) will no longer be available on the contract record.

Contract Upsell

The Software Vertical Contract Renewals SuiteApp is designed to account for additional items that are added to a contract during the contract term.

By creating a sales order and associating it with an existing contract, new contract items are created on the existing contract.

> **Note:** The start and end dates for upsell items must be within the contract's term to be included in the contract. Any items that are sold for a period outside of the existing contract's term should be tracked on a separate, new contract.

> **Note:** If you are creating an upsell sales order for a renewal contract, you can set up the items to start earlier than the renewal contract start date if you checked the **Enable Flexible Start Date for Renewal Transactions** box on the Contract Renewals Preference page. If this preference is enabled, you can set the start date of contract items to any date between the current date and the contract end date. For more information, see Setting Up Contract Renewals Preferences.

You can process an upsell from the contract record or by creating a sales order and associating it with an existing contract. For information about which contracts can be processed for upsell, see Managing Contracts.

ORACLE **NET**SUITE

> **(i)** **Note:** Contract items created using CSV import are not supported for upsell.

To process an upsell from the contract record:

1. Open the contract record. For information about viewing a contract record, see Viewing a Contract.

2. On the contract record, click **Edit**.

3. On the **Contract Items** subtab, check the box in the **Process** column and click **OK** for each item that you want to upsell.

   To check the **Process** box for all contract items, click **Mark All**. To clear the **Process** box for all contract items, click **Unmark All**.

4. Click the **Create Up-sell Order** button.

5. On the transaction page, verify that the contract items that you are upselling are properly set on the **Items** subtab.

6. Click **Save**.

To process an upsell by creating a standalone sales order:

1. Create a new sales order. Go to Transactions > Sales > Enter Sales Order.

2. Select the customer you are adding service for in the **End User** field.

3. In the **Contract** field on the **Items** subtab, select the contract where you are adding contract items to. This field is filtered to show only contracts for the selected end user, with the appropriate contract status. For more information, see Managing Contracts.

   Selecting the contract does two things:

   - The end date of the sales order is co-terminated with the end date of the contract you selected.

   - The contract term for the items added reflects this end date.

   By default, the items that you add to the order are given the same term, start date, and end date as the body of the sales order. You can change these start and end dates, but items with end dates that are earlier than the contract end date will not be automatically renewed.

4. Enter or accept the date of the transaction.

5. Select an item you want to add to the contract.

   - Set the quantity and price level.

   - Make any changes to the start and end dates if needed.

6. Click **Add**.

7. Repeat Steps 5 and 6 for each item that you want to add.

8. Click **Save**.

> **(i)** **Note:** If you added items that affect percentage-based maintenance or support items, you are prompted to verify the maintenance/support line item before saving.

If the Combine Like Items preference is enabled on the Contract Renewals Preferences page, when the contract is renewed, identical items that were added by upsell sales orders are combined with matching items from the original contract if the rates are the same. For information about preference, see Setting Up Contract Renewals Preferences.

When the order is approved and then billed (which is the default setting), the items are added as contract items on the contract.

Contracts and Returns

In the Software Vertical Contract Renewals SuiteApp, removal of contract items is processed through return authorizations (RMAs). You can issue returns for items at any time during a contract's term.

You can process contract item returns from the contract record or from the sales order associated with the contract. For information about which contracts can be processed for downsell, see Managing Contracts.

> **ⓘ Note:** Contract items created using CSV import are supported for downsell. If the price level is blank, the custom price level will be used in the RMA.

To process a return from the contract record:

1. Open the contract record. For information about viewing a contract record, see Viewing a Contract.

2. On the contract record, click **Edit**.

3. On the **Contract Items** subtab, check the box in the **Process** column and click **OK** for each item that you want to return.

   To check the **Process** box for all contract items, click **Mark All**. To clear the **Process** box for all contract items, click **Unmark All**

4. Click the **Create Down-sell RMA** button. A progress bar appears while the RMA is being created in the background. When the RMA is created, the page redirects to the RMA record in edit mode, with the contract items for return automatically added on the **Items** subtab.

5. On the **Items** subtab of the return authorization form, set the quantity of the contract items that you want to issue a return for. Also, verify that the other details of the contract items are properly set. For a return to be valid, the items and rates on the return authorization must match the items and rates on the contract.

6. Click **Save**. The page refreshes and reloads the RMA in view mode.

To issue a return from the original sales order:

1. Go to Transactions > Sales > Enter Sales Orders > List.

2. Click the **View** link next to the sales order that contains the contract items that you are returning.

3. On the sales order form, click the **Authorize Return** button. A return authorization opens, with the items and other information from the contract sales order automatically filled in.

   - The end user is selected in the **End User** field.
   - The **Order Type** field is automatically set to **Contract-Downsell**.
   - The contract is selected in the **Contract** field.
   - The contract items are shown on the **Items** subtab.

   The header dates on the RMA match the date and term fields on the sales order.

4. Adjust the items listed on the **Items** subtab to show only the items and quantities you are issuing a return for.

5. Adjust the term, start, and end dates to reflect the portion of the contract term you are issuing the return for.

ORACLE® **NETSUITE**

6. Click **Save**.

When the return is approved, the transaction lines are available for the creation of contract items. The downsell items appear as offsetting items with a negative quantity on the contract and on the Contract Items subtab of the customer record.

When the contract is renewed, downsell contract items are omitted from the renewal transaction.

You can also enter a standalone RMA, but you must make sure that the rates for the lines items on the RMA are the same as the rates on the sales order. To create a standalone RMA, go to Transactions > Customers > Issue Return Authorizations. For more information, see the help topic Entering a Standalone Return Authorization.

> ⓘ **Note:** For downsell of contract items that use quantity pricing, creating a standalone RMA or manually adding the item to an RMA (regardless of how the RMA is created) may result in validation error.

Example – Renewal Impact of Upsell and Returns

Contract renewal automatically reflects upsell and returns that occur during the original term of the contract. Upsell items that extend to the end of the contract term are renewed, and items that are returned are not renewed.

For example, a software company creates an order for a new contract that includes the following items:

- A twelve-month term product license
- Three-months of on-site professional services training
- 100 seats
- A support entitlement

All of these items are renewable except for the training, which ends after three months. The training is not generated as a contract item.

When the order is approved and fulfilled, a contract is generated that includes all of the order line items (except for the training) as contract items.

Six months into the contract, the company purchases an add-on module. A new order is created and tied to the existing contract. When the existing contract is selected in the Contract field, the term, start and end dates are automatically updated on the transaction.

The new order includes the module as well as a support entitlement for the module.

ITEM	RR SCHEDULE	RR START DATE	RR END DATE	DELAY RR	DESCRIPTION	PRICE LEVEL	LIST RATE	DISCOUNT	QTY	RATE	AMOUNT	TAX	COMMITMENT CONFIRMED	ORDER PRIORITY	OPTIONS	TERM	START DATE	END DATE
ACME Software: Advanced Billing	Standard - Straight Line	7/1/2014	12/31/2014			Base Price	1,000		1	6,000.00	6,000.00					6	7/1/2014	12/31/2014
ACME Software: Support - Gold - New	Standard - Straight Line	7/1/2014	12/31/2014			Base Price	280		1	1,680.00	1,680.00					6	7/1/2014	12/31/2014

After the order is approved and billed, the contract is updated with the new contract items.

Nine months into the contract, there is an economic downturn, and the company decides to reduce the number of seats from 100 to 75. A return authorization is entered.

Items	Billing	Channel	Accounting	Relationships	Shipping	Communication	Related Records	Options & Log	System Information	

Contract
51-2014-01-01-2014-12-31

Contract Start Date
1/1/2014

Contract End Date
12/31/2014

Transaction Discount

Rate

Customer Discount

ITEM	RR SCHEDULE	RR START DATE	RR END DATE	DELAY RR	DESCRIPTION	PRICE LEVEL	LIST RATE	DISCOUNT	QTY	RATE	AMOUNT	TAX	COMMITMENT CONFIRMED	ORDER PRIORITY	OPTIONS	TERM	START DATE	END DATE
ACME Software: Production Seats	Standard - Straight Line	10/1/2014	12/31/2014			Base Price	100		25	300.00	7,500.00					3	10/1/2014	12/31/2014

The return shows as a negative line on the contract.

When the contract renews, only the renewable items from the original contract and the add-on module that was added mid-term are renewed. The 25 seats that were removed through the RMA are not renewed. Also, the support entitlement from the upsell order is combined with the support item that was included in the original contract.

Contract Renewals Reports and KPIs

The following Contract Renewals reports are available on the Contract Renewals tab:

- Under Metrics and KPIs:
  - Current Licenses | All
  - Current Licenses | Production Users
  - Current Maintenance
  - Customer Retention
  - Customer by Product Retention
  - Customer Maintenance Retention
- Under Channel Reporting:
  - Sales by Channel
  - Sales by Distributor Summary
  - Sales by Reseller Summary
  - Sales by End User Summary
  - Open Sales Orders

The following key performance indicators (KPIs) are available on the Contract Renewals tab under Metrics and KPIs:

- Current Licenses | Production Users | KPI
- Current Maintenance | KPI
- Customer Retention | KPI
- Customer Maintenance Retention | KPI

To set up these KPIs on your dashboard, click Set Up on the Key Performance Indicators portlet. Then, click Add Custom KPIs on the Set Up Key Performance Indicators popup window.

ORACLE® NETSUITE

Scripting Contract and Contract Item Records

Use the following tables when scripting the contract or contract item records.

Contract Record

Internal ID: customrecord_contracts

Field Internal ID	FIeld UI Label	Type	List/Record	Tab	Required
custrecord_contracts_ start_date	Contract Start Date	Date			Yes
custrecord_contracts_ end_date	Contract End Date	Date			Yes
custrecord_swe_ contract_type	Contract Type	List/Record	Contract Type		No
custrecord_contracts_ bill_to_customer	Bill To Customer	List/Record	Customer		Yes
custrecord_contracts_ end user	End User	List/Record	Customer		Yes
custrecord_swe_ contract_value	Contract Value (Base Curr)	Currency			Yes
custrecord_swe_ contract_value_base	Contract Value (Customer Primary Curr)	Currency			Yes
custrecord_swe_ annual_contract_val_ gross	Annual Contract Value (Gross)	Currency			No
custrecord_swe_ annual_contract_val_ net	Annual Contract Value (Net)	Currency			No
custrecord_swe_ contract_document	Contract Document	Document			No
custrecord_swe_ target_renewal_date	Target Renewal Date	Date			No
custrecord_contract_ date_renewed	Contract Renewed On	Date			Yes
custrecord_swe_ original_contract	Original Contract	List/Record	Contract		No
custrecord_swe_ contract_value_olr	Contract Value (OLR)	Currency			No
custrecord_swe_ contract_value_clr	Contract Value (CLR)	Currency			No
custrecord_swe_ annual_cv_gross_olr	Annual Contract Value - Gross (OLR)	Currency			No
custrecord_swe_ annual_cv_gross_clr	Annual Contract Value - Gross (CLR)	Currency			No

ORACLE **NET**SUITE

Field Internal ID	FIeld UI Label	Type	List/Record	Tab	Required
custrecord_swe_annual_cv_net_olr	Annual Contract Value - Net (OLR)	Currency			No
custrecord_swe_annual_cv_net_clr	Annual Contract Value - Net (CLR)	Currency			No
custrecord_swe_days_b4_renewal	Days Before Renewal (hidden)	List/Record	Contract Renewal Preferences		No
custrecord_swe_renewals_pricing_model	Renewals License Pricing Model (hidden)	List/Record	Contract Renewal Preferences		No
custrecord_swe_contract_perp_cntrct_itms	Perpetual Contract Items	Multiple Select	Contract Items	Contract Items	No

Contract Item Record

Internal ID: customrecord_contract_item

Field Internal ID	Field UI Label	Type	List/Record	Required
custrecord_ci_contract_id	Contract ID	List/Record	Contract	Yes
custrecord_ci_process_item	Process	Check Box		Yes
custrecord_ci_quantity	Quantity	Decimal Number		Yes
custrecord_ci_item	Item	List/Record	Item	Yes
custrecord_ci_item_category	Item Category	List/Record	Item Categories	Yes
custrecord_ci_startdate	Contract Item Start Date	Date		Yes
custrecord_ci_enddate	Contract Item End Date	Date		Yes
custrecord_ci_status	Contract Item Status	Free-Form Text		Yes
custrecord_ci_state	Contract Item State	Free-Form Text		Yes
custrecord_ci_bill_to_customer	Bill To Customer	List/Record	Customer	Yes
custrecord_ci_end_user	End User	List/Record	Customer	Yes
custrecord_ci_customer_discount	Bill To Customer Discount	Percent		No
custrecord_ci_product_line	Product Line	List/Record	Product Lines	No
custrecord_ci_quantity_type	Quantity Type	List/Record	Quantity Types	No
custrecord_ci_quantity_cap	Quantity Cap (hidden)	List/Record	Quantity Caps (hidden)	No
custrecord_ci_maximum_quantity	Maximum Quantity (hidden)	Integer Number		No
custrecord_ci_renew_with	Renew With	List/Record	Item	No

ORACLE® **NET**SUITE

Field Internal ID	Field UI Label	Type	List/Record	Required
custrecord_ci_renewal_processed_on	Renewal Processed On	Date		No
custrecord_ci_historical_install_base	Historical Install Base	Check Box		No
custrecord_ci_original_so_lineno	Original Line No	Integer Number		No
custrecord_ci_term	Contract Item Term	Decimal Number		No
custrecord_ci_order_type	Contract Item Order Type	List/Record	Order Types	No
custrecord_ci_original_transaction	Original Transaction	List/Record	Transaction	No
custrecord_ci_original_list_rate	Original List Rate	Decimal Number		No
custrecord_ci_current_list_rate	Current List Rate	Currency		No
custrecord_ci_original_discount	Original Discount	Percent		Yes
custrecord_ci_vendor	Vendor (hidden)	List/Record	Vendor	No
custrecord_ci_party	Party (hidden)	List/Record	Parties	No
custrecord_ci_ms_type	Maintenance/Support Type	List/Record	Maintenance/Support Types	No
custrecord_ci_ms_percentage	Maintenance/Support %	Percent		No
custrecord_ci_uplift_cap_basis_rate	Uplift Cap Basis Rate (hidden)	Currency		No
custrecord_ci_uplift_cap	Uplift Cap (hidden)	Percent		No
custrecord_ci_license_status	License Status	List/Record	License Statuses	No
custrecord_ci_tran_line_description	Tran Line Description	Long Text		No
custrecord_ci_end_of_life_date	End of Life Date	Date		No
custrecord_ci_end_of_ms_date	End of Mtce/Support Date	Date		No
custrecord_ci_replaced_with	Replaced With	List/Record	Item	No
custrecord_ci_replaced_with_renew_with	Replaced With Renew With	List/Record	Item	No
custrecord_ci_opt_out_ms	Opt-Out M/S	Check Box		No
custrecord_ci_renewals_exclusion	Renewals Exclusion	Check Box		No

Adding Transaction Fields to a Web Service Request for Contract Renewals

Contract Renewals uses some transactions (sales orders, in particular) as the basis for contract creation and renewal. When creating transactions using a web service, you must ensure that the fields being used by the Contract Renewals SuiteApp have a value in the web service request.

The following table lists the fields on a sales order that must be included in the web service request:

Field Internal ID	Field UI Label	Description	Required
Primary Information			
entity	Bill To Customer	Enter the internal id of the customer.	Yes
custbody_end_user	End User	Enter the internal id of the customer.	Yes
custbody_order_type	Transaction Order Type	Enter the transaction order type: ■ **1** – Contract-New ■ **2** – Contract-Renewal ■ **3** – Contract-Upsell ■ **13** – Contract-Downsell	Yes
custbody_tran_term_in_months	Term	Enter the contract term in months. If a value is not supplied, a default value of 12 will be used.	No
startdate	Start Date	Enter the transaction start date.	Yes
enddate	End Date	Enter the transaction end date. If no value is supplied, the end date will be computed based on the start date and contract term.	No
custbody_renewal_terms	Renewal Terms	Enter the new term of the contract (in months) when it is renewed.	No
Item Subtab			
item	Item	Enter the internal ID of the item to be added in the item sublist.	Yes
quantity	Quantity	Enter the quantity of the items to be added.	No
price	Price	Enter the price level used for the item: ■ **1** – Use the base price. This is the default value. ■ **-1** – Use a custom price. If this option is used, you must also set a value for List Rate and Rate. Block Custom Price Level must also be set to 2 (No) to allow custom pricing. ■ Internal ID of the price level created on the account.	No
custcol_list_rate	List Rate	Enter a value for the item list rate.	Yes (if custom price level is used)

ORACLE® **NETSUITE**

Field Internal ID	Field UI Label	Description	Required
			No (if non-custom price level is used)
custcol_inline_discount	Discount	Specify the discount percentage, if applicable. Enter a value from 0 to 100. Do not append the percent sign (%).	No
rate	Rate	Enter the rate for the item. The value should be equivalent to: [list_rate]*[term]*[discount]	Yes (if custom price level is used) No (if non-custom price level is used)
amount	Amount	This is the computed amount based on the rate and quantity.	No
custcol_swe_contract_item_term_months	Term	Enter the item term in months. By default, this is automatically populated based on the contract term.	No
custcol_swe_contract_start_date	Start Date	Enter the item start date. By default, this is automatically populated based on the transaction start date.	No
custcol_swe_contract_end_date	End Date	Enter the item end date. By default, this is automatically populated based on the transaction end date.	No
Options & Log Subtab			
custbody_block_custom_price_level	Block Custom Price Level	Enter either **1** (Yes) or **2** (No).	Yes (if custom price level is used) No (if non-custom price level is used)
custbody_allow_custom_price_lvl_for_ms	Allow Custom Price Level for M/S Items	Enter either **1** (Yes) or **2** (No).	No
custbody_custom_price_is_annual_rate	Custom Price Entered is Annual Rate	Enter either **true** or **false**.	No

Software Vertical Contract Renewals References

The following sections provide information on how the Software Vertical Contract Renewals SuiteApp calculates values that are reflected on contract records.

- Contract Value Calculation
- Contract Term Calculation

ORACLE **NETSUITE**

Contract Value Calculation

Contract values are calculated based on the Renewals License Pricing Model that you selected on the Contract Renewals Preferences page. For more information, see Setting Up Contract Renewals Preferences.

This section shows how contract values are calculated for each pricing model:

- Historical License List Rate - From Tran Line
- Current License List Rate - Price Level on Customer Record
- Current License List Rate - Price Level on Contract
- Current License List Rate - Price Level on Contract with Custom Price Handling

The following variables are used to calculate the contract value:

Variable	Description
annualTerm	Refers to the contract term. A value of 12 is used when the term type is annual, otherwise a value of 1 is used.
ciTerm	Refers to the contract item term. A value of 1 is used when there is no term defined, otherwise the value of the original contract item term is used.
contractRenewalTerms	Refers to the new term of the contract (in months) when it is renewed.
contractLR	Refers to the current item list rate based on the contract price level.
currentLR	Refers to the current item list rate based on the base price on the item record.
customerLR	Refers to the current item list rate based on the customer price level.
origLR	Refers to the original item list rate from the transaction.
origDC	Refers to the original discount.
qty	Refers to the quantity of the contract items.

Historical License List Rate - From Tran Line

This pricing model calculates the contract value based on the price level and list rate specified on the contract's source transaction.

For information about the contract value fields on a contract record, see Contract Fields.

Field	Formula
Contract Value (Customer Primary Curr)	origLR * (1-origDC) * qty * ciTerm
Contract Value (Base Curr)	origLR * (1-origDC) * qty * ciTerm
Annual Contract Value (Gross)	origLR * qty * ciTerm
Annual Contract Value (Net)	origLR * (1-origDC) * qty * ciTerm
Annual Renewal Value (Gross)	origLR * qty * 12
Annual Renewal Value (Net)	origLR * (1-origDC) * qty * 12
Renewal Term Renew Value (Gross)	origLR * qty * contractRenewalTerms
Renewal Term Renew Value (Net)	origLR * (1-origDC) * qty * contractRenewalTerms

> **ⓘ Note:** Even if a renewal item is different from the original item, this pricing model will still use the list rate of the original item in the source transaction.

Current License List Rate - Price Level on Customer Record

This pricing model calculates the contract value based on the price level set on the customer record and its corresponding price specified on the item record. If there is no price level specified on the customer record, the base price on the item record is used to calculate the contract value.

For information about the contract value fields on a contract record, see Contract Fields.

Field	Has a Customer Price Level	Annual Term	Formula
Contract Value (Customer Primary Curr)	No	Yes	`(currentLR/12) * (1-origDC) * qty * ciTerm`
	No	No	`currentLR * (1-origDC) * qty * ciTerm`
	Yes	Yes	`(customerLR/12) * (1-origDC) * qty * ciTerm`
	Yes	No	`customerLR * (1-origDC) * qty * ciTerm`
	—	—	`customerLR = customerLR / exchangerate` **ⓘ Note:** This formula is used when the Multiple Currencies feature is enabled.
Contract Value (Base Curr)	No	Yes	`(currentLR/12) * (1-origDC) * qty * ciTerm`
	No	No	`currentLR * (1-origDC) * qty * ciTerm`
	Yes	Yes	`(customerLR/12) * (1-origDC) * qty * ciTerm`
	Yes	No	`customerLR * (1-origDC) * qty * ciTerm`
Annual Contract Value (Gross)	No	Yes	`(currentLR/12) * qty * annualTerm`
	No	No	`currentLR * qty * annualTerm`
	Yes	Yes	`(customerLR/12) * qty * annualTerm`
	Yes	No	`customerLR * qty * annualTerm`
Annual Contract Value (Net)	No	Yes	`(currentLR/12) * (1-origDC) * qty * annualTerm`
	No	No	`currentLR * (1-origDC) * qty * annualTerm`
	Yes	Yes	`(customerLR/12) * (1-origDC) * qty * annualTerm`

ORACLE® **NET**SUITE

Field	Has a Customer Price Level	Annual Term	Formula
	Yes	No	`customerLR * (1-origDC) * qty * annualTerm`
Annual Renewal Value (Gross)	—	—	`origLR * qty * 12`
Annual Renewal Value (Net)	—	—	`origLR * (1-origDC) * qty * 12`
Renewal Term Renew Value (Gross)	—	—	`origLR  * qty * contractRenewalTerms`
Renewal Term Renew Value (Net)	—	—	`origLR * (1-origDC) * qty * contractRenewalTerms`

Current License List Rate - Price Level on Contract

This pricing model calculates the contract value based on the price level set on the contract's source transaction and its corresponding price specified on the item record. If a custom price level is specified on the source transaction (that is, contract price level is blank), the base price on the item record is used to calculate the contract value.

For information about the contract value fields on a contract record, see Contract Fields.

Field	Has a Contract Price Level	Annual Term	Formula
Contract Value (Customer Primary Curr)	No	Yes	`(currentLR/12) * (1-origDC) * qty * ciTerm`
	No	No	`currentLR * (1-origDC) * qty * ciTerm`
	Yes	No	`contractLR * (1-origDC) * qty * ciTerm`
	—	—	`contractLR = contractLR /exchangerate` ⓘ **Note:** This formula is used when the Multiple Currencies feature is enabled.
Contract Value (Base Curr)	No	Yes	`(currentLR/12) * (1-origDC) * qty * ciTerm`
	No	No	`currentLR * (1-origDC) * qty * ciTerm`
	Yes	No	`contractLR * (1-origDC) * qty * ciTerm`
Annual Contract Value (Gross)	No	Yes	`(currentLR/12) * qty * annualTerm`
	No	No	`currentLR * qty * annualTerm`
	Yes	No	`contractLR * qty * annualTerm`
Annual Contract Value (Net)	No	Yes	`(currentLR/12) * (1-origDC) * qty * annualTerm`

ORACLE® **NET**SUITE

Field	Has a Contract Price Level	Annual Term	Formula
	No	No	`currentLR * (1-origDC) * qty * annualTerm`
	Yes	No	`contractLR * (1-origDC) * qty * annualTerm`
Annual Renewal Value (Gross)	—	—	`origLR * qty * 12`
Annual Renewal Value (Net)	—	—	`origLR * (1-origDC) * qty * 12`
Renewal Term Renew Value (Gross)	—	—	`origLR  * qty * contractRenewalTerms`
Renewal Term Renew Value (Net)	—	—	`origLR * (1-origDC) * qty * contractRenewalTerms`

Current License List Rate - Price Level on Contract with Custom Price Handling

This pricing model calculates the contract value based on the price level set on the contract's source transaction and its corresponding price specified on the item record, with the option to set a custom price on the source transaction. If a custom price level is specified on the source transaction (that is, contract price level is blank), the original list rate specified on the source transaction is used to calculate the contract value.

When a custom price is set on the contract and the Renew With item is the same as the original item, the renewal contract uses the custom price for the item on the source transaction. If the Renew With item is different, the renewal contract uses the base price of the renewal item.

For information about the contract value fields on a contract record, see Contract Fields.

> **ⓘ Note:** The computation is the same for annual or non annual contract terms.

Field	Has a Contract Price Level	Formula
Contract Value (Customer Primary Curr)	No	`origLR * (1-origDC) * qty * ciTerm`
	Yes	`contractLR * (1-origDC) * qty * ciTerm`
	—	`contractLR = contractLR/exchangerate` > **ⓘ Note:** This formula is used when the Multiple Currencies feature is enabled.
Contract Value (Base Curr)	No	`origLR * (1-origDC) * qty * ciTerm`
	Yes	`contractLR * (1-origDC) * qty * ciTerm`
Annual Contract Value (Gross)	No	`origLR * qty * annualTerm`
	Yes	`contractLR * qty * annualTerm`

ORACLE® **NET**SUITE

Field	Has a Contract Price Level	Formula
Annual Contract Value (Net)	No	`origLR * (1-origDC) * qty * annualTerm`
	Yes	`contractLR * (1-origDC) * qty * annualTerm`
Annual Renewal Value (Gross)	—	`origLR * qty * 12`
Annual Renewal Value (Net)	—	`origLR * (1-origDC) * qty * 12`
Renewal Term Renew Value (Gross)	—	`origLR  * qty * contractRenewalTerms`
Renewal Term Renew Value (Net)	—	`origLR * (1-origDC) * qty * contractRenewalTerms`

Contract Term Calculation

This section shows how the Software Vertical Contract Renewals SuiteApp calculates the contract term based on the start and end dates that you enter on a sales order. For information about creating a contract, see Creating a New Contract.

The following variables are used to calculate the contract term:

Variable	Description
DD	Day of the month
MM	Month number
YYYY	Year
n	Number of full months between start date and end date, integer component of the contract term
f	Decimal component of the contract term

To show how the SuiteApp calculates the contract term, use the following start and end dates as an example.

Start Date		End Date		Term
14 March 2016	Start Date DD = 14 Start Date MM = 03 Start Date YYYY = 2016	31 December 2017	End Date DD = 31 End Date MM = 12 End Date YYYY = 2017	n + f

The SuiteApp uses the following logic to compute for the integer component (n) and the decimal component (f) of the term.

Steps to Calculate Contract Term	Sample calculation	
Step 1: Get the number of months between the contract's start date and end date (n). This is the integer component of the term.	`n = ((End Date YYYY – Start Date YYYY) * 12) – Start Date MM + End Date MM`	`n = 21`

Steps to Calculate Contract Term	Sample calculation	

	`n = ((2017 - 2016) * 12) - 03 + 12`
	
	`n = 21 months`	

Step 2: Based on the start date, get the date of the last full month before the end date (x). To get x, add the number of months (n) to the start date.
 	
  1. If x is later than the end date, subtract 1 month until x becomes earlier than or equal to the end date.
  2. If both x and the start date have the same value for DD, subtract 1 day.
  3. If x is equal to the end date, then the term is equal to n (from Step 1). Otherwise, continue with Step 3 to calculate the decimal component (f) of the term.
	`x = Start Date + n`
	
	`x = 14 March 2016 + 21 months`
	
	`x = 14 December 2017`
	
	This example falls under condition 2.2, both x and the start date have the same value for DD, which is 14. Hence, 1 day is subtracted from the initially calculated x value.
	
	`x = 14 December 2017 - 1 day`
	
	`x = 13 December 2017`
		`x = 13 December 2017`

Step 3: Get the date of the start of the month following x (y).	`y = x + 1 day`
	
	`y = 13 December 2017 + 1 day`
	
	`y = 14 December 2017`
		`y = 14 December 2017`

Step 4: Based on the start date, get the date of the last full month after the end date (z).
 	
If both z and the start date have the same value for DD, subtract 1 day.
	`z = Start Date + n + 1 month`
	
	`z = 14 March 2016 + 21 months + 1 month`
	
	`z = 14 January 2018`
	
	For this example, both z and the start date have the same value for DD, which is 14. Hence, 1 day is subtracted from the initially calculated z value.
	
	`z = 14 January 2018 - 1 day`
	
	`z = 13 January 2018`
		`z = 13 January 2018`

Step 5: Get the number of days between the end date and y, and add 1 day ($d1$).	`d1 = (End Date - y) + 1 day`
	
	`d1 = (31 December 2017 - 14 December 2017) + 1 day`
	
	`d1 = 17 + 1 = 18`
		`d1 = 18`

Step 6: Get the number of days between the last full month after the end date (z) and the start of the month following the last full month before end date (y), and add 1 day ($d2$).	`d2 = (z - y) + 1 day`
	
	`d2 = (13 January 2018 - 14 December 2017) + 1 day`
	
	`d2 = 30 + 1 = 31`
		`d2 = 31`

Step 7: Get the decimal component (f) by dividing $d1$ by $d2$. Round off to the nearest three decimal places.	`f = d1/d2`
	
	`f = 18/31 = 0.581`
		`f = 0.581`

Step 8: Calculate the term by adding the integer component (n, from Step 1) and decimal component (f, from Step 7).	`Term = n + f`
	
	`Term = 21 + 0.581 = 21.581`
		`Term = 21.581`

ORACLE® **NET**SUITE