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SuiteCommerce InStore Administrator’s Overview

SuiteCommerce InStore (SCIS) is a web-based point-of-sale application. Because it was built on the same platform as the Commerce web store applications, SCIS leverages the app’s responsive web design to provide an intuitive user interface for touch tablet screens.

SCIS is delivered as a managed SuiteApp, so that after initial installation, any updates are pushed directly to your NetSuite account. The following topics provide information for administrators on how to install SuiteCommerce InStore (SCIS):

- SCIS Installation
- Installing SCIS Mobile Apps

To learn about general information intended for sales associates and employees using SCIS for day-to-day operations, read the SCIS User Guide Overview.

Locations and Subsidiaries

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

Standard Records and Custom Records

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

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

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

Sales and Other Transactions

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

SuiteCommerce InStore (SCIS) is delivered as a managed SuiteApp (bundle) that you install in your NetSuite account. With a managed SuiteApp, you automatically receive updates for fixes and enhancements without any need to update manually or migrate for future releases.

Prerequisites

Before you can install SCIS, contact your NetSuite sales rep or account manager. Ensure that you have access to NetSuite Commerce features such as SuiteCommerce InStore and access to the SuiteCommerce InStore SuiteApp.

First Installation of SuiteCommerce InStore

For detailed instructions on installing the SuiteApp, read SuiteCommerce InStore Installation.

Note: After installation, you must configure SCIS for your business needs. Configuration steps include defining SCIS Settings, configuring receipt templates, employee records, item records, cash drawer management settings, and SCIS custom records. For more information about configuration, read SCIS Configuration.

Managed Bundle Updates and Phased SCIS Release

After you have installed the SuiteCommerce InStore SuiteApp in your account, the SuiteApp is updated periodically. SCIS has major releases of new features and enhancements occur twice each year. Efixes can occur every two weeks. Efix releases are typically used to correct issues and to deliver version updates to a set of accounts. Major releases and efixes are delivered directly to your account in managed bundle updates.

For more information, read Managed Bundle Updates of SCIS.

SCIS for iOS and SCIS for Windows

These are the mobile apps that are required on devices running SCIS. For more information about how to install and configure the mobile apps for your account, read SCIS for iOS and SCIS for Windows Applications.

SCIS on Sandbox

It is recommended that you install and configure SCIS on a sandbox account before using it in production. Testing on sandbox enables you to verify that your business processes work seamlessly before you start taking orders with SCIS in your store.

For more information, read Working with SCIS on Sandbox.
Reference Information

Use the following topics for reference information:

- **Required Features and Settings for SCIS** – Useful as a reference on first installation. You must enable required features and settings for successful installation.
- **Configuring Search Fields and Field Sets** – Use this information if you have made significant configuration changes.

SuiteCommerce InStore Installation

This section includes information about first-time installation of SuiteCommerce InStore (SCIS). When you install the SuiteApp, the following basic components are automatically set up and configured:

- Website for SCIS, including search fields and field sets
- SCIS Quick Cash Denominations
- Image resize preferences on the Images subtab of the Web Site Setup page

If certain features required by the SuiteApp are not enabled, then SuiteApp installation fails. To identify required features and settings, read Required Features and Settings for SCIS.

Installation consists of two tasks:

- Installing SuiteApps for SCIS
- Setting Up the SCIS Website

Installing SuiteApps for SCIS

This section includes information about first-time installation of SuiteCommerce InStore (SCIS).

SuiteApps install all the components required to run SCIS, including custom records and fields, JavaScript files, and other assets. The SuiteApp installation process checks for required features.

If installation of the SuiteCommerce InStore SuiteApp fails, ensure that you have all the required features and preferences enabled, then try the installation again. For more information, read Required Features and Settings for SCIS.

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

- SuiteCommerce InStore (Bundle ID 249555)
- Reference Product List Records (Bundle ID 53051)
- Reference Product Review Records (Bundle ID 53053)

To install SuiteApps for SCIS:

1. Go to Customization > SiteBundler > Search & Install Bundles.
2. In the **Keyword** field, enter the Bundle ID for each SuiteApp.
3. Click **Search**.
4. Verify that the correct SuiteApp is returned in the search and select it.
5. Review the SuiteApp details and then click **Install**.
After completing SuiteApp installation, finish configuring your SuiteCommerce InStore website. For more information, see Setting Up the SCIS Website.

Setting Up the SCIS Website

The first time you install SuiteCommerce InStore (SCIS), a new website is automatically created. The new site, called SuiteCommerce InStore Website, appears on the list of websites at Setup > Suite Commerce Advanced > Set Up Web Site.

You will use this website for SCIS transactions. All items that you plan to sell using SCIS must be configured to display in this website.

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

To set up the SCIS website:

1. After installation is complete, go to Setup > Suite Commerce Advanced > Set Up Web Site.
2. Click Edit next to SuiteCommerce InStore Website.

   **Note:** For NetSuite 2019.2 and earlier, the website **Type** is SuiteCommerce Advanced. For NetSuite 2020.1 and later, the **Type** is SuiteCommerce InStore. You cannot change the website type.

3. If you use OneWorld, select a Subsidiary at the bottom of the page. For more information about subsidiary settings, see Subsidiaries and SuiteCommerce InStore.
4. Check the Include Out of Stock Items in Web Store box.
5. Click the **Touch Points** subtab.
   - Under **Name**, select **View Homepage**.
   - Under **Web Application**, select **SuiteCommerce InStore**.
   - Under **Path**, accept the default value, **/pos/index.ssp**.

6. Click **Save**.

7. Go to Setup > SuiteCommerce Advanced > Domains.

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

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

   - Set the **HTML Hosting Root** to **Live Hosting Files**.

9. Click **Save**.

   SuiteCommerce InStore is a managed SuiteApp, which means that updates and enhancements to the SuiteApp are pushed automatically to your account. No changes are made to the website if you update or remove the SuiteApp. If you remove the SuiteApp and then install it again there will be two websites.

   **Important:** After you have completed setting up the SuiteCommerce InStore Website, you must install the SCIS for iOS or SCIS for Windows mobile app on the device you will use for entering orders. For more information, read SCIS for iOS and SCIS for Windows Applications.

### Using a Registered Domain with SCIS

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

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

### Required Features and Settings for SCIS

This section includes information for administrators setting up SuiteCommerce InStore (SCIS). Read the following for more information:

- **Required Features for SuiteCommerce InStore**
- **Accounting and Tax Preferences for SCIS**
Required Features for SuiteCommerce InStore

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

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

### Enable Features

#### Company
- Locations
- Multi-Language

#### Accounting
- Accounting Periods

#### Tax
- Advanced Taxes

#### Transactions
- Advanced Billing
- Multiple Shipping Routes
- Promotion Codes

#### Items & Inventory
- Gift Certificates
- Bar Coding and Item Labels
- Inventory
- Multi-Location Inventory

#### CRM
- Upsell Manager

#### Web Presence
- Web Site

---

**Note:** The Multi-Language feature is optional for NetSuite US, but **required** for other editions of NetSuite, such as NetSuite Canada and NetSuite Australia.
## SuiteCommerce InStore Installation

### Subtab on Enable Features Page

<table>
<thead>
<tr>
<th>Feature Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Store</td>
</tr>
<tr>
<td>Advanced Site Customization</td>
</tr>
<tr>
<td>Descriptive URLs</td>
</tr>
<tr>
<td>SuiteCommerce InStore</td>
</tr>
<tr>
<td>Host HTML Files</td>
</tr>
<tr>
<td>Online Ordering</td>
</tr>
</tbody>
</table>

### SuiteCloud

<table>
<thead>
<tr>
<th>Feature Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom Records</td>
</tr>
<tr>
<td>Advanced PDF/HTML Templates</td>
</tr>
<tr>
<td>Client SuiteScript</td>
</tr>
<tr>
<td>Server SuiteScript</td>
</tr>
<tr>
<td>SuiteScript Server Pages</td>
</tr>
<tr>
<td>Custom Transactions</td>
</tr>
</tbody>
</table>

## Accounting and Tax Preferences for SCIS

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

- Set Accounting Preferences
- Set Shipping Charge Automation
- Configure Tax Settings
- Permit Refunds or Exchanges for Transactions in Closed Accounting Periods

### Set Accounting Preferences

Follow these steps to set your SCIS accounting preferences.

**To set accounting preferences for SCIS:**

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

### Set Shipping Charge Automation

Follow these steps to have SCIS automatically charge for shipping.

**To automatically charge for shipping:**

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

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

**Configure Tax Settings**

Follow these steps to configure your SCIS tax settings.

**To configure tax settings:**

1. Go to Setup > Accounting > Nexuses. You must have at least one tax nexus set up.
2. Go to Setup > Accounting > Set Up Taxes.
   a. Check the box next to **Enable Tax Lookup on Sales Transactions**.
   b. Check the box next to **Customers Default to Taxable**.
   c. Check the box next to **Charge Out of District Sales Taxes**.
   d. Check the box next to **Per-Line Taxes on Transactions**.

   **Note:** In some cases, the Per-Line Taxes on Transactions preference conflicts with the feature, Multiple Shipping Routes. If you find that the preference is not available, go to Setup > Company > Enable Features. On the Transactions subtab, clear the box next to Multiple Shipping Routes. Click Save. Then, you can check the Per-Line Taxes on Transactions box, and enable the Multiple Shipping Routes feature again.
   e. Under **Charge Sales Tax on Store Orders**, select **Always**.
   f. Select a **Default Tax Code**.

   **Note:** If there is no tax code or tax item on the customer record, then the tax is calculated based on the SCIS location address.
   g. Under **Tax Code Lists Include**, select **Tax Groups and Tax Codes**.
   h. Set up a tax code for each location where you will be using SCIS.
   i. Click **Save**.

3. Go to Setup > Accounting > Tax Schedule. Verify that the nexus corresponding to each location is taxable.

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

For more information about tax settings, see [Calculating Taxes on Transactions](#).

To view a list of SCIS installation tasks, see [SuiteCommerce InStore Installation](#).

**Permit Refunds or Exchanges for Transactions in Closed Accounting Periods**

By default, after an accounting period has been closed, sales associates cannot process a refund or exchange for transactions that occurred during that period. To disable the restriction for a period, you can use the **Allow Non-G/L Changes** option. The option allows adding non-posting transactions to a closed period.
Perform the following steps in NetSuite. The first two can be one-time tasks.

1. Ensure you have **Allow Quick Close** enabled in your Accounting Preferences.
2. For the SCIS Clerk role, check the option for **Allow Non-G/L Changes**.
3. For the closed period, check the option to **Allow Non-G/L Changes**.

**Note:** Sales associates and other users who do not have the Allow Non-G/L Changes enabled in their role cannot enter non-posting transactions to a closed period, even if the Allow Non-G/L Changes option for a period is checked.

1. **To ensure you have Allow Quick Close enabled:**

   This setting lets you close accounting periods.

   1. Go to Setup > Accounting > Accounting Preferences.
   2. On the **General** tab, scroll to the end of the **General Ledger** section.
   3. Ensure **Allow Quick Close of Accounting Periods** is checked. If not, check the option.
   4. If you checked the option, click **Save**.

2. **To adjust the SCIS Clerk role to Allow Non-G/L Changes:**

   1. Go to Setup > Users/Roles > Manage Roles.
   2. Click **Edit** for the **SCIS Clerk** role.
   3. On the **Permissions** tab, click **Setup**.
   4. In the **Add** field, select **Allow Non-G/L Changes**.
   5. Click **Add**.
   6. Click **Save**.

3. **To enable Allow Non-G/L Changes for a Closed Accounting Period:**

   1. Go to Setup > Accounting > Manage Accounting Periods.
   2. Expand the desired **Period Name** to display the period to enable.
   3. Verify that the **Period Close** column is checked for the period.
      Open periods do not require the option to allow non G/L changes.
   4. Click the **Period Name** to display the details.
   5. Check the **Allow Non-G/L Changes** box.
   6. Click **Save**.

**Tip:** To always allow refunds and exchanges for closed periods, include checking the **Allow Non-G/L Changes** box as a standard task when closing a period.

**Managed Bundle Updates of SCIS**

After the SuiteCommerce InStore SuiteApp is installed for the first time in your account, periodically there will be updates to the SuiteApp. Updates to SuiteCommerce InStore (SCIS) happen automatically in your
account. These updates are delivered by a phased release process, similar to the release process for NetSuite upgrades. You will receive an email notification before any major update.

If the managed bundle update fails, you can run a script to identify required features and settings that may not be enabled. For information, read Identifying Required Features and Settings for SCIS.

Resetting Touch Points for a New Version

⚠️ **Important:** You must reset the touch point after each update to a new version.

**To reset the touch point after a managed bundle update:**

1. Go to Setup > SuiteCommerce Advanced > Set Up Web Site.
2. Edit your SCIS website.
3. On the **Touch Points** subtab, set the **View Homepage** touch point to **SuiteCommerce InStore**.
4. Click **Save**.

Efix Releases

Efix releases happen periodically. These are typically, minor releases that include bug fixes and patches. If the efix impacts any configurations that you may have in your account, only then will you receive an email notification prior to the efix release.

Phased Release Process for SCIS

A new version of SCIS is released twice each year. The new version of SCIS is delivered to groups of customers in phases over a period of two months. You will receive an email notification before SCIS is updated to the new version in your account. The email message includes the date and time when your account will be updated, and may include required actions for administrators to perform in preparation for the new version of SCIS.

The new version of SCIS is available on sandbox prior to the date when your account is updated in production. On sandbox, you can test new features using your own data and business processes. For more information, read Working with SCIS on Sandbox.

The following is recommended when a new version of SCIS is available in your sandbox account:

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

After the new version has been available in sandbox for approximately two weeks, updates to customer accounts begin in phases. Contact your NetSuite representative for more information about your account.

Identifying Required Features and Settings for SCIS

You can run a script that identifies features and settings that may have caused installation failure. Use the NetSuite debugger to run the script.
To generate a list of required features and settings:

1. Copy the script displayed in the SCIS_CheckRequiredFeatures.js file in the NetSuite file cabinet at Web Site Hosting Files > Live Hosting Files > SSP Applications > NetSuite Inc. - POS > SuiteCommerce InStore > scripts. You can use the Search box in the File Cabinet to locate the file.

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

If there are features required for SCIS that are not enabled in your account, they will be listed at the bottom of the page.

SCIS for iOS and SCIS for Windows Applications

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

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

Recommended Settings for iPads Running SCIS

1. iOS 11.x, iOS 12.x, or iOS 13.0 through 13.3 – These versions have been verified to be compatible with SCIS for iOS version 5.0.1

   **Important:** Free space issues in iOS 13.x can affect the storage required for Fallback. Under certain circumstances, these issues can cause the SCIS for iOS mobile app to fail. See Fallback and Storage Limits for iOS13.

2. SCIS for iOS mobile app 5.0.1 – To update the mobile app, go to the App Store app. On the Updates tab, tap the Update button next to NetSuite SuiteCommerce InStore app.
3. Turn off automatic updates – Go to Settings > iTunes & App Store > Automatic Downloads. Turn off App Updates.

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

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

**Fallback and Storage Limits for iOS13**

An issue exists with Fallback and storage limits on iOS13 devices. This topic provides steps you can take to
avoid interruptions at the point of sale (POS).

**Space Availability Maximums**

The maximum database storage available to SCIS Fallback under iOS13 is 500 MB. This limit could affect
SCIS's ability to process and save transactions on your iOS13 POS devices.

- If the space needed for Fallback on an iOS13 device exceeds 500 MB, the SCIS application will fail on
  that device.
- If an iOS13 device has less than 1 GB of free space, the space available for Fallback is reduced to 50%
  of that free space.

For example, if only 700 MB is free on the device, storage for Fallback is limited to 350 MB. This reduced
availability could cause the SCIS application to fail.

**Reasons that Fallback could Exceed the Available Space**

Situations that could impact the free space available include:

- A download of your catalog to the device for use by Fallback exceeds 500 MB.
- The transaction volume stored offline in a Fallback session exceeds 500 MB.
- The device has less than 1 GB of free space, reducing the amount available to Fallback by 50%.

**Best Practices to Avoid Space Issues**

We recommend these guidelines to avoid issues with free space under iOS13:

- **For SICS iOS devices not on iOS13,** do not upgrade them. Leave those devices at the prior iOS
  version.
- For devices already using iOS13, maintain at least 1 GB of free space on each device.

If you are using Fallback, have some devices on iOS13, and you are not experiencing failures, your item/
price and transaction volumes likely do not exceed the free space limit.

If you see that SCIS on an iOS13 device is taking too long to respond or freezes after a sales associate
logs in, you should:

1. Disable Fallback for the device's location.
2. Uninstall the SCIS application on the device.
3. Reinstall the SCIS application on the device.
To disable Fallback by Location:

1. Log into NetSuite.
2. Go to Setup > SuiteCommerce Advanced > SCIS Fallback Settings.
3. Clear the highlight for Locations using devices affected by the iOS13 space issue.

Note: This action will disable Fallback for all devices at those locations.

4. Click Save.

NetSuite Customer Support is available to assist you and answer your questions.

Recommended Settings for Windows Tablets Running SCIS

SCIS for Windows version 4.1 includes specific system requirements. Tablets running SCIS must be updated to run the following:

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

Supported Windows Operating System

The following table shows Windows OS versions that support SCIS for Windows version 4.1.

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>5.0</td>
<td>.NET 4.7.1</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

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

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

■ Updating the Operating System and SCIS Mobile App

Installing SCIS Mobile Apps

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

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

To configure SCIS mobile apps on iPads and Windows tablets:

1. Ensure you have the latest version of SCIS for iOS, or SCIS for Windows app on your tablet.
   - For iOS devices, open the App Store on your iPad and download the NetSuite SuiteCommerce InStore app.
   - For Windows devices, to access the SCIS for Windows executable file, contact your NetSuite account representative or Customer Support. Then, install the app on the Windows device where you plan to run SCIS.

2. After you have installed the mobile app on the tablet, launch SCIS on your tablet. If you use an iPad, tap Configure Account, after the Welcome screen.

3. Choose Production to set up SCIS for daily business use.
   - Choose Sandbox or Release Preview if you are setting up SCIS in a test environment.

4. Log in to SCIS. Enter your login credentials.

5. If you have access to more than one NetSuite account with SCIS installed, you can access any of those accounts. Choose an account.

6. Choose a role that is capable of configuring devices, such as the Administrator role.

7. On the next screen, the device ID is automatically configured. Enter the website ID for your SCIS Website.
Choose the following configuration settings based on the operating system on your tablet:

- **iOS devices:**
  - Guided Access – Optional.
  - Printing Technology – Choose Airprint.

- **Windows devices:**
  - Assigned Access – Recommended. An administrator can configure assigned access to limit an existing user account to use only SCIS. Refer to Microsoft Docs for configuration steps.

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

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

8. **Click Done.**

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

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

### Setting Up Guided Access

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

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

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

**To set up Guided Access on an iOS device:**

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

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

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

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

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

Setting Up Mobile Certificates and a Domain Whitelist for SCIS

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

Read the following topics for more information and detailed instructions:
SCIS Mobile Certificates

SuiteCommerce InStore (SCIS) installs a set of records called, **SCIS Mobile Certificates**. These custom records store authorizing certificates for domains associated with your implementation of SCIS. A standard set of certificates is created when the SCIS is installed in your account.

An important administrative task when using SCIS, is maintaining the list of SCIS Mobile Certificates. Administrators will need to modify existing SCIS Mobile Certificates periodically to update certificate fingerprints that go out of date.

Read the following topics to learn how to add a new SCIS Mobile Certificate record, how to obtain a current certificate fingerprint, and how to update SCIS Mobile Certificate records for account-specific domain capabilities:

- Updating SCIS Mobile Certificates
- Adding a Mobile Certificate Entry
- Obtaining Domain Fingerprints for SCIS Mobile Certificates

Updating SCIS Mobile Certificates

An important administrative task when using SuiteCommerce InStore (SCIS), is maintaining the list of SCIS Mobile Certificates. When a certificate expires, an administrator must modify the corresponding SCIS Mobile Certificate record with an updated certificate fingerprint.

Tip: For a list of Mobile Certificates and Certificate Fingerprints, refer to [SuiteAnswers](#).

You can tell that a mobile certificate has expired, when the SCIS for iOS app displays a warning message during the login process. Note that sales associates can ignore the expired certificate warning and continue working.

**To update the certificate fingerprint:**

1. Login to NetSuite.
2. Go to Customization > List, Records & Fields > Record Types.
3. Click **Edit** next to the host domain named in the warning message. For example, in the following screenshot, the Fingerprint for host domain, `system.na1.netsuite.com` must be updated.
4. Under the **Certificate Fingerprint** field, enter the new Fingerprint.

5. Click **Save** when you are finished entering a new Fingerprint.

**Note:** After updating an SCIS Mobile Certificate record in NetSuite, log in to SCIS on the mobile device to refresh configuration settings.

---

**Adding a Mobile Certificate Entry**

You may need to create a new entry in the list of SCIS Mobile Certificates records for SuiteCommerce InStore (SCIS). Creating a new entry may be required store authorizing certificates for a new domain associated with SCIS. Use the following instructions.

**To create a new SCIS Mobile Certificate entry:**

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

---

**Obtaining Domain Fingerprints for SCIS Mobile Certificates**

To obtain a domain Fingerprint when updating or creating an SCIS Mobile Certificate, you can use OpenSSL, or find the Fingerprint in the Firefox browser information.

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

**Using OpenSSL to Obtain a Domain's SHA-256 Fingerprint**

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

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

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

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

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

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

SCIS Domain Whitelist

SCIS Domain Whitelist is a custom record installed by SuiteCommerce InStore (SCIS). It contains a list of domains that can be accessed using the device running SCIS. These white-listed domains are global to your account, regardless of location or subsidiary. The following domains are required for SCIS to function properly.

---

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

---

To create a new entry to the SCIS Domain Whitelist:

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

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

**Required Whitelist Domains:**

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

Creating a Shortcut for the SCIS Mobile Device List

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

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

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

Setting Up SCIS Touch ID for iOS

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

To set up SCIS for Touch ID login:

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

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

To log in with touch ID:

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

To turn off touch ID:

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

After log out, Touch ID login to SCIS is no longer configured for that user.
To update Touch ID when password changes:

1. Start the SCIS mobile application.
2. When the Touch ID for SCIS prompt appears, touch Cancel. If you use your fingerprint to access SCIS, then you will be required to enter the login email address and correct password to view the SCIS cart.
3. In the SCIS login window, enter the login email address and new password.
4. The Password Update prompt appears. Touch your fingerprint to confirm password update. You are logged in to SCIS.

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

Updating the Operating System and SCIS Mobile App

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

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

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

Updating the SCIS for iOS Mobile App

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

To update the SCIS for iOS mobile app:

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

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

Acceptance tests for iOS and mobile app updates:

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

1. Test the updated version of the mobile app to ensure that additional settings are not required.
a. Go to the AppStore, and touch the SCIS for iOS app icon to update the app.

b. Open the app. If the device has already been configured, then the first screen is the login screen.

c. Verify that you can log in to the app.

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

2. Test device configuration.
   a. Download the SCIS for iOS app on a device that has not yet been configured.
   b. Follow the instructions on the configuration screen.
   c. Verify that you can successfully configure the device.

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

3. Test the printer configuration. Run the following tests using the printer you configured for SCIS.
   a. When you log in to the SCIS for iOS mobile app, select a printer from the menu. The following printer types are supported: Star, Epson, Airprint. If you use OPrint or Printopia, also test with these.
   b. Enter a test transaction. Add an item to the cart, and then process a payment.
   c. Print the receipt.
   d. Verify the receipt is printed as expected.

4. Test a barcode scanner:
   a. Connect a barcode scanner to the device running SCIS.
   b. Log in to SCIS.
   c. Scan a barcode.
   d. Verify that the corresponding item is added automatically.
   e. Process a test payment.
   f. Print the receipt.
   g. Verify the receipt is printed as expected.

5. Test cash drawer operations:
   a. Connect a cash drawer to a printer.
   b. Log in to SCIS.
   c. Perform a cash sale, or perform another drawer operation, such as an Initial Loan or End of Day transaction.
   d. Verify that the cash drawer opens automatically.

6. Test fingerprint or Touch ID:
   b. Open SCIS and check the Touch ID box on the login screen.
   c. Log in to SCIS.
   d. Log out of SCIS.
   e. Log in to SCIS a second time.
   f. Verify that the Touch ID option populates the email and password automatically.
Working with SCIS on Sandbox

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

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

**Note:** For information on acquiring one or more sandbox accounts, contact your NetSuite account representative.

The following instructions assume you are using SCIS 2017.2.7 or later.

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

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

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

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

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

### Configuring Search Fields and Field Sets

SuiteCommerce InStore (SCIS) uses search fields and field sets to retrieve and display item information. The NS_RP_ResetSearchFields.js script is run automatically during the first installation of SCIS. However, if you create a second SCIS website, or if you make significant changes to your SCIS configuration, you may need to use the following steps to configure or reset search fields and field sets.

**To configure search fields and field sets for SuiteCommerce InStore:**

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

2. Edit the `siteID` and the `debug` setting in the setup script.
   a. Set the value for `debug` to `true`.
   b. Use the ID for your SCIS website. You can see the site ID in the address bar of your browser when the Web Site Setup page is in Edit mode.

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

   To view a list of SCIS installation tasks, see [SuiteCommerce InStore Installation](#).

### Troubleshooting SCIS Installation

This section includes information about resolving common errors in SuiteCommerce InStore (SCIS) setup and configuration.
**Note:** If you choose to uninstall the SuiteCommerce InStore SuiteApp, some records that were added to your NetSuite account on the first installation will remain in the system. If you choose to uninstall or remove the SuiteApp, and then install it again, you must select the option to replace the records during the latest installation process.

<table>
<thead>
<tr>
<th>Error Message</th>
<th>Problem/Cause</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Script Execution Usage Limit Exceeded</td>
<td>Searches for transaction record document numbers can exceed script execution usage limits.</td>
<td>Go to Setup &gt; Company &gt; Auto-Generated Numbers. Click <strong>Document Numbers</strong>. You can enter a prefix for Cash Sale, Estimate, Sales Order and Invoice. In SCIS a search can occur for any of these transactions. For example, enter the prefix, “CASHSALE” for cash sale transactions.</td>
</tr>
<tr>
<td>Internal error: Must identify a region associated with this site.</td>
<td>The subsidiary associated with the logged-in employee is not marked as online.</td>
<td>Go to Setup &gt; SuiteCommerce Advanced &gt; Set Up Web Site. Click the Setup subtab. At the bottom of the page, mark the appropriate subsidiary online.</td>
</tr>
<tr>
<td>There’s been an internal error</td>
<td>Items are not displayed in SCIS. GET request returns a 500 Internal Server Error.</td>
<td>Rebuild the Search Index. Go to Setup &gt; SuiteCommerce Advanced &gt; Setup Web Site. Click the Actions menu, and then select Rebuild Search Index.</td>
</tr>
<tr>
<td>An nlobjSearchColumns contains an invalid column join ID, or is not in proper syntax: custrecord_ns__pl_plip_value</td>
<td>The product List SuiteApp is not updated on the account.</td>
<td>Go to Setup &gt; SuiteCommerce Advanced &gt; Search &amp; Install Bundles &gt; List. Click the Action icon to update your version of the Product List SuiteApp.</td>
</tr>
<tr>
<td>The record type [CUSTOMRECORD_NS.POS_GATEWAY] is invalid.</td>
<td>The custom record referenced in the error has been deprecated.</td>
<td>Go to Setup &gt; Company &gt; Auto-Generated Numbers. Click <strong>Document Numbers</strong>. You can enter a prefix for Cash Sale, Estimate, Sales Order and Invoice. In SCIS a search can occur for any of these transactions. For example, enter the prefix, “CASHSALE” for cash sale transactions.</td>
</tr>
</tbody>
</table>
| Invalid shippingtaxcode reference key -7 for shipaddress... | Each time an item is added to the cart, the error is shown. This is because the –Not Taxable– tax code is inactive. | To resolve the error, review the following settings:  
  - Ensure the shipping items are assigned to the SCIS site.  
  - Go to Setup > Company > Auto-Generated Numbers. Click **Document Numbers**. You can enter a prefix for Cash Sale, Estimate, Sales Order and Invoice. In SCIS a search can occur for any of these transactions. For example, enter the prefix, “CASHSALE” for cash sale transactions.  
  - Set the –Not Taxable– tax code as active.  
  - Go to Setup > Accounting > Tax Codes. Mark the **Show Inactives**.  
  - Go to Setup > SuiteCommerce Advanced > Record Types. Find **SCIS Settings**, and then click List in that row. Edit the SCIS Location record for that location. Select **SCIS Shipping Methods**.  
  - Set the –Not Taxable– tax code as active.  
  - Go to Setup > Accounting > Tax Codes. Mark the **Show Inactives**.  
  - Go to Setup > Company > Auto-Generated Numbers. Click **Document Numbers**. You can enter a prefix for Cash Sale, Estimate, Sales Order and Invoice. In SCIS a search can occur for any of these transactions. For example, enter the prefix, “CASHSALE” for cash sale transactions.  
  - Set the –Not Taxable– tax code as active.  
  - Go to Setup > Accounting > Tax Codes. Mark the **Show Inactives**.  
  - Go to Setup > SuiteCommerce Advanced > Record Types. Find **SCIS Settings**, and then click List in that row. Edit the SCIS Location record for that location. Select **SCIS Shipping Methods**.  
  - Set the –Not Taxable– tax code as active.  
  - Go to Setup > Accounting > Tax Codes. Mark the **Show Inactives**.  
  - Go to Setup > SuiteCommerce Advanced > Search & Install Bundles > List. Click the Action icon to update your version of the Product List SuiteApp. |
## Troubleshooting SCIS Installation

<table>
<thead>
<tr>
<th>Error Message</th>
<th>Problem/Cause</th>
<th>Solution</th>
</tr>
</thead>
</table>
| Invalid account reference key 123 for subsidiary 1.. | The SCIS Store Safe Account used in the sales associate's location does not have the subsidiary set correctly. | To resolve the error:  
1. Check the location on the employee record for the sales associate.  
2. Verify that the location on the employee record matches the location for the subsidiary named in the error (check the ID for the subsidiary, for example, id=1).  
3. Verify that the subsidiary on the account you use for the SCIS Store Safe Account is also the same.  
   - **Note:** SCIS Store Safe Account is set on the Location record.  
     a. Go to Setup > Company > Locations. Make a note of the SCIS Store Safe account assigned to the location.  
     b. Go to Setup > Accounts > Chart Of Accounts.  
     c. Find the account you selected as the SCIS Store Safe Account. For example, this could be the Petty Cash account.  
     d. Edit the account record and select the subsidiary. |
| Cannot read attributes of undefined                 | The `roundItemId` is missing from CustomConfiguration.js                      | If you installed SCIS prior to the 2016.1.0 release, you must also update the CustomConfiguration.js file to support currency rounding capabilities introduced in SCIS 2016.1.0. Search for `ns_pos_rounditem` in NetSuite, and then add:  
   ```js  
   roundItemId: 0,  
   ```  
   to the CustomConfiguration.js file, under the `voidItem` definition. |
<table>
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<th>Error Message</th>
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</table>
| Error: Please enter value(s) for: Account                                    | This error can be displayed during an initial loan or end of day transaction entered in SCIS. The problem could be any of the following:  
  - Cash Drawer account is not set correctly in SCIS User Settings.  
  - SCIS Store Safe Account and SCIS Cash Drawer Difference Account are not set on the location record.  
  - The subsidiary setting on the SCIS Store Safe Account does not match the location. | Review the following settings:  
  - Go to Customization > Record Types > SCIS User Settings. Set the correct cash drawer account for the employee.  
  - Check the location record for the store. Verify that there is a value for SCIS Store Safe Account and SCIS Cash Drawer Difference.  
  - Check the Chart of Accounts to verify that the subsidiary on the account selected as the SCIS Store Safe Account and the SCIS Cash Drawer Difference has the same subsidiary as the location. |
| Please enter a value for amount.                                            | This error occurs because the price of the item was not entered for the currency used in the order.                                                                                                                      | To resolve this error, go to Lists > Accounting > Items. Click Edit next to the item, and then enter prices for each currency on the Sales/Pricing subtab.                                                                                                  |
| Invalid taxcode reference key 115 for subsidiary 6                         | This error occurs because the tax code for sales on the tax schedule was set incorrectly for the country where SCIS is being used.                                                                                       | To resolve the error:  
  1. Setup > Accounting > Tax Codes.  
  2. Click Edit next to the tax code associated with the region where the order is being entered in SCIS.  
  3. In the Available On list, ensure that Sales Transactions or Both is selected.  
  4. Click Save.                                                                                                                                                                                                  |
<p>| Insert transaction failure: No valid, open, tax period for date – 4/22/2016 | If this error occurs, it will be displayed instead of the receipt popup window after a payment is made on an order. The problem is that the tax reporting period does not exist.                                                                 | To resolve the error, go to Setup &gt; Accounting &gt; Manage Tax Reporting periods. Set up tax reporting periods as needed.                                                                                                 |
| An nlobjSearch Filter contains an invalid operator or is not in proper syntax: upcocode | After the sales associate adds a line level discount, this error can appear in the Enter Access Code popup window.                                                                                                                                 | Verify that the discount item has the location and subsidiary set properly. Both location and subsidiary must match the settings on the sales associate's employee record and the SCIS settings record.                                                                                               |
| An unexpected error occurred. Please go back and try again.                | This error can appear while performing any action in SCIS. It                                                                                                                                                                                                                 | To resolve the error, verify any changes made to the CustomConfiguration.js file following installation of the SCIS setup.                                                                                                                                       |</p>
<table>
<thead>
<tr>
<th>Error Message</th>
<th>Problem/Cause</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>invalid property id (CustomConfiguration.js#414)</td>
<td>happens because of an error in the CustomConfiguration.js file.</td>
<td>SCIS SuiteApp. Double-check any customizations.</td>
</tr>
</tbody>
</table>
| Enter only numeric characters | This error appears in the Cash Payment popup window after adding an item to the order and clicking on a Cash Denomination. It typically happens in accounts that use multiple currencies. The problem may be related to the configuration of the currency record in NetSuite. | To resolve the error:  
1. Go to Lists > Accounting > Currencies.  
2. Click Edit next to the currency that displayed the error.  
3. Check the Override Format check box. |
| Invalid Number undefined | This error occurs when attempting to initiate a customer return from the customer profile page. The problem is that the saved search, SCIS Transactions Details was modified, removing the ID and some required fields. | Do not modify the SCIS Transactions Details saved search. |
| Invalid taxcode reference key undefined for subsidiary 13. | This error typically occurs in accounts that use multiple currencies with SCIS. The CustomConfiguration.js file must contain an ID for the non taxable tax group record associated with each currency in which you transact. Note that you must create a zero percent (0.0%) tax group for each region. For more information, read Setting up Currency Rounding for SCIS. | To resolve the problem:  
1. Go to Web Site Hosting Files > Live Hosting Files > SSP Applications > NetSuite Inc. - POS > SuiteCommerce InStore.  
2. Click Edit next to CustomConfiguration.js.  
3. Add IDs for the tax groups you want to use for calculating tax on transactions where rounding was applied. (Replace 0 with the ID for the applicable tax groups in your account.) |
| Couldn’t add items. The following items couldn’t be added. Item #: unknown error. | This error occurs because the nonTaxableTaxCode is set incorrectly in the CustomConfiguration.js file. There must be a zero percent (0.0%) tax group for the country associated with the order. | |
| Invalid taxcode reference key undefined for subsidiary 6. Your payment couldn’t be processed. Please review the amount entered and the order details and try again. | This error may appear instead of the receipt popup window, after a payment is entered. There must be a zero percent (0.0%) tax group for the country associated with the order. | |
| Configuration Error: Subsidiary on Employee and SCIS must match. Must identify a region associated with this site. | The Subsidiary selected on the Employee must match the Subsidiary on the website record. | To resolve this error:  
1. Go to Lists > Employees.  
2. Click Edit next to the employee in question.  
3. Note which Subsidiary is selected on the Employee record. |
<table>
<thead>
<tr>
<th>Error Message</th>
<th>Problem/Cause</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>4. Go to Setup &gt; SuiteCommerce Advanced &gt; Web Site Setup.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5. Click Edit next to the SCIS website.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>6. Click the Setup subtab, and then scroll to the bottom of the page. Ensure that the same subsidiary is selected on the website and on the Employee record. If there are multiple subsidiaries, at least one must match.</td>
</tr>
</tbody>
</table>
Peripherals Supported for SCIS

- List of Supported Peripherals
- Setting Up Receipt Printers for SCIS
- Setting up Barcode Scanners for SCIS
- Customer-facing Accessories

List of Supported Peripherals

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

- Main Devices for POS
- Receipt Printers
- Barcode Scanners
- Cash Drawers

Main Devices for POS

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

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Supported Device</th>
</tr>
</thead>
<tbody>
<tr>
<td>Win</td>
<td>Surface Pro 3, Surface Pro 4</td>
</tr>
<tr>
<td>iOS</td>
<td>iPad (4th generation), iPad Air, all iPad models that run iOS 10 or higher.</td>
</tr>
</tbody>
</table>

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

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

Receipt Printers

The following printers are compatible with SCIS.

<table>
<thead>
<tr>
<th>Technology</th>
<th>Model</th>
</tr>
</thead>
<tbody>
<tr>
<td>AirPrint</td>
<td></td>
</tr>
<tr>
<td>Star LAN</td>
<td>TSP650II</td>
</tr>
<tr>
<td></td>
<td>TSP700II</td>
</tr>
<tr>
<td></td>
<td>TSP143IIILAN</td>
</tr>
</tbody>
</table>
# List of Supported Peripherals

<table>
<thead>
<tr>
<th>Technology</th>
<th>Model</th>
</tr>
</thead>
<tbody>
<tr>
<td>TSP100III</td>
<td>TSP143IIIW</td>
</tr>
<tr>
<td>Star WLAN</td>
<td>TSP700II</td>
</tr>
<tr>
<td>Star Bluetooth</td>
<td>TM-T88V</td>
</tr>
<tr>
<td>Epson Bluetooth</td>
<td></td>
</tr>
<tr>
<td>Epson LAN</td>
<td>TM-T88V-i</td>
</tr>
<tr>
<td>HP</td>
<td>HP LJ Pro MFP M127fn</td>
</tr>
</tbody>
</table>

⚠️ **Important**: Advanced Cash Management supports two or more printers of the same brand and model per location only for Star and Epson network printers that have a static IP or a domain name assigned.

## Barcode Scanners

The following scanners are compatible with SCIS.

<table>
<thead>
<tr>
<th>Technology</th>
<th>Model</th>
</tr>
</thead>
<tbody>
<tr>
<td>Socket Mobile</td>
<td>CHS 7Ci (Discontinued by manufacturer)</td>
</tr>
<tr>
<td></td>
<td>CHS 8Ci (Discontinued by manufacturer)</td>
</tr>
<tr>
<td></td>
<td>CHS 7Qi</td>
</tr>
<tr>
<td></td>
<td>S700: CX3397-1855</td>
</tr>
<tr>
<td></td>
<td>S740: CX3447-1910</td>
</tr>
<tr>
<td></td>
<td>S800: CX2881-1476</td>
</tr>
</tbody>
</table>

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

## Cash Drawers

SCIS is compatible with the following cash drawer models.

<table>
<thead>
<tr>
<th>Technology</th>
<th>Series</th>
<th>Model</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birch/Firich</td>
<td>POS-203 6P24V, RJ12</td>
<td></td>
</tr>
<tr>
<td>APG</td>
<td>Vasario Series</td>
<td>Drawer: P/N: VBS320-BL1616</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cable: APG CD-101A Printer Cable</td>
</tr>
<tr>
<td>MMF</td>
<td>Advantage Series</td>
<td>Drawer: P/N: ADV113B11331004</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cable included: 226199EPST1000 KwickKable RJ12 Data Transfer Cable for Star and Epson POS Printer.</td>
</tr>
<tr>
<td></td>
<td>Value line</td>
<td>Drawer: PN: MMF-VL1616E-04</td>
</tr>
</tbody>
</table>
The cash drawer is identified based on your printer technology setting on the SCIS Mobile Device record. Your setting on each SCIS Payment Method record defines whether or not the cash drawer opens automatically. The cash drawer opens based on the SCIS Payment Method used to pay for the order. Sales associates can also open the cash drawer by selecting the No Sale option in the User Menu.

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

### Setting Up Receipt Printers for SCIS

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

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

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

**To set up printing for SCIS:**

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

**Note:** SCIS sets default paper sizes that you can change as needed.
4. Click the **Printing** subtab. Here, you can enable the automatic printing capability, as well as define printer name and paper size for each printer.

5. Set the following fields as needed:
   - **Airprint Default Paper Size** – (Required) Select the paper size. Accept the default setting if you do not use Airprint.
   - **Star Default Paper Size** – (Required) Select the paper size. Accept the default setting if you do not use a Star printer.
   - **Epson Default Paper Size** – (Required) Select the paper size. Accept the default setting if you do not use an Epson printer.
   - **Auto-Print Sales Receipts** – Check this box to print sales receipts automatically, when the sales associates submits an order.
   - **Auto-Print Return Receipts** – Check this box to print return receipts automatically.

6. Click a sublist to set preferences for your printer.
   - **SCIS Printing Settings (AirPrint)**
     
     **Important:** AirPrint is not supported on Windows devices.
   - **SCIS Printing Settings (Star)**
   - **SCIS Printing Settings (Epson)**

7. Click **New Printing Settings** to enter the printer name and select the paper size.
   - **Name** – The Name of the printer should be exactly the same name that the printer already has set in the network.
     
     Note this example of a description based on supported printers: **Star TSP650**
   - **Paper Size** – Select the paper size. SCIS only supports the following:
     - For AirPrint: **A4** or **Letter**.
     - For Star and Epson printers: **2 inches** or **3 inches**
     
     **Important:** Do not enter new paper sizes.

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

### Setting up Barcode Scanners for SCIS

You can use a barcode scanner with SuiteCommerce InStore (SCIS) whether you use an iOS or Windows tablet. This section includes detailed steps for setting up a scanner with SCIS for iOS, and pairing a scanner on a Windows device.

- **Setting up a Barcode Scanner on an iOS Device**
- **Pairing a Barcode Scanner for Use with SCIS for Windows**

**Important:** Serial Port Profile (SPP) mode is required for using barcode scanners with SCIS.

### Setting up a Barcode Scanner on an iOS Device

The SCIS for iOS application or SCIS for Windows application must be installed before completing barcode scanner setup. To view a list of supported barcode scanners, read **Barcode Scanners**.
The following procedure describes the basic requirements for pairing your Bluetooth scanner for use with SCIS for iOS. Consult your manufacturer’s handbook for specific setup requirements of your scanner. SCIS for iOS includes native support for barcode scanner pairing.

To set up a barcode scanner for use with SCIS for Windows, read Pairing a Barcode Scanner for Use with SCIS for Windows.

**To setup a Bluetooth scanner for use with SCIS for iOS:**

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

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

   ![Barcode Scanner](barcode.png)

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

7. In the iOS settings menu, establish a new pairing with the scanner.
8. After the scanner has been paired, log in to the SCIS app.
9. After logging in to the home dashboard of the app, you will receive an audible alert from the scanner to confirm connection.

**Pairing a Barcode Scanner for Use with SCIS for Windows**

The SCIS for Windows application must be installed before completing barcode scanner setup. The following procedure describes how to pair your barcode scanner for use with SCIS for Windows. Please consult your manufacturer’s handbook for the specific setup requirements for your device. SCIS for Windows includes native support for barcode scanner pairing.
The following procedure assumes you are using **Socket-Scan 10 for Windows** with a bar-code scanner supported by SCIS. View the List of Supported Peripherals.

**To pair a barcode scanner for SCIS for Windows:**

1. Before you begin, exit SCIS and exit the SocketScan 10 application.
2. Unpair the device.
   a. Power on the Scanner.
   b. Press and hold the trigger button, and press and hold the power button.
   c. After you hear 3 quick beeps, release both buttons.
3. Remove the device from Windows Bluetooth settings.
4. Restore the scanner to factory default settings by using the barcode in the manual.
5. Use the barcode in the manual to set the scanner to SPP mode.
6. Use the following steps to pair the scanner:
   a. Open **SocketScan 10 for Windows**.
   b. If an error displays, “Com port in use,” then choose a different com port.
   c. Click **SocketScan 10 for Windows** in the tray and select **Easy Pair**.
   d. Click the **Bluetooth** button.
   e. Click **Pair**.
   f. You should get a long beep, and then the Windows Bluetooth utility should show that the scanner is connected.
7. Exit **SocketScan 10 for Windows**.
8. Launch SCIS.
9. Log in.
10. Scan a barcode.

After the scanner is connected, then you can scan barcodes and add items to the cart in SCIS.

**Customer-facing Accessories**

Some retailers mount their SuiteCommerce InStore (SCIS) tablets on swivel stands or similar accessories that can rotate the display to face the customer.

This accessory type is helpful for customers who want to review the prices and discounts shown in the cart, before beginning the payment steps. The sales associate can turn the display at the customer’s request.

**Warning:** You should not “mirror” the display used by the sales associate. Replicating your sales associate’s display for the customer could expose information that should be kept secure and confidential.

For example, some tablets will briefly display each character of a password as it is entered.
Performance Management and Tips for SCIS

This chapter provides information you can use to monitor, manage, and improve performance in your SuiteCommerce InStore (SCIS) environment.

- Application Performance Management (APM) for SCIS
- Performance Tips using NetSuite Settings
- Performance Tips for using SCIS POS Devices
- Performance Tips for Network Resources
- Performance Tips for Scripts and Workflows
- Performance Tips for using Third-Party SuiteApps

The topics include settings/areas to be monitored and adjusted by the administrator and guidelines the administrator can pass to store managers and sales associates.

Application Performance Management (APM) for SCIS

SuiteCommerce InStore Application Performance Management (SCIS APM) is a SuiteApp that you can install in your NetSuite account. It shows detailed information about SuiteCommerce InStore (SCIS) performance. You can filter the information to see performance data based on particular devices running SCIS, certain retail locations, or subsidiaries.

Administrators can use SCIS APM to identify customizations, such as user event scripts and workflows that affect SCIS performance. Then, based on that information, administrators can modify settings in SCIS to enable faster performance, or work with their in-house development team to optimize long-running scripts.

SCIS Actions

SuiteCommerce InStore APM measures performance data for certain actions that occur during daily operations using SCIS. Each action is displayed on a tile on the SCIS APM Performance Diagnostics page.
APM captures performance statistics for the following actions:

- **Customers and Items**
  - **Creating a customer with an empty cart** — For customer with no record in SCIS and the cart empty, begins when sales associate has completed new customer form and creates customer/adds customer to transaction. Ends when the associate can add items.
  - **Creating a customer with items in the cart** — For customer with no record in SCIS and items already in the cart, begins when sales associate has completed new customer form and creates customer/adds customer to transaction. Ends when the associate can add items again.
  - **Adding an existing customer to an empty cart** — For customer previously set up in SCIS and an empty cart, begins when sales associate has selected and added customer to transaction. Ends when the associate can add items.
  - **Adding an existing customer to a cart with items** — For customer previously set up in SCIS and items already in the cart, begins when sales associate has selected and added customer to transaction. Ends when the associate can add items again.

  **Note:** When a new customer is created or an existing customer is added to a sales transaction in progress, the application recreates the transaction.

- **Display item search results** — Measures the time used to display search results. Begins when user completes entering keyword in the global search bar and ends when the search results display.
- **Adding an item to the cart** — Measures the time used to add an item to the cart.
- **Open Product Detail Page (PDP)** — Measures the time used to prepare the Product Details page. Begins after user clicks the item link and ends when the user can add the item to the cart or select its options.

- **Payments and Payment Devices**
  - **Paying with manual or custom payment methods** — Measures the time used to process payments made with cash, check or by entering credit card information directly into SCIS (without a payment device). Begins when sales associate applies the payment and ends when the receipt displays. Custom payment methods set up for your SCIS implementation are included in this action.
  - **Priming the payment device** — Measures the time spent initializing the PIN pad or other payment device. Initialization begins when the sales associate enters the payment amount in SCIS and ends when the device is ready to receive the customer’s credit, debit or other payment source.
  - **End-to-end payment device processing** — Measures the action beginning immediately after initialization and includes the time spent by the customer interacting with the payment device until the payment is processed.

- **Receipts**
Display receipt after NetSuite payment confirmation — Begins when payment confirmation is received from NetSuite and ends when the receipt displays.

Display email receipt status — Shows if the email message sent succeeded or failed. Begins when user clicks Send and ends when the success or fail message displays.

Display print receipt status — Shows if printing succeeded or failed. Begins when the user clicks Print and ends when the print job status is received. If auto-print is used, it begins when the print request is sent to the printer and ends upon receiving the print job status.

Returns

Submit validated return, cart ready — Measures the time to prepare the cart after submitting a validated return. Begins when user clicks Return and ends when the user can interact with the cart again.

Unvalidated return, cart ready after selecting line — Measures the time to prepare the cart after selecting a line for unvalidated return. Begins when user clicks Return for the item and ends when the user can interact with the cart again.

Customization

Based on how your organization has configured NetSuite, there may be custom scripts that run in the background while sales associates perform various actions using SCIS. User event scripts, client scripts, and workflows are captured in performance data as customizations. SCIS APM also shows performance data from custom scripts included in other SuiteApps or bundles installed in your NetSuite account, so you can see how these affect SCIS performance.

For more information about how to boost performance in SCIS, read Performance Management and Tips for SCIS.

Installing SuiteCommerce InStore APM

SuiteCommerce InStore APM (SCIS APM) is a managed SuiteApp, installed separately from the Application Performance Management (APM) SuiteApp, and the SuiteCommerce InStore (SCIS) SuiteApp.

You can install the SuiteApp in OneWorld accounts and in accounts that are not OneWorld.

After you install the SCIS APM SuiteApp in your account, updates and enhancements to the SuiteApp are pushed automatically to your account. You do not need to update the SuiteApp manually.

To Install SCIS APM:

1. Go to Customization > SuiteBundler > Search & Install Bundles.
2. In the Keywords field, enter the Bundle ID: 267306.
3. Verify that the search result lists SuiteCommerce InStore APM.
4. Click the bundle Name to view the Bundle Details.
5. Click Install.
6. Click Install Bundle.
7. The Installed Bundles page includes a Status column to show the installation progress.
   You can click Refresh to update the status. The column displays a green check mark when the installation is complete.

   **Note:** You might need to scroll to the bottom to find the SuiteCommerce InStore APM bundle and see its status. The installation might take awhile to finish.

8. Next, see Granting Permission to View SuiteCommerce InStore APM.
Granting Permission to View SuiteCommerce InStore APM

Administrators must grant permission for employees to view performance data in SuiteCommerce InStore APM (SCIS APM). Use the SuiteCommerce InStore Performance Setup page to select roles and employees who should be allowed to view SCIS performance data.

To grant permission to view SuiteCommerce InStore APM:
1. Go to Customization > SCIS Performance > SCIS Performance Setup.
2. Use either method to grant permissions to view SCIS performance data:
   - Click the Roles tab to give access to specific roles, such as SCIS Store Manager. Click the entry field to see a list of roles.
   - Click the Employees tab to give access to individual employees by selecting their names. Click the down arrows and then List to see a list your employees who are set up in NetSuite.
3. Click Add to grant permission to each role or employee.
4. Click Save when the task is complete.

SCIS Performance Diagnostics

SuiteCommerce InStore APM (SCIS APM) shows performance data for actions performed by sales associates using SCIS as a point-of-sale solution.

The date that shows for customizations, such as user event scripts and workflows, is the date when SCIS APM last gathered data for these in the last 30 days, regardless of the date range selected in the filter settings. When no data is available for user event scripts, workflows, or actions within a selected date range, a notification is displayed indicating that customization data is not available.

To view performance data for SCIS:
1. Go to Customization > SCIS Performance > SCIS Performance Diagnostics.
2. Set the following filters to display the information you want to see:
   - **Date Range** — (Required) Select a period of time for viewing SCIS performance data.
     - Note: Date range can be no more than 30 days.
   - **Location** — Select a location to focus on performance data recorded from a certain retail store.
Subsidiary — Select a subsidiary to view performance data based on actions that occurred in a certain subsidiary, or all subsidiaries.

Note: The Subsidiary filter is only shown if you are using a OneWorld account.

Device Name — View performance data captured on a specific device or all devices running SCIS.

User — Select an employee name to view performance data associated with transactions submitted by a particular sales associate.

3. Click Refresh.

4. SuiteCommerce InStore APM shows all actions for which SCIS captures performance data. You can click a tile to view more detailed information. Also, you can sort the tiles by actions that occur most frequently, or the actions that take the longest amount of time to complete.

About SCIS Action Tiles

Each tile shows detailed information about the performance of each action based on the filters you selected. The tiles can help identify actions if there are changes in the total duration of an action over time. Use the average, median, and 95th percentile data for more information about long-running processes.

Note the following details on each tile:

- **Average Duration**
  
  Shows the average amount of time for SCIS to process a particular action. The average duration takes into account every time the action occurred, based on the filter settings you choose. Total duration for every action is summed and then divided by the number of actions that occurred.

- **Median Time**
  
  The median is useful because it is a way to interpret the middle of the SCIS performance data set. Note that the average may be influenced by low or high values in performance data that are atypical. To find the median, performance data is sorted by total duration, least to greatest, and the middle position is displayed.
  
  For example: there are a total of nine performance logs captured for a particular action in a certain date and time range. Based on the example above, 3.91 seconds represents the time on the fifth performance log (the middle position) in a list of nine logs.
95th Percentile

This value is useful in measuring performance data because it gives an accurate picture of how the action performs most of the time. Based on the example above, 95% of the total occurrences of the action are faster than 6.77 seconds. While, 5% of the total occurrences are slower than 6.77 seconds. So, most of the time, it takes less than 6.77 seconds to add an item to the cart.

The icons along the bottom of each tile display: the count of locations, devices, and the number of performance logs captured for the action.

You can click a tile to view the timeline. Then, click a point in the timeline to view more detailed performance data for each action at a certain point in time.

Total Duration of Actions and Customization Performance Over Time

When you click on a point in the timeline, you can view aggregate performance data for a particular action. A popup window shows the number of times the action occurred, and the average time it took for SCIS to process the action, including the time it took for customizations associated with that action to run. By default, you can see the average total duration on the graph. Click one of the tabs to see data graphed for the median or 95th percentile.

You can drag to zoom at any point in the graph to magnify a particular section. The duration of user event scripts and workflows are indicated by different colored lines. Also note that the date and time is always displayed in Pacific Time. You cannot change the time zone settings for SuiteCommerce InStore APM.

For example, the timeline graph shows the following information:
### Description

1. Tabs you can click to show Average, Median, or 95th Percentile data.
2. The number of times the action occurred based on filter settings.
3. The total duration of time it took for SCIS to process the action.
4. The amount of time it took for user event scripts associated with the action to run.
5. The amount of time it took for workflows associated with the action to run.

#### Note:
User event scripts and workflows are customizations. SCIS APM displays the actual date and time when customization data was most recently available.

6. Click the node to display the [Action History](#), which shows detailed information about each action.

---

### SuiteCommerce InStore APM Action History

The **Action History** is displayed when you click the link in the popup window displayed in the timeline. You can set filters to limit how much performance data is displayed:

- Total Duration
- User Event Time
- Workflow Time

The columns in the Action History show the following information:

- **Date & Time** — Shows the time of day when the action occurred.
- **Total Duration** — Shows the time it takes for the action to complete. Total Duration time includes customizations such as user event scripts and workflows.
- **User Event Time** — Shows the time it takes for user event scripts to run. If a web developer created custom user event scripts for your organization, you can identify long-running scripts here. Viewing the performance data enables your development team to identify which scripts might need to be optimized.
- **Workflow** — Shows the time it takes for workflows to run. Use this performance data to identify long-running workflows, and then you can modify them.
- **Customization Duration** — Shows the total duration of user event scripts and workflows in graphic form.

#### Note:
User event scripts and workflows are customizations. SuiteCommerce InStore APM displays the actual date and time when customization data was most recently available.

- **User** — Shows the email address of the sales associate logged in during the action.
- **Device** — Shows the device ID for the device where the action occurred.
Application Performance Management (APM) for SCIS

- **Location** — Shows the location where the action occurred.
- **Subsidiary** — Shows the subsidiary where the action occurred.

SCIS Action History Detail

To go to the **Action History Detail** page, locate the performance log on the Action History table. Click the corresponding view detail icon.

1. The **Overview** section shows the following information:
   - Total Duration of the action.
   - Sales associate’s email address.
   - Location where the action took place.
   - Device ID, identifies the device running SCIS.
   - SCIS SuiteApp Version.
   - Log ID is the unique identifier for this specific performance log.

2. The **Time Sources** diagram includes the following information:
   - **Server Time** includes the following:
     - **User Event Scripts** and **Workflows**, which are customizations applied to your account, or components included in SuiteApps installed in your account.
     - **Custom Client Script URL Requests**, which include the duration of time for client script URL requests.
     - **SCIS App & Others**, which include SuiteScript processing associated with the SCIS SuiteApp.
   - **Overhead Time** includes customer interaction with a payment device, network latency, such as internet connectivity, and SCIS data processing.

3. The **Time by Bundle** chart includes the following information:
   - **Bundle** — Lists the active SuiteApps installed in your account. Each bundle entry here is formatted with the bundle ID and bundle name, for example: **53195 Last Sales Activity**.
     - If the bundle was removed, the bundle ID is still displayed, but the bundle name is changed to a generic name, for example, **2471 Uninstalled Bundle**.
   - **User Event Scripts** — Lists the user event scripts that are components of SuiteApps installed in your account.
   - **Workflows** — Lists workflows that are components of SuiteApps installed in your account.
Application Performance Management (APM) for SCIS

- **Total Duration** — Lists the period of time it took to run user event scripts and workflows associated with active SuiteApps in your account.

**Customization Performance Portlets**

Portlets on the Action History Detail page show performance data associated with different types of customization you may have applied to your NetSuite account. If you have the Application Performance (APM) SuiteApp installed in your account, you can navigate directly from the User Event Scripts portlet and workflow portlet to the **Profiler Details** and **SuiteScript Analysis** pages in APM.

Read the following to learn more:

- User Event Scripts
- Workflows
- Custom Client Script URL Requests

**User Event Scripts**

The User Event Scripts portlet shows detailed performance data associated with user event scripts. If a web developer created custom user event scripts for your organization, you can identify long-running scripts here. The following information is displayed in the portlet:

- **Date & Time** — Shows the date and time when the script started running.
- **Total Duration** — Shows the amount of time it took for user event scripts associated with the action to run.
- **Script Name** — Shows the name of the script. Click the script name to view the script record.
- **Record Type** — Shows the type of record against which the user event script runs.
- **Event** — Shows actions as they occur in the user event script. For example, **AfterSubmit** is an event generated at the code level.
- **Bundle** — If the user event script is included in a SuiteApp, this column shows the SuiteApp that includes the user event script.
- **Operations** — Shows the number of record operations that were run by the user event script.
- **Profiler Details** — Click the link to view the **Profiler** page. **Profiler Details** is a tool that lets you gather performance data about the timing and context of an operation, action, or request.
- **SuiteScript Analysis** — Opens the **SuiteScript Analysis** tool which lets you know when a script was installed and how it performed in the past.

**Important:** To view **Profiler Details** and **SuiteScript Analysis** you must have the Application Performance (APM) SuiteApp installed in your account. For more information, read the help topics **Profiler Details Overview** and **Using SuiteScript Details**.

**Workflows**

The Workflows portlet shows detailed performance data associated with custom workflows applied to your NetSuite account. The following information is displayed in the portlet:
**Date & Time** — Shows the date and time when the workflow started running.

**Total Duration** — The amount of time it took for a workflow associated with an action to run. For example, if there is a custom workflow associated with creating a new customer, then the total duration of the workflow shows in this column.

**Workflow Name** — You can click the workflow name to navigate directly to the workflow page of NetSuite.

**Record Type** — Shows the type of record associated with the workflow. For example, if there is a custom workflow associated with creating a new customer, then Customer shows in this column.

**Bundle** — If the workflow is included in a SuiteApp, this column shows the SuiteApp that includes the workflow.

**Profiler Details** — Click the link to view the Profiler page. Profiler Details is a tool that lets you gather performance data about the timing and context of an operation, action, or request.

**Important:** To view Profiler Details you must have the Application Performance (APM) SuiteApp installed in your account.

**Custom Client Script URL Requests**

The Custom Client Script URL Requests portlet shows client script data that runs within an action. Client scripts are SuiteScripts executed in the browser. Generally, client scripts are used to validate user-entered data and to auto-populate fields or sublists at various form events. The following information is displayed in the portlet:

- **Date & Time** — Shows when the client script request url started to process.
- **Total Duration** — Shows the total duration of time that it takes the client script request to process.
- **Client Script URL** — Shows the request URL that represents the custom client script.

**Performance Tips using NetSuite Settings**

These topics cover SuiteCommerce InStore (SCIS) performance adjustments to be made in NetSuite by users having an administrator role.

**Searches**

- Clear the option to Search for Transaction by Serial Number
- Require searching for Transactions Using Exact Match
- Ensure Custom Searches are Efficient
- Remove any Filters not needed in Customer Searches

**Forms**

- Keep Transaction and Entry Forms Minimal
Images
- Compress your Images
- Use Image Resizing aliases in the Web Site Setup record

Promotion and Payment Processing
- Auto-apply Promotions and SCIS
- Item Saved Search for Promotion Eligibility
- Customer Group Saved Search for Promotion Audience Eligibility
- Optimize EMV
- Disable Bill Costs to Customers Feature
- Cancel or Close Out-of-Date Open/Tendering Transactions

Receipts
- Auto-Print Receipts

Searches
The following settings can boost performance when sales associates and other users perform a search in SCIS. The tips are helpful for all search types, including searches for items, customers and transactions.

**Clear the option to Search for Transaction by Serial Number**
This search option is disabled (cleared) by default. When enabled, the option expands the criteria for searching past transactions to include a transaction item's lot number or serial number. However, it can slow your search performance.

This additional criteria is only needed if you usually locate transactions by serial item. If searching by serial item is not common in your stores, you should avoid enabling it. In addition to requiring extra resources for transaction searches, the option increases overhead when looking up items and customers.

**To clear the Search for Transaction by Serial Number option:**
1. Log into NetSuite as an administrator.
2. Go to Customization > Lists, Records, & Fields > Record Types.
3. Locate the SCIS Settings record and click List.
4. Click Edit and open the Order subtab.
5. If checked, clear the Search for Transaction by Serial Number box.
6. Click Save.
For more information, see SCIS Settings for Orders.

Require searching for Transactions Using Exact Match

Searching for a transaction using the default “global” search is the least efficient way to locate a transaction. A global search only needs the first few characters of the Transaction ID, such as the prefix, but the search can return too many results to make it useful during a customer transaction. An “exact match” search requires entering the complete Transaction ID, but it displays only the desired transaction. Although it takes additional effort to enter an entire ID, the user time saved by doing so can be significant.

In addition, the system time used for a global search is much greater than the system time used for an exact match search. The increased overhead incurred by global searches can affect performance for item and customer searches.

Guideline

Use your transaction volume as a guideline on whether to allow searching using a few characters or require entering the complete Transaction ID. The more transactions a NetSuite account has, the greater the overhead needed to search using only a few characters.

Alternatives to Transaction Searches

Regardless if a search uses global or exact match requirements, a typical search needs user time to enter the Transaction ID (partial or full), system time to locate the transaction, and user time to find the transaction within the results. The following methods can provide results faster than using searches:

- If the transaction has a receipt, locate the transaction by scanning the receipt barcode.
- If a transaction occurred recently, use the Transaction History.

To require that Transaction Searches use Exact Match:

1. Log into NetSuite as an administrator.
2. Go to Customization > Lists, Records, & Fields > Record Types.
3. Locate the SCIS Settings record and click List.
4. Click Edit and open the Order subtab.
5. Check the Search Transaction Using Exact Match box.
6. Click Save.

For more information, see SCIS Settings for Orders.

Ensure Custom Searches are Efficient

Custom searches often use many resources and can slow your SCIS performance. For example, a custom search could provide too many results or display results that include details that you do not need. Ensure
your custom searches only query the NetSuite backend for information that is essential to your needs. The more specific and unique a search is, the faster it can return results.

For more information, see Modifying Saved Searches for SCIS. Also see Customizing the Configuration File.

**Remove any Filters not needed in Customer Searches**

You can lower the time required to search for customers by removing any search filters that are not needed for your business processes. For example, if you do not need to search for customers by their email or phone number, you can remove those filters. Keeping search filters at a minimum uses less system resources than searching using the full set of default filters.

You adjust filters by editing your account’s **customConfiguration.js** file. The following shows the default search filters included in SCIS:

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

**To adjust Customer Search Filters:**

1. Log into NetSuite as an administrator.
2. Go to Documents > Files > File cabinet.
3. Locate the **customConfiguration.js** file. In the index on the left, drill down to:
   - Web Site Hosting Files > Live Hosting Files > SSP Applications > NetSuite Inc. - POS > SuiteCommerce InStore
4. Click **Edit** for the file and remove the search filter lines that are not needed.
5. Save your changes.

⚠️ **Important:** Be certain to test performance before and after any changes to the CustomConfiguration.js file. These tests are especially important for custom Saved Searches that replace the default SCIS search architecture.

For more information, see Filters for Customer Search under Optional Settings in CustomConfiguration.js.

**Forms**

You can maintain performance by ensuring forms use as few resources as possible.

**Keep Transaction and Entry Forms Minimal**

SCIS installs a set of minimal forms for transactions and entries. If you need to create a custom form, start from a minimal form and only add essential fields. The more fields included on a form, the more likely it is that users will experience slower performance. Non-essential fields on a form create extra lag time because the application is waiting to write both essential and non-essential data to the database.
To ensure you use SCIS Minimal Forms:

1. Log into NetSuite as an administrator.
2. Go to Customization > Lists, Records, & Fields > Record Types.
3. Locate the SCIS Settings record and click List.
4. Click Edit.
5. Open the Other configurations subtab.
6. Review that Transaction Forms and Entry Forms use the SCIS Minimal forms.
7. Replace Standard forms with Minimal forms when available.
8. If you need to modify a form for your business, duplicate the Minimal forms and use only the fields essential to your purpose.
9. Click Save if you make changes.

Images

Images are assets used in SCIS to illustrate your catalog and reflect your branding. Brand images can include your logo, receipt logo, wallpaper, pictures representing your sales associates, and so on. You can use image compression and image resizing to boost the performance of images in your setup.

Compress your Images

Use an image compressor when an image's quality and detail are not critical. Compressed images tend to load faster due to their small file sizes. Good candidates for compression are item, brand, logo and wallpaper images, especially images that display on multiple pages.

If you have not compressed your images, we recommend that you do so. Using image compression should improve performance not only for SCIS, but for other channels where the images are used.

To compress item images for your catalog, we recommend using our NetSuite in-house image compressor. For other images, you must use a 3rd-party application. You can find free image compressors online through an internet search.

**Note:** NetSuite's compressor only affects images that are 500 kb or greater. You should use a 3rd-party application to compress images less than 500 kb.

To set up image compression for your SCIS website:

1. Log into NetSuite as an administrator.
2. Go to Setup > SuiteCommerce Advanced > Set Up Web Site.
3. Click **Edit** next to your SCIS website name.
4. Open the **Images** subtab.
5. Enable the following options:
   - **Compress All Website Images**
   - **Compressed Image Quality** - **Low** (maximum compression)
   - **Strip Metadata**
   - **Chroma Subsampling**

   **Note:** Since the SCIS website is often only used internally, a **Compressed Image Quality** of **Low (maximum compression)** should be acceptable for most businesses.

6. Click **Save**.

For more information, see the help topic *Setting up Image Compression for Websites*.

**Use Image Resizing aliases in the Web Site Setup record**

Use image resizing from the website record used by SCIS to serve images in proportions appropriate for how you use the site.

For more information and a list of Size IDs, see *Configuring Item Images for SCIS*.

**To verify your Image Resizing setup:**

1. Log into NetSuite as an administrator.
2. Go to Setup > SuiteCommerce Advanced > Set Up Web Site.
3. Click **Edit** next to your SCIS website name.
4. Open the **Images** subtab.
5. Verify that **Image Size ID**, **Minimum Width**, and **Maximum Width** match the recommendations.
   To view the recommendations, see *Configuring Item Images for SCIS*.

**Promotion and Payment Processing**

These settings can increase performance when including promotional discounts in transactions and while processing payments via the PIN pad or other payment device. Also included are steps you can take to resolve out-of-date transactions.
Item Saved Search for Promotion Eligibility

When you use an item saved search to define item eligibility in SuitePromotions, the Saved Search Preferences subtab appears on the Promotion record. You can use these preferences to configure the way that the promotion handles saved searches.

For SCIS, using cached saved searches is the fastest method. Saved searches are cached periodically to update the items included. This caching ensures the data is retrieved quickly every time a promotion that uses saved searches is evaluated on a transaction.

You can select one of the following options for each promotion using an item saved search:

- **Use cached saved search** – Provides better performance as results are returned faster whenever the promotion is applied to a transaction. This is the default behavior.
- **Run saved search each time the promotion is applied** – Uses the most current version of the saved search possible, but results are slower to return.

![Saved Search Preferences](image)

To Manage Saved Search Performance on Promotions:

1. Log into NetSuite as an administrator.
2. Go to Lists > Marketing > Promotions > New.
3. In the Item section, choose a search using the From Saved Search field.
4. Open the Saved Search Preferences subtab that appears.
5. Choose the desired saved search option.
6. Complete the remaining promotion options and click Save.

For more information on setting this preference, see the help topic Saved Search Performance.

Customer Group Saved Search for Promotion Audience Eligibility

When you use a dynamic customer group to define audience eligibility in SuitePromotions, the Customer Group Preferences subtab appears on the Promotion record. You can use these preferences to configure how the customer group is handled when evaluating the promotion's eligibility.

For SCIS, using cached customer groups provides the best performance. Caching ensures the data is retrieved quickly when a customer group is evaluated on a transaction.

You can select one of the following options for each promotion targeting dynamic customer groups:

- **Use cached customer group** – Provides better performance as results are returned faster whenever the promotion is applied to a transaction. This is the default behavior.
- **Run customer group each time the promotion is applied** – Uses the most current version of the customer group results possible, but results are slower to return.
Performance Tips using NetSuite Settings

To Manage Customer Group Performance on Promotions:

1. Log into NetSuite as an administrator.
2. Go to Lists > Marketing > Promotions > New.
3. Open the Audience subtab.
4. Select the Specific Customers option.
5. Select the dynamic Customer Group to use.
6. Open the Customer Group Preferences subtab that appears.
7. Choose the desired customer group option.
8. Complete the remaining promotion options and click Save.

For more information on setting this preference, see the help topic Saved Search Performance.

Auto-apply Promotions and SCIS

This NetSuite option automatically applies promotional discounts to items and transactions that meet your promotion criteria. If auto-apply is not enabled, the sales associate must manually add applicable promotions to a transaction. Manual tasks add user time.

However, the system time used to validate whether a promotion is applicable increases when auto-apply is enabled. Auto-apply can negatively affect the performance of every operation that triggers the system to search for promotions.

Guidelines for choosing to Auto-apply Promotions

- Use Auto-apply Promotions if your account has a few promotions that are applicable to most of your transactions. This scenario reduces user time more than it increases system time.
  - If you rarely offer promotions, then auto-apply will not have a significant impact on performance.
- Do not use Auto-apply Promotions if your account has many promotions, especially if some promotions are rarely used because they are not applicable to most transactions.

**Tip:** If you decide to use auto-apply, you should perform frequent reviews of your active promotions list. Inactivating promotions that are expired or no longer apply to your current item catalog can improve system performance.

**Note:** The auto-apply option requires enabling the SuitePromotions feature.

To enable Auto-apply Promotions:

1. Log into NetSuite as an administrator.
2. Go to Setup > Company > Enable Features.
3. Open the **Transactions** subtab.
4. Scroll down to the **Sales** section.
5. Check the **SuitePromotions** box.
6. Check the **Auto-apply Promotions** box.
7. Click **Save**.

For more information, see [Promotions and Coupon Codes for SCIS](#).

**Optimize EMV**

This recommended payment setting can improve performance when shoppers use a credit or debit card to tender payment via the payment device, such as a PIN pad. The setting affects the type of records submitted to NetSuite. It also determines the point at which a shopper can begin interacting with the payment device.

- **With Optimize EMV** – SCIS submits a Customer Payment and Invoice during the payment device priming process. A shopper can begin using the payment device after the Customer Payment portion saves. The Invoice saves next without affecting the shopper's payment device activity.
- **Without Optimize EMV** – Before the PIN can begin priming, SCIS must submit a Cash Sale to NetSuite. The shopper cannot use the payment device until the Cash Sale is saved. This process is the default EMV method.

The Optimize EMV method can be faster than the default EMV method because Customer Payments do not calculate taxes or typically run user event scripts.

**Note:** EMV refers to the secure protocol used by payment gateway providers to safeguard credit and debit card information. On occasion, SCIS will use the term EMV to refer to the flow of events that route through a PIN pad or other payment device.

**Warning:** Optimize EMV box changes the payment process. If you want to use this setting, enable it in your sandbox account first and perform tests using typical sales and return transactions.

**Choosing whether to use Optimize EMV**

The level of customization applied to your account's Cash Sale and Customer Payment records can affect how the default and Optimize EMV methods perform in your stores. In most cases, the recommended Optimize EMV method is faster than the default.

To determine the best method for your business, you can run test transactions to compare performance when Optimize EMV is checked or cleared. Perform these tests after hours or in your sandbox.

- Testing should include your entire EMV payment flow.
Optimize EMV might prime the payment device faster than the default EMV, but it could be slower to accept the response and print the receipt.

- Test using **typical transactions** that are common to your store.

Some factors, such as the number of lines in a transaction, can impact whether Optimize EMV or the default EMV setup performs faster.

⚠️ **Important:** Test performance using typical transactions both with Optimize EMV enabled and with it disabled. Results can vary based on transaction complexity and the types of scripts running on the account.

### To enable Optimize EMV:

1. Log into NetSuite as an administrator.
2. Go to Customization > Lists, Records, & Fields > Record Types.
3. Locate the **SCIS Settings** record and click **List**.
4. Click **Edit** and open the **Order** subtab.
5. Check the **Optimize EMV** box.
6. Click **Save**.

For information, see [Sales Transactions](#) and review the short topics on Invoices and Optimize EMV Enabled Sales Transactions.

### Disable Bill Costs to Customers Feature

The Bill Costs to Customers feature creates additional sublists on cash sale transactions, and can slow your SCIS performance. Disabling the feature can improve performance.

### To disable Bill Costs to Customers:

1. Log into NetSuite as an administrator.
2. Go to Setup > Company > Enable Features.
3. Open the **Transactions** subtab.
4. Under the **Billing** section, clear the **Bill Costs to Customers** check box.
5. Click **Save**.
For more information, see the help topic Enabling Features.

**Cancel or Close Out-of-Date Open/Tendering Transactions**

This performance tip is a maintenance task, not a setting to enable or disable. The tip is to cancel or close older transactions that have a **POS Status** of Open or Tendering. Whether to cancel or close an out-of-date transaction depends on your internal business processes.

**To Find and Cancel or Close Transactions:**

1. Log into NetSuite as an administrator.
2. Go to Transactions > Management > Search transactions.
3. For **POS Status**, select **any of** and then **Open** and **Tendering**.
4. Click **Submit**.
5. Review the list for transaction eligible to close or cancel.
   For example, sort the list by **Type** and look for **Invoice**.
6. Click **Edit** by the transaction to review.
7. Open the **Custom** subtab.
8. Change the Transaction record's **POS Status** to **Closed** or **Cancelled**.
9. Click **Save**.
10. Review the next transaction as desired.

You might want to filter the search criteria to ensure only the desired transactions display. For example, to avoid closing transactions that should remain open for now, you can include a **Date** filter, such as for transactions created more than three days ago.
Receipts

The following settings improve performance by reducing the number of tasks sales associates perform at the end of a sale or return.

**Auto-Print Receipts**

If your store defaults to printing a receipt for every transaction, you can enable **Auto-Print** to automatically print the receipt when a transaction is complete. This option saves user time and prevents sales associates from forgetting to provide customers with their receipt.

**To enable Auto-Print Receipts:**

1. Log into NetSuite as an administrator.
2. Go to Customization > Lists, Records, & Fields > Record Types.
3. Locate the **SCIS Settings** record and click **List**.
4. Click **Edit** and open the **Printing** subtab.
5. Check the **Auto-Print Sales Receipts** box.
6. Check the **Auto-Print Return Receipts** box.
7. Click **Save**.

For more information, see **Setting Up Receipt Printers for SCIS**.

Performance Tips for using SCIS POS Devices

These SuiteCommerce InStore (SCIS) tips can help your sales associates reduce the time spent performing tasks on your point of sale (POS) devices. Some tips require configuration by the administrator.

Administrators and store managers should ensure that sales associates are aware of these tips. We also include tips in the SCIS User Guide.

**Logging Into SCIS**

- Use Autocomplete for fast Logins
- Enable Touch ID for faster logins on iOS devices
Performance Tips for using SCIS POS Devices

Assign Default Sales Representatives
Search using the Transaction History
Taking Orders
- Use QuickAdd Bar Shortcuts
- Scan Items in bulk – Continue Scanning
- Act on Receipt options while Receipts are loading

Logging Into SCIS

These tasks and settings can reduce the time your sales associates need for setting up before they begin entering transactions.

Use Autocomplete for fast Logins

This feature provides faster login for SCIS users. A sales associate can type the first few letters of their email address, and the login screen shows a list of email addresses that match. The feature works by location, so only email addresses registered to the sales associate's location appear in the list.

Sales associates' email addresses are stored on the device the first time they log in after the setting is enabled in NetSuite. After that, the sales associate can take advantage of autocomplete starting with the next time they log in.

To enable Autocomplete Login:
1. Log into NetSuite as an administrator.
2. Go to Customization > Lists, Records, & Fields > Record Types.
3. Locate the SCIS Settings record and click List.
4. Click Edit and open the General subtab.
5. Check the Use Autocomplete Login box.
6. Click Save.
Enable Touch ID for faster logins on iOS devices

If your mobile device includes a fingerprint reader, your sales associates can log in with a touch. Touch ID for SuiteCommerce InStore (SCIS) must be configured on the mobile device first to enable it. The steps a sales associate can use to log in after Touch ID is configured are as follows.

**To Login using Touch ID after setup:**

1. Log into SCIS on the desired device.
2. Touch the fingerprint on the Touch ID for SCIS prompt.
3. If an associate has multiple roles, select the role under which to log in.

**Important:** You must configure Touch ID before the first use.

The first time a sales associate logs in to SCIS on a device, they must enter their email address and password. SCIS saves their login credentials to the device. The associate can then use Touch ID the next time they log in.

For information on setting up and using SCIS touch ID, including turning the feature on or off and making updates for password changes, see Setting Up SCIS Touch ID for iOS.

Assign Default Sales Representatives

If your business requires selecting a sales representative to begin a shift, and it is common to have one sales representative per shift, you can set a **Default Sales Rep** for the current session or all sessions.

If during a session the default needs to be changed, you can change it for a particular transaction. When that transaction is complete, the next transaction will revert to using the Default Sales Rep.

**To set a Default Sales Representative:**

1. Log into SCIS on one of your store's devices.
2. Touch the menu icon.
4. Touch to default for This Session or All Session.
5. Touch the sales representative.

The cart displays to begin a transaction.

For more information, see SCIS User Settings.

Search using the Transaction History

When looking up a past transaction, scrolling through the Transaction History can be faster than doing a search. Searches require entering criteria and then waiting for the device to query the NetSuite database. Scrolling allows you to visually move through the history.

Transaction history should be used for recent transactions or when the date is known and you will apply date filters.

To search using the Transaction History:

1. Log in to SCIS.
2. Touch the clock icon at the top of the screen.
3. Scroll through the transaction history.
4. Touch the desired transaction to display the details.

Tip: To find a transaction for a specific customer, enter search criteria to find the customer and then use their timeline graph.

For information related to using the history, see the help topic Printing Receipts from the Transaction History.
Taking Orders

Use the suggestions in this section to ensure sales associates can complete transactions quickly and efficiently.

Use QuickAdd Bar Shortcuts

One way to use the QuickAdd Bar is as a shortcut to reduce the user time needed to locate items, scan items or navigate to an item's details page.

Use the QuickAdd Bar:

- For frequently sold items.
- For hard-to-scan items due to packaging or lack of a barcode.
- To provide a variable-price miscellaneous item to sell in lieu of items you are not able to find by scanning or searching.
- As a shortcut to the product details page for items that you frequently search for or navigate to.

You can set up a QuickAdd Group to create a separate tab on the bar, and then add items as QuickAdd Keys.

For information about setting up QuickAdd Groups and QuickAdd Keys for your QuickAdd Bar, see Configuring QuickAdd Keys.

Scan Items in bulk – Continue Scanning

SCIS allows scanning multiple items, one after the other. You do not need to wait for the previous item to display in the cart before scanning the next item. We recommend:

- Scanning in bulk, one item after the other.
- Not waiting for an item to display. Continue scanning or adding items.
Act on Receipt options while Receipts are loading

It can take a few seconds to load a receipt image when a transaction is complete. However, the sales associate can tap or click the Email Receipt or Print Receipt options as soon as they appear.

Performance Tips for Network Resources

SuiteCommerce InStore (SCIS) administrators can make modifications to improve network performance in your SCIS environment. This topic lists a few tips that you should find helpful.

- Use the Warming Up Service to keep the Server active
- If you do not use Client Scripts, clear the Execute Client Scripts option
- Asynchronous Method for Adjusting the POS Status

Use the Warming Up Service to keep the Server active

The warming up service keeps the NetSuite server “warm” while it is idle. The default is for the service to run every 10 minutes. If your store does not typically experience much idle time between making transactions, you should extend the warming up service interval to 30 or 40 minutes.

Extending the interval is especially important if you have several SCIS devices running at the same time. Having the service trigger every 10 minutes for multiple devices can have a negative impact on your server resources.

You configure the service interval by modifying the CustomConfiguration.js file.

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

To adjust the Warming Up Service interval:

1. Log into NetSuite as an administrator.
Performance Tips for Network Resources

2. Go to Documents > Files > File cabinet.
3. Locate the CustomConfiguration.js file. In the index on the left, drill down to:
   Web Site Hosting Files > Live Hosting Files > SSP Applications > NetSuite Inc. - POS >
   SuiteCommerce InStore
4. Click Edit for the file.
5. Locate the warmUp: code section.
6. Adjust the warmUpTime minutes.
7. Save your changes.

**Note:** Changing the interval to be less time, such as 1 minute, causes additional processing in
the system that diminishes the purpose of the warm up service.

For more information, see Customizing the Configuration File.

If you do not use Client Scripts, clear the Execute Client Scripts option

The Execute Client Scripts setting on the SCIS Setting > Orders subtab enables the application to execute
certain integration code as user event scripts. It is typically associated with using Avalara AvaTax.
Although the setting can improve performance under certain circumstances, it can also affect transaction-
processing time. If you do not use Avalara, you should leave the Execute Client Scripts setting disabled.

**Important:** Before clearing the check box, you might verify with Customer Support that your
setup does not need the Execute Client Scripts option enabled.

**To clear the Execute Client Scripts option:**

1. Log into NetSuite as an administrator.
2. Go to Customization > Lists, Records, & Fields > Record Types.
3. Scroll to SCIS Settings, and then click List in that row.
4. Click Edit for the SCIS Settings record.
5. Open the Order subtab.
6. If the box is checked, clear the Execute Client Scripts box.
7. Click Save.

For more information, see SCIS Settings for Orders.

Asynchronous Method for Adjusting the POS Status

When a payment or refund is made through a payment device, the transaction creates an Invoice record
and changes the POS Status to Closed.

To ensure performance at the register, SCIS uses an asynchronous method to change the POS Status
after the receipt becomes available. This method means that saved searches that include the POS Status
might show a temporary status of Tendering for some transactions.
For purposes of ensuring the POS Status is correct, an asynchronous job runs every hour to adjust transactions that were not changed to **Closed** automatically. Support can set the job to run more frequently for your account, but be aware that additional job runs can have a negative impact on performance.

Note that the POS Status for transactions paid by cash and other tenders that do not use a payment device are not affected by the asynchronous method.

### Performance Tips for Scripts and Workflows

Use the tips in this section to help ensure scripts and workflows included in your NetSuite environment do not slow your SuiteCommerce InStore (SCIS) performance.

- **Find Scripts that affect records used by SCIS**
- **Disable unneeded User Event Scripts via Roles**
- **Exclude unneeded Script and Workflow Execution via Context**
- **Convert or Refine the Scripts You Need**
- **Performance Tips for Avalara® AvaTax Scripts**
  - Disable Avalara Tax Calculation at the Line Level
  - Disable Avalara Extensive Logging
  - Disable unneeded Avalara Scripts

Scripts can run behind the scenes in NetSuite to affect how the database handles records. If a script is active in NetSuite, it runs each time a user, system or another script creates, modifies, deletes or loads a record in the database. By default, a user event script will run on every record process, regardless of the Role of assigned to the user that submits the transaction.

The SCIS application submits and loads records to the NetSuite database when performing common point of sale (POS) tasks. For example, when a sales associate completes a sales transaction, SCIS submits a Cash Sale or Invoice record.

---

**Common SCIS POS tasks**

- Completing a sale
- Completing a return
- Creating or updating quotes
- Creating a new customer
- Suspending and resuming transactions
- Scanning or viewing drill-down details of a transaction
- Preparing fulfillments

**NetSuite records used by SCIS**

- Cash Sale
- Invoice
- Estimate
- Customer
- Customer Payment
- Credit Memo
- Sales Order
- Fulfillment request

The time spent to complete record processing is referred to as "system time." This time includes the duration required to run the associated scripts. Reducing system time is key for maximizing performance.
Performance Tips for Scripts and Workflows

SCIS does not have a direct method for blocking the execution of unneeded scripts and workflows. However, NetSuite includes methods to accomplish this task. These methods are described in the following topics.

Find Scripts that affect records used by SCIS

The first step in maximizing script performance is to locate the scripts that run on records used by SCIS. Then you can identify which scripts to continue running and which scripts to avoid running.

To find Scripts that affect SCIS:

1. Log into NetSuite as an administrator.
2. Go to Customization > Scripting > Script Deployments.
3. Expand the Filters.
4. Select the desired Record Type, such as Invoice or Cash Sale.
   The list refreshes with the filtered results.

Disable unneeded User Event Scripts via Roles

You can prevent an unneeded user event script from running by clearing its Role assignments.

To disable unneeded Scripts via Roles:

1. Log into NetSuite as an administrator.
2. Go to Customization > Scripting > Script Deployments.
3. Use information from the task Find Scripts that affect records used by SCIS to locate the script Roles to adjust.
4. Click Edit by the desired script.
5. Go to the Audience section.
6. If checked, clear the Roles >Select All box.
7. To remove individual assignments, click those Roles to clear the highlights.
8. Click Save.

Exclude unneeded Script and Workflow Execution via Context

Use this performance tip to exclude scripts and workflows from processing in contexts where they are not needed. The exclusions reduce the system time required to complete a transaction.

The procedure to set up exclusions uses a NetSuite method for Analytics filtering using the context in which a script or workflow executes. You can set exclusions for user event scripts, client scripts, and workflows.

The contexts available for SCIS exclusion are:

- Web Application — Used for submitting SCIS records
- Payment PostBack — Used with SCIS-supported payment devices

The first set of steps use Analytics filtering to identify unneeded scripts and workflows by context. Then you can use the context list found on the Script Deployment or Workflow page to exclude them from those contexts. The procedures follow this path:
Performance Tips for Scripts and Workflows

- A. Use the **Analytics** tools to identify scripts and workflows that include a context.
- B. Use the **Script Deployment** page to set exclusions for those scripts.
- C. Use the **Workflow** page to set exclusions for those workflows.

**A. Use Analytics to identify scripts and workflows by context:**

You should repeat these steps for each type of script or workflow implemented in your account.

1. Log into NetSuite as an administrator.
2. Go to Analytics.
3. If you have performed these steps before and saved a workbook, search for and open that workbook.
4. Otherwise:
   a. Click **New Workbook** and search by entering the type of script or workflow:
      - User Event Script Deployment
      - Client Script Deployment
      - Workflow Action Script Deployment

   b. Click on that script or workflow deployment to open the filter page. The following examples are based on the user event script deployment.
5. Search for the **Execution Context** criteria and drag it to a new column.

![New Workbook: Select a Record Type](image)

6. Search for and drag **ID** to a new column. The ID will list the script name.
7. Open the **Execution Context** column menu and select **Filter**.
8. In the Filter form, select the context to exclude and move it to the right. Available contexts for SCIS exclusion are:
   ■ Web Application
   ■ Payment PostBack

9. Click OK.

The results refresh to show only those scripts or workflows that include the filter you selected.

10. If desired, click the Save icon to save the workbook with your criteria choices.

11. Note the script or workflow identifiers in the ID column. You will use the IDs to set context exclusions.

12. Use the next sets of steps to set exclusions for each script or workflow context identified.

   ✔️ **Tip:** You can open the Script Deployments and Workflow pages in new browser tabs.

**B. Set exclusions for identified scripts:**

1. Go to Customization > Scripting > Script Deployments.
2. Review the ID column for a script identified in the previous task.
3. Click Edit for that script.
4. On the **Script Deployment** page, click the **Context Filtering** subtab.
5. Find the desired context in the **Execution Context** list.
   By default, NetSuite highlights all contexts. A highlighted context means that the script will run (execute) for that context.
6. Press and hold the Ctrl key, then deselect the context. For example, deselect **Web Application**.
   Leave the other contexts highlighted or clear.
7. Click **Save**.

   ![Context Filtering Subtab](image)

**C. Set exclusions for identified workflows:**

1. Go to Customization > Workflow > Workflows.
2. Review the **ID** column for a workflow identified in the previous task.
3. Click **Edit** for that workflow.
4. In the **Workflow** context panel on the right, click the **Edit** icon.

   ![Workflow Context Panel](image)

5. Scroll to the **Contexts** list.
6. Press and hold the Ctrl key, then deselect the context. For example, deselect **Web Application**.
Leave the other contexts highlighted or clear.

7. Click Save.

**Repeat the Analytics and Exclusion steps as needed**

Repeat using the proceeding steps until all desired scripts and workflows are excluded for the appropriate contexts.

**Convert or Refine the Scripts You Need**

For scripts that are required to meet your business needs, consider converting or refining those scripts.

- **Convert Workflows and Custom Scripts to Scheduled Scripts.** Scheduled scripts run on the server without blocking record handling in NetSuite. They should not affect performance at the point of sale. Whenever possible, try to convert workflows and custom scripts to scheduled scripts.

- **Refine Scripts to minimize actions.** If you cannot convert a workflow or custom script to a scheduled script, consider streamlining the tasks it executes. The goal is having the workflow or script perform the least possible amounts of record loading, submission and searching. For searches, ensure the criteria is accurate and returns only the minimum data required to accomplish the task. See Ensure Custom Searches are Efficient.

**Performance Tips for Avalara® AvaTax Scripts**

SCIS can use the Avalara AvaTax application to calculate sales taxes. AvaTax has a performance impact on SCIS when common point of sale (POS) actions cause AvaTax to recalculate taxes. Actions that can initiate tax recalculations during a transaction include:

- Adding or changing a customer
- Adding lines to a transaction
- Applying payment
- Changing item quantities
- Voiding items
- Returning items
- Ordering items
- Adding promotions
- Applying discounts

This topic lists a few setups you can do to boost SCIS performance when using Alvalara AvaTax.

- **Disable Avalara Tax Calculation at the Line Level**
- **Disable Avalara Extensive Logging**
- **Disable unneeded Avalara Scripts**

**Disable Avalara Tax Calculation at the Line Level**

This performance feature controls when Avalara AvaTax calculates taxes for SCIS. Rather than running calculations each time a sales associate adds an item to the cart, the feature puts tax calculations on hold until all cart entries are complete.
Delaying tax calculations until the transaction is ready for payment allows SCIS to focus resources on item entry and other cart options. It can reduce the time spent waiting for tax calculations to complete.

**To disable Avalara line-level tax calculations:**

1. Log into NetSuite.
2. Go to Avalara > Setup > Configure Avalara.
3. Click the **Tax Calculation** subtab.
4. Check the option to **Disable Tax Calculation at Line Level**.
5. Click **Save**.

![Tax Calculation Subtab](image)

The setup to disable Avalara AvaTax calculations at the line level is complete.

**Disable Avalara Extensive Logging**

One option for improving Avalara performance when using SCIS is to disable the Extensive Logging option. You do this task from your Avalara configuration menus.

**To disable Avalara Extensive Logging:**

1. Log into NetSuite as an administrator.
2. Go to Avalara > Setup > Configure Avalara.
3. Open the **General** subtab.
4. Find **Miscellaneous Settings**.
5. Clear the **Extensive Logging** box.
6. Click **Save**.

![Avalara Configuration](image)
Disable unneeded Avalara Scripts

Some Avalara user event scripts run on records used by SCIS, but are not needed for SCIS to function. You can disable the following scripts by clearing each script’s assigned Roles:

- AVA_CustomerBeforeLoad
- AVA_CustomerBeforeLoad_Address
- AVA_CustomerBeforeLoad_Certs

See Disable unneeded User Event Scripts via Roles for the steps.

Performance Tips for using Third-Party SuiteApps

If you are using bundles that integrate to NetSuite, make sure that they are up to date so that you can take advantage of their latest performance improvements.

NetSuite can use third-party applications delivered through SuiteApps to apply payments or calculate taxes for SuiteCommerce InStore (SCIS) transactions. Each third-party provider might include performance enhancements in new versions. However, the version provided to SuiteApps are in the form of unmanaged bundles. You must manually update these bundles to install new versions.

To check for third-party bundle updates:

1. Go to Customization >SuiteBundler > Search & Install Bundles > List. The Version column shows an exclamation icon ![if a new version is available.](#)
2. Click the icon for details.
3. Click the green arrow on the left and select Update to get the latest version.
# SCIS Configuration

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

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

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

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

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

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

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

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

Subsidiaries and SuiteCommerce InStore

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

For example, you have subsidiaries in New York and California and you plan to use SCIS with the subsidiary only in California. You must select the California subsidiary on item records and employee records.

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

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

Configuring Locations for SCIS

You must set a location on every employee record and item record you plan to use with SuiteCommerce InStore (SCIS). The SCIS user interface shows whether or not a product is in stock at an employee's location.
For example, you may be using SCIS in two locations: Los Angeles and San Francisco. The sales associate
assigned to the San Francisco location can see that an item is out of stock at her location, but available
at the Los Angeles location. This visibility enables the sales associate to make arrangements to have the
product shipped.

SuiteCommerce InStore uses location data for the following:

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

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

**To define locations for SCIS:**

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

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

   - Check the following boxes:
     - **Make Inventory Available** – (Required) Makes all on-hand inventory at the location
       available for orders.
     - **Make Inventory Available In Web Store** – (Required) Makes all on-hand inventory at the
       location available for web store orders.

   **Note:** Check the **Make Inventory Available In Web Store** box to ensure that
   inventory information is available to SCIS. If the box is not checked, then the available
   inventory count displayed on the Product Detail Page (PDP) in SCIS shows 0.

3. Click **Save**.
4. Go to Lists > Relationships > Employees.
   Set the location for each employee record. For more information, see **Configuring Employee
   Records for SCIS**.
5. Go to Lists > Accounting > Items.
   (Optional) Set the location on item records you create. For more information on creating items, see
   **Configuring Item Records for SCIS**.
In addition to configuring a standard location record for each location where you plan to use SCIS, you must also configure custom records to define additional location settings. Additional settings include discounts and shipping methods available at certain locations, information for nearby store locations, and employees who work at more than one location.

### SCIS Location Distance

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

To configure Location Distance:

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

### SCIS Location Searches

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

To create a location search for the Product Detail Page:

1. Select your own criteria for the location search. Follow the instructions in Modifying Saved Searches for SCIS.
2. Go to Reports > All Saved Searches. Remember the ID for your modified SCIS location search.
3. Go to Web Site Hosting Files > Live Hosting Files > SSP Applications > NetSuite Inc. - POS > SuiteCommerce InStore.
4. Click Edit next to CustomConfiguration.js.
5. Replace the default value for locationSearch with the ID for your own custom saved search.
SCIS Settings

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

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

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

To configure an SCIS Settings record:

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

   All changes to the SCIS Settings record are tracked in the list of System Notes.

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

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

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

For more information about setting up SCIS for different locations and subsidiaries, read Setting Up SCIS for Multiple Countries.

General SCIS Settings

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

Define the following settings for discounts and shipping:

- In the SCIS Location Discounts list, select the discounts that you want to make available at this location.
- In the SCIS Shipping Methods list, select the shipping methods you want to make available for this location.
- Check the Use Default Discount box to make custom discounts available.
- Select a value in the Default Discount list.
  
  Select the discount item to use with custom discounts. The value you select here is the actual discount item used for custom discounts. If you do not make a selection here, the default value is "Partner Discount."
  
  For example, you can check the Use Default Discount box, and then select a value from the list of discounts. When a sales associate enters a custom discount, the resulting sales transaction form shows the discount you choose as the custom discount name. The sales associate can enter any value as the amount of discount.

- (Optional) Select one or more searches in the SCIS Saved Searches list. The saved searches you select here are available to the SCIS Sales Clerk when he or she is logged in.

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

SCIS Logo Settings

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

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

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

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

Logo Image Dimensions

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

To enable the auto-complete login feature, check to the **Use Login Autocomplete** box on the SCIS settings record.

The first time the sales associate logs in after Autocomplete has been enabled, their email address is stored in the local database on the device. After that, the sales associate can take advantage of auto-complete capabilities on subsequent log-ins.

### Saved Search

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

### Shipping Label Fields

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

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

### Automatic Logout

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

SCIS Settings for Printing

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

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

Important: Printing configuration is required for each location.

SCIS Custom Attributes for PDP, Cart, Item, and Customer Search

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

For more information, see Creating SCIS Custom Attributes.

SCIS Customer Settings

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

- Check the Give Access box to grant customer center access to each customer who places an order. An email message is sent to the customer as notification that customer access has been granted.
■ (Required) In the Default Customer Group list, accept the default value, Default Customer. For more information, read Default Customer Group.

**Important:** The Default Customer Group is a required field. Changing this setting from Default Customer may affect the ability to search for customers in SCIS.

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

### SCIS Settings for Orders

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

■ **Charge Payments** – Check this box to ensure that credit card payments are charged. You can clear the box while you are testing your SCIS implementation on Sandbox, or while troubleshooting.

■ **Signature Folder** – Enter the name of the folder in which you want to store signature images. If you have not created a folder for credit card signatures, then the folder is automatically created with the first credit card transaction that requires a signature.

■ **Signature File Type** – Enter the file type you use for signature images. In most cases, enter .png.

■ **Voided Item** – Select the item record you use to represent voided line data. This item must be a non-taxable, non-inventory item with a price of zero (0).

■ **Rounding Item** – (Required if you use multiple currencies) Select the item record used to represent the rounding amount for Payment Methods that use rounding. SCIS already provides this item by default. For more information, read Setting up Currency Rounding for SCIS.

■ **Search Transaction by Serial Number** – Check this box to enable the search of transactions by serial number or lot number. If this box is checked, you can find a transaction using the serial number or the lot number of an item on the transaction.

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

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

**Warning:** SCIS only supports client scripts for use with AvaTax integrations. You are responsible for testing and maintaining the client scripts that you create. Ensure your scripts work properly with each managed bundle update. For more information, read Recommendations for Using the Execute Client Scripts Setting.

■ **Enable Split Tender Refunds** - Check this box to enable paying refunds to customers using two or more payment methods on the same transaction.

■ **Search Transaction Using Exact Match** - When the box is cleared, SCIS search returns a list of transactions based on the first characters of the transaction identifier. When the box is checked, SCIS search returns transactions based on exact match.

■ **Optimize EMV** – Check this box to enable a performance enhancement. When this box is checked, SCIS submits a customer payment and invoice during the EMV device priming process. Because customer payments do not calculate taxes, or typically run several user event scripts, this optimization speeds up the process of submitting a sales transaction. When the box is cleared, a cash sale is created during the EMV device priming process.
This check box affects specific types of sales transactions:
- Sales transactions where the entire amount is processed using an EMV payment method.
- Sales transactions where an EMV payment method is the first one used in a split payment of more than one payment method.

Optimize EMV uses the **Invoice in Advance of Fulfillment** accounting option. For information on how Optimize EMV works for Pickup or Shipment orders, see **Invoice in Advance of Fulfillment with Optimize EMV**.

**Important:** Optimize EMV changes the payment process. If you want to use this setting, enable it in your sandbox account first and perform tests using sales and return transactions.

---

### QuickAdd Bar and Forms Settings for SCIS

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

#### QuickAdd Bar

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

#### Transaction Forms

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

**Note:** Standard forms and forms that are installed by SCIS are updated or changed during scheduled updates to SCIS. Custom forms that you create are **not** changed during these updates.

The following screenshot shows a custom form selected for invoices, but standard forms selected for other transactions.
Tip: It is recommended that you create custom forms to avoid unexpected changes during a scheduled update. To create your custom forms, use the standard forms in NetSuite as templates. For more information about creating custom forms, read Creating Custom Transaction Forms for SCIS Best Practice.

You are responsible for maintaining your own custom forms. Test your custom forms after each scheduled update to ensure your custom forms continue to work as expected.

Creating Custom Transaction Forms for SCIS Best Practice

Administrators create custom forms to ensure there are no unexpected changes after a scheduled upgrade, or to implement a specific business process. Note that using custom forms which include fewer fields, only the fields required to capture essential information, can improve the performance of SCIS.

The more fields that are included on a custom form, the more likely it is that users will experience slower performance. Extra, non-essential fields on a form can create lag time after clicking the submit button, while the application waits to write data to the system. SCIS installs a set of Minimal forms, but using these forms is not required.

Important: It is recommended that you test custom forms on your Sandbox environment to ensure they work as expected.

To create custom transaction forms for SCIS:

1. Create a custom transaction form in NetSuite that is based on a Standard form.
   
   For example, if you want to create a custom version of the Standard Product Invoice, go to Customization > Forms > Transaction Forms, and then click Customize next to Standard Product Invoice.

2. Name your custom form.

3. Use the following guidelines when creating custom forms for SCIS:
   
   - Ensure that the Enable Item Line Shipping field is marked to show on transaction forms. This field is required on forms used for SCIS transactions.
   
   - Do not change or remove default tax settings. If you modify default tax settings on these forms, tax may not be calculated properly, or you may not be able to submit transactions through SCIS.
   
   - To view the line Item location on transactions entered using SCIS, ensure the Line Item Location field is marked to show on custom forms.

4. After you create custom transaction and entry forms, go to the SCIS Settings record to select the forms you want to use.

For general reference information about creating custom forms, read the help topic Creating Custom Entry and Transaction Forms.
Entry Forms

On the **Entry Forms** subtab select forms you want to use for customers created with SCIS, employees logging into SCIS, and more. To learn how to customize the entry form used for the Customer Profile, read [Configuring the Customer Entry Form](#).

SCIS Settings for Receipts

Use the SCIS Settings record to set the source for generating certain SuiteCommerce InStore (SCIS) receipts, to select a receipt form, and to define the subject line on email receipts.

For more information about configuring receipts, read [Advanced Receipt Templates for SCIS](#).

Source Receipts from Local Session

This setting adjusts the source for rendering receipts when a payment or refund occurs through an SCIS-supported payment device with Optimize EMV enabled. By default, SCIS uses records from the local session as the source for receipts from these transactions.

Using local-session sourcing for receipts can reduce the time that customers who use a payment device must wait before they are released.

Using the local session is also the default for receipts from transactions that include an Invoice record. This invoice default means that most retailers experience optimal receipt performance even if they do not use Optimize EMV with payment devices.

Payment types such as cash use records transmitted to and received from the NetSuite database as the source for receipts.

Although we include the steps to disable using the local-session as the source for receipts, that should only be done if you are experiencing issues with your receipts.

**To disable local-session sourcing for rendering receipts:**

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Scroll to **SCIS Settings**, and then click **List** in that row.
3. Click **Edit** next to an existing SCIS Settings record to make changes.
4. Click the **Receipt** subtab to configure settings:
5. Clear the **Source Receipts from Local Session** option.
   
   Clearing the option means that it is disabled. All receipts will be generated via NetSuite-sourced records.

   **Tip:** Checking the **Source Receipts from Local Session** option re-enables it.
6. Click **Save**.
To select an SCIS receipt form:

1. Go to Customization > Lists, Records, & Fields.
2. Scroll to SCIS Settings, and then click List in that row.
3. Click Edit next to an existing SCIS Settings record to make changes.
4. Click the Receipts subtab to configure settings:
   - Email
   - Preview
5. Click Save.

Email

Define settings in each of the following fields:

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

Preview

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

Selecting Sales Reports for SCIS

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

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

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

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

SuiteCommerce InStore (SCIS) supports traditional, cash based point-of-sale capabilities. Administrators must complete general setup steps to use cash drawer management.

Advanced Cash Drawer Management provides features for sales associates working in multiple locations. Additional setup is required for Advanced Cash Drawer Management, including configuration of custom records and permissions. For more information, read SCIS Cash Drawer Management.

Localizing SCIS

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

The following general capabilities are supported in SCIS:

- Currency
- Decimal precision
- Item pricing
- Taxes
- Receipts
- Cash rounding
- Address formats
- Phone formats
- Date formats

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

Custom Address Form Templates

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

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

Taxes and Localization

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

**Note:** The Prices Include Tax check box is only applicable to the United Kingdom and International editions of NetSuite.

**To include tax in item prices:**

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

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

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

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

**Setting Up SCIS for Multiple Countries**

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

**Note:** If you use Multiple Currencies in your account, an Administrator must ensure that the Currency permission exists on the SCIS Clerk role. For more information, read SCIS Clerk.

**To assign multiple currencies to item records:**

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

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

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

**To create new SCIS custom records for certain regions:**

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

1. To create a new custom record, go to Customization > Lists, Records & Fields > Record Types.
2. Find the record type in the list.
3. Click **New Record**.

4. (Required) On the **Filters** subtab, select the appropriate Location, Website, and Subsidiary for each record.

5. Make sure employee records have the same subsidiary and location as the SCIS website that supports a particular region. Go to Lists > Employees to view employee records and verify Subsidiary and Location settings. For more information, see Configuring Employee Records for SCIS.

### Configuring SCIS Custom Records for Multiple Regions

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

- **SCIS Settings** – Required for the following items:
  - Discounts
  - Shipping
  - Saved searches
  - Logo and background images
  - Settings for printing
  - Custom attributes
  - Customer settings
  - Settings for orders
  - QuickAdd bar
  - Transaction forms
  - Entry forms
  - Settings for email receipts
  - Sales reports

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

- **SCIS Quick Cash Denominations** – Required to support various currency denominations. There should be an SCIS Quick Cash Denomination record to reflect denominations for each currency in which you transact.

- **SCIS Permission** – Required for SCIS Clerk to access items. Ensure that you select the appropriate locations and subsidiaries on the Filters subtab.

- **SCIS Payment Method** – Required for payment methods that are only valid for a particular locale. There should be an SCIS Payment Method record to reflect payment methods that apply to each currency in which you transact.

- **SCIS QuickAdd Group** – Required for grouping items by locale. Ensure that you select the appropriate locations and subsidiaries on the Filters subtab.

- **SCIS QuickAdd Key** – Required for items to display correct currency symbol and price. Ensure that you select the appropriate locations and subsidiaries on the Filters subtab.

- **SCIS Discount Reasons** – Required to create a custom discount for subsidiary, website, and location. Ensure that you select the appropriate locations and subsidiaries on the Filters subtab.

- **SCIS Return Reason** – Required so that return reasons can be filtered by subsidiary, website, and location. Ensure that you select the appropriate locations and subsidiaries on the Filters subtab.
Setting Filters on Custom Records

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

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

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

Setting up Currency Rounding for SCIS

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

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

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

To set up currency rounding:

1. Go to Customization > Lists, Records, & Fields.
2. Scroll to SCIS Settings, and then click List in that row.
3. Click Edit to modify an existing record.
4. Click the Order subtab.
5. Select the Rounding Item installed by the SuiteCommerce InStore SuiteApp. It is named, ns_pos_rounditem
6. Click Save.
7. Edit the CustomConfiguration.js file.
   Add IDs for the tax groups you want to use for calculating tax on transactions where rounding was applied. Set the applicable zero percent tax groups for rounding. (Replace 0 with the ID for the applicable tax groups in your account.)
8. Set the **Rounding** field on **SCIS Payment Method** records.
   
   a. Go to Customization > Lists, Records, & Fields.
   
   b. Scroll to **SCIS Settings**, and then click **List** in that row.
   
   c. Set rounding on cash payment methods and custom payment methods.

   ![Rounding field](image)

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

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

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

   ![Filter options](image)

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

10. Click **Save**.

To view a list of SCIS installation tasks, see [SuiteCommerce InStore Installation](#).

### Managing Multiple Languages for SCIS

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

1. Ensure that the **Multi-Language** feature is enabled at Setup > Company > Enable Features.

2. Enable the languages that you want to show in SCIS. Do this in your NetSuite account first. Go to Setup > Company > General Preferences. On the languages subtab, select the languages you want to show in SCIS.

3. Select the languages on the SCIS website. Go to Setup > SuiteCommerce Advanced > Set Up Web Site.
   a. Click **Edit** next to your SCIS website.
   b. Click the **Shopping** subtab.
      At the bottom of the page, click **Languages**. Mark the languages you want available online. Sales associates will be able to choose these languages in the SCIS User menu.

4. Click **Save**.

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

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

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

Advanced Receipt Templates for SCIS

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

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

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

Creating SCIS Receipt Template Custom Records

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

Customizing a Receipt Template for SCIS

To make a copy of the SCIS Receipt Template:

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

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

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

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

To make your receipt template available in SCIS:

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find SCIS Receipt Template in the list, and then click List in that same row.
3. Click New SCIS Receipt Template.
4. In the Custom Form list, select Standard or Custom SCIS Receipt Template.
5. Enter a Name for the receipt template. This is the name that is displayed in SCIS.
6. (For use only in Japan) In the Minimum Amount for Fiscal Stamp field, enter the amount over which the receipt will include a space for a Fiscal Stamp.
7. On the Filters subtab, select the location, website, and subsidiary where this template will be applied. If you do not want to make specific selections, check the Apply to All boxes.
8. On the Template Settings subtab, set the following:
   - **Use as Default** – (Optional) Check this box to set the template you select for printed receipts to show in the following scenarios:
     - When a transaction is submitted (also applies when auto-print is enabled).
     - When a transaction is about to be suspended.
     - When a transaction is searched and the receipt is shown.
     - When a quote is generated.
   - **Template Type** – (Required) Select a type of template. You can choose to apply a template to receipts sent by email, apply it to printed receipts, or to both print and email. If you apply the same template to both print and email, then the sales associate can choose a receipt type when completing the transaction.
   - **Select a Template** – (Required) Select the copy of the SCIS receipt template that you created.
9. Click Save.
When you create multiple SCIS Receipt Template custom records, sales associates can select the appropriate receipt template on completing the transaction. The screenshot below shows a list of available receipt templates in the right pane. To select a receipt template for the order, the sales associate clicks an option in the list. The text and layout of the selected receipt displays in the left pane. Because the selected receipt template is available for both print and email, the sales associate can also choose the type of receipt at the top.

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

### Adding Fields to Custom SCIS Receipt Templates

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

**To add a field to a receipt template:**

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

   ```javascript
   // Add custom fields to show in receipt
   customMappingFields: {
     // Define extra fields in the order
     order: ['ismultishipto'],
     // Define extra fields in the creditmemo
     creditMemo: ['billcountry'],
     // Define extra fields in the lines of the order
     line: ['itemtype'],
     // Define extra fields in the lines of the creditmemo
     creditMemoline: ['printitems']
   },
   ```
**Note:** All field types are supported except fields of type Select.

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

- For **order**, the supported fields are listed in the SuiteScript records browser, under Cash Sale. Only objects listed under Fields are supported.
- For **creditMemo**, the supported fields are listed in the SuiteScript records browser, under Credit Memo. Only objects listed under Fields are supported.
- For **line**, the supported fields are listed in the SuiteScript records browser, under Cash Sale. Only objects listed under item-Items are supported.
- For **creditMemoLine**, the supported fields are listed in the SuiteScript records browser, under Credit Memo. Only objects listed under item-Items are supported. Also note that only and/or operations are supported.
- A custom field can be placed in any of the following arrays: **order**, **creditMemo**, **line**, or **creditMemoLine**.

2. Save your changes to the CustomConfiguration.js file.

3. Modify your custom SCIS Receipt Template.
   a. Go to Customization > Forms > Advanced PDF/HTML Templates.
   b. Click Edit next to the custom SCIS Receipt Template you want to modify.

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

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

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

   For more information, read **JSON Object Field Mapping**.

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

**JSON Object Field Mapping**

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

- creditmemo (object)
Advanced Receipt Templates for SCIS

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

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

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

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

### JSON Object Data for SCIS Receipt Templates

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

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Object Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>createddate</td>
<td>String</td>
<td>Date that was created the order. Format MM/DD/YYYY HH:mm</td>
</tr>
<tr>
<td>creditmemo</td>
<td>JSON object</td>
<td>Order summary information, such as total amount, discounts, and tax amount and lines of a credit memo</td>
</tr>
<tr>
<td>customer</td>
<td>JSON object</td>
<td>Customer assigned to the order.</td>
</tr>
<tr>
<td>customExtraFields</td>
<td>JSON object</td>
<td>Additional fields on the custom receipt template form. For more information, read JSON Object Field Mapping.</td>
</tr>
<tr>
<td>includeTaxInPrices</td>
<td>Boolean</td>
<td>Flag to indicate when the prices have tax included.</td>
</tr>
<tr>
<td>internalid</td>
<td>String</td>
<td>Internal ID for the transaction record.</td>
</tr>
<tr>
<td>labels</td>
<td>JSON object</td>
<td>Translated text that appears in the default template.</td>
</tr>
<tr>
<td>lines</td>
<td>Array of objects</td>
<td>Lines added to the order, each line contain an item.</td>
</tr>
<tr>
<td>line</td>
<td>JSON object</td>
<td>Contains information about each line item on an order.</td>
</tr>
<tr>
<td>location</td>
<td>JSON object</td>
<td>Current location from the employee. Location information from the employee record.</td>
</tr>
<tr>
<td>operation</td>
<td>String</td>
<td>Type of order. Possible values [&quot;Suspend&quot;</td>
</tr>
<tr>
<td>payments</td>
<td>Array of objects</td>
<td>Payments made to the order.</td>
</tr>
<tr>
<td>payment</td>
<td>JSON object</td>
<td>Contains information about the payment associated with the order.</td>
</tr>
<tr>
<td>posStatus</td>
<td>String</td>
<td>Status of the order, mapped from the POS Status field. A numeric ID is displayed for each status value:</td>
</tr>
<tr>
<td>Object Name</td>
<td>Object Type</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>-------------</td>
</tr>
<tr>
<td>receiptType</td>
<td>String</td>
<td>Possible value ['purchase'].</td>
</tr>
<tr>
<td>recordtype</td>
<td>String</td>
<td>Contains the transaction record type. Possible values are, ['cashsale'</td>
</tr>
<tr>
<td>returnType</td>
<td>String</td>
<td>Contains the type of return transaction. Possible values are ['unvalidated'</td>
</tr>
<tr>
<td>salesassoc</td>
<td>JSON object</td>
<td>Sales associate assigned to the order.</td>
</tr>
<tr>
<td>status</td>
<td>String</td>
<td>Contains the status of the order transaction. Possible values ['open'</td>
</tr>
<tr>
<td>subsidiary</td>
<td>JSON object</td>
<td>Subsidiary assigned to the employee record.</td>
</tr>
<tr>
<td>summary</td>
<td>JSON object</td>
<td>Order summary information, such as total amount, discounts, and tax amount.</td>
</tr>
<tr>
<td>taxes</td>
<td>Array of objects</td>
<td>Contains an array of tax Objects grouped by rate, it is added to the order summary and creditmemo summary.</td>
</tr>
<tr>
<td>tax</td>
<td>JSON object</td>
<td>Contains information about the tax charged on an order.</td>
</tr>
<tr>
<td>templateId</td>
<td>String</td>
<td>Internal ID of the receipt template record.</td>
</tr>
<tr>
<td>urlLogo</td>
<td>String</td>
<td>URL for company logo.</td>
</tr>
</tbody>
</table>

**creditmemo**

This object only exists if the recordtype is invoice.

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Object Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>customer</td>
<td>JSON object</td>
<td>Customer assigned to the credit memo.</td>
</tr>
<tr>
<td>customExtraFields</td>
<td>JSON object</td>
<td>Additional fields on the custom receipt template form. For more information, read JSON Object Field Mapping.</td>
</tr>
<tr>
<td>discountitem</td>
<td>JSON object</td>
<td>Global discount applied of the creditmemo</td>
</tr>
<tr>
<td>entity</td>
<td>String</td>
<td>Customer Name as it appears in NetSuite, for example, 3832 John Smith.</td>
</tr>
<tr>
<td>internalid</td>
<td>String</td>
<td>ID for the transaction.</td>
</tr>
<tr>
<td>lines</td>
<td>Array of objects</td>
<td>Lines returned in a credit memo, each line contain an item.</td>
</tr>
</tbody>
</table>
Advanced Receipt Templates for SCIS

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Object Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>posStatus</td>
<td>String</td>
<td>Status of the order, mapped from the POS Status field. A numeric ID is displayed for each status value. For more information, see JSON Object Data for SCIS Receipt Templates.</td>
</tr>
<tr>
<td>refunds</td>
<td>Array of objects</td>
<td>Refund from credit memo.</td>
</tr>
<tr>
<td>salesassoc</td>
<td>JSON object</td>
<td>Sales associate assigned to the credit memo.</td>
</tr>
<tr>
<td>salesrep</td>
<td>JSON object</td>
<td>Sales rep assigned to the credit memo.</td>
</tr>
<tr>
<td>summary</td>
<td>JSON object</td>
<td>Order summary information, such as total amount, discounts, and tax amount on the credit memo.</td>
</tr>
</tbody>
</table>

**customer**

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

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

**labels**

This JSON object contains labels from the default template.

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Object Type</th>
<th>English Translated Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>change</td>
<td>String</td>
<td>“Change”</td>
</tr>
<tr>
<td>customer</td>
<td>String</td>
<td>“Customer”</td>
</tr>
<tr>
<td>discount</td>
<td>String</td>
<td>“Discount”</td>
</tr>
<tr>
<td>giftcards</td>
<td>JSON object</td>
<td></td>
</tr>
<tr>
<td>giftcard</td>
<td>String</td>
<td>“Giftcard”</td>
</tr>
<tr>
<td>giftcertnumber</td>
<td>String</td>
<td>“Gift Certificate Number”</td>
</tr>
<tr>
<td>handlingCost</td>
<td>String</td>
<td>“Handling Cost”</td>
</tr>
<tr>
<td>Object Name</td>
<td>Object Type</td>
<td>English Translated Text</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>operation</td>
<td>String</td>
<td>&quot;Operation&quot;</td>
</tr>
<tr>
<td>payments</td>
<td>JSON object</td>
<td></td>
</tr>
<tr>
<td>■ authcode</td>
<td>String</td>
<td>&quot;Authorization Code&quot;</td>
</tr>
<tr>
<td>■ ccexpiredate</td>
<td>String</td>
<td>&quot;CC Expiration&quot;</td>
</tr>
<tr>
<td>■ ccname</td>
<td>String</td>
<td>&quot;Name&quot;</td>
</tr>
<tr>
<td>■ ccnumber</td>
<td>String</td>
<td>&quot;CC Number&quot;</td>
</tr>
<tr>
<td>refunds</td>
<td>JSON object</td>
<td></td>
</tr>
<tr>
<td>■ checknum</td>
<td>String</td>
<td>&quot;Checknum&quot;</td>
</tr>
<tr>
<td>■ refund</td>
<td>String</td>
<td>&quot;Refund&quot;</td>
</tr>
<tr>
<td>returnDiscount</td>
<td>String</td>
<td>&quot;Returned Items Discount&quot;</td>
</tr>
<tr>
<td>returnSubtotal</td>
<td>String</td>
<td>&quot;Returned Items Subtotal&quot;</td>
</tr>
<tr>
<td>returnTax1</td>
<td>String</td>
<td>&quot;Returned Tax&quot; or &quot;Returned GST/HST&quot;</td>
</tr>
<tr>
<td>returnTax2</td>
<td>String</td>
<td>&quot;Returned PST&quot;</td>
</tr>
<tr>
<td>returnTotal</td>
<td>String</td>
<td>&quot;Returned Item TOTAL&quot;</td>
</tr>
<tr>
<td>salesAssoc</td>
<td>String</td>
<td>&quot;Sales Assoc.&quot;</td>
</tr>
<tr>
<td>salesRep</td>
<td>String</td>
<td>&quot;Sales Rep.&quot;</td>
</tr>
<tr>
<td>shippingCost</td>
<td>String</td>
<td>&quot;Shipping Cost&quot;</td>
</tr>
<tr>
<td>subtotal</td>
<td>String</td>
<td>&quot;Subtotal&quot;</td>
</tr>
<tr>
<td>tax1</td>
<td>String</td>
<td>&quot;GST/HST&quot;</td>
</tr>
<tr>
<td>tax2</td>
<td>String</td>
<td>&quot;PST&quot;</td>
</tr>
<tr>
<td>thanks</td>
<td>String</td>
<td>&quot;Thanks for coming!&quot;</td>
</tr>
<tr>
<td>total</td>
<td>String</td>
<td>&quot;TOTAL&quot;</td>
</tr>
</tbody>
</table>

**lines**

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

**line**

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

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Object Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>amount</td>
<td>String</td>
<td>Amount on the line item.</td>
</tr>
<tr>
<td>customExtraFields</td>
<td>String</td>
<td>Additional fields on the custom receipt template form. For more information, read JSON Object Field Mapping.</td>
</tr>
</tbody>
</table>
## Advanced Receipt Templates for SCIS

### Item

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Object Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>item</td>
<td>JSON object</td>
<td>Describes the line item.</td>
</tr>
<tr>
<td>displayname</td>
<td>String</td>
<td>Item display name.</td>
</tr>
<tr>
<td>internalid</td>
<td>String</td>
<td>Item ID of the item record.</td>
</tr>
<tr>
<td>isVoid</td>
<td>Boolean</td>
<td>Defines the void item.</td>
</tr>
<tr>
<td>itemType</td>
<td>String</td>
<td>Defines the type of item.</td>
</tr>
<tr>
<td>thumbnail</td>
<td>String</td>
<td>Defines the thumbnail image.</td>
</tr>
<tr>
<td>voidqty</td>
<td>Number</td>
<td>Stores the original quantity of the line, if the line is voided from the order.</td>
</tr>
<tr>
<td>price</td>
<td>Number</td>
<td>Defines the item price.</td>
</tr>
<tr>
<td>quantity</td>
<td>String</td>
<td>Quantity on the item line.</td>
</tr>
<tr>
<td>tax_code</td>
<td>String</td>
<td>Contains the internal ID of the tax code associated with this line, for example if the item is Not Taxable it shows -7 or -8.</td>
</tr>
</tbody>
</table>

### Location

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

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

### Payments

This is an array of Payment objects.
payment

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

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Object Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>changeDue</td>
<td>String</td>
<td>Change due after cash payment on the order.</td>
</tr>
<tr>
<td>internalid</td>
<td>String</td>
<td>Internal ID of the payment method.</td>
</tr>
<tr>
<td>paymentmethod</td>
<td>String</td>
<td>Contains the ID of the payment method record from the Accounting List.</td>
</tr>
<tr>
<td>paymentmethodname</td>
<td>String</td>
<td>Name of the payment method associated with the transaction.</td>
</tr>
<tr>
<td>total</td>
<td>String</td>
<td>Contains the total of each payment made on the order.</td>
</tr>
<tr>
<td>totalTendered</td>
<td>String</td>
<td>Total amount paid.</td>
</tr>
</tbody>
</table>

salesassoc

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

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Object Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>id</td>
<td>String</td>
<td>Internal ID from the employee record of the sales associate.</td>
</tr>
<tr>
<td>name</td>
<td>String</td>
<td>Name of the employee.</td>
</tr>
</tbody>
</table>

subsidiary

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

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Object Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>legalname</td>
<td>String</td>
<td>Subsidiary legal name.</td>
</tr>
<tr>
<td>tin</td>
<td>Boolean</td>
<td>Taxpayer Identification Number.</td>
</tr>
</tbody>
</table>

summary

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

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Object Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>amountdue</td>
<td>Number</td>
<td>Amount due on the order.</td>
</tr>
<tr>
<td>changedue</td>
<td>String</td>
<td>Change due after cash payment on the order.</td>
</tr>
<tr>
<td>createddate</td>
<td>String</td>
<td>Date the order was created.</td>
</tr>
<tr>
<td>discounttotal</td>
<td>String</td>
<td>Total discount applied to the order.</td>
</tr>
</tbody>
</table>
### Advanced Receipt Templates for SCIS

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Object Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>giftcertapplied</td>
<td>String</td>
<td>Gift certificate applied to the order.</td>
</tr>
<tr>
<td>handlingcost</td>
<td>String</td>
<td>Handling cost applied to the order, if applicable.</td>
</tr>
<tr>
<td>shippingcostoverriden</td>
<td>String</td>
<td>Contains a value related to the Shipping cost activation/deactivation in SCIS (sidebar). If you changed the shipping cost to zero, the value is T. If shipping cost was not modified it shows F.</td>
</tr>
<tr>
<td>subtotal</td>
<td>String</td>
<td>Subtotal of the order.</td>
</tr>
<tr>
<td>taxes</td>
<td>Array of objects</td>
<td>Contains a list of taxes grouped by rate</td>
</tr>
<tr>
<td>taxtotal</td>
<td>String</td>
<td>Total tax charged on the order.</td>
</tr>
<tr>
<td>tax2total</td>
<td>String</td>
<td>If multiple taxes were applied, then this shows the other tax amount. For example if both GST and PST tax is incurred.</td>
</tr>
<tr>
<td>total</td>
<td>String</td>
<td>Total amount of the order.</td>
</tr>
<tr>
<td>tranid</td>
<td>String</td>
<td>Transaction ID of the order.</td>
</tr>
</tbody>
</table>

### taxes

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

### tax

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

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

### Custom Receipt Template Setup for SCIS

Use the following instructions to ensure that your custom receipt template is used on sales transactions submitted in SCIS.

**To set a custom receipt template as the SCIS receipt template:**

1. Go to Customization > Forms > Advanced PDF/HTML Templates.
2. Click **Edit** next to your customized template. Ensure that the **Source Code** toggle is on.
3. Copy the source code that is your customized receipt.

4. After you have copied the source code, go back to the Advanced PDF/HTML Templates list page and click Customize next to Standard SCIS Receipt Template PDF/HTML Template.

The Custom SCIS Receipt Template PDF/HTML Template page appears.

5. On the Custom SCIS Receipt Template PDF/HTML Template page, ensure the Source Code toggle is on, and then paste the source code of the receipt template you copied in Step 3.

6. Click Template Setup. Change the title to something that describes your customized receipt template. Click Save.

7. Click Save on the Advanced PDF/HTML Template page to save your template.
8. Go to Customization> Forms > Advanced PDF/HTML Templates. Verify that your template is on the list of Advanced PDF/HTML templates.

9. Set your custom template as the SCIS Receipt Template.

   In the global search box, search for the SCIS Receipt Template page. Alternately, go to Customization > Lists, Records & Fields > Records > SCIS Receipt Template. Then edit the record you are using in SCIS.

   a. Set SCIS Receipt Template filters.

   b. Select your custom template.
c. Click **Save**.

### Configuring SCIS Payment Methods

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

### SCIS Payment Method Records

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

#### To configure SCIS Payment Method records:

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

4. Configure the required fields described below. All other fields are optional based on the intended behavior of the payment method.
Configuring SCIS Payment Methods

- **Payment Method** – (Required) Select the payment method you want to use with SCIS.
- **Open Cash Drawer** – Specifies that the cash drawer should be opened when using this payment type.
- **Capture Signature** – Indicates that a customer signature is required when using this payment method.
- **Credit Card Pattern** – Defines the appropriate credit card pattern, if this payment method represents a credit card type. For more information, read Credit Card Patterns for SCIS.
- **Is Check** – Prompts for a check number when using this payment method.
- **Is Main** – Check this box to show the payment method in the list on the transaction summary pane of the SCIS main screen.
- **Icon** – Defines the appropriate credit card icon, if this payment method represents a credit card type. For more information, read Credit Card Icons.
- **Authorized Roles** – (Required) Defines the roles authorized to submit transactions with this payment method. You must select at least one Authorized Role for the payment method to show in SCIS. See also, Role-Based Payment Methods.

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

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

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

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

6. Click **Save**.

### Role-Based Payment Methods

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

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

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

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

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

Credit Card Patterns for SCIS

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

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

To configure the credit card pattern:

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

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

<table>
<thead>
<tr>
<th>Provider</th>
<th>Pattern</th>
</tr>
</thead>
<tbody>
<tr>
<td>VISA</td>
<td>^4{0-9}{12}(?:{0-9}{3})?$</td>
</tr>
<tr>
<td>MasterCard</td>
<td>^{5}{1-5}{0-9}{2}\ {222}{1-9,}{22}3-9,{0-9}{2}{2}3-6,{0-9}{2}{27}01,{0-9}{2720,{0-9}{12}}$</td>
</tr>
<tr>
<td>American Express</td>
<td>^{47}{0-9}13$</td>
</tr>
<tr>
<td>Diners</td>
<td>^{3}{0-5}16,{0-9}{0-9}{11}$</td>
</tr>
<tr>
<td>Discover</td>
<td>^{6}{0-11},5{0-9}{2}{0-9}{12}$</td>
</tr>
<tr>
<td>JCB</td>
<td>^{2131\1800\35</td>
</tr>
</tbody>
</table>

Credit Card Icons

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

**To assign an icon to a credit card payment method:**

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

5. Click Save.

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

<table>
<thead>
<tr>
<th>Provider</th>
<th>Filename</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visa</td>
<td>visa.png</td>
</tr>
<tr>
<td>Master Card</td>
<td>master.png</td>
</tr>
<tr>
<td>American Express</td>
<td>american.png</td>
</tr>
<tr>
<td>Diners</td>
<td>diners.png</td>
</tr>
<tr>
<td>Discover</td>
<td>discover.png</td>
</tr>
<tr>
<td>JCB</td>
<td>jcb.png</td>
</tr>
</tbody>
</table>

**Setting Up Payment Services for SCIS**

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

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

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

Read the following topics for more information:

- Understanding Payment Processing with SCIS
Understanding Payment Processing with SCIS

This section includes an overview of payment device transactions submitted with SCIS. You can use the following diagram to understand how payments are processed. Note that configuration of a payment partner gateway is not required. The following information is intended to provide general information.

1. **Select payment device**
   The sales associate uses SCIS to select a payment device. SCIS displays an informational message to the sales associate, indicating the payment device is being initialized.

2. **Request for payment**
   The request for payment occurs between SCIS and the NetSuite account. At this time, a transaction record is created in NetSuite. SCIS begins to send requests for payment status periodically to the transaction record created in NetSuite.

3. **Initiate Plugin**
   It is through the transaction record that the request for payment reaches the payment partner plugin. The payment partner plugin receives the request and starts communication with the payment partner gateway, if a gateway is configured. Alternately, the request goes directly to the payment device.

4. **Request for payment**
The payment partner plugin sends a request to the payment partner for payment device initialization and sends the request for the payment.

5. Initialize PIN pad
SCIS displays an informational message to the sales associate, "waiting for customer payment."
Next, the shopper interacts with the payment device. If a payment gateway is configured, then data is exchanged between the payment device and the gateway. This communication is not monitored by SCIS.

6. Payment confirmation
The payment partner sends payment confirmation to NetSuite, and then the transaction record is updated. Through its continual requests, SCIS discovers the confirmed payment status. The sales transaction in SCIS is complete.

Configuring SCIS Gateway Records

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

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

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

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

Configuring EMV Payment Services for SCIS

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

To configure EMV payment services for SCIS:
1. Go to Setup > Accounting > Accounting Preferences.
2. Click the Items/Transactions subtab. Check the following boxes under Payment Processing:
- Use Strict Rules for the Selection of Payment Processing Profiles.
- Preserve Transactions When Payment is On Hold.

4. Create a Payment Method in NetSuite flagged as EMV.
   a. Go to Setup > Accounting > Accounting Lists.
   b. Create a new Payment Method. Name it for the payment processing solution you plan to use.
   c. Check the EMV box.
   d. Click Save.

5. Set up a payment processing profile in NetSuite for your Payment Service Provider. Go to Setup > Accounting > Payment Processing Profiles.
   a. In the Primary section, complete the information as appropriate.
   b. In the Authentication Credentials section, enter the account information provided by the payment service provider.
   c. Under Payment Information, select the payment methods you want to process with this profile.
   d. In the Gateway Request Types section, select the requests this profile supports.

6. Create an SCIS Payment Method custom record.
   a. Go to Customization > Record Types > SCIS Payment Method > List.
   b. Click New SCIS Payment Method.
   c. In the Payment Method field, select the EMV payment method you created in Step 3.
   d. Check the Is Main box.
   e. Complete other fields on this page as needed. For more information on creating SCIS payment methods, see SCIS Payment Method Records.
   f. Click Save.

7. Define SCIS Payment Devices. This custom record identifies the device you plan to use to process the EMV payment type.

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

**EMV Error Handling – When an Invoice Fails to Save**

EMV credit card payments include behind-the-scenes steps that save an invoice in NetSuite. When an invoice failure occurs, SCIS attempts to automatically refund the customer's payment back to their credit card. The error-handling process alerts the sales associate to the payment error and lists whether the refund to the card was successful.

For the automatic refund to occur, the EMV payment must have included a Payment Number Reference (PNRF) that enables a refund without the physical credit card. Some Payment Processing Profiles provide a PNRF for payment transactions, while others do not.

If an automatic refund fails, the alert states that the refund must be processed manually. Manual refunds are performed in NetSuite by your administrator.

**Important:** The customer's payment must be refunded before the sales associate can attempt to take payment again

- **Customer payment was automatically refunded** — This alert means that no action is needed from the sales associate for the refund.

  The associate should:
  1. Tap Return to Cart
  2. Try submitting the payment again.
  3. If the error continues to happen, the associate should ask their store manager to report the error to the system administrator.

- **You must manually refund the payment** — The automatic refund failed to complete. An administrator must process the refund in NetSuite before the sales associate can complete the transaction.

  1. The sales associate will notify their store manager, who will contact the system administrator. The administrator will:
a. Log into NetSuite.

b. Find the customer’s payment and refund their credit card. See the help topic Refunding an Open Balance.

c. Notify the store manager when the refund is complete.

2. When notified by the manager that the refund has been made, the sales associate will:

   a. Tap Return to Cart.
   b. Try submitting the payment again.
   c. If the error continues to happen, they will notify the store manager and ask for instructions on how to proceed with the customer.

If notified by the store manager that the error continues to occur, the administrator should contact NetSuite Customer Support for assistance.

**Note:** Failure to save an invoice is not due to an issue with the credit card. The customer can try to pay again using the same card, a different card, or another payment method, such as cash.

### SCIS Payment Device Custom Records

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

**To configure an SCIS Payment Device:**

1. Go to Customization > Record Types > SCIS Payment Device > List.

2. Click New SCIS Payment Device.

3. In the Name field, enter a name for the device. Enter a name that you can use to identify the device, for example, Device–1234.

4. Enter the Device ID. This value is commonly an IP or an unique value the payment processor uses to communicate with the device.

5. In the Supported Payment Method list, select the EMV payment method supported on the device.

6. Select the Locations that can use this payment device. You can select one or more options in the list.

7. Click Save.

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

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

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

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

**To view or modify cash payment denominations:**

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

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

5. Click **Save**.
SCIS Fallback Overview

SCIS Fallback enables sales associates to perform basic point-of-sale operations when SuiteCommerce InStore (SCIS) is unable to connect to NetSuite. Fallback is included in the SCIS SuiteApp and runs locally on the mobile device you use for point-of-sale transactions. To start using Fallback when NetSuite is not available, an administrator must enable Fallback and perform some configuration tasks in NetSuite.

While SCIS relies on backend capabilities provided by NetSuite, such as payment processing, tax calculations and storing customer and product data, Fallback runs independently. Assets such as, images (logos and background), printing settings and specific Fallback settings are stored in the SCIS mobile app. After Fallback has been configured in NetSuite, logging in to SCIS on the mobile device triggers the download of the product catalog to the device. Product download is transparent to the sales associate who has logged in. It occurs automatically upon login, and does not disrupt the typical workflow.

Prerequisites

To prepare for using Fallback, administrators are required to complete some prerequisite steps. Note the following:

- If you use SCIS on an iPad, ensure that SCIS mobile apps are up to date.
- Ensure that the External Pin Pad payment method is enabled.

Best Practice for Using Fallback

If the connection to NetSuite is interrupted, the Fallback login screen displays. After logging in to Fallback with a Fallback PIN number, the sales associate can continue creating orders and submitting sales transactions.

Fallback can be used during the following events when NetSuite is not available:

- NetSuite twice yearly major updates
- NetSuite scheduled maintenance
- Temporary internet outage

Operating in Fallback

Note the following considerations for sales associates entering orders in Fallback, and for administrators and store managers setting up Fallback and working in NetSuite.
Sales Associates

After logging into Fallback, sales associates can enter orders while SCIS is not available, but with limited capability. For example, orders are not submitted to the system in real time. Also, some SCIS operations are not available in Fallback, such as shipping and in-store pickup.

Note: In Fallback sales associates can use custom discounts regardless of authorization requirements.

Administrators and Store Managers

Orders submitted in Fallback are posted to NetSuite through a consolidation process that occurs asynchronously. An administrator or manager may need to reconcile a Fallback transaction if it fails to create a transaction in NetSuite. General ledger accounts and inventory will be out of date until transactions are posted in NetSuite.

Operations Supported in Fallback

The following table shows operations that are supported in Fallback, as well as operations not supported in Fallback.

<table>
<thead>
<tr>
<th>Operation</th>
<th>Supported in Fallback</th>
<th>Not Supported in Fallback</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Shopping Cart Operations</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Void lines on orders</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>(Voided lines are removed from Fallback</td>
<td></td>
<td></td>
</tr>
<tr>
<td>transactions.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Currency rounding</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Change item quantity</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Add/edit/delete item-level note</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Quantity or customer based pricing</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>QuickAdd Key groups</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>QuickAdd key dynamic lists (related and</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>co-related item in the cart)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Operations on Customer Records</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer profile</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Creating new customers</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Editing customer information</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>Order-level operations</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assigning customers to orders</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Add/edit/delete order-level note</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Returns</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Refunds</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
### Operation

<table>
<thead>
<tr>
<th>Operation</th>
<th>Supported in Fallback</th>
<th>Not Supported in Fallback</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quotes</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Shipping and Pickup</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>▪ Shipping and pickup options are not available at line-level or order level.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>▪ Fulfillment tasks are not available to sales associates.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>▪ Pick up in-store is not available for customers.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Limited payment methods. The following payment methods are the only ones supported in Fallback:</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>▪ Cash</td>
<td></td>
<td></td>
</tr>
<tr>
<td>▪ External PIN Pad (this includes any electronic payment supported by EPP, such as google wallet, credit card, all-in-one payment method)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>▪ Check</td>
<td></td>
<td></td>
</tr>
<tr>
<td>▪ Any custom non-electronic payment method</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Systems that only use payment processing capabilities in NetSuite, are not supported.

For more information about setting up payment methods for Fallback, read [SCIS Fallback Payment Methods](#).

<table>
<thead>
<tr>
<th>Operation</th>
<th>Supported in Fallback</th>
<th>Not Supported in Fallback</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partial payments</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Email receipts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Print receipts</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Sales rep selection on orders</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adding touchpoints, extra attributes, or event validators.</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Login and Shift</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email and password login credentials</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Generic PIN login per location</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SCIS Cash Drawer Management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>▪ Entering initial loan or end of day transactions are not available for sales associates.</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>▪ Opening a shift or closing a shift is not available.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Information for administrators is included in the topic, [Cash Drawer Management for Fallback](#).

<table>
<thead>
<tr>
<th>Operation</th>
<th>Supported in Fallback</th>
<th>Not Supported in Fallback</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager authorization</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Promotions, Gift Certificates, Discounts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adding custom discounts and price override</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Adding Promotions</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Setting Up SCIS Fallback

Fallback is included in SuiteCommerce InStore (SCIS) and runs locally on the mobile device you use for point-of-sale. To start using Fallback, an administrator must perform some configuration tasks in NetSuite.

To prepare for using Fallback, complete the following steps:

1. Configure the Fallback Settings record. For more information, read SCIS Fallback Settings.
2. Ensure SCIS mobile apps are up to date. For more information, read SCIS for iOS and SCIS for Windows Applications.
3. Configure an External Pin Pad payment method. For more information, read SCIS Fallback Payment Methods.

### SCIS Fallback Settings

This section includes information for administrators configuring the SCIS Fallback Settings record in NetSuite.
You must configure the SCIS Fallback Settings record in NetSuite before you can start using Fallback. Here, you define the following important settings:

- The locations and subsidiaries where Fallback can be used.
- A personal Identification Number (PIN) so that sales associates can log in to Fallback when SCIS is not available.
- The default tax rate applied to transactions entered in Fallback.
- The role assigned to employees using Fallback. (Typically, this is the SCIS Clerk role.)

After you configure Fallback settings, the next time you launch the SCIS for iOS or SCIS for Windows app, your product catalog and Fallback settings are downloaded and stored in the app running on the point-of-sale device. After initial configuration, you can change Fallback settings as needed. The catalog and settings are downloaded periodically to stay up-to-date.

**Best Practice: Subsidiary and Location Considerations**

As you configure the SCIS Fallback record, consider the following about using subsidiaries and locations:

- **Enabling Fallback** - You can enable Fallback for certain subsidiaries and locations, and not for others.
- **Defining a Fallback tax rate** - Define a default tax rate for fallback. You can define a tax rate by subsidiary or by location. All orders entered in Fallback use the default tax rate you define. For more information about how taxes are calculated on Fallback transactions, read [Tax Calculation in Fallback](#).

**Note:** After initial setup, you can change the tax rate in Fallback Settings. The new tax rate you define will be used the next time you go to Fallback when SCIS is not available.

**To configure the SCIS Fallback Settings record:**

2. (For OneWorld accounts) Check the **Enable All Subsidiaries** box if you want to enable Fallback for all Subsidiaries in your OneWorld account.
3. (For OneWorld accounts) In the **Subsidiaries** list, you can select one or more Subsidiaries where you want to enable Fallback.
4. (For accounts without OneWorld) Check the **Enable All Locations** box if you want to enable Fallback for all Locations in your account.
5. In the **Locations** list, select one or more Locations where you want to enable Fallback.

   When you enable subsidiaries, locations that are associated with those subsidiaries are automatically enabled. To disable certain locations, remove them from the list at the top of the page.

6. Click the link below the **Default Access PIN** field to enter a Personal Identification Number (PIN) that employees can use to log in to Fallback. The PIN must be 4 - 8 digits. Only numbers are allowed.

   ![Default Access PIN](default_access_pin.png)

   The Default Access PIN is applied to all subsidiaries and locations where Fallback is enabled. If you wish to define an Access PIN per subsidiary, or per location, then select the subsidiary or location in the sublist, clear the Default Access PIN check box, and enter a unique Access PIN. In the following screenshot, a Subsidiary Access PIN entered on the Parent Company: Illinois line can override the Default Access PIN when the check box is cleared.
Note: By default, the Access PIN assigned to a subsidiary is automatically shared with associated locations. To change the setting in a particular location, edit the location in the sublist.

7. In the Default Tax Rate field, enter the tax rate that should be applied to orders in Fallback.

In Fallback only one tax code is applied to all transactions in a particular location. This tax rate is used for all items (regardless of a non-taxable setting) in all transactions entered in a Fallback session. If you wish to define a Tax Rate per location, then select the location in the sublist, clear the Default Tax Rate check box, and enter a tax rate.

If you change the tax rate setting, then the change takes effect in the next session. For more information about Fallback Sessions, read SCIS Fallback Session and SCIS Transmission Batch Records.

8. Use the sublists on the SCIS Fallback Settings page to make configuration changes for specific subsidiaries and locations (for accounts with OneWorld).

   a. The following list describes each column on the Subsidiaries sublist:

      - **Subsidiary** – Shows the names of subsidiaries.
      - **Default Access PIN** – Check this box to use the Default Access PIN entered in the Default Settings section of the page.
      - **Subsidiary Access PIN** – This is an input field, used for overriding the Default PIN. The Default Access PIN check box is automatically cleared when you enter a PIN in this field.
      - **Default Tax Rate** - Check this box to use the Default Tax Rate entered in the Default Settings section of the page.
      - **Subsidiary Tax Rate** - This is an input field, used for overriding the Default Tax Rate. The Default Tax Rate check box is automatically cleared when you enter a Tax Rate in this field.
      - **Fallback is Enabled** – This is a read only check box reflecting the Fallback Enabled setting at the top of the page.
b. The following list describes each column on the Locations sublist:

- **Location** – Shows the names of locations.
- **Subsidiary Access PIN** - (For accounts with OneWorld) Check this box to use the same access PIN as the subsidiary with which this location is associated.
- **Default Access PIN** - (For accounts without OneWorld) Check this box to use the Default Access PIN in this location.
- **Location Access PIN** – You can enter a different Access PIN for the location.
- **Subsidiary Tax Rate** - (For accounts with OneWorld) Check this box to use the same Tax Rate as the subsidiary with which the location is associated.
- **Default Tax Rate** - (For accounts without OneWorld) Check this box to use the Default Tax Rate in this location.
- **Location Tax Rate** - When the Subsidiary Tax Rate check box is clear, then you can enter a different Tax Rate for the location.
- **Fallback is Enabled** - This is a read only check box reflecting the Fallback Enabled setting at the top of the page.

**Note:** If you choose to remove SCIS from your NetSuite account or change the NetSuite account associated with SCIS, contact NetSuite Customer Support. A Customer Support rep can help you identify any Fallback transactions that may have occurred on a point-of-sale device but may not have posted to NetSuite.

When sales associates log in to SCIS, the product catalog and settings are downloaded. The download process is transparent to the sales associate. It occurs automatically upon login, and does not disrupt the typical workflow.

### SCIS Fallback Payment Methods

Fallback is designed to operate when an internet connection is not available. Because Fallback is designed as an offline solution, payment methods used in Fallback cannot rely on communication with the NetSuite backend. When operating in Fallback, sales associates can use payment methods such as, Cash, Check, and custom non-electronic payment methods that you may have created.

The **External PIN Pad** payment method, installed by the SCIS SuiteApp, is designated as a Fallback payment method by default. Do not make any changes to this record other than setting location, subsidiary, and website filters. Credit or debit card gateways, and gift cards issued through NetSuite from the store are not supported in Fallback. EMV is only supported on external payment terminals that do not interact with payment gateways configured in NetSuite.

**To set filters in the External PIN Pad Payment Method:**

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find **SCIS Payment Method**, and click **List**.
3. Click **Edit** next to **External PIN Pad**.

**Important:** Do not change the **Payment Method** field or the **Is Fallback External PIN Pad** check box. The setting can be enabled on only one SCIS Payment Method record. Other SCIS Payment Method records show the check box as read-only.

4. Click the **Filters** subtab.
   Select the **Location**, **Website**, and **Subsidiary** where you use Fallback. You can select more than one value in each box.
5. Click **Save** to preserve your changes.

**Note:** If you have not configured external payment terminals in your store, or for business reasons sales associates should not use credit cards with Fallback, you can mark the SCIS Payment Method, External PIN Pad as inactive.

### Working with Sales Associates in SCIS Fallback

In Fallback, sales associates operate as they do in SCIS online. However, SCIS Permissions which you may have applied to restrict certain operations in SCIS online are not supported in Fallback. For example, SCIS Permission restrictions on custom discounts are not supported. Sales associates can apply a discount of any value without manager approval.

In general, SCIS Permissions are **not** supported in Fallback. Note that SCIS permissions are not enforced for the following operations:

- Deleting a transaction
- Voiding a line
- Payment Methods
- 100% discount

**Note:** Only custom discounts are supported in Fallback.

### Working with Customers in SCIS Fallback

Entering new customer information is not supported in Fallback. However, while in Fallback, a sales associate can click or touch the **Assign Customer** link to assign an existing customer to an order. The Assign Customer capability is successful only if there is a customer record in NetSuite that matches the customer identifier entered in Fallback. The customer identifier can be an email address, a customer ID, or the customer's first or last name.

After the order is submitted in Fallback, during the transaction creation process in NetSuite, the customer identifier is matched against the list of customers in the system. If the identifier matches an existing customer, the customer is associated with the SCIS Fallback Transaction record, and then the customer information is carried through to the final transaction created in NetSuite.

If the customer identifier does not match an existing customer, or if it matches more than one customer, then the final transaction is not created. In this case, an Administrator or SCIS Fallback Auditor must perform a manual reconciliation by editing the SCIS Fallback Transaction in NetSuite to trigger creation of the final transaction. For more information, read [SCIS Fallback Transaction Reconciliation](#).

**Note:** In Fallback, customer search, and adding customers are not supported. The Customer Profile is not available.

If the sales associate does not assign a customer to the order in Fallback, then a default Fallback customer is assigned to the order.
For step-by-step instructions for sales associates, read the help topic Assign a Customer to an Order in Fallback.

**Fallback Data Delivery**

This section includes information about the process by which orders submitted in Fallback are posted to NetSuite.

**Data Delivery and Consolidation**

Data delivery and consolidation occur automatically, without any interaction from an administrator. During the data delivery process, data from Fallback transactions is transferred to NetSuite. The automatic consolidation process ultimately results in a final NetSuite transaction record that represents the order submitted in Fallback. When the NetSuite transaction is created, inventory and general ledger accounts are impacted.

The data from the order submitted in Fallback is saved on the device where the order was submitted. When NetSuite is back online, and a sales associate logs in to use SCIS, the process that sends transaction data to NetSuite is initiated. The delivery process creates SCIS Fallback Session and SCIS Fallback Transmission Batch records in NetSuite.

**SCIS Fallback Session and SCIS Transmission Batch Records**

Administrators can view these records for reference and troubleshooting purposes:

- **SCIS Fallback Session** records in NetSuite represent the session created each time a sales associate logs in to Fallback. One SCIS Fallback Session can be linked to multiple SCIS Transmission Batch records.
- **SCIS Transmission Batch** records contain the original output of transaction data in JSON format. There can be multiple transactions in a Transmission Batch record.

**Note:** SCIS Fallback Session and SCIS Transmission Batch records are locked. These records are intended for reference purposes only.

**Transaction Creation Process**

This section describes the process by which SCIS Fallback Transaction records and corresponding cash sale transactions are created in NetSuite.
Each **SCIS Fallback Transaction** record in NetSuite represents an order entered in Fallback. This custom record is created by a scheduled script that runs every 15 minutes. The script also creates a corresponding final **NetSuite transaction**.

**SCIS Fallback Transaction**

Use SCIS Fallback Transactions to view details about each order, such as items sold, and the payment method used on the order.

Each SCIS Fallback Transaction record includes a link to the following linked Fallback records:

- **SCIS Fallback Line** – This record contains information from each line in the order that was submitted using Fallback.
- **SCIS Fallback Payment** – This record contains the payment information from the order submitted in Fallback.
- **SCIS Fallback Notes** – If the sales associate added a note to the transaction entered in Fallback, the note appears here.
- **Final NetSuite Transaction** – This is the cash sale in NetSuite that corresponds to the Fallback Transaction. The NetSuite transaction only appears after the transaction creation process is complete, and has successfully created the transaction. However, a link to a final NetSuite transaction may not appear on the SCIS Fallback Transaction record for the following reasons:
  - The transaction creation process has not completed. In this case, the Status on the SCIS Fallback Transaction is **Waiting to write transaction data**.
  - The transaction creation process has failed to create the NetSuite transaction. In this case, the Status on the SCIS Fallback Transaction is **Failed to create Cash Sale**.

**Final NetSuite Transaction**

During the transaction creation process, a cash sale transaction record is created for each SCIS Fallback Transaction record without any interaction from an administrator. NetSuite transactions created from Fallback Transactions include the following information on the SCIS Fallback Transaction subtab:

- **Fallback Transaction** – Shows a link to the related SCIS Fallback Transaction.
- **Sales Date** – Shows the date and time the transaction was submitted in Fallback.
- **Reconciliation Status** – Shows the Fallback Consolidation Status.
SCIS Fallback Transaction Reconciliation

Reconciliation is the process by which an administrator or SCIS Fallback Auditor edits an SCIS Fallback Transaction record to trigger the creation of a cash sale in NetSuite.

Typically, a scheduled script runs periodically to create a NetSuite cash sale for each SCIS Fallback Transaction. However, there are cases when a NetSuite cash sale transaction cannot be created. Use the Fallback Transactions without Transaction saved search in NetSuite to identify SCIS Fallback transactions that require reconciliation.

To reconcile an SCIS Fallback Transaction record:

1. Go to Reports > Saved Searches > All Saved Searches.
2. Find the Saved Search named Fallback Transactions without Transaction. Click View.
3. Click Edit next to the Fallback Transaction you want to modify.
   a. View the Error Log. Examine the data to identify errors.
   b. Edit fields on the SCIS Fallback Transaction record as needed.
4. Click Save.
   The transaction creation process is triggered for the SCIS Fallback Transaction.

If reconciliation is successful, then a cash sale transaction is created in NetSuite and the Transaction status of the SCIS Fallback Transaction becomes **Cash Sale created**. The SCIS Fallback Transaction is removed from the saved search.

If an error occurs that prevents the cash sale from being created, then the SCIS Fallback Transaction status does not change. The SCIS Fallback Transaction will continue to appear in the saved search.

Cases when NetSuite Transactions are not created and Reconciliation is Required

The following table describes issues that may prevent the creation of a cash sale from the SCIS Fallback Transaction. Also included in the table, are solutions for resolving these issues with the SCIS Fallback Transaction, and how to trigger the creation of a cash sale transaction in NetSuite.

<table>
<thead>
<tr>
<th>Case</th>
<th>Solution</th>
</tr>
</thead>
</table>
| Subsidiary does not exist (or it is inactive).               | 1. Find the subsidiary, location or item record in NetSuite. Ensure the record in question is active and configured correctly.  
2. Edit the SCIS Fallback Transaction.                       |
| Location does not exist (or it is inactive).                 | 3. Update the ID on the transaction to ensure the correct subsidiary, location, or item is selected. |
| Item does not exist (or it is inactive).                     | 4. Click Save on the SCIS Fallback transaction.                                                     |
| Sales rep record becomes inactive, or the sales rep location changes in NetSuite. | 1. Edit the SCIS Fallback Transaction.                                                             
2. Update the transaction to ensure the correct sales rep information is selected. |
| Payment method does not exist (or it is inactive).           | 3. Click Save on the SCIS Fallback transaction.                                                     |

1. Find the payment method in NetSuite. Ensure it is marked as active. Also, ensure it is configured correctly with a corresponding SCIS Payment custom record.
### Case Solution

2. Edit the SCIS Fallback Transaction.
3. Select the correct payment method,
4. Click Save.

### Cases when NetSuite Transactions are Different from Transactions Entered in Fallback

The **Transaction Difference from Fallback** field shows a value only if there is a difference between the sales transaction entered in Fallback and the final transaction created in NetSuite. This field appears on the SCIS Fallback subtab on the final transaction.

The following table describes data as it may appear on the final transaction with corresponding values in the **Transaction Difference from Fallback** field.

<table>
<thead>
<tr>
<th>Data on the final transaction in NetSuite</th>
<th>Values in the Transaction Difference from Fallback field</th>
</tr>
</thead>
</table>
| Sales Rep is missing from the final transaction. | - The selected sales rep is disabled or does not exist.  
- The sales rep selected in Fallback is not associated with the location. |
| The amount on one or more transactions lines is different from the expected transaction line amount. | Transaction line was recalculated because of a different tax rate on the Fallback transaction. |
| The discount amount on the final transaction is not as expected. | Order discount was recalculated because of a different tax rate on the Fallback transaction. |

### Tax Calculation in Fallback

The default tax rate you specify on the SCIS Fallback Settings record is applied to all orders submitted using Fallback. You can specify a default tax rate for each location and subsidiary. For example, if you have a subsidiary with two locations, in New York and California, you can create two tax rates, one for each location. Alternately, you could define one tax rate for the Subsidiary that would be inherited by the two locations.

The tax rate you define on the SCIS Fallback Settings record is applied to all orders submitted in Fallback. It is recommended that tax rates you define in Fallback settings are the same tax rates defined in your NetSuite account.

### Sales Tax Difference Between Fallback and NetSuite

Note the following examples of how transaction amounts are calculated if the sales tax defined on the SCIS Fallback Settings record is different from sales tax items defined in NetSuite.

#### Example of Recalculation for a Transaction Line

A shirt was purchased using Fallback. The price (rate) of the shirt was $15.00 (before tax). The default tax rate for Fallback was set to 6%. On the Fallback transaction, $0.90 was charged for tax, so the total amount for the transaction line in Fallback was $15.90.
However, sales tax information in NetSuite indicates the sales tax rate is 10%. In this case, the amount on the cash sale created in NetSuite must be modified to ensure the total amount for the transaction line equals $15.90.

**Example of Recalculation Including an Order Discount**

For accounting purposes, the total amount on the cash sale in NetSuite must be the same as the amount on the SCIS Fallback Transaction. To maintain the impact to the general ledger, a discount or markup is added when creating the cash sale from the Fallback transaction. In this way, the difference in tax calculation is noted, but the total amount of the order stays the same in Fallback and SCIS.

For example, a shirt is purchased using Fallback for $9.17. The sales associate adds a $1.00 discount. With 8% tax applied the total amount of the order is $8.82. However, in NetSuite, the tax code applied to the transaction is 10%.

After the NetSuite transaction creation process is complete, the NetSuite transaction has the following values in the item list on the transaction: The shirt has a rate of $9.00, but the amount shows $9.17, so that it is the same as on the Fallback transaction. A custom discount is applied for $0.98, and the Tax amount is $0.80 Tax. The order total is the same as the order total on the Fallback transaction, $8.82.

**Prices Include Tax**

Fallback supports the Prices Include Tax setting on item records. This setting enables you to save the item price as either tax inclusive or tax exclusive.

<i>Note:</i> In Fallback, discounts are always added before tax.

If you change the Prices Include Tax setting on item records, then you must login to SCIS on each device to ensure the catalog of items is downloaded with the updated setting. Allow 5 to 10 minutes before going to Fallback to ensure that updated settings have been downloaded properly.
Configuring Records for SCIS

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

A location must be specified on each employee record granted access to SCIS. If you use OneWorld, you must select a subsidiary on item records and employee records.

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

Read the following topics for more information:

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

After you have installed and configured SCIS, you can refer to the topics on configuring records if you need to change configuration settings.

Customer Records and SCIS

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

When configuring customer records, consider the following settings:

- **Taxable settings** – Administrators can check the Taxable box and set the Tax Item on the Financial tab of the customer record. These settings are applied automatically when the customer record is submitted, based on the customer's address.
- **Currency settings** – Currencies the customer has used on transactions are tracked on the Financial subtab of the customer record.
- **Sales Rep** – If your store pays commissions to sales reps, an administrator can assign a sales rep to a customer record.

Default Customer

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

SCIS automatically creates a Default Customer record for each sales associate. Administrators can access the Default Customer record in NetSuite at Lists > Relationships > Customers.
Default Customer Group

The **Default Customer Group** field on the **SCIS Settings** record defines which customer records are identified as default customer records. It defines the SCIS Customer Group to which default customers belong. Default customer records are only used when the sales associate does not create a new customer, or select a particular customer for a transaction. For more information, read **SCIS Customer Settings**.

Default Customer and Transactions

Some transactions cannot be processed without a unique customer record. To process the following transactions, a sales associate must use an existing customer record, or create a new customer:

- Delivery
- Store Pickup

To use the following refund methods and payment methods, a sales associate must select an existing customer, or create a new customer:

- Credit Memos
- Purchase on Account

The following features of SCIS cannot be used with a default customer:

- Wish List
- Customer Profile

Subsidiary Customers in SCIS

Multi-Subsidiary capabilities on customer records are supported in SCIS. Sales associates can use search in SCIS to find customers and transactions regardless of the subsidiary where they were originally created. Each transaction entered in SCIS shows the subsidiary where it was submitted.

For example, a sales associate working in Subsidiary A can create a transaction for a customer assigned to Subsidiary B. When an administrator views the transaction in NetSuite, the transaction shows the subsidiary where the transaction occurred. The subsidiary where the transaction occurred is then added to the list of subsidiaries on the customer record.
Configuring the Customer Entry Form

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

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

Customer Profile Entry Form for SCIS

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

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

1. Go to Lists > Search > Saved Searches.
2. Click Edit next to the custom searches installed in your account by the SuiteCommerce InStore SuiteApp:
   - SCIS Individual Company Form – For customers that are companies.
   - SCIS Individual Customer Form – For individual customers.
3. Click the Results subtab. Here you can specify the fields that are displayed in the customer entry form. You can also enter a custom label for any field.
   a. To add a field, make a selection in the blank row at the bottom of the Field column.
   b. Optionally, enter a label in the Custom Label column.
   c. Click Add.
   d. To remove a field, select an existing row in the list, and then click Remove.
4. Enter a new name for the search.
5. Click **Save As**.

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

### To define your customer search in CustomConfiguration.js file:

Defining the customer search in the configuration file is what enables your customer entry form to be displayed in SCIS.

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

![Select File](image)

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

```javascript
customer: {
    defaults: {
        },
    identifiers: {
        //Add the code and the saved search id here
        customerIndividualCustomerFormSearch: 'customsearch_ns_pos_individual_custome_2',
    }
},
```

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

### To specify required fields on the customer entry form:

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

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

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

Defining SCIS Customer Notes

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

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

To define SCIS Customer Note Types:

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

5. You can choose particular **Locations**, **Websites**, and **Subsidiaries**, or make the note available to all of them.

6. Click **Save**.

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

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**Configuring Item Records for SCIS**

- Setting Up Products for Sale on SCIS
- Configuring Serialized Items and Lot Numbered Items in SCIS
- Configuring Item Images for SCIS
- Fields Displayed on the Product Detail Page
- Creating an Open Item in SCIS to Prompt for Price
- Configuring QuickAdd Keys

**Setting Up Products for Sale on SCIS**

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

- Inventory items
- Matrix items
- Non-inventory items
- Gift card items
- Discount for sale items
- Service items
- Kit items
- Serialized items
- Lot Numbered items

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

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

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

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

**To configure items for SCIS:**

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

2. Enter a value in the **Item Name/Number** field. The value you enter here displays in NetSuite on lists. It will display in SuiteCommerce InStore as the product name if the **Display Name/Code** field is blank.

3. Enter a value in the **UPC Code** field. It lets you scan a bar code for this item. Note that the UPC Code must be unique for each item.
   
   If you have additional codes, use the **Additional UPCs** field on the Custom subtab to enter multiple UPC codes separated by commas.

4. Enter a value in the **Display Name/Code** field. The value you enter here displays in SuiteCommerce InStore and on the website as the product name. If this field is blank, then the value in the **Item Name/Number** field is displayed.

5. (Optional) Add the item to a location. In the **Location** list, select the SCIS location where the item will be available for purchase. If you do not select a location here, the item is available in all locations.

6. Click the **Accounting** subtab. Select a **Tax Schedule**.

7. Click the **Sales / Pricing** subtab. In the **Price Levels** section, enter a **Base Price** for the item. Enter the same price level for each currency that can be used to purchase the item.

   If you offer different prices based on the quantity purchased, enter a purchase QTY and then the “each” or single-item price for that quantity. All purchases that meet or exceed the quantity will use that price, up to the next QTY specified.

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

8. Click the **Web Store** subtab to configure the following settings:

   a. Check the **Display in Web Store** box.

   b. (Optional) Enter a short description of the item in the **Detailed Description** field. This setting is recommended, but not required. The description you enter here displays in the SuiteCommerce InStore.
c. (Optional) In the **Out of Stock Behavior** list, accept the default selection.

**Note:** SCIS ignores any option selected in the **Out of Stock Behavior** list.

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

9. Click **Save**.

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

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

### Configuring Serialized Items and Lot Numbered Items in SCIS

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

1. To use serialized inventory, you must first enable the feature and then set up item records. Read instructions in the following topics:
   a. [Enabling Serial Numbered Inventory](#)
   b. [Entering Serialized Inventory Records](#)

2. To use lot numbered items, you must first enable the feature, and then create item records including the lot numbers:
   a. To enable the feature, go to Setup > Company > Setup Tasks > Enable Features. On the Items & Inventory subtab, check the Lot Tracking box, and then click **Save**.

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

   b. To create lot numbered item records, follow instructions described in the topic, **Creating Lot Numbered Items**.

3. The SCIS Settings record includes a preference for searching transactions using serial and lot numbers. Administrators can set this preference, at Customization > Record types > SCIS Settings. On the Orders subtab, check the box next to Search transactions by Serial Number.

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

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

### Configuring Item Images for SCIS

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

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

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

To learn how to configure item images for SCIS, read Example of Item Image Configuration.

**Best Practice for Setting up Image Size Parameters for SCIS**

You cannot define custom Image Size IDs for the SCIS website. You must use the Image Size IDs that are installed by the SCIS SuiteApp. Changing the Image Size IDs for SCIS, or removing any of them, will result in distorted images on the site.

The only acceptable way to modify image size parameters is to change the values for Maximum Width and Maximum Height.

<table>
<thead>
<tr>
<th>Image Resizing</th>
<th>MAXIMUM WIDTH</th>
<th>MAXIMUM HEIGHT</th>
</tr>
</thead>
<tbody>
<tr>
<td>full screen</td>
<td>Yes</td>
<td>1,600</td>
</tr>
<tr>
<td>main</td>
<td>Yes</td>
<td>600</td>
</tr>
<tr>
<td>search</td>
<td>Yes</td>
<td>150</td>
</tr>
<tr>
<td>thumbnail</td>
<td>Yes</td>
<td>100</td>
</tr>
<tr>
<td>tiny thumb</td>
<td>Yes</td>
<td>50</td>
</tr>
<tr>
<td>zoom</td>
<td>Yes</td>
<td>900</td>
</tr>
<tr>
<td>cart item</td>
<td>Yes</td>
<td>150</td>
</tr>
<tr>
<td>receipt item</td>
<td>Yes</td>
<td>80</td>
</tr>
<tr>
<td>item details</td>
<td>Yes</td>
<td>200</td>
</tr>
<tr>
<td>quick add item</td>
<td>Yes</td>
<td>90</td>
</tr>
</tbody>
</table>

**Using a Keyword to Support Multiple Images**

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

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

**Example of Item Image Configuration**

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

```
[Display Name/Code]_media-[number].[file extension]
```
If your NetSuite account has another Commerce web stores site, you can copy the image mapping criteria and use it for your SCIS site. If your only Commerce web stores website is used for SCIS, then follow the steps below to set up image mapping criteria. In this case, you must rebuild the search index to update all the items with the image files uploaded.

**Sample steps to configure item images:**

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

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

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

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

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

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

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

   e. Click **Save**.

3. Upload your image files (from Step 1) to Web Site Hosting Files > Live Hosting Files > Images.
   a. Go to the folder at Setup > SuiteCommerce Advanced > Web Site Hosting Files > Live Hosting Files > Images.
   b. Click **Advanced Add**.
   c. In the **ZIP Archive to Add** field, choose the ZIP file on your computer.
   d. Verify the **Destination Folder** is where you intend to upload files.
   e. Check the **Unzip Files** box.
   f. Check the **Make all Files Available Without Login** box.
   g. Check the **Overwrite Files with Same Name** box to avoid uploading duplicate files in this folder. Files of the same name are automatically updated with the latest version you upload.
   h. Click **Add**.

4. Rebuild the search index. This step is required if you are adding item images, you have only one Commerce web stores website, and you use that site for SCIS.
   a. Go back to Setup > SuiteCommerce Advanced > Setup Web Site.
   b. Click the **Actions** menu.
   c. Select **Rebuild Search Index**.
The time it takes to rebuild the search index depends on the number of items in the account, and network connections. To check the status of the search index, go to Setup > SuiteCommerce Advanced > Web Site Set Up. Click View under Search Status Index.

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

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

**Fields Displayed on the Product Detail Page**

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

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

**Product Detail Page Specific Options**

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

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

```javascript
// Product Detail Page specific options
pdp: {
    // If true it will show the Item ID label on the page
```
You can also modify the item name display in the cart. For more information, see Item Display in Cart.

Creating an Open Item in SCIS to Prompt for Price

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

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

To create an open item:

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

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

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

c. Check the **Variable Amount** box. This setting enables the sales associate to enter a price.

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

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

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

### Configuring QuickAdd Keys

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

#### QuickAdd Groups

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

**To configure QuickAdd Groups:**

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

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

5. Click **Save**.
QuickAdd Keys

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

To create a new QuickAdd Key:
1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find the SCIS QuickAdd Key row. Click List in that row.
3. Click New SCIS QuickAdd Key.
4. Select a QuickAdd Group from the Key Group list.
5. Select an item from the Item list.
6. The following settings are optional. You can set all of them, or some of them as they apply to your business:
   a. Select the SCIS Location where you want to show the item. If you do not select a location, the item QuickAdd Key shows at all locations.
   b. Specify a Role. This setting is useful if you want to make certain QuickAdd Keys visible to sales associates with a certain role.
   c. Specify a User. This is the list of employees granted access to SCIS. The QuickAdd Key displays for the user you specify.
   d. Select a Customer Group. This list is sourced from the SCIS Customer Group list. If you select a customer group here, the QuickAdd Key is only available when the sales associate adds a customer from this group to a sales transaction. If you do not make a selection, the QuickAdd Key is available for all customers.
   e. Select a Customer. The QuickAdd Key is only available when the customer is selected on a transaction. If you do not make a selection, the QuickAdd Key is available for all customers.
7. Click the Filters subtab, and then select filters for Location, Website, and Subsidiary.
   Filter settings are required. If filters are not selected, the SCIS custom record is ignored entirely. If you do not want to setup specific localizations, then you must check the Apply to All boxes on the Filters subtab.
8. Click Save.

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

QuickAdd Keys CSV Export and Import

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

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

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

To import QuickAdd Key data:

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

Configuring Employee Records for SCIS

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

The following must be configured:

- **Location** – Set the location on the employee record to ensure the sales associate has access to items and customers in the same location.
- **Access** – Select one or more roles for each SuiteCommerce InStore user on the employee record. You must select the SCIS Clerk role installed by the SuiteCommerce InStore SuiteApp, or a role configured using the SCIS Clerk role as a template.
- **SCIS Access Code** – (Optional) Custom field setting only required for employees with manager override permission.
- **SCIS Location** – (Required) Select one or more locations for each employee. Employees can log in to SCIS at more than one location. Additional permissions may also be required.
- **SCIS User Settings** – Custom record that links the employee record to other records, such as default customer, default sales rep, and cash drawer account. For more information, read SCIS User Settings.
To add a new SCIS sales associate:


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

2. Enter name, email, and address information.

3. (Required if you use OneWorld) Make a selection from the Subsidiary list.

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

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

5. (Required) Click the Custom subtab. Select at least one SCIS Location. If you have employees who work in more than one location, read Working with Employees in Multiple SCIS Locations.

6. (Required if you use Departments) Make a selection from the Department drop down.

7. (Optional) Click the Human Resources subtab, and then check the Sales Rep box.

8. (Required for employees with Authorized Roles) Click the Custom subtab. Enter a value in the SCIS Access Code field. For more information, see Manager Override.

9. Click the Access tab.

10. Check the Give Access box.

11. As of 2018.2, you should check the Send New Access Notification Email box.

    When checked, the employee receives an email notification that access has been granted to your NetSuite account. The email contains a link so that the employee can set up a NetSuite password.

   **(Optional)** If you prefer to specify the employee’s password yourself, follow these steps instead:

   a. Do not check the Send New Access Notification Email box.

   b. Check the Manually Assign or Change Password box.

   c. In the Password field, enter a password for the employee to use to log in. As you type, the characters are validated against the password policy criteria, and the results displayed.

   d. In the Confirm Password field, re-enter the password. You must tell the employee the password you assigned.

   e. Check the Require Password Change on Next Login box to require this employee to change their password on their next login to NetSuite.

12. In the Roles column, select one or more roles for the employee.

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

13. Click Save.

---

**Working with Employees in Multiple SCIS Locations**

Many retailers have more than one store in the same city, so employees may work at multiple locations. To set up SuiteCommerce InStore (SCIS) for employees in multiple locations, an administrator or store manager must use NetSuite to configure point-of-sale devices and employee records.
SCIS installs the **Device Location** field on the SCIS Mobile Device record, and the **SCIS Locations** list on the employee record. Selecting SCIS locations is a one-time setting when configuring a new Employee.

### To set up SCIS for employees in multiple locations:

1. Assign locations to mobile devices:
   a. Go to Customization > Lists, Records, & Fields > Record Types.
   b. Find **SCIS Mobile Device**, and click List in that row.
   c. Click **Edit** next to the mobile device you want to configure for a particular location.
   d. In the **Device Location** list, select a location for the device. The options in the list are sourced from the list of locations that you configured in NetSuite. You can choose one location per device.
   e. Click **Save**.

2. Assign locations to Employee records:
   a. Go to Lists > Relationships > Employees.
   b. Click **Edit** next to the employee record you want to modify.
   c. Click the **Custom** subtab.
   d. In the **SCIS Locations** list, select the locations where this employee logs in to SCIS.
   e. Click **Save**.

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

### SCIS User Settings

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

### To view the SCIS User Settings custom record:

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find **SCIS User Settings**, and then click List in that row.
3. Click View next to a name in the list of employees, to confirm the settings. If you want to change or update settings, click Edit.
4. Note the following user settings:
   - **Employee** – Shows the employee name. This field is automatically populated, and is linked to the employee record.
   - **Default Customer** – Shows the default customer record associated with the employee. For more information, see Default Customer.
Important: Do not change the default value in the Default Customer field. Changing this can affect the ability to track sales transactions submitted for customers who do not provide personal information such as name or email address.

- Default Sales Rep – Defines the default sales rep for the employee.
- Account – Defines the cash drawer account assigned to the employee.
- EULA Version Presented – Shows the ID of the latest version of the End-User License Agreement (EULA) presented to the user. This field is automatically updated each time a new version of the EULA is displayed in SCIS.
- EULA Review Date – Shows the date and time when the user accepted the terms of the EULA.
- EULA Acceptance – This check box is marked if the SCIS user has accepted the terms of the EULA. If the box is cleared, then the SCIS user has not accepted the EULA.

5. Click Save.
SCIS Customization

You can customize your implementation SuiteCommerce InStore (SCIS) in the following ways:

- modify various optional settings in the CustomConfiguration.js file. For more information, read Customizing the Configuration File.
- Display additional item attributes in the cart, in search result lists, and on the product detail page. You can also show additional information about customers in the Customer Profile or in customer search results. For more information, read Creating SCIS Custom Attributes.
- Web developers can write custom logic into scripts that run before or after a specific event occurs in the shopping cart. For more information, read SCIS Event Validators.
- Web developers can create custom popup widows that can be displayed in the SCIS shopping cart. For more information, read SCIS Extensions. Read also, SCIS Extensibility API.

Note: SCIS only supports client scripts for use with AvaTax integrations. You are responsible for testing and maintaining the client scripts that you create. Ensure your scripts work properly with each managed bundle update.

Customizing the Configuration File

SuiteCommerce InStore (SCIS) includes the CustomConfiguration.js file where you can modify various optional settings. This section includes instructions on how to modify the CustomConfiguration.js file to meet your business needs:

- For step-by-step instructions, see Editing the CustomConfiguration.js File.
- For more information about optional settings, see Optional Settings in CustomConfiguration.js.

Managed SuiteApp Updates not Applied to CustomConfiguration.js

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

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

Editing the CustomConfiguration.js File

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

To edit the CustomConfiguration.js file:

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

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

## Optional Settings in CustomConfiguration.js

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

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

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

### Filters for Customer Search

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

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

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

---

SuiteCommerce InStore Administrator's Guide

Oracle® NetSuite™
Switch the Sales Rep After Each Transaction

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

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

Item Display in Cart

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

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

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

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

Customize Location Display

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

**Important:** If you choose to modify the SCIS Inventory Locations saved search, ensure that the Make Inventory Available field is included on the Results tab of your custom saved search. If this field is not included, the inventory count on the Product Detail Page shows 0.

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

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

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

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

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

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

  // Sort Nearby Stores and Store Pickup locations by distance to the current SCIS user's location. If you
  // choose not to sort by location distance, then search results sort order is used. You can set the sort
  // parameters for Nearby Stores and Store Pickup, and set a limit to the number of stores in the list.
  nearbyStoresExtraSort: 'none',
  nearbyStoresLimit: 0,

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

  // How many locations displayed in all locations
  // 0 means no limit.
  nearbyStoresLimit: 0,

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

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

Creating SCIS Custom Attributes

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

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

To create custom attributes for SCIS:

1. Go to the SCIS Settings record.
2. Click a subtab named for the area you want to customize.
3. Click **New SCIS Custom Attributes**.
   
a. **Label** – Enter a label for the field. The text you enter in this field displays in SCIS.

b. **Field ID** – Enter a field ID for an item attribute, or a field ID associated with the customer record.

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

   ■ To define custom attributes for the **PDP**, **item search** results page, and **cart**, you must use field IDs defined in the Details field set. For more information, read **Product Detail Page, Item Search, and Cart**.

   ■ To define custom attributes for display on the **Customer Profile** and in **Customer Search** results, use field IDs from the list displayed at, **Customer Profile and Customer Search Results**.

c. **Zone** – Select the area where you want to display a custom attribute: **right**, **left**, **top**, or **bottom**.

   **Note:** If you see **Undefined** in the Zone column, select a different value for the zone. Custom attributes associated with a zone that is undefined, does not display in SCIS.

   The following list shows the zones that apply to each SCIS area:

   ■ **Product Detail Page** – Top, Bottom, Left

   ■ **Item Search** – Top, Bottom

   ■ **Cart** – Right, Left

   ■ **Customer Profile** – Right, Left

   ■ **Customer Search** – Top, Bottom

d. **Allowed Roles** – Define the roles that can view the custom attributes you define.

e. **Order** – If you have more than one attribute in a zone, enter the order in which you want each one to display. You can enter numbers or letters in this field.

   **f. Parent select lists** – Select the SCIS Settings record you want the custom attributes associated with.
Creating SCIS Custom Attributes

Product Detail Page, Item Search, and Cart

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

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

Product Detail Page

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

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

Cart

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

Customer Profile and Customer Search Results

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

Customer Profile

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

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

SCIS Event Validators

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

**Note:** Using event validators is the recommended way to customize the application for specific business workflows and design needs. Client scripts are not supported for this purpose. Client scripts are only supported with AvaTax integrations.

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

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

How to Modify the validator.js File

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

**To modify the validator.js file:**

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

Setting a Variable in Session

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

Note the following example:

```javascript
var context = nlapiGetContext();
context.setSessionObject('mykey', 'my value');
// then
var theValue = context.getSessionObject('mykey');
```

Methods

The following methods are available:

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

**addLine(data)**

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

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

**updateLine(data)**

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

**getLines()**

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

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

### getSummary()

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

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

### Events

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

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

- event **String** name of the event
- callback **Function**

The following events in SCIS support customization:

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

beforeAddLine

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

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

afterAddLine

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

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

beforeVoidLine

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

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

afterVoidLine

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

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

beforeUpdateLine

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

```javascript
//EVENTS
SCISCartComponent.on('beforeUpdateLine', function(line) {
    'use strict';
});
```
afterUpdateLine

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

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

beforeSetCustomer

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

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

afterSetCustomer

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

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

beforeReturnLine

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

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

Note the following example:

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

beforeAddDiscount

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

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

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

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

afterAddDiscount

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

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

beforeAddGiftItem

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

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

    var giftValue = gift.baseprice
        , maxValue = 400;
```
if (giftValue > maxValue) {
    throw new Error('You can not add a gift card with amount greater than ' + maxValue + '.');
}

afterAddGiftItem

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

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

beforeAddGlobalDiscount

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

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

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

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

afterAddGlobalDiscount

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

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

beforeCancelTransaction

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

```javascript
//EVENTS
SCISCartComponent.on('beforeCancelTransaction', function(transaction) {
    'use strict';
});
```
afterCancelTransaction

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

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

beforePay

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

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

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

afterPay

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

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

The following arguments are accessible:

- Line
- Payment
- Discount
- Customer
- Transaction

**Line**

This argument contains the following properties in SCIS:

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

Note the following example:

```javascript
{
    "line":1,
    "item": {"internalid": 108},
    "isdonationitem":false,
    "quantity":"1.0",
    "voidLine":true,
    "order":">F",
    "description":"
    "giftcertfrom":"Mrs. Wolfe",
    "giftcertmessage":"You received a gift from MySCISWebsite",
    "giftcertnumber":"1234560",
    "giftcertrecipientemail":"mrwolfe@email.com",
    "giftcertrecipientname":"Mr. Wolfe",
    "tax_code":"
    "note":"
    "excludefromraterequest":">F",
    "custcol_ns_pos_voidqty":"
```
Payment

This argument contains the following properties in SCIS:

- paymentmethod
- paymentmethodname
- payment
- total
- rounding

Note the following example:

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

Discount

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

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

Customer

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

```json
114
```

Transaction

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

```json
2123
```

Summary

This argument contains the following properties in SCIS:

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

Note the following example:

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

**SCIS Extensions**

Web developers can use the Extensibility API to customize the display of popup windows in the SCIS shopping cart. Layout and cart components enable web developers to create option windows and information windows that provide users with feedback about an operation. These windows fill only the amount of space required for the message, so the current activity in the cart remains visible to the user.

For more information, read the following topics:

- Option Windows and Information Windows
- Build and Deploy an Extension for SCIS
- Activate Extensions for SCIS
- SCIS Extensibility API
Option Windows and Information Windows

Web developers can create option windows and information windows with personalized and dynamic content. Note the following:

- **Option window** – This window enables the sales associate to choose between two options. Use the option window to display the following:
  - Toast notification based on one of the status values available for extensions (warning, error, success, information).
  - Paragraph with text that can be loaded dynamically.
  - Two buttons that can be customized.

- **Information window** – This window shows an informational message. Only one action can be associated with the Information window, typically to acknowledge the message and close the popup window. Use the information window to show the following:
  - Toast notification based on one of the status values available for extensions (warning, error, success, information).
  - Paragraph with text that can be loaded dynamically.
  - One button that can be customized.

- **Status values** – Option and information windows indicate a particular status. Each window is marked with a color bar at the top. Note the following supported status values and colors:
  - **Success** – green
  - **Information** – blue
  - **Warning** – yellow
  - **Error** – red

Anatomy of the Option Window

The following describes the areas you can customize in the option window.

<table>
<thead>
<tr>
<th>Customizable Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Toast title area</td>
<td>Name for the popup window.</td>
</tr>
<tr>
<td>2 Toast content area and status color</td>
<td>Description, or reason for the popup, and the status value color bar.</td>
</tr>
<tr>
<td>3 Message area</td>
<td>Detailed message.</td>
</tr>
</tbody>
</table>
### Customizable Area

<table>
<thead>
<tr>
<th>Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Toast title area</td>
</tr>
<tr>
<td>2</td>
<td>Toast content area and status color</td>
</tr>
<tr>
<td>3</td>
<td>Message area</td>
</tr>
<tr>
<td>4</td>
<td>Buttons area</td>
</tr>
</tbody>
</table>

**Note:** Only one action can be associated with the Information window, typically to acknowledge the message and close the popup window at the same time.

---

## Build and Deploy an Extension for SCIS

To start building extensions for SCIS, install the `SuiteCommerce Extension Management` bundle in your NetSuite account. Web developers can use the developer tools provided in the bundle to build and deploy extensions to your NetSuite account. Administrators can activate extensions for SCIS by using the Extension Manager in NetSuite.

See [Install Your Commerce Web Store Applications](#) for information on the `SuiteCommerce Extension Management` SuiteApp and the Bundle ID.

NetSuite Commerce web stores provides tools to create, test, and deploy code as extensions for SCIS. Not all of the same events and methods that are available for Commerce web stores are available in SCIS. However, the way you build extensions, using the Extensibility Layer API is the same. The following instructions describe general information about setting up your development environment and building an extension for SCIS.
**SCIS Extensions**

**Note:** Option windows and information windows can only be triggered by logic associated with front end SCIS events.

To set up your development environment and build an extension for SCIS:

1. Install Node.js
2. Install Gulp.js
3. Set Up Extension Developer Tools
4. Use events and methods available for use with the SCIS API. For more information, read SCIS Extensibility API.

**Note:** SCIS does not support views, templates, or themes.

5. Use Gulp to create your extension.
6. Deploy your extension. Follow the instructions in Deploy an Extension to NetSuite.
7. After the extension is deployed, an administrator can activate the extension in SCIS. For more information, read Activate Extensions for SCIS.

Activate Extensions for SCIS

Administrators can activate extensions for SCIS by using the Extension Manager in NetSuite. For more information, read the help topic Extensions.

To activate an extension for SCIS:

1. After the extension is created and deployed in NetSuite, use the Manage Extension Wizard to activate your extensions in SCIS.
   
   Go to Setup > SuiteCommerce Advanced > Extensions Manager.

2. Click **New Activation**.

   The following are required settings for SCIS Extensions:

   - Select the site that you want to manage from the Select a Web Site list.
   - Select the domain you want to manage from the Select a Domain list.

   **Note:** If you choose a domain that already has themes and extensions activated, you can edit or update the current activations.

   - Select the subsidiary from the Select Subsidiary list.
   - Select the location from the Select Location list.

   **Note:** If you leave the Subsidiary or Location setting blank, then your activation applies to all subsidiaries or all locations.

3. Click **Next** to select themes and extensions for the domain, or click **Cancel** to abort the activation process.
4. Select extensions to activate:
   a. Click the Extensions tab.
   b. Check the Active box next to any extensions you want to activate.
5. Click **Activate** to activate the selected extensions.
To abort the activation process, click **Cancel**.

**To deactivate extensions:**

1. Go to Manage Extension Wizard.
2. Click the **Extensions** tab.
3. Clear the **Active** box next to the extension you want to deactivate.
SCIS Roles and Permissions

Different employees interact with SuiteCommerce InStore (SCIS) and with NetSuite based on their roles. The following roles are installed in your NetSuite account when you install the SuiteCommerce InStore SuiteApp:

- **SCIS Clerk** – This role is assigned to sales associates. It enables them to enter orders and includes permissions required to access SCIS on an approved device, search for customers and enter transactions.
- **SCIS Support** – This role enables employees to configure devices for SCIS. It does not include any permission to enter transactions.
- **SCIS Store Manager** – This role allows managers to view Cash Drawer Activity for sales associates at their store location, and close a shift for an employee if needed. This role is only for use with Advanced Cash Drawer Management.
- **SCIS Fallback Auditor** – This role allows the user to reconcile SCIS Fallback Transactions. An individual can use this role to log in to NetSuite and edit SCIS Fallback Transaction records to trigger the creation of cash sale transactions in NetSuite. For more information, read SCIS Fallback Transaction Reconciliation.

For more information, read SuiteCommerce InStore Roles.

Permissions

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

Manager Override

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

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

SCIS Audit Log

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

SuiteCommerce InStore Roles

Employees who use SCIS require specific permissions that are configured on roles installed by the SuiteCommerce InStore SuiteApp. This section describes SCIS roles and role-based permissions.

Employees also require authorization to perform certain operations in SCIS, defined on SCIS Permission records. For more information, read SuiteCommerce InStore Permissions.
For the purpose of secure authentication, roles for employees who will be using SCIS on tablets must also be restricted by Device ID. For more information about Device ID setup, see the help topic Device ID and the SCIS SuiteApp.

SCIS Clerk

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

Role-Based Permissions for SCIS Clerk

The following table includes a list of permissions required on the SCIS Clerk role. If you use a custom role, go to Setup > Manage Roles, and verify the role you use for SCIS includes all of the following permissions.

<table>
<thead>
<tr>
<th>Permission Type</th>
<th>Permission</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Transactions</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access Payment Audit Log</td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>Cash Sale</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Credit Memo</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Customer Deposit</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Customer Payment</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Customer Refund</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Find Transaction</td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>Fulfill Orders</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Fulfillment Request</td>
<td>Full</td>
<td></td>
</tr>
<tr>
<td>Invoice</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Invoice Approval</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Item Fulfillment</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Sales Order</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Sales Order Approval</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Estimate</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>SCIS Closing Drawer</td>
<td>Create</td>
<td></td>
</tr>
<tr>
<td>SCIS Opening Drawer</td>
<td>Create</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Required for Advanced Cash Drawer Management.

<table>
<thead>
<tr>
<th>Permission</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Store Pickup Fulfillment</td>
<td>Full</td>
</tr>
<tr>
<td>Permission Type</td>
<td>Permission</td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>Lists</td>
<td>Accounts</td>
</tr>
<tr>
<td></td>
<td>Currency</td>
</tr>
<tr>
<td></td>
<td>Custom Record Entries</td>
</tr>
<tr>
<td></td>
<td>Customers</td>
</tr>
<tr>
<td></td>
<td>Documents and Files</td>
</tr>
<tr>
<td></td>
<td>Employee Record</td>
</tr>
<tr>
<td></td>
<td>Employees</td>
</tr>
<tr>
<td></td>
<td>Items</td>
</tr>
<tr>
<td></td>
<td>Locations</td>
</tr>
<tr>
<td></td>
<td>Notes Tab</td>
</tr>
<tr>
<td></td>
<td>Perform Search</td>
</tr>
<tr>
<td></td>
<td>Phone Calls</td>
</tr>
<tr>
<td></td>
<td>Promotion</td>
</tr>
<tr>
<td></td>
<td>Shipping Items</td>
</tr>
<tr>
<td></td>
<td>Subsidiaries</td>
</tr>
<tr>
<td>Setup</td>
<td>Accounting Lists</td>
</tr>
<tr>
<td></td>
<td>Custom Lists</td>
</tr>
<tr>
<td></td>
<td>Fulfillment Exception Reason</td>
</tr>
<tr>
<td></td>
<td>Set Up Company</td>
</tr>
<tr>
<td></td>
<td>SuiteScript</td>
</tr>
<tr>
<td>Custom Record</td>
<td>SCIS Audit Log</td>
</tr>
<tr>
<td></td>
<td>SCIS Cash Drawer</td>
</tr>
<tr>
<td></td>
<td>SCIS Fallback Settings</td>
</tr>
<tr>
<td></td>
<td>SCIS Fallback Transactions</td>
</tr>
<tr>
<td></td>
<td>SCIS Location Distance</td>
</tr>
<tr>
<td></td>
<td>SCIS Mobile Device</td>
</tr>
<tr>
<td></td>
<td>SCIS Shift</td>
</tr>
</tbody>
</table>
SCIS Support

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

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

Role-Based Permissions for SCIS Support

The following table includes a list of permissions required on the SCIS Support role.

<table>
<thead>
<tr>
<th>Permission Type</th>
<th>Permission</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lists</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Currency</td>
<td>View</td>
</tr>
<tr>
<td></td>
<td>Custom Record Entries</td>
<td>View</td>
</tr>
<tr>
<td></td>
<td>Subsidiaries</td>
<td>View</td>
</tr>
<tr>
<td>Setup</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Custom Record Types</td>
<td>View</td>
</tr>
<tr>
<td></td>
<td>Mobile Device Access</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Set Up Company</td>
<td>View</td>
</tr>
<tr>
<td>Custom Record</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SCIS Mobile Certificate</td>
<td>Edit</td>
</tr>
<tr>
<td></td>
<td>SCIS Mobile Device</td>
<td>Edit</td>
</tr>
<tr>
<td></td>
<td>SCIS Settings</td>
<td>Edit</td>
</tr>
</tbody>
</table>

SCIS Store Manager

This role is only used with Advanced Cash Drawer Management. Employees with the SCIS Store Manager role can view shifts for all sales associates at the store. The Store manager is allowed to close shifts for other employees as needed. This capability is useful if a sales associate is called away unexpectedly and is unable to close a shift on their own.
Important: Before closing a sales associate’s shift, the SCIS Store Manager must ensure that the sales associate has stopped entering orders. If there is an order in progress when the store manager closes a shift, one order could be split across two different shifts. This could impact the closing drawer transaction.

To allow the SCIS Store Manager role to view and close shifts:

1. Go to Customization > Lists, Records & Fields > Records Types > SCIS Permission.
2. Click Edit next to Store_Manager.
3. In the Authorized Roles list, select SCIS Store Manager.
4. Click Save.

Role-Based Permissions for SCIS Store Manager

The following table includes a list of permissions required for the SCIS Store Manager role.

<table>
<thead>
<tr>
<th>Permission Type</th>
<th>Permission</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transactions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access Payment Audit Log</td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>Cash Sale</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Credit Memo</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Customer Payment</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Customer Refund</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Find Transaction</td>
<td>View</td>
<td></td>
</tr>
<tr>
<td>Fulfill Orders</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Fulfillment Request</td>
<td>Full</td>
<td></td>
</tr>
<tr>
<td>Invoice</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Invoice Approval</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Item Fulfillment</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Sales Order</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Sales Order Approval</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>Estimate</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>SCIS Closing Drawer</td>
<td>Create</td>
<td></td>
</tr>
<tr>
<td>SCIS Opening Drawer</td>
<td>Create</td>
<td></td>
</tr>
<tr>
<td>Store Pickup Fulfillment</td>
<td>Full</td>
<td></td>
</tr>
</tbody>
</table>

Note: Required for Advanced Cash Drawer Management.
<table>
<thead>
<tr>
<th>Permission Type</th>
<th>Permission</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lists</td>
<td>Accounts</td>
<td>Full</td>
</tr>
<tr>
<td></td>
<td>Currency</td>
<td>View</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> This is required for using Multiple Currencies.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Custom Record Entries</td>
<td>View</td>
</tr>
<tr>
<td></td>
<td>Documents and Files</td>
<td>Create</td>
</tr>
<tr>
<td></td>
<td>Employee Record</td>
<td>Full</td>
</tr>
<tr>
<td></td>
<td>Employees</td>
<td>View</td>
</tr>
<tr>
<td></td>
<td>Items</td>
<td>View</td>
</tr>
<tr>
<td></td>
<td>Locations</td>
<td>Edit</td>
</tr>
<tr>
<td></td>
<td>Notes Tab</td>
<td>Edit</td>
</tr>
<tr>
<td></td>
<td>Perform Search</td>
<td>View</td>
</tr>
<tr>
<td></td>
<td>Phone Calls</td>
<td>View</td>
</tr>
<tr>
<td></td>
<td>Promotion</td>
<td>View</td>
</tr>
<tr>
<td></td>
<td>Shipping Items</td>
<td>View</td>
</tr>
<tr>
<td></td>
<td>Subsidiaries</td>
<td>View</td>
</tr>
<tr>
<td>Setup</td>
<td>Accounting Lists</td>
<td>View</td>
</tr>
<tr>
<td></td>
<td>Custom Lists</td>
<td>View</td>
</tr>
<tr>
<td></td>
<td>Fulfillment Exception Reason</td>
<td>Edit</td>
</tr>
<tr>
<td></td>
<td>Set Up Company</td>
<td>View</td>
</tr>
<tr>
<td></td>
<td>SuiteScript</td>
<td>View</td>
</tr>
<tr>
<td>Custom Record</td>
<td>SCIS Audit Log</td>
<td>Create</td>
</tr>
<tr>
<td></td>
<td>SCIS Cash Drawer</td>
<td>Full</td>
</tr>
<tr>
<td></td>
<td>SCIS Fallback Settings</td>
<td>View</td>
</tr>
<tr>
<td></td>
<td>SCIS Fallback Transactions</td>
<td>View</td>
</tr>
<tr>
<td></td>
<td>SCIS Location Distance</td>
<td>View</td>
</tr>
<tr>
<td></td>
<td>SCIS Mobile Device</td>
<td>Create</td>
</tr>
<tr>
<td></td>
<td>SCIS Shift</td>
<td>Full</td>
</tr>
<tr>
<td></td>
<td>SCIS User Setting</td>
<td>Edit</td>
</tr>
</tbody>
</table>
SCIS Fallback Auditor

An individual with the Fallback Auditor role can reconcile SCIS Fallback Transactions. It may be necessary to reconcile SCIS Fallback Transactions when a corresponding NetSuite transaction was not created automatically in the system. An employee with the SCIS Fallback Auditor role can log in to NetSuite and edit SCIS Fallback Transaction records to trigger the creation of cash sale transactions in NetSuite. For more information about the process of reconciliation, read SCIS Fallback Transaction Reconciliation.

Role-Based Permissions for SCIS Fallback Auditor

The following table includes a list of permissions required for the SCIS Fallback Auditor role.

<table>
<thead>
<tr>
<th>Permission Type</th>
<th>Permission</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transactions</td>
<td>Cash Sale</td>
<td>Full</td>
</tr>
<tr>
<td></td>
<td>Find Transaction</td>
<td>Full</td>
</tr>
<tr>
<td></td>
<td>Opportunity</td>
<td>Full</td>
</tr>
<tr>
<td>Lists</td>
<td>Custom Record Entries</td>
<td>View</td>
</tr>
<tr>
<td>Setup</td>
<td>Custom Record Types</td>
<td>View</td>
</tr>
<tr>
<td>Custom Record</td>
<td>SCIS Fallback Consolidation Status</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>SCIS Fallback Session</td>
<td>Edit</td>
</tr>
<tr>
<td></td>
<td>SCIS Fallback Settings</td>
<td>Edit</td>
</tr>
<tr>
<td></td>
<td>SCIS Fallback Transaction</td>
<td>Edit</td>
</tr>
<tr>
<td></td>
<td>SCIS Fallback Transaction Line</td>
<td>Edit</td>
</tr>
<tr>
<td></td>
<td>SCIS Fallback Transaction Note</td>
<td>Edit</td>
</tr>
<tr>
<td></td>
<td>SCIS Fallback Transaction Payment</td>
<td>Edit</td>
</tr>
<tr>
<td></td>
<td>SCIS Fallback Transaction Batch</td>
<td>Edit</td>
</tr>
</tbody>
</table>

Creating Custom Roles for SCIS

You may want to create additional roles beyond the roles installed by the SuiteCommerce Instore SuiteApp. For example, perhaps Sales Associate is the job title used in your organization, instead of Clerk. You can create a custom role in your account called Sales Associate, based on the original SCIS Clerk role. If additional roles are needed, then an administrator must create custom roles with the same role-based permissions as the roles installed by the SuiteCommerce Instore SuiteApp.
To customize a role installed by SCIS:

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

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

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

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

After you create roles for employees who will be using SCIS, grant permissions for each role. For more information, see SuiteCommerce InStore Permissions.
need authorization from the manager to complete an order each time an item is voided. To configure
VOID_LINE so that the sales associate can void an item without further authorization, select the sales
associate’s role as the Authorized Role, and then leave the Requires Authorization list blank.

Defining Permissions

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

To define SCIS Permission records:

1. Go to Customization > Lists, Records & Fields > Records Types.
2. Find SCIS Permission in the list of Record Types, and then click List in that row.
3. Click Edit next to the permission record you want to modify.
   a. Name – Do not edit this field. This is the name of the operation. It is used as a key to identify
      the permission.
   b. Description – (Optional) Enter a description for the operation.
   c. Authorized Roles – (Required) Select one or more roles that are allowed to perform the
      operation. The roles selected here have manager override capability.
   d. Require Authorization Role – (Optional) Select the role that needs authorization to perform
      the operation. You can select more than one role.
4. Click the Filters subtab. Set the Locations, Websites, and Subsidiaries where you want the
   permission to apply.
5. Click Save.
6. Go to Lists > Relationships > Employees.
7. Enter an SCIS Access Code for each employee granted manager override on SuiteCommerce
   InStore transactions.
   a. Click Edit next to employee records with authorized roles.
   b. Click the Custom subtab, and then enter a value in the SCIS Access Code field.
8. Click the Filters subtab, and then select filters for Location, Website, and Subsidiary.

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

9. Click Save.

Operations that Require Authorization

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

<table>
<thead>
<tr>
<th>Operation</th>
<th>SCIS Permission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay with a Credit Memo</td>
<td>APPLY_CREDITMEMO</td>
</tr>
<tr>
<td>Pay with a Gift Card</td>
<td>APPLY_GIFTCARD</td>
</tr>
<tr>
<td>Operation</td>
<td>SCIS Permission</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------</td>
<td>----------------------------</td>
</tr>
<tr>
<td>Apply customer terms of payment to an order</td>
<td>APPLY_TERMS</td>
</tr>
<tr>
<td>Enable an employee to configure a device</td>
<td>CONFIGURE_DEVICE</td>
</tr>
<tr>
<td>Required for Administrators logged in to NetSuite on a desktop computer to set the SCIS Mobile Device Location.</td>
<td>EDIT_DEVICE_LOCATION</td>
</tr>
<tr>
<td>Apply Custom Discounts</td>
<td>CUSTOM_DISCOUNT</td>
</tr>
<tr>
<td>Apply Order level discount</td>
<td>GLOBAL_DISCOUNT</td>
</tr>
<tr>
<td>Apply line level discount</td>
<td>LINE_DISCOUNT</td>
</tr>
<tr>
<td>Open the cash drawer between transactions with No Sale operation</td>
<td>OPEN_CASH_DRAWER</td>
</tr>
<tr>
<td>Convert quotes to sales</td>
<td>QUOTES_CONVERT</td>
</tr>
<tr>
<td>Create quotes</td>
<td>QUOTES_CREATE</td>
</tr>
<tr>
<td>Edit or change quotes</td>
<td>QUOTES_UPDATE</td>
</tr>
<tr>
<td>Remove or delete transaction</td>
<td>REMOVE_TRANSACTION</td>
</tr>
<tr>
<td>Resume order</td>
<td>RESUME_ORDER</td>
</tr>
<tr>
<td>Close a shift for a sales associate.</td>
<td>STORE_MANAGER</td>
</tr>
<tr>
<td>Suspend Orders</td>
<td>SUSPEND_ORDER</td>
</tr>
<tr>
<td>Unvalidated Return</td>
<td>UNVALIDATED_RETURN</td>
</tr>
<tr>
<td>Validated Return</td>
<td>VALIDATED_RETURN</td>
</tr>
<tr>
<td>Void Line</td>
<td>VOID_LINE</td>
</tr>
</tbody>
</table>
SCIS Cash and Transactions

Review the administrator topics in this chapter to learn how SuiteCommerce InStore (SCIS) configures and processes transactions at the point of sale (POS). It includes record handling in NetSuite and steps to configure SCIS to meet your business needs, such as configuring gift certificates.

- Sales Transactions
- Payment Configurations
- SCIS Purchase on Account
- SCIS Cash Drawer Management
- SCIS Ship from Store, Pickup In-Store Overview
- Setting Up Quotes in SCIS
- Discounts, Markups, and Promotions for SCIS
- Returns and Refunds
- Configuring Gift Certificates for SCIS
- Voiding a Line and Deleting a Transaction
- Calculating Taxes on Transactions
- SCIS Saved Search and Reporting

Sales Transactions

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

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

Cash Sales

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

![Cash Sale Diagram]

Invoices

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

When the Optimize EMV preference is enabled, SCIS submits a customer payment and invoice during the EMV device priming process. Because customer payments do not calculate taxes, or typically run user event scripts, the process of submitting a sales transaction is faster.

**Note:** The Optimize EMV preference affects specific types of sales transactions:

- Sales transactions where the entire amount is processed using an EMV payment method.
- Sales transactions where an EMV payment method is the first one used in a split payment of more than one payment method.

POS Status Definitions

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

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

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

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

**Orders for Delivery**

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

- **A non-default customer must be selected on the order.** Orders for delivery require a customer record with a shipping address. Before creating the order, the sales associate must establish whether the customer is already registered with the store. If the customer does not already exist in the system, then a customer record must be created.
- **Items must exist in the cart.** The sales associate uses the Item Action menu to set up the delivery. The Item Action menu appears under each line-item in the cart.

When an SCIS order is set up for delivery, the resulting transaction is a Cash Sale or an Invoice (depending on the payment methods, or return status). The workflow is the same for a delivery order as with a standard order. The difference is that the cash sale or invoice is created from a sales order. If the order contains items that are not to be shipped, an item fulfillment transaction is created in NetSuite for those items as well.
SuiteCommerce InStore supports ship from store and pickup in-store. For more information, read SCIS Ship from Store, Pickup In-Store Overview in the SCIS Administrator's Guide. See also Fulfilling Orders for Shipping and Pickup with SCIS, in the SCIS User Guide.

**Note:** When an item is not shipped, the address in the **Ship To** field on the transaction line in NetSuite is set to the store location address.

### Payment Configurations

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

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

### SCIS Purchase on Account

SuiteCommerce InStore (SCIS) supports the Purchase on Account payment option that allows customers to purchase items using payment terms. After selecting a customer on the order, the sales associate can select the Purchase on Account option from the list of Other Payment options.
When an order is placed using Purchase on Account, an invoice is created in NetSuite. If the customer already has terms defined on the customer record, those terms are already selected in SCIS. If the sales associate is entering a new customer at point of sale, then the sales associate can select from the list of customer payment terms already defined in NetSuite.

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

### Permission for Purchase on Account

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

**To configure permission for purchase on account:**

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

### SCIS Cash Drawer Management

SuiteCommerce InStore (SCIS) supports traditional, cash based point-of-sale capabilities. This section provides information for administrators about Cash Drawer Management in SCIS.

| Important: | The SuiteCommerce InStore mobile app is always required when using SCIS on an iPad, or with the Windows Operating System on a tablet or computer. Using SCIS on a desktop or laptop computer with a web browser such as Safari, Chrome, or Firefox is not supported. |

#### Overview

Cash Drawer Management capabilities include the ability for sales associates to use SCIS to enter opening and closing drawer transactions. Administrators can use NetSuite to view the opening and closing drawer transactions, as well as track all of the transaction entered by sales associates in SCIS. Administrators must complete general setup steps to use cash drawer management. Additional setup is required for Advanced Cash Drawer Management.

| Important: | Advanced Cash Management supports two or more printers of the same brand and model per location only for Star and Epson network printers that have a static IP or a domain name assigned. |

### SCIS Cash Drawer Management Accounts

The first step in setting up Cash Drawer Management is to edit and then save each location where you use SCIS. This action triggers the automatic creation of the following accounts in the NetSuite chart of accounts:
- **SCIS Store Safe Account**
- **SCIS Cash Drawer Difference account**

These accounts are used for tracking the movement of cash from the store safe to the cash drawer.

When you use Cash Drawer Management, each sales associate using SCIS is assigned a Cash Drawer account. The Cash Drawer account is automatically created in the chart of accounts when each sales associate first logs in to SCIS.

For example, if you have five sales associates entering transactions in SCIS, you will have five cash drawer accounts in NetSuite. Each cash drawer account name is appended with the sales associate's name. The location assigned to the cash drawer account is the same as the location assigned to the employee.

### Advanced Cash Drawer Management

Advanced Cash Drawer Management is useful for organizations with sales associates working in multiple locations. Because Advanced Cash Drawer Management includes the use of the **SCIS Cash Drawer** custom record, administrators can group a receipt printer and cash drawer configuration by location. To use Advanced Cash Drawer Management, an administrator must set the preference on the **SCIS Settings** record.

When Advanced Cash Drawer Management is enabled, the following custom records require configuration:

- **SCIS Cash Drawer custom record** – Configured by an administrator for each cash drawer and printer combination used at each retail store.
  
  **Note:** Each Printer can be associated to only one Cash Drawer.

- **SCIS Shift custom record** – Created when sales associates open a shift in SCIS. This record is linked to the SCIS Cash Drawer. It also enables the administrator to track information about each shift, such as opening and close date and time, as well as the amount in the initial loan and closing drawer transactions.

For more information about setting up Cash Drawer Management, read the following topics:

- SCIS Cash Drawer Management Setup
- Advanced Cash Drawer Management Setup for SCIS
- Cash Drawer Management for Fallback
- SCIS Cash Drawer Management Workflows and Tracking
- Cash Drawers

### SCIS Cash Drawer Management Setup

Administrators must first complete the following general Cash Drawer Management setup steps whether or not they plan to use Advanced Cash Drawer Management in SuiteCommerce InStore (SCIS). This section includes general setup steps.
For more information about setting up Advanced Cash Drawer Management, read Advanced Cash Drawer Management Setup for SCIS.

For reference information about the custom fields and records that are used in Cash Drawer Management, read the section on Cash Drawer Management custom fields and records.

**To set up Cash Drawer Management in SCIS:**

1. Go to Setup > Company > Locations.
2. Click **Edit** next to each location using SCIS, and then click **Save**.
   
   This action triggers the automatic creation of an **SCIS Store Safe Account** and **SCIS Cash Drawer Difference** account for each Location. The accounts are also saved on Location records automatically.

3. Ensure the **Use Cash Drawer Account** box is checked on the SCIS Payment record for cash, and for any other payment method for which you want the cash drawer to open.
   
   b. Find the **SCIS Payment Method** record, and click **List** in that row.
   c. View or edit the SCIS Payment record used for cash. Ensure the **Use Cash Drawer Account** box is checked. This box must be checked on all payment methods for which you want the cash drawer to open.

**Advanced Cash Drawer Management Setup for SCIS**

The following instructions are for administrators using SuiteCommerce InStore (SCIS) with Advanced Cash Drawer Management capabilities.

**To set up Advanced Cash Drawer Management:**

1. Enable Advanced Cash Drawer Management on the SCIS Settings record.
   
   a. Go to Customization > Lists, Records, & Fields > SCIS Settings. Click the **Cash Drawer Management** subtab.
   b. Check the **Advanced Cash Drawer Management** box.
   c. Select a **Close Shift Receipt Template**.
Note: If you need to view certain fields on the Close Shift Receipt Template, create a custom receipt template. Because SuiteCommerce InStore is a managed SuiteApp, any changes to default receipt templates will be overwritten by automatic updates to SCIS. For more information, read Customizing a Receipt Template for SCIS.

d. (Optional) Check the Hide Expected Cash on Shift Close box. When this box is checked, sales associates cannot see the expected amount in the cash drawer when they are closing a shift.

e. (Optional) Check the Mandatory Open Shift box. When this box is checked, Sales associates cannot enter an order unless they have entered the amount in the cash drawer and selected a register.

f. Click Save.

2. Create one or more bank accounts to track funds collected in cash drawers.

Tip: You will use this bank account when you create an SCIS Cash Drawer record in a later step (Step 3a).

a. Go to Lists > Accounts > New.

b. Click New.

c. Enter a name (and number, if applicable) for the account.

d. If you use OneWorld, select a Subsidiary for the account.

e. (Required) In the Restrict to Location field, select the location to which this account is available.

Note: If you leave this field blank, the account is not available for selection on the SCIS Cash Drawer record.

3. Create an SCIS Cash Drawer record for each cash drawer and printer combination.

a. Go to Customization > Lists, Records, & Fields > SCIS Cash Drawer.

   ▪ Name - Enter a name for the cash register or cash drawer.
   ▪ Register Location - Select a location for the cash drawer. The options on the list are sourced from the list of locations set up in your NetSuite account.
   ▪ Printer/Register - Enter the name of the printer associated with the cash drawer.
   ▪ Register Account – Select the bank account you created in Step 2b. The options in this list are filtered by the Restrict to Location setting on the bank account record you created in Step 2.

b. Click Save.

4. Ensure the SCIS Clerk role includes Edit-level permission for the SCIS Closing Drawer and SCIS Opening Drawer transactions.

Note: Role permission should be in place by default. For more information about the SCIS Clerk role and related permissions, read SCIS Clerk.

5. Assign the SCIS Store Manager role to an employee, and set it as an authorized role in SCIS permissions. For more information, read SCIS Store Manager.
When Advanced Cash Drawer Management is set up, the sales associate opens a shift by entering the amount in the cash drawer and selecting a register. The sales associate is not allowed to enter a sales transaction without selecting a cash drawer and register.

Selecting a cash drawer and register creates an SCIS Shift record automatically in the NetSuite backend. The shift record shows opening and closing shift time, the register used, and includes links to the opening drawer and closing drawer transactions. For more information about Cash Drawer Management tracking, read SCIS Cash Drawer Management Workflows and Tracking.

**Advanced Cash Drawer Management Calculator**

When you use Advanced Cash Drawer Management, the SCIS user interface includes a Calculator. Administrators must configure SCIS Quick Cash Denomination records for the calculator to be most useful. For more information, read Modifying Cash Payment Denominations.

If cash denominations have not been configured, then the calculator does not show any cash values. The calculator is useful for sales associates when they enter an opening drawer or closing drawer transaction, and when entering a cash drawer adjustment.

![Calculator Image]

**Cash Drawer Management for Fallback**

Sales submitted in Fallback are tracked in a Fallback cash drawer bank account. The Fallback cash drawer account is automatically created in the chart of accounts during the consolidation process. One Fallback cash drawer account is created for each location in the NetSuite system. The following diagram shows two locations, Embarcadero Store and SoMa Store. Each location has its own Fallback cash drawer account.
Fallback Cash Drawer and SCIS Cash Drawer

In SCIS, a register or physical cash box is associated with one cash drawer account. The register or physical cash box is represented in NetSuite as a custom record called **SCIS Cash Drawer**.

The following diagram shows the Embarcadero store location, where Cash Drawer A, in the chart of accounts is associated with Register 1. While, Cash Drawer B, in the chart of accounts is associated with Register 2. It also shows transactions entered in SCIS, plus a transaction entered in Fallback.
When working in Fallback, a transaction submitted from any register is allocated to the Fallback cash drawer for that location. Note the following key points in this example:

- In SCIS, on Register 1, a sales associate sold two T-shirts for $40 and a pair of jeans for $80.
- In SCIS, on Register 2, another sales associate sold one T-shirt for $20.
- While in Fallback, one pair of jeans was sold for $80.

(This sale could have been entered from either Register 1 or Register 2. While in Fallback, a transaction entered on any register is allocated to the Fallback cash drawer account.)

When each sales associate closes their shift, the close shift operation only calculates transactions that occurred at each register. Transactions entered in Fallback are not considered in closing drawer or closing shift operations.

**Important:** The transaction entered in Fallback is not counted in the expected amount on the Close Shift screen for each register.

The following diagram shows Close Shift operations entered in SCIS by sales associates using Register 1 and Register 2.

### Tracking Sales Transactions Entered in Fallback

To keep track of sales entered in Fallback, you must go to the chart of accounts in NetSuite, at Lists > Accounts. Then find the SCIS Fallback Cash Drawer account for each location running SCIS. The amount collected from sales transactions submitted in Fallback is displayed in the SCIS Fallback Cash Drawer account for that location.

The following table represents the balance in each cash drawer account based on the Close Shift screen in the diagram above.

<table>
<thead>
<tr>
<th>Chart of Accounts</th>
<th>Type</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash Drawer A</td>
<td>Bank</td>
<td>120.00</td>
</tr>
<tr>
<td>Account</td>
<td>Type</td>
<td>Balance</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-------</td>
<td>---------</td>
</tr>
<tr>
<td>Cash Drawer B</td>
<td>Bank</td>
<td>20.00</td>
</tr>
<tr>
<td>SCIS Fallback Cash Drawer Location 48*</td>
<td>Bank</td>
<td>80.00</td>
</tr>
</tbody>
</table>

*Note that the Fallback cash drawer uses the location ID in the account name.

SCIS Cash Drawer Management Workflows and Tracking

This section includes workflow diagrams showing the workflow for sales associates opening and closing the cash drawer with Advanced Cash Drawer Management and without. Workflows for sales associates are slightly different depending on whether or not Advanced Cash Drawer Management is enabled for SCIS. This section also includes information on tracking opening and closing drawer transactions in NetSuite.

Workflows for Sales Associates

At the beginning of a shift, the sales associate receives a cash drawer. Before entering any sales transactions, the sales associate must enter an Initial Loan or Open Shift transaction to document the amount of cash in the drawer.

Opening a Shift with Advanced Cash Drawer Management

When Advanced Cash Drawer Management is enabled, after logging in to SCIS, the sales associate must enter the initial loan amount and then select a cash drawer.

Opening a Shift with Standard Cash Drawer Management

If Advanced Cash Drawer Management is not enabled, then the sales associate uses the Drawer Operations... option in the User Menu to open the Initial Loan dialog screen. Next, enter the total amount for each cash denomination in the cash drawer.
Closing a Shift with Advanced Cash Drawer Management

If Advanced Cash Drawer Management is enabled, the sales associate must select **Close Shift** from the User Menu (Drawer Operations... > Close Shift). Next, count the cash in the drawer, and then enter the amount of cash in the drawer. If the amount of cash in the drawer does not equal the expected amount, then the sales associate must enter a note to explain why. A Close Shift receipt is printed and then the sales associate is automatically logged out of SCIS.

Closing a Shift with Standard Cash Drawer Management

If Advanced Cash Drawer Management is **not** enabled, then the sales associate selects **End of Day** from the User menu to start the process. Next, the sales associate enters the amount of cash in the drawer.

Tracking Opening and Closing Drawer Transactions

SuiteCommerce InStore (SCIS) enables administrators and managers to track the cash transactions that happened during a shift. The custom transactions, **SCIS Opening Drawer** and **SCIS Closing Drawer** show a line for each cash denomination that moves from the safe to the cash drawer, and from the cash drawer back to the safe.

Opening Drawer

Typically, at the beginning of a shift, the sales associate receives cash in a drawer. If you use standard Cash Drawer Management capabilities, when the sales associate logs into SCIS, his or her Cash Drawer account is created automatically. If you use Advanced Cash Drawer Management, then an SCIS Shift record is created after the sales associate enters an Opening Shift transaction. In either case, the first task for a sales associate is to enter the opening drawer amount.

In NetSuite, the administrator can see the sales associate’s cash drawer account on transactions entered using standard Cash Drawer Management. With Advanced Cash Drawer Management, the shift is displayed on each cash sale transaction submitted. The administrator can also view or edit SCIS Opening Drawer transactions.

**To view SCIS Opening Drawer transactions:**

1. Go to Customization > Lists, Records & Fields > Transaction Types.
2. Find **SCIS Opening Drawer** in the list. Click **List** in that row.
3. Click **View** to view details of the SCIS Opening Drawer. Each line in the list tracks the transfer of cash from the SCIS Store Safe Account to each sales associate’s cash drawer account. Note that only the last amount entered as part of the opening drawer is displayed in the list.

**Closing Drawer**

At the end of each shift, the sales associate uses SCIS to enter the amount of cash that is in his or her cash drawer. Whether you use standard Cash Drawer Management or Advanced Cash Drawer Management, this is tracked as an SCIS Closing Drawer transaction in NetSuite. After the sales associate submits the closing drawer transaction, he or she is automatically logged out of SCIS. An administrator can view or edit the SCIS Closing Drawer transaction in NetSuite.

**To view SCIS Closing Drawer transactions:**

1. Go to Customization > Lists, Records & Fields > Transaction Types.
2. Find **SCIS Closing Drawer** in the list. Click **List** in that row.
3. Click **View** to see details of the SCIS Closing Drawer transaction.

![Table showing SCIS Closing Drawer transactions]

The Closing Drawer transaction tracks the transfer of cash from the sales associate’s cash drawer account or the register account back to the SCIS Store Safe Account. Note that only the last amount entered as part of the SCIS Closing Drawer transaction is displayed in the list.

**SCIS Ship from Store, Pickup In-Store Overview**

**Note:** Advanced Order Management is required to set up order fulfillment capabilities for SCIS. Contact your NetSuite account representative for more information.

With SuiteCommerce InStore (SCIS), merchants who have SCA websites can enable customers to order online, and then have orders shipped from store locations or picked up in-store. This topic includes general overview information about the ship from store, pickup in-store capabilities.

To enable shipping and pickup from your store, you must configure your fulfillment process in NetSuite. Also, ensure that you have enabled the features required to perform your workflow. For more information, read **Setting Up Ship from Store, Pickup In-Store for SCIS**.

SCIS supports the following order management features:

- Fulfillment Request
- Pick, Pack, and Ship
- Automatic Location Assignment Rules
- Store Pickup

Sales associates click or touch the shopping bag icon in the SCIS header bar to view the **Fulfillment Request** page. Here, the sales associate sees a list of all orders in queue for shipping and pickup.
Sales associates can use filters at the top of the page to filter orders by type or status. For example, sales associates can filter the list to view only orders for shipping. Alternately, they can filter the list to show orders for pick up, or all orders. The information that is displayed on this page, is output from a saved search. For more information, read Ship from Store, Pickup In-Store Workflow.

### Setting Up Ship from Store, Pickup In-Store for SCIS

This topic includes instructions for administrators to set up Ship From Store, Pickup In-Store capabilities in SuiteCommerce InStore (SCIS).

#### Important: Fulfillment requests must be configured properly to use ship from store and pickup in-store capabilities in SCIS.

#### To set up ship from store, pickup in-store for SCIS:

1. Configure fulfillment requests in your account. Read the topic, Setting Up Fulfillment Requests. Ensure that you complete all the steps listed in that topic.
2. Select a sales order form on the SCIS Settings record.
   - Use global search in NetSuite to find the SCIS Settings record.
   - Click Edit next to SCIS Settings.
   - On the Transaction Forms tab, click Other Configuration.
   - In the Sales Order field, select the Standard Sales Order – BOPIS.

   **Note:** You can use a custom sales order form. However, for potential troubleshooting purposes, it is recommended that you use the Standard Sales Order – BOPIS form where the Location field, and the Fulfillment Choice fields are displayed by default. If you use a custom form, ensure that these fields are marked to show on the sales order form that you customize.

3. Ensure that the Fulfillment Request permission is present on the SCIS Clerk role at Setup > Users/Roles > Manage Roles.
4. Ensure that the SCIS Fulfillment Requests saved search includes all of the required fields. The Results subtab should have the following:
Note: You can modify the saved search by changing the filters available, but you cannot change the columns that are displayed.

Ship from Store, Pickup In-Store Workflow

This topic includes general information for administrators about sales associates' workflow for fulfilling orders in SuiteCommerce InStore (SCIS).

Note: You can configure the exception reason that appears when one or more line items are rejected in a fulfillment. For more information, read For more information, read the help topic Defining Fulfillment Exception Reasons.

- Ship from Store
- Pickup in Store
- Fulfilling Orders With and Without Automatic Location Assignment

Ship from Store

Sales associates can perform the entire fulfillment process: pick, pack, print receipts, label packages, and ship. When a sales associate is working on an order, the order is displayed on the Fulfillment Request list as in progress, along with the current status and the sales associate's name. Only the sales associate who is working on an order, can complete fulfillment on that order.

Note the following:

- When fulfilling an order, if there is a reason why the sales associate cannot pick items for the order, the sales associate can select a fulfillment exception reason.
  An administrator must enter Fulfillment Exception Reasons at Setup > Order Management > Fulfillment Preferences > Fulfillment Exception Reasons.
- The shipping method determines the shipping label that is printed for the package.
- The same shipping items configured for use on your website are also available in SCIS for shipping from the store. Customers can track orders using the My Account application associated with your SCA website.
- The shipping label must be printed in PDF format.

Important: To print shipping labels, the administrator must ensure the appropriate shipping items are configured in NetSuite.

Pickup in Store

When an order is marked for pickup in-store, the sales associate finds it on the Fulfillment Request list. Next, the sales associate marks the items in the order as picked. When the customer arrives at the store for pickup, the sales associate prints the receipt. At this time, the sales associate (and customer) have the option to add items to the order.

For more information about the workflow for sales associates, read the help topic Fulfilling Orders for Shipping and Pickup with SCIS.
Note the following limitations for shipping from store and pickup in store:

- Serialized inventory and lot numbered items cannot be shipped.
- Partial quantities cannot be shipped or picked up in store. If the entire quantity on a line item is not available, then the sales associate must reject that line on the picking list. The order appears on the Fulfillment Request list again, assigned to a different location for processing.

**Fulfilling Orders With and Without Automatic Location Assignment**

On orders that are shipped from the store or picked up in the store, Location assignment is different based on whether or not you have enabled the **Automatic Location Assignment** feature, and the **Default Order Location** setting for SCIS. The table below describes how the fulfillment field is set on sales order line items based on the configuration of your NetSuite account.

<table>
<thead>
<tr>
<th>Feature and Configuration</th>
<th>How is the fulfillment location set on sales orders?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Automatic Location Assignment (ALA)</strong></td>
<td><strong>Default Order Location</strong></td>
</tr>
<tr>
<td>Enabled</td>
<td>Not Enabled</td>
</tr>
<tr>
<td>Not Enabled</td>
<td>Enabled</td>
</tr>
<tr>
<td>Enabled</td>
<td>Enabled</td>
</tr>
<tr>
<td>Not Enabled</td>
<td>Not Enabled</td>
</tr>
</tbody>
</table>

**Note:** In the following scenarios, SCIS sets the Fulfillment Location field:

- **Items for Store pickup** — SCIS sets the store location as the fulfillment location.
- **Items to be shipped along with cash-and-carry items on the same sales transaction** — Cash-and-carry items are set with the store location as the Fulfillment Location.

**Invoice in Advance of Fulfillment with Optimize EMV**

The Optimize EMV option in SCIS creates a customer payment before creating an invoice. This sequence helps expedite the payment process. However, when the option to **Invoice in Advance of Fulfillment** is disabled and the order is for pickup or shipping, the flow is directed to use standard EMV processing.

This table shows when SCIS uses Optimize EMV for pickup and shipping orders based on the Invoice in Advance of Fulfillment option.

<table>
<thead>
<tr>
<th>Order Type</th>
<th>Invoice in advance of Fulfillment?</th>
<th>Optimize EMV enabled?</th>
<th>EMV payment action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pickup or Shipment</td>
<td>Yes</td>
<td>Yes</td>
<td>Optimize EMV payment</td>
</tr>
<tr>
<td>Pickup or Shipment</td>
<td>No</td>
<td>Yes</td>
<td>Standard EMV payment</td>
</tr>
</tbody>
</table>
**Important:** When ordering items for pickup or shipment, and Invoice in advance of fulfillment is disabled, SCIS does not use Optimize EMV to process the order payment.

You can find the **Invoice in Advance of Fulfillment** option by logging into NetSuite and going to Setup > Accounting > Accounting Preferences > Order Management subtab.

## Setting Up Quotes in SCIS

In NetSuite, you can provide customers with an estimate before the order is accepted. In SuiteCommerce InStore (SCIS), estimates are called Quotes. A sales associate can create a quote in SCIS based on items and discounts in the cart, and then print or email the quote to the customer. After the customer has reviewed the order amount, the sales associate can make changes as needed, and then convert the quote into a sales order or cash sale.

As the NetSuite administrator, you define the fields that are displayed in the Quotes entry form in SCIS. In SCIS, the sales associate enters information in required fields. Any sales associate can use SCIS to find a quote and convert it to a sale. You can find existing quotes by scanning the transaction number displayed on the receipt, or by typing the transaction number or the customer’s name in SCIS.

To set up quotes in SCIS, you must complete the following tasks:

1. Permissions for Quotes
2. Defining Fields for Display on the Quote Form in SCIS

### Permissions for Quotes

The sales associate must have permission to create Estimates. To grant additional permissions to sales associates, you must modify the SCIS Clerk role. Also, check that permissions are set properly for creating quotes.

**Note:** To work with quotes in SCIS, a role with edit-level permission for the Estimate transaction is required. For more information about role-based permissions for SCIS, read SuiteCommerce InStore Roles.

### To check that permissions for Quotes are set appropriately:

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find **SCIS Permission**, and click **List** in that row.
3. On the SCIS Permission records for quotes, ensure that the expected roles appear in the list of **Authorized Roles**. For example, if you want sales associates to enter and modify quotes, the SCIS Clerk role must be an Authorized role.
   - Click **Edit** next to the following roles:
     - QUOTES_CONVERT
     - QUOTES_CREATE
     - QUOTES_UPDATE
4. Click **Save** after making changes.
Defining Fields for Display on the Quote Form in SCIS

To configure the entry form used for Quotes in SCIS, an administrator must create a copy of the default saved search, and then modify the CustomConfiguration.js file. By creating a modified copy of the default saved search, you can define which fields appear in the popup window presented to the sales associate in SCIS. In the configuration file, you define the search you want to use in SCIS.

To create a modified copy of the saved search for quotes:

1. Go to Reports > Saved Searches > All Saved Searches.
2. Click Edit next to SCIS Estimate Header Fields.
3. Check the Public box.
4. Click the Results subtab. Select the fields you want to display in the Quotes popup window.

**Important:** Ensure the fields that are on the original saved search also exist on your customized saved search. If you have created a custom Quote form with custom fields, you should be able to select those fields on the Results subtab.

5. Click Save.

To define your saved search for quotes in the CustomConfiguration.js file:

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

5. Add the following line in the CustomConfiguration.js file, after the section where forms are defined. Replace 'customsearch_xxxx_xxxx_xxxx' with the ID for the custom search you want to use.

```javascript
quote: {
  quoteHeaderFieldSavedSearch: 'customsearch_xxxx_xxxx_xxxx',
}
```

Note the following example:
After you modify the saved search, then a sales associate can click Quotes in SCIS to open the popup window and enter information in the fields you have defined.

Discounts, Markups, and Promotions for SCIS

Use the topics in this section to work with the various the types of pricing discounts and overrides available in SuiteCommerce InStore (SCIS). Discounts and promotions must be set up by administrators using the tools in NetSuite before those price adjustments can be applied to a transaction. SCIS options for promotions include the capabilities found in SuitePromotions. Sales associates can use markups or price overrides to replace a designated price while processing a transaction. These overrides do not require configuration by the administrator.

- Configuring Discounts
- Price Override for SCIS
- Promotions and Coupon Codes for SCIS

Configuring Discounts

In NetSuite, discounts are a type of item record. You must configure discount items in NetSuite, and then make the discount available for SCIS by selecting it on the SCIS Settings record. Sales associates can then apply discounts to the orders they create in SuiteCommerce InStore (SCIS).

**Important:** SCIS assigns a discount Item record to the SCIS Custom Discount to calculate rates and perform other tasks. Never use that discount Item for other discounts or for NetSuite promotions or promotion codes. Doing so can lead to errors.

**To create a discount for SuiteCommerce InStore:**

1. Go to Lists > Accounting > Items > New.
2. Click Discount in the list of item types.
3. Enter information in the fields listed below:
   - **Item Name/Number** – Enter a name for the discount. The information you enter here is displayed in SCIS.
   - **Description** – (Optional) Enter a description for the discount. The information in this field is not displayed in SCIS.
   - **Rate** – Enter a dollar amount or percentage for the rate of discount. The information in this field is displayed in SCIS.
   - **Subsidiary** – (Required if you use OneWorld) Select a subsidiary from the list.
4. Click Save.
5. Go to Customization > Lists, Records, & Fields.
6. Scroll to **SCIS Settings**, and then click **List** in that row.
7. Click **Edit** next to an existing SCIS Settings record to make changes.
8. Click the **General** subtab.
9. In the **SCIS Location Discounts** list, select the discounts that you want to make available to SCIS.

   **Note:** If you use multiple SCIS websites, note that discounts defined on the SCIS settings record are applied depending on the combination of location, subsidiary, and website defined on the filters subtab. For particular discounts to be available to a particular employee, the location and subsidiary defined on the employee record must match those settings on the SCIS Settings record.

10. Click Save.

To apply a discount in SCIS, the sales associate clicks the order subtotal to view a list of the discounts available. The sales associate can select one of the discounts in the list, or add a custom discount. If a custom discount is selected, then the sales associate enters the discount amount, and is required to submit a discount reason.

### Discount Reasons

**Discount Reasons** is a custom transaction body field that displays when a custom discount is applied to a sale. The sales associate is required to enter a value in this field. The value is output on the resulting transaction record. This custom field does not require any configuration.

**SCIS Discount Reasons (List)** is a custom record type that you have the option to modify. SCIS installs two default values: **Regular Customer**, and **Other**. You can modify this list to define reasons for applying sales discounts that make sense for your organization.

**To modify the list of discount reasons:**

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find **SCIS Discount Reasons (List)**, and then click **List** in that row.
3. Edit existing values, or enter additional values into the list.
4. Click the **Filters** subtab, and then select the Location, Website, and Subsidiary where you want these settings to apply. You can select more than one value in each box.

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

5. Click Save.

### Price Override for SCIS

In SuiteCommerce InStore (SCIS), store managers and sales associates can override the subtotal of an order. The price override capability allows you to increase the amount of the order. There is no additional configuration required from administrators to support price override capability.

To apply a price override or markup in SCIS, the sales associate clicks on the amount in the line-item in the cart or the order subtotal. He or she can then use the custom discount dialog to increase the amount. For more information, read the help topic **Applying a Markup or Price Override**.
Promotions and Coupon Codes for SCIS

SuiteCommerce InStore (SCIS), supports the use of promotions or coupon codes. For example, a customer might bring a flyer to your store promoting a 10% savings on their purchase. The sales associate enters the coupon code from the flyer, and then the promotion is applied to the order subtotal.

With SCIS, you can use the following solutions for creating promotions:

- SuitePromotions
- Standard Promotions
- Advanced Promotions

**Important:** To learn about limitations in SCIS support for Advanced Promotions, read the help topic [Migrating to SuitePromotions](#).

In each case, an administrator must complete the following tasks before promotion codes can be used in SCIS:

1. Configure promotion records in NetSuite.
2. Use the SCIS Settings record to define the discounts associated with the promotions you plan to offer

For more information about the different options available for configuring promotions, read the help topic [Promotions Overview](#).

To enable SuitePromotions capabilities, go to Setup > Enable Features. Click the Transactions subtab, and then check the boxes next to [SuitePromotions](#) and [Auto-Apply Promotions](#).

**Coupon Codes and SCIS**

Because the administrator enables features and configures records for SCIS, different types of promotions and coupon code eligibility may not be obvious to sales associates. Sales associates only add items to the order and enter coupon codes. The administrator is responsible for configuring promotion records with stackable and auto-apply capabilities, then training sales associates as needed.

**Important:** A promotion can be used together with a discount on a line item, only if the **Prices Include Tax** preference is **disabled** on the item record. This preference is only available in NetSuite accounts (except US and Canada) that do not use the Advanced Taxes feature.

To learn more about configuring all types of promotions, read the help topic [Creating Promotions](#).

**Auto-Apply Free Gift Promotions**

In SCIS the free gift item is added to the cart according to the way in which the Free Gift promotion is defined in NetSuite. To use free gift promotion capabilities in SCIS, an administrator must set up the promotion correctly. For setup information, read the help topic [Creating Free Gift Promotions](#).

For example, you set up an auto-apply store promotion where customers receive a free t-shirt along with the purchase of a particular item. In SCIS, the sales associate puts the item associated with the free gift promotion in the cart. When the sales associate selects a payment option, a popup dialog is displayed enabling the sales associate to add the free t-shirt to the order. If the item associated with the free gift promotion is removed from the order, then SCIS prompts the sales associate to remove the t-shirt.
To learn how sales associates apply different types of promotions to orders in SCIS, read the help topic Applying Promotion Codes to Transactions in SCIS.

Returns and Refunds

Sales associates can use SuiteCommerce InStore (SCIS) to process returns and issue refunds to customers. When SCIS processes a return, NetSuite generates a customer return transaction and a credit memo. These transaction records are created in addition to the original sales transaction created when the item was purchased.

Administrators can track activity by viewing transaction records, customer records or sales reports in NetSuite. Returns and credit memos are associated with customer records. Sales associates and store managers can view transaction and customer activity in SCIS.

Returns

- **Return Types**
- **Validated Returns**
  - SCIS and NetSuite Processing for Validated Returns
  - Promotions and Manual Verification of Return Quantities
- **Unvalidated Returns**
- **Working with Return Reasons**

Refunds

- **Refunding a Return**
- **Split Tender Refunds**
- **Refund by Credit Memo**
- **Refund by Exchange**
- **Supported Refund Use Cases**

Return Types

Using SCIS, sales associates can process two types of returns:

- **Validated Returns**
- **Unvalidated Returns**

Validated Returns

In a validated return, the sales associate can verify the details of a purchase by reviewing the original transaction. Validated returns can reduce fraud and mistakes because they enable the associate to authenticate that the purchase was made through the retailer. As long as SCIS has access to the original transaction, it can process validated returns for items purchased in the store, through a NetSuite
commerce website, or through other connected sources. The customer's timeline will include purchases from those connected sources.

Associates can find the transaction in SCIS by:

- Scanning the customer's copy of the receipt.
- Entering the transaction ID from the receipt into the Search Bar.
- Searching for the customer and reviewing their Customer Profile timeline.
- Reviewing the Transaction History list.

**Note:** To process the return of a serial or lot numbered item, associates must use the validated return process.

## SCIS and NetSuite Processing for Validated Returns

SCIS works with NetSuite record processing to verify details and generate a credit memo for the refund. The processing maintains the integrity of the original transaction record while documenting the changes produced from the return. The internal steps are:

1. Locate the original transaction record.
2. Generate the credit memo.
3. Save the items and item quantities returned.

The last step is an SCIS process to control the items and quantities eligible for return. It is used to maintain the integrity of the transaction record.

## Promotions and Manual Verification of Return Quantities

Promotions that were in effect when the original transaction occurred can impact the SCIS item-quantity verification process. This automatic process reviews the original transaction and any previous returns made against the original to control the quantities shown as eligible for return.

**Important:** If the original transaction included a promotion, SCIS cannot verify the item quantity originally purchased or previously returned.

If Original Transaction Included a Promotion

If the original transaction included one or more promotions that were in effect on the transaction date, and the promotion has ended, SCIS cannot control the quantity of items eligible for return.

This limitation is part of an SCIS return process that protects the integrity of the original transaction record in NetSuite. The process used to protect the original is not compatible with certain NetSuite processes.

Because SCIS cannot control the return quantity if a promotion was in effect, a customer could return more of an item than was originally purchased. For example, if a customer bought three hats on promotion, but now wants to return those hats, SCIS will not automatically limit the return of hats to only three. The sales associate must verify the eligible quantities before proceeding with the return.

## Promotion Alerts

To reduce the chance of a sales associate accepting an incorrect return quantity, SCIS reviews the transaction at the start of a return to see if it included a promotion. If SCIS finds that a promotion was in effect, an alert displays on the **Returns** page.

The alert instructs the associate to verify that quantities returned are less than or equal to the original transaction and any previous returns.
Returns and Refunds

If previous returns against the original exist, these are shown as **Credit Memo** links that the associate uses to display the details.

If Original Transaction Did Not Include a Promotion

If the original transaction did not include a promotion, SCIS will automatically control the quantities eligible for return. It is not necessary for the sales associate to verify the quantity details.

Unvalidated Returns

This return type does not require the sales associate to locate the original transaction. Instead, the associate scans the returned item to determine the refund amount. This method can be quicker than a validated return, but it is more prone to fraud. Your store might have procedures you must follow when making unvalidated returns.

Working with Return Reasons

Sales associates can select a return reason before submitting an item return transaction. Return Reasons is a custom list installed by SCIS. The custom list includes values you can modify, or you can add more.

**Note:** If a return reason is not selected, then the text, **Return Reason** appears on the transaction in NetSuite.

**To modify or add return reasons:**

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find **SCIS Return Reasons (List)**, and then click **List** in that row.
3. Add or modify the list:
   - Click **New SCIS Return Reasons (List)** to add a new value to the list.
   - Click **Edit** next to an existing value to change the name or modify filter settings.
4. Click the **Filters** subtab, and then select the Location, Website, and Subsidiary where you want these settings to apply. You can select more than one value in each box.
   **Note:** By default, the filters are set to apply to all locations, websites, and subsidiaries.
5. Click **Save**.

Refunding a Return

A refund occurs as part of the return process. Sales associates can use any payment method available in SCIS for returns, including a split tender refund, using more than one payment method on the same
returns and Refunds

The refund amount is displayed in NetSuite on the Customer Refund transaction page.

If the sales associate chooses to refund cash, then the refund is provided from the cash drawer. If the original payment was made with only one credit card, and the payment provider supports referenced refunds, there is no need for the sales associate to interact with the payment device to process a return.

A Credit Memo is always created to capture information from return transactions. If the customer chooses to be refunded in cash or by credit card, the credit memo is closed out at the time of the refund.

Note: By default, refunds and exchanges can only occur if the accounting period in which the transaction took place has a Status of Open. To allow refunds and exchanges for a Closed period, see Permit Refunds or Exchanges for Transactions in Closed Accounting Periods.

Split Tender Refunds

Sales associates can provide a refund as more than one payment type, such as a cash refund and a credit card refund.
For example, a customer returns a set of items, and the total amount returned is $100. The sales associate wants to refund $25 cash and $75 to a credit card. In SCIS, the sales associate clicks Refund Cash to enter the cash amount, and then clicks Refund Credit Card to enter the remaining amount. The refund transaction is not complete until the total refund amount is entered.

After the refund is submitted in SCIS, a credit memo is created in NetSuite to capture the data from the return. The credit memo is linked to the original sales transaction in the SCIS Returns Credit Memo field on the Related Records Subtab.

![Credit Memo Image]

**Refund by Credit Memo**

When choosing how to refund a customer, the sales associate can apply the refund to a credit memo. This refund type is an alternative to providing refunds in cash or to a credit card. The customer can use the credit memo later as payment for a future transaction. NetSuite saves the refund as a credit memo on the customer record. The customer’s return receipt includes a credit memo identifier for the refund amount.

To redeem a credit memo for a transaction, the sales associate chooses Other Payment and then Credit Memo. The associate can scan the receipt or select manual entry to choose from a list. If manual, SCIS displays the credit memos that are available to the customer.

![Payment - Credit Memo Image]

**Note:** A credit memo cannot be used as payment unless it is associated with a customer record. If a credit memo is required for refund of a purchase made using the Default Customer record, then the sales associate must create a new customer record. For more information, see Default Customer.

**Credit Memos Not Valid for Sales Orders**

Sales associates cannot accept a credit memo as payment for any transaction that generates a sales order. NetSuite creates sales orders for SCIS transactions that have items for shipping, or pick up in-
store. SCIS displays an alert if a sales associate attempts to apply a credit memo as payment for a sales order. The transaction cannot proceed until the associate selects a different payment method.

**Refund by Exchange**

Rather than receive a cash/credit card refund or credit memo, a customer can request an item exchange. When processing an exchange, NetSuite creates an invoice for the new order and uses the return credit memo to adjust the balance due.

To perform an exchange, the sales associate adds the exchange item to the cart during the return transaction. The exchange item can be the same as the return item. The balance due or refund due to complete the exchange depends on the following factors:

- If the total of the exchange is more than the total of the return, then a balance is due.
- If the total of the exchange is equal to the total amount of the return transaction, then no balance or refund is due.
- If the total of the exchange is less than the total amount of the return, then a refund is due.

If no balance or refund is due, the associate can tap End Transaction to finalize the exchange.

**Important:** Sales associates cannot perform exchanges that include an item for shipping or pickup.

For example, the customer cannot exchange an item already purchased for an item that will be shipped or picked up in-store. Instead, the associate must first complete a return transaction and then enter a sales transaction for the shipping or pickup item.

**Supported Refund Use Cases**

The following table shows customer refund scenarios based on payments received using a PIN pad device. Note that the Payment Network Reference ID (PNREF) is a unique identifier assigned to a transaction payment.

Sales associates can only process a referenced refund when the original sales transaction has one credit/debit card payment method. After the payment is approved, the payment provider sets a PNREF to it. When the refund takes place, SCIS uses the PNREF to send the refund directly to the credit/debit account. In this case, the sales associate is not required to use the payment device to complete the refund.

**Note:** If the original payment was submitted with more than one credit/debit card, then to process the refund, the sales associate must use the payment device to swipe or enter each card associated with the original payment and select the amounts to be refunded.
Returns and Refunds

<table>
<thead>
<tr>
<th>Payment Received from Customer in SCIS with payment device</th>
<th>Sales Transaction Automatically Created in NetSuite</th>
<th>Number of Items Purchased</th>
<th>Number of Items Returned</th>
<th>Split Refund (With PNREF)</th>
<th>Split Refund (Without PNREF)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiple credit/debit cards (Split Payment)</td>
<td>Invoice</td>
<td>1</td>
<td>1</td>
<td>Not Supported</td>
<td>OK</td>
</tr>
<tr>
<td>Multiple credit/debit cards (Split Payment)</td>
<td>Invoice</td>
<td>2</td>
<td>1</td>
<td>Not Supported</td>
<td>OK</td>
</tr>
</tbody>
</table>

**Gift Certificates in SuiteCommerce InStore**

To sell a gift card or gift certificate in SuiteCommerce InStore (SCIS), an administrator must configure a gift certificate item record in NetSuite. A check box on this item record defines the gift certificate as a physical gift card or a digital gift certificate. The digital gift certificate is redeemable with only the authorization code. The gift certificate can be configured so that the sales associate sets the amount at the time of sale. For more information, see Configuring Gift Certificates for SCIS.

An administrator can also modify the CustomConfiguration.js file to configure the default values displayed in fields on gift certificates. Changing the default values in these fields is an optional customization. For more information, see Setting Gift Certificate Attributes For SCIS.

**Selling Gift Certificates**

After Gift Certificates are configured in NetSuite they are treated as items in SCIS. After the gift certificate is added to the cart, the sales associate can click on the line-item to change the information, if needed. When a **gift card** is added to the cart, SCIS prompts the sales associate to swipe the card, and then enter the price (if the gift card is configured with a variable amount). For more information useful for sales associates, read the help topic Working with Gift Cards in SCIS.

Selling a **digital gift certificate** is similar, except there is no card to swipe. Also, the sales associate is prompted to enter information for the notification email message that is sent to the recipient. The sales associate enters the names of the gift certificate giver and recipient, the email address of the recipient, the authorization code, and a message. When the order is complete, the authorization code is sent to the gift recipient in an email message and printed on the receipt.

**Applying a Gift Certificate as Payment**

After the sales associate adds items to an order, he or she clicks the Other Payment button in SCIS, and then selects Gift Certificate. Next, the sales associate swipes the gift card, or enters the authorization code for a digital gift certificate. After the authorization code has been entered, the transaction summary window shows the gift certificate amount applied to the order and the remaining amount due. For more information useful for sales associates, read the help topic Paying with a Gift Card.

**Configuring Gift Certificates for SCIS**

To offer Gift Certificates in SuiteCommerce InStore (SCIS), you must first set them up in NetSuite. Ensure the gift certificate feature is enabled, and accounting preferences are set correctly. This section includes instructions on how to set up gift certificates for sale in SCIS.

**To set up gift certificates for SCIS:**

1. Ensure the Gift Certificates feature is enabled at Setup > Company > Enable Features. Click the **Items & Inventory** subtab.
2. Set accounting preferences:
   a. Go to Setup > Accounting > Preferences > Accounting Preferences.
   b. Click the Items/Transactions subtab.
   c. In the Other Item Preferences section, set the following:
      ■ In the **Matrix Item Name/Number Separator** field, enter `-`.
      ■ In the **Gift Certificate Auth Code Generation** field, select **System Generated**.

3. Go to Lists > Accounting > Items > New. Click **Gift Certificates**.

4. In the **Item Name/Number** field, enter a name for your gift certificate. This field displays internally in NetSuite on lists. If you want to display a different name for the gift certificate on the SCIS website, then enter it in the **Display Name/Code** field.

5. If you use OneWorld, select the **Subsidiary**. Optionally, you can select a **Location**.

6. On the **Accounting** subtab, select the following:
   - Income account
   - Liability account
   - Tax Schedule

7. On the **Custom** subtab, check the **SCIS Gift Card** box if you want this to be a gift card. Leave the box clear if you want to use a digital gift certificate. The digital gift certificate generates an email message to the gift certificate recipient at the time of sale. If you use a gift card, you must also modify the CustomConfiguration.js file.

   For more information, read **Setting Gift Certificate Attributes For SCIS**.

8. On the **Web Store** subtab, set the following:
   a. Check the **Display in Web Store** box to display the gift certificate in SCIS.
   b. (Optional) Check the **Variable Amount** box, if you want to allow the sales associate to set the gift certificate amount.
   c. (Optional) Enter a maximum amount for the gift certificate in the **Maximum Variable Amount** field.
   d. Click **Web Site List**, and then select the SCIS website in the **Site** column. Under **Site Category**, select **Home**.

9. (Optional) If you want to define a set price for the gift certificate, instead of a variable price, click the **Sales/Pricing** tab, and then enter the amount.

10. Click **Save**.

11. Upload images for the gift certificate. The process for uploading images for gift certificates is the same process for uploading images to other types of items. For more information, see **Configuring Item Images for SCIS**.

12. Create a QuickAdd key for the Gift Certificate. For more information, see **Configuring QuickAdd Keys**.

### Setting Gift Certificate Attributes For SCIS

When you use gift cards in SuiteCommerce InStore (SCIS), you must modify the CustomConfiguration.js file to include settings for swiping gift cards. You can configure default gift certificate attributes for SCIS. These attributes are displayed in entry fields when sales associates create new gift certificates. The
default values you set are displayed as prompts in SCIS. When selling a gift certificate, the sales associate overwrites the default values.

**Note:** CustomConfiguration.js includes settings for card separator and gift card fields. Accept the defaults. Changing these settings in the configuration file can affect gift certificate capabilities.

### Gift Card Separator, Scanning, and Fields

To use physical gift cards in SCIS, you must modify gift card settings in the CustomConfiguration.js file. Find the following code snippet, and then make modifications as described in the code sample given here:

```javascript
// RegularExpression used to decide if a character is a Card separator
// Used to distinguish Gift Card and Employee Access Cards fields
// separator: '[\|\/]',
separator: '[\-]',

// Characters ignored during the scan
// ignore: ['%', '?'],

// Gift card Fields in order of appearance.
// fields: ['upccode', 'quantity', 'giftcertauthcode'],
}
```

### Modifying Display of Authentication Code

You can hide the authorization code field on the gift certificate entry form at the point of sale. Add the following line to the CustomConfiguration.js file:

```javascript
hideAuthorizationCode: true
}
```

To display the authorization code field, change the setting from `true` to `false`.

### Modifying Gift Card Entry Field Attributes

Define the following parameters in the `giftCertificate` entry:

- **defaultFromName**: defines the default name of the purchaser of the gift certificate. By default, this name is automatically read from the application environment.
Gift Certificates in SuiteCommerce InStore

- **defaultToName**: specifies the default recipient of the gift certificate.
- **fallbackEmail**: defines a generic email address associated with the gift certificate.
- **defaultMessage**: specifies a default message that appears on the gift certificate receipt.

The following code sample shows the syntax for the `giftCertificate` entry:

```javascript
// Gift card selling configuration
giftCertificate: {
   // The name that appears on the gift certificate in the 'From' field by default
   //
   // defaultFromName: 'Your store'

   // The name that appears on the gift certificate in the 'To' field by default
   //
   // defaultToName: 'Customer',

   // The email that appears on the 'Email' field by if the order customer has
   // no email set and the user didn't specify a email on the gift certificate
   //
   // fallbackEmail: 'mail@example.com',

   // The message that appears on the gift certificate in the 'Message' field by default
   //
   // defaultMessage: 'You received a Gift Card from this store',

   },
```

SCIS Gift Certificates FAQ

The following questions are frequently asked about configuring gift certificates for SuiteCommerce InStore (SCIS).

**What format should I use when ordering a batch of gift certificates?**

When ordering a batch of gift cards from a third-party printer, use barcode Code 128. Use the format, `UPC/authcode`, for example `12345/00001`. Ensure the UPC Code field is populated on the gift certificate record in NetSuite.

**How many numbers can I use in a gift certificate?**

System generated gift certificates use 10 alphanumeric characters. If you enter the gift certificate number manually at the point of sale or set it up in the back end, you can use 9 alphanumeric characters.

**Does SCIS only support system generated authorization codes?**

Recommended setup steps include selecting the **System Generated** option in the **Gift Certificate Auth Code Generation** field in **Accounting Preferences**.

However, you can choose to show or hide the authorization code on the gift certificate entry form in SCIS. Also, during the sale of a gift certificate, if you choose not to show the Authorization Code field on the gift certificate, or show it and leave it empty, then the code is automatically generated. Alternately, the sales associate can enter a 9 character alphanumeric code at point of sale.
How do I scan a physical gift card?

If you are scanning the gift card to pay for items purchased, you can swipe the gift card to get the authorization code, or enter the code manually.

If the customer is purchasing a gift card, you must scan the barcode. SCIS performs a search, to identify the gift card as an item. Then the dialog is displayed where the sales associate must enter the required information, and then add it to the cart.

Can an order that includes a physical Gift Card be shipped?

No, a gift card cannot be shipped. You can only ship line items that are not gift certificates. You can ship line by line, excluding the gift certificate.

SCIS No Sale

Typically, the cash drawer opens automatically based on the payment method used on an order. However, sales associates can use the No Sale option in the SCIS User menu to open the cash drawer without a sales transaction. After the sales associate selects No Sale in the User Menu, he or she must choose a reason for opening the cash drawer.

Administrators must enable permissions for roles that are authorized to use the No Sale option, and roles that require manager override. Administrators must also define reasons for opening the cash drawer. Configure SCIS Open Drawer Reason custom records for this purpose.

To enable permission to use No Sale:

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find SCIS Permission, and then click List in that row.
3. Click Edit next to OPEN_CASH_DRAWER.
4. In the Authorized Roles list, select the roles who are authorized to use No Sale.
5. In the Require Authorization Roles list, select the roles that require manager override.
6. Click Save.

Employees with authorized roles enter their SCIS Access Codes to allow employees that require authorization to open the cash drawer.

To configure SCIS Open Drawer Reason custom records:

1. Go to Customization > Lists, Records, & Fields > Record Types.
2. Find SCIS Open Drawer Reason and click List in that row.
3. Click **New SCIS Open Drawer Reason**.
   a. Enter a **Name** for the reason. This name is what displays to the sales associate using SCIS.
   b. Choose the SCIS **Location**, **Website**, and **Subsidiary** where this open drawer reason should apply. You can also apply the record globally, by marking the **Apply to All** boxes.

The reasons you define appear in a list that displays when the sales associate selects the No Sale option in the SCIS User Menu. The cash drawer will not open until the sales has selected a reason.

### Voiding a Line and Deleting a Transaction

In SuiteCommerce InStore (SCIS), a sales associate can void an item to remove it from a transaction, or delete the transaction entirely. When an item is voided from a sales transaction, it is replaced with the void item configured during installation. Administrators can view or modify transactions in NetSuite.

#### Voiding a Line in a Transaction

To remove an item from a sales transaction, the sales associate must void the item by clicking X on the transaction line in SCIS. This action removes the item from the transaction and replaces that item with a **void item** (ns_pos_voiditem). The void item is not visible to the sales associate using SCIS, but appears on the transaction record in NetSuite.

You must configure the void item during installation of SuiteCommerce InStore.

Note that performing a void on a transaction requires additional permission. Be sure to select authorized roles on the SCIS Permission custom record. For more information, see **SuiteCommerce InStore Permissions**.

#### Void Item and Multiple Subsidiaries

When you have more than one subsidiary, you must update the void item created during installation to support all subsidiaries associated with your SuiteCommerce InStore implementation. To update the void item, you must modify the Item record in NetSuite.

**To apply the void item to multiple subsidiaries:**

1. Go to Lists > Accounting > Items.
2. Find **ns_pos_voiditem** in the list.
3. Click **Edit** to modify this record.
4. In the **Subsidiary** list, select all the subsidiaries associated with your SuiteCommerce InStore implementation.

5. Click **Save**.
Deleting a Transaction

To delete a transaction, the sales associate clicks the Delete waste can icon in SCIS. When a transaction is deleted, there is no record of it in NetSuite.

Accounting Results of Void and End vs. Delete

Ending a transaction after voiding a line produces different results for your accounting records than does choosing to delete a transaction.

- Tapping Void for a line item and then tapping End Transaction generates a Cash Sale record with a total value of zero ($0.00). SCIS creates a receipt of the transaction.
- Tapping Delete for an open transaction ends the transaction without creating a Cash Sale record or a receipt.

Defining SCIS Transaction Notes

Administrators can use the SCIS Transaction Note Types custom record to define notes for different types of information needed on a transaction. This custom record is installed with SuiteCommerce InStore (SCIS).

After an administrator has defined transaction notes, sales associates can add them as they build orders. For example, a transaction note can be used to indicate that the customer was referred by a friend. The sales associate can add the note to a line item on an order or to the entire transaction in SCIS. After the order is submitted, the note displays on the transaction form in NetSuite.

The following screenshot shows the user interface for adding a note. After the sales associate chooses a note type on the left, then he or she can enter additional information on the right. The names of the SCIS Transaction Note Types displayed here are: Prefers Pickup, Custom Note, and Friend Referral.

To define SCIS Transaction Note Types:

1. Go to Customization > Lists, Records, & Fileds > Record Types > SCIS Transaction Notes Types.
2. Click New SCIS Transaction Note Types.
3. Enter a Name for the transaction note type. The name is displayed in SCIS. The sales associate can select a note type, and then enter additional information. The Custom Note is installed by default.
4. On the Filters subtab, you can select particular Locations, Websites, and Subsidiaries, or make the note available to all of them.
Defining SCIS Transaction Notes

5. Click Save.

In SCIS, sales associates can apply one note to a line item on an order, or apply multiple notes to a transaction. Be aware of the following capabilities depending on where the note is added.

Adding a Note to a Line Item

- Only one note can be added to a line item.
- After the transaction is submitted, each note is stored on the line item on the transaction form in NetSuite.
- Line-item notes are recommended for comments related to a particular item.

Adding a Note to a Transaction

- Multiple notes can be added to a transaction.
- After the transaction is submitted, the notes are attached to the transaction form in NetSuite, on the Communication subtab under User Notes.
- Transaction-level notes are recommended for notes related to the whole transaction.

SCIS Saved Search and Reporting

SuiteCommerce InStore (SCIS) includes a set of saved searches that you can use as reports. Saved searches installed with the SuiteApp are locked. To modify any SCIS saved search you must first make
a copy, and then create a customized report for your organization. Read the following sections to learn more about SCIS reporting capabilities:

- Modifying Saved Searches for SCIS
- Custom SCIS Sales Reports
- SCIS Audit Log
- Publishing Saved Searches to SCIS Users

Modifying Saved Searches for SCIS

The SuiteCommerce InStore SuiteApp installs a set of saved searches in your NetSuite account. Many of these saved searches are used for displaying certain fields and data from your NetSuite account in SuiteCommerce InStore (SCIS).

For example, the saved search, **SCIS Individual Customer Form Fields** exposes fields to the customer entry form used in SCIS. Also, the **SCIS Locations** saved search displays location information from your NetSuite account on the Nearby Locations subtab of the Product Detail Page in SCIS.

**Important:** If you choose to modify the **SCIS Inventory Locations** saved search, ensure that the Make Inventory Available field is included on the Results tab of your custom saved search. If this field is not included, the inventory count on the Product Detail Page shows 0.

For a list of saved searches installed by SCIS, see SCIS Custom Fields, Lists, Records, and Searches. For instructions on specific search modifications, see Customize Location Display, and Custom SCIS Sales Reports.

**To make a copy of an SCIS saved search:**

Follow these steps to modify any type of saved search. Saved searches installed with SCIS are locked. To modify any of the saved searches you must first make a copy, and then make changes to your copy.

1. Go to Reports > All Saved Searches.
2. Click **Edit** next to the saved search you want to copy.
3. Change the name in the **Search Title** field.

4. (Optional) Check the **Public** box so others can view the report in NetSuite. Set other check boxes on the form as needed.
5. Change the values on saved search subtabs as needed. The most common modifications are adding and removing values on the **Criteria** subtab, and changes to the **Results** subtab.

6. Click **Save As**.

After you click Save As, a new ID is generated for the modified saved search. The name of your modified saved search and the ID are displayed on the list of saved searches.

**Custom SCIS Sales Reports**

In NetSuite, you can view sales reports by using the saved searches included in SuiteCommerce InStore (SCIS). The following sales reports are installed by default:

- SCIS Daily Sales
- SCIS Sales by Department
- SCIS Daily Tenders

To modify the data displayed in NetSuite, you must first make a copy of an SCIS saved search. Then, create your own custom search to meet your business needs. For example, you may want to create a saved search that shows SCIS sales for each month. To do this, copy one of the saved transaction searches installed by SCIS. Next, set the date filter, and then save a report for each month.

**To create a sales report for each month:**

1. Follow the instructions for **Modifying Saved Searches for SCIS**.
2. On the criteria subtab, select **Date Created**, and then select the first and last day of the month.

3. Click **Save As**.

**Publishing Saved Searches to SCIS Users**

As an administrator, you can share information with employees about day to day business operations by defining a saved search for display in the SCIS User Menu. For example, you might share a list of customers who were in the store this week, or inventory that is out of stock. Sales associates can click a
Saved Search link in the User Menu, and then view report data organized in a way that makes sense for your organization.

To define a saved search that displays on sales associates' User Menu, create a saved search, and then select the saved search on the SCIS Settings record. The SCIS Settings record defines the audience of sales associates who can access the saved search.

**Note:** The number of results returned from a saved search can impact performance. Saved searches that return more than 1,000 rows may not display properly.

To publish a saved search to the User Menu in SCIS:

1. Create a saved search.
   a. Go to Reports > All Saved Searches.
   b. You can copy and then modify an existing SCIS saved search, or create a new one. The most common modifications are adding and removing values on the **Criteria** subtab, and changing values on the **Results** subtab.
   c. Be sure to check the **Public** box so others can view the report in NetSuite. Set other check boxes on the form as needed.
   d. Change the values on saved search subtabs as needed.
   e. Click **Save As**.
2. Go to Customization > Lists, Records, & Fields > Record Types.
3. Find **SCIS Settings** in the list, and then click **List** in that row.
4. Click **Edit** next to an **SCIS Settings** record.
5. Select one or more saved searches in the **SCIS Saved Searches** list.
6. Click **Save**.

The saved search will display in the User Menu depending on the settings for SCIS Location, Subsidiary, and Website that exist on the SCIS Settings record. Sales associates whose employee records match the same criteria as the SCIS Settings record are able to view the saved search.

### SCIS Audit Log

In NetSuite, you can track the restricted operations that were performed in SuiteCommerce InStore (SCIS). The SCIS Audit Log shows the time and date when a restricted operation occurred. It shows the operation, the employee who initiated the operation, and the employee who authorized the operation. The audit log enables you to track each restricted operation. SCIS Audit logs are automatically generated based on transactions that SCIS users submit.

<table>
<thead>
<tr>
<th>EDIT</th>
<th>VIEW</th>
<th>OWNER</th>
<th>DATE CREATED</th>
<th>OPERATION</th>
<th>AUTHORIZER</th>
<th>TRANSACTION</th>
<th>APPROVED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>View</td>
<td>Sam Smith</td>
<td>3/28/2019 2:22 pm</td>
<td>Apply Gift Card</td>
<td>Jonathan Broker</td>
<td>Cash Sale #UOSH14826</td>
<td>Yes</td>
</tr>
<tr>
<td>Edit</td>
<td>View</td>
<td>Sam Smith</td>
<td>3/28/2019 2:22 pm</td>
<td>Line Discount</td>
<td>Jonathan Broker</td>
<td>Cash Sale #UOSH14827</td>
<td>Yes</td>
</tr>
<tr>
<td>Edit</td>
<td>View</td>
<td>Sam Smith</td>
<td>3/28/2019 2:22 pm</td>
<td>Apply Custom Discounts</td>
<td>Jonathan Broker</td>
<td>Cash Sale #UOSH14827</td>
<td>Yes</td>
</tr>
</tbody>
</table>

To view the SCIS Audit Log:

1. Go to Customization > Lists, Records, & Fields.
2. Find **SCIS Audit Log** in the list, and then click **List** in that row.

3. Sort the list by clicking the header of the **Date Created** column. You can drill down on certain columns to access more information.
   - **Owner** – Shows the employee who initiated the operation. This is the sales associate logged in to SuiteCommerce InStore.
   - **Date Created** – Shows the date and time when the operation occurred.
   - **Operation** – Shows the name of the operation.
   - **Authorizer** – Shows the employee who authorized the operation.
   - **Transaction** – Shows the transaction on which the operation was initiated. For example, if a sales associate applied a credit memo to an invoice, Invoice is the transaction that displays in this column. The transaction number is also included.
   - **Approved** – Shows Yes or No depending on whether the operation was successfully authorized.

### Calculating Taxes on Transactions

SuiteCommerce InStore (SCIS) calculates tax based on the tax settings you configure in NetSuite. For sales tax to be calculated correctly, you must enable the Advanced Taxes feature in NetSuite, set the tax preferences required for SCIS, and create tax schedules. Set up tax preferences according to SuiteCommerce InStore Installation guidelines. For more information, see Required Features and Settings for SCIS.

Tax Schedules, created in NetSuite, determine how taxes are calculated for items in each nexus. Tax schedules are useful in countries such as the U.S. and Canada where some goods and services are not taxable in certain states and provinces. For more information on setting up Tax Schedules, see the help topic Creating Tax Schedules.

**Note:** The Advanced Taxes feature is required for SuiteCommerce InStore. Tax schedules are required in accounts that use Advanced Taxes. For more information, see the help topic Advanced Taxes.

You create nexuses to establish different tax jurisdictions. For general information about setting up tax nexuses, see the help topic Nexuses and Subsidiaries.

### Tax Codes and Tax Groups

In NetSuite there are important distinctions between tax codes and tax groups. You can create a tax group to combine several tax codes that can be applied to one transaction, even if the taxes are paid to different jurisdictions. The tax group rate is the sum of these separate tax codes.

For example, if you have two retail locations in Illinois, you may have the following tax groups configured in NetSuite:

- **Tax Group IL_ASES** – The tax rate is 7%, which is the sum of the two tax codes included in the group.
  - Includes two tax codes: IL_IL state tax of 6.25%, and IL_ASES at 0.75%.
  - Applicable to certain postal codes, such as 60002.

- **Tax Group IL_ALGONQUIN_ARXL** – The tax rate is 7.75%, which is the sum of three tax codes included in the group.
  - Includes three tax codes: IL_IL at a rate of 6.25% (State), IL_ALGONQUIN at 0.75% (City), and IL_ARXL at 0.75% (Transit).
Applies only to postal code 60102.

The setting in NetSuite, **Enable Tax Lookup on Sales Transactions**, determines the appropriate tax group or tax code for a customer based on the postal code in the customer’s shipping address.

### Sales Tax for Customers

Based on the example above, if a product is sold to the “Default Customer” with the postal code 60102 (ALGONQUIN), NetSuite sets the tax rate to 7.75%. Alternatively, if no tax group exists, tax calculation for the order depends on the tax item set on the Default Customer record. To charge tax on the order, note that the customer record must be marked as taxable, and a tax nexus must be configured. Both of these are tax preference settings included in the installation guidelines.

The default customer record is marked as taxable by default. Also, note that part of configuration is setting the default tax item for new customers.

### Cash and Carry

When selecting a customer on an SCIS transaction, the sales tax is calculated based on the tax code or tax item set on the customer record. If there is no tax code or tax item on the customer record, then the tax is calculated based on the SCIS location address. Note that **Customers Default to Taxable** is a tax preference setting included in the installation guidelines.

### Delivery Orders

For products that are ordered through SCIS (the product is shipped to the customer), tax is calculated based on the tax code or tax item set on the customer record. An Administrator configures tax settings for new customers as part of installation.
SCIS Custom Fields, Lists, Records, and Searches

This section includes reference information about the custom fields, lists, records, and searches installed by the SuiteCommerce InStore SuiteApp. Read this section to learn general information, such as which custom fields require configuration. Links to detailed configuration steps are included in the descriptions. To view or configure custom fields in NetSuite, go to Customization > Lists, Records, & Fields, and then make a selection from the list.

This section also includes general information about saved searches associated with SuiteCommerce InStore (SCIS). SCIS uses data from saved searches in the customer profile, to display location information on the Product Detail Page, and to show sales report data in SCIS and in NetSuite. Administrators can view and modify all saved searches in NetSuite.

Read the following sections for more information about custom fields, lists, records, and searches associated with various elements of SCIS:

- Mobile Device Settings
- Cash Drawer Management
- Customer Profile
- Discounts and Returns
- Employee
- Location
- Item
- Transactions
- Opening and Closing Drawer
- QuickAdd Keys
- Payments
- Printer Settings
- Sales Reports
- SCIS Receipts
- Transactions
- Fallback Custom Records

Mobile Device Settings

The following custom records are used to configure the mobile device you use to run SCIS. You configure these custom records after installing the SCIS POS application. For more information, read Installing SCIS Mobile Apps.

SCIS Mobile Device

- **ID:** customrecord_ns_pos_mobile_device
- **Description:** Use this record immediately after installing the SCIS POS application on a mobile device. This custom record stores the mobile device ID. It also stores the SCIS website and printer technology associated with the mobile device.
SCIS Domain Whitelist

- **ID**: customrecord_ns_domain_whitelist
- **Description**: This custom record contains a list of domains that are allowed access to SCIS. This list of whitelisted domains are global to your account, regardless of location or subsidiary. The following domains are available by default and cannot be disabled. These domains are required for SCIS to function properly:
  - system.netsuite.com
  - system.na1.netsuite.com
  - system.na2.netsuite.com
  - sandbox.netsuite.com

**Note**: After applying any configuration changes, including changes to the Domain Whitelist, or Certificates, the user must log out and log in again to refresh the updated settings to the device.

SCIS Mobile Certificate

- **ID**: customrecord_ns_pos_certificate
- **Description**: This custom record stores the list of authorizing certificates. As certificates go out of date, you must add updated certificates to the list. After applying any configuration changes, the user must log out and log in again to refresh the updated settings to the device.

Cash Drawer Management

SCIS Store Safe Account

- **ID**: custrecord_ns_pos_location_safeaccount
- **Description**: Account used for tracking the amount in the store safe. You must define a store safe account for each point-of-sale location. Set this field on the Location record.

SCIS Cash Drawer Difference

- **ID**: custrecord_ns_pos_location_diffaccount
- **Description**: A custom field on location records. For each location that uses SCIS, you must select the account to use when there is a discrepancy between the amount in the cash drawer and the amount entered in SCIS for the Closing Drawer transaction.

SCIS Register

- **ID**: customrecord_ns_pos_registers
- **Description**: (Required for Advanced Cash Management) A custom record that must be configured for each cash drawer and printer combination used at the retail store.

SCIS Shift

- **ID**: customrecord_ns_shifts
Description: (Advanced Cash Management) A custom record that is created automatically each time a sales associate opens a shift in SCIS.

Customer Profile

To configure fields that display in the Customer Profile in SuiteCommerce InStore (SCIS), modify custom searches installed by the SuiteCommerce InStore SuiteApp. The following saved searches generate fields for the customer entry form used in SCIS, and data for the Customer Profile. You can find these saved searches in NetSuite at Reports > Saved Searches > All Saved Searches. For more information about modifying any of the custom searches that impact the Customer Profile, read Modifying Saved Searches for SCIS.

For general information about the Customer Profile in SCIS, read the help topic Working with Customer Profile Information.

SCIS Customer Group (List)

- ID: customrecord_ns_pos_customergroup
- Description: Defines the group to which default customer records belong. For more information, read Default Customer.

SCIS Customer Notes Types

- ID: customrecord_ns_pos_customer_notes_types
- Description: Defines notes for different types of information associated with a customer. After an administrator has defined customer notes, sales associates can add them to the customer profile in SCIS. For more information, read Defining SCIS Customer Notes.

Customer Saved Searches

- SCIS Individual Company Form
- SCIS Individual Customer Form
- SCIS Support Calls
- SCIS Shipping Status List
- SCIS Transactions Detail
- SCIS Transactions Totals
- SCIS Purchases and Returns
- SCIS Purchase Breakdown

SCIS Individual Company Form

- ID: customsearch_ns_pos_company_customer
- Description: Defines fields for company customers on the customer entry form in SCIS. For more information, see Configuring the Customer Entry Form.

SCIS Individual Customer Form

- ID: customsearch_ns_pos_individual_customer
- **Description**: Defines fields shown for individual customers on the Customer Profile in SCIS. For more information, see *Configuring the Customer Entry Form*.

**SCIS Support Calls**
- **ID**: customsearch_ns_pos_supportcalls
- **Description**: Returns the information that is used on the Customer Profile in the timeline to show Support Calls.

**SCIS Shipping Status List**
- **ID**: customsearch_ns_pos_shipping_status
- **Description**: Returns the information that is used in the Customer Profile timeline on the Shipments Tabs.

**SCIS Transactions Detail**
- **ID**: customsearch_ns_pos_transactions
- **Description**: Returns the information that is used in the Customer Profile on the TimeLine.

**Warning**: Do not modify this saved search. Changing the ID or removing fields from the default search may cause errors in the Customer Profile.

**SCIS Transactions Totals**
- **ID**: customsearch_ns_pos_last_transactions
- **Description**: Returns the information that is used on the Customer Profile in the Visit Count Chart.

**SCIS Purchases and Returns**
- **ID**: customsearch_ns_pos_purchases_returns
- **Description**: Returns the information that is used in the Customer Profile to generate the Purchases & Returns Chart.

**SCIS Purchase Breakdown**
- **ID**: customsearch_ns_pos_purchase_breakdown
- **Description**: Returns the information that is used in the Customer Profile to generate the Purchases Breakdown Chart.

**Discounts and Returns**

SuiteCommerce InStore (SCIS) installs the following custom fields and records that apply to discounts and returns. Configure the custom fields described below with values that make sense for your organization.

**Discount Reason**
- **ID**: custbody_ns_pos_tran_dct_reason
- **Description**: Stores the custom discount applied to an order. This custom field requires no configuration. When a custom discount is applied, this field stores the reason for the discount as
entered by the sales associate at the time of the transaction. When a custom discount is applied to the
order, the discount reason is output to this field on the custom subtab of the transaction form. When
a custom discount is applied to an item in the cart, the discount reason is output to the description
field on the transaction line (on the Items subtab). SCIS requires the sales associate to enter a reason
before a custom discount can be applied. For more information about setting up discounts, see
Configuring Discounts for more information.

SCIS Discount Reasons (List)
- **ID**: customrecord_ns_pos_dtreasons
- **Description**: Specifies a predefined list of reasons for applying a custom discount. The sales associate
can select a predefined reason for the discount, and then that selection is displayed in NetSuite on
Cash Sales and Invoices. SCIS requires a sales associate to select a reason before a custom discount
can be applied. This custom field is installed with default values, however, you can modify the values in
the list. For more information, see Discount Reasons.

SCIS Return Reasons (List)
- **ID**: customrecord_ns_pos_return_reasons
- **Description**: Enables you to define reasons for an item return. A sales associate must select one
of these reasons when performing a return or exchange. For more information, see Returns and
Refunds.

Employee

The following custom fields apply to employee records used with SuiteCommerce InStore (SCIS). You can
find these custom fields and records in NetSuite, and then modify them as needed. Read the following for
more information.

SCIS Access Code
- **ID**: custentity_ns_pos_accesscode
- **Description**: Configure this custom field on the employee record. You must enter a pass code in this
field for employees who have roles authorized to perform restricted operations. This field is associated
with roles and permissions. For more information, see Manager Override.

SCIS Locations
- **ID**: custentity_ns_pos_employee_scislocations
- **Description**: This is a custom list on the employee record. The options in the list are sourced from the
list of store locations that you configured in NetSuite. If you have employees that work at more than
one location, selecting SCIS locations is a one-time setting when configuring a new Employee. For
more information, read Working with Employees in Multiple SCIS Locations.

SCIS User Settings
- **ID**: customrecord_ns_pos_defaultcustomer
- **Description**: This custom record defines critical user settings, such as Default Customer record,
default sales rep, and cash drawer account. One of these custom records is automatically created for
each employee, however configuration is required. For more information, see SCIS User Settings.
SCIS Permission

- **ID**: customrecord_ns_pos_permission
- **Description**: Stores the permission required for an action. Each permission has a name, a description, the roles that can perform the action, and the roles that require authorization to perform the action. A POS Permission custom record exists for each action that requires authorization. All actions that require authorization are logged on the SCIS Audit Log. For more information, see SuiteCommerce InStore Permissions.

Item

The following custom fields apply to item records used with SuiteCommerce InStore (SCIS). You can find these custom fields in NetSuite, and then modify them as needed.

SCIS Gift Card

- **ID**: custitem_ns_pos_physical_item
- **Description**: Used exclusively for gift certificates, this check box differentiates a gift certificates in card form from digital gift certificates. You can access this field on gift certificate item records in NetSuite. For more information, see Configuring Gift Certificates for SCIS.

Additional UPCs

- **ID**: custitem_ns_pos_additional_upcs
- **Description**: Defines additional UPC codes for items. You can enter a comma separated list of UPC codes in this custom field on item records. For more information, see Configuring Item Records for SCIS.

Location

SuiteCommerce InStore (SCIS) uses the standard location record along with the custom records described below to define various settings such as store locations, available shipping methods and discounts. For step-by-step instructions on setting up standard location records and custom records related to location settings, read Configuring Locations for SCIS.

SCIS Settings

- **ID**: customrecord_ns_pos_location_settings
- **Description**: Defines settings for: shipping methods, predefined discounts, custom discounts, and saved searches. Define specific locations where certain shipping methods, discounts, and saved searches are available. Also, use this custom record to configure location-specific printer settings and custom attributes, and more.

Note: After applying any changes to the Printer Settings, the sales associate must log out of SCIS on the mobile device, and then log in again to refresh the updated settings. For changes to printer settings, the user must also select the printer again from the main menu in the SCIS for iOS app.

For more information, see SCIS Settings.
SCIS Custom Attributes

- **ID**: customrecord_ns_pos_extra_attrs
- **Description**: Use these records to define attributes for customizing certain areas of SCIS. For more information, read Creating SCIS Custom Attributes.

SCIS Service Hours

- **ID**: custrecord_ns_pos_servicehours
- **Description**: Displays service hours for your store location in the Nearby Stores subtab on product display pages. This is a custom field on the Location record in NetSuite. Setting this field is optional.

SCIS Location Distance

- **ID**: customrecord_ns_pos_locationdistance
- **Description**: Defines the distance between store locations. The field shows on the nearby stores tab on the product display page. For more information, see SCIS Location Distance.

Default Order Location

- **ID**: custrecord_ns_pos_default_so_location
- **Description**: Defines the location where sales orders should be fulfilled. You can set the location of the warehouse where SCIS orders are fulfilled. Applies to delivery and pickup orders created through SCIS. Sales associates cannot access this setting from the SCIS user interface, this location is automatically set on sales order transactions for fulfillment purposes. Configure this field on the Location record.

SCIS Store Safe Account

- **ID**: custrecord_ns_pos_location_safeaccount
- **Description**: Defines the account you use to track the amount in your store safe. You must define a safe account for each point-of-sale location. Set this field on the Location record.

Custom Searches for Location

The following saved searches generate location information for SCIS. You can modify these searches to meet your business needs, see Modifying Saved Searches for SCIS.

To modify the locations displayed in SCIS, you must edit the CustomConfiguration.js file. For more information, see Customize Location Display.

SCIS Inventory Locations

- **ID**: customsearch_ns_pos_inventory_locations
- **Description**: Saved search that returns the information used on the All Inventory tab on the Product Display Page.

SCIS Locations

- **ID**: customsearch_ns_pos_locations
- **Description**: Saved search that returns the list of locations you have configured in NetSuite. These locations are displayed on the Nearby Stores subtab in SCIS.
Opening and Closing Drawer

SuiteCommerce InStore (SCIS) uses custom transaction types and custom records to track opening drawer and closing drawer transactions. Custom transaction types track the movement of cash from the store safe account into a cash drawer and from the cash drawer back to the safe. A store safe account custom record is created for each point-of-sale location. The cash drawer difference account tracks any discrepancy found in the process of reconciling the amount entered by a sales associate during the closing drawer transaction.

- Custom Transaction Types
- Custom Records for Opening and Closing Drawer Transactions

Custom Transaction Types

Custom transactions types are used internally in NetSuite for Opening Drawer and Closing Drawer transactions, which are specific to SCIS. The following custom transaction types are added to your NetSuite account when you install SCIS.

**SCIS Opening Drawer**

- **ID:** customtransaction_ns_pos_initial_loan
- **Description:** Transaction type used to record each opening drawer that is performed by a sales associate at the beginning of a shift.

**SCIS Closing Drawer**

- **ID:** customtransaction_ns_pos_end_of_day
- **Description:** Transaction type used to record the closing drawer transaction that is performed by a sales associate at the end of a shift.

Custom Records for Opening and Closing Drawer Transactions

The custom records described below appear on the location record. You must set a safe account and cash drawer difference account for each point-of-sale location. For instructions on setting up location records for SCIS, see Configuring Locations for SCIS.

For more information about how the custom records are used, see SCIS Cash Drawer Management.

**SCIS Cash Drawer Difference**

- **ID:** custrecord_ns_pos_location_diffaccount
- **Description:** Use this field on the Location record to select the account where funds should be allocated when there is a discrepancy between the amount in the cash drawer and the amount entered in SCIS for the Closing Drawer transaction. You must define a cash drawer difference account for each point-of-sale location.

**SCIS Open Drawer Reason**

- **ID:** customrecord_ns_pos_opendrawerreasonlist
Description: Administrators use this record to define reasons for opening the cash drawer. When a sales associate opens the cash drawer using the No Sales option, he or she must select a reason from the list. For more information, read SCIS No Sale. Read also, SCIS Cash Drawer.

Payments

The following custom lists and records are required for accepting payments with SuiteCommerce InStore (SCIS). You can find these custom lists and records in NetSuite. Configuration is required.

SCIS Quick Cash Denominations

- **ID**: customrecord_ns_pos_quickcash
- **Description**: Enables you to define the denominations that appear on Quick Cash buttons in SCIS. Sales associates use Quick Cash buttons when accepting cash for purchases. You can also configure various actions associated with each payment method including which payment methods require a signature, or can trigger the cash drawer to open. For more information, see Modifying Cash Payment Denominations.

SCIS Gateway

- **ID**: customrecord_ns_pos_gateway
- **Description**: Used in credit card payment processing, this record must be defined to associate a location with a payment gateway. For more information, see Configuring SCIS Gateway Records.

SCIS Payment Method

- **ID**: customrecord_ns_pos_payment_method
- **Description**: Defines payment methods used by SuiteCommerce InStore, such as cash and credit card. Configuring a custom record for each payment method is required. For more information, see Configuring SCIS Payment Methods for more information.

SCIS Payment Device

- **ID**: customrecord_ns_pos_emv_device
- **Description**: Defines an EMV payment device for use with SuiteCommerce InStore. Configuring a custom record for each EMV payment device is required. For more information, see Configuring EMV Payment Services for SCIS.

Printer Settings

The following custom records are included to store printer settings for SCIS. Note that SCIS only supports specific paper sizes. Do not enter additional paper sizes. For more information, read Setting Up Receipt Printers for SCIS.

SCIS Available Printers

- **ID**: customrecord_ns_pos_printers
- **Description**: List of known devices for printing receipts. You must configure a custom record for each printer associated with a point-of-sale device configured for SCIS.
SCIS Paper Size

- **ID**: customrecord_ns_pos_paper
- **Description**: SCIS only supports the following paper sizes: A4 or Letter for Air print, and 2 inches or 3 inches for Star printers.

SCIS Printing Settings (AirPrint)

- **ID**: customrecord_ns_pos_printing_airprint
- **Description**: Stores preferences for the AirPrint receipt printer. Including the printer name, paper size, and SCIS settings record.

SCIS Printing Settings (Star)

- **ID**: customrecord_ns_pos_printing_star
- **Description**: Stores preferences for the Star receipt printer. Including the printer name, paper size, and SCIS settings record.

QuickAdd Keys

QuickAdd keys are used in SuiteCommerce InStore (SCIS) to add items to a transaction. Configuration of QuickAdd Groups and QuickAdd Keys is required. For more information, see Configuring QuickAdd Keys.

SCIS QuickAdd Group

- **ID**: customrecord_ns_pos_hotkeygroup
- **Description**: List that defines the tabs that appear in the QuickAdd bar in the main application screen. You can configure QuickAdd Groups as filters to hide or expose products based on criteria such as user role, location, or customer. To define a QuickAdd Group, go to Customization > Lists, Records, & Fields > Lists. Click SCIS QuickAdd Group, and then add or modify values in the list.

SCIS QuickAdd Key

- **ID**: customrecord_ns_pos_hotkey
- **Description**: Used to configure QuickAdd Keys. You configure one custom record for each QuickAdd Key associated with a product for sale. To define a QuickAdd Key, go to Customization > Lists, Records, & Fields > Record Types.

Sales Reports

The following saved searches affect the data in the sales report available to sales associates logged in to SuiteCommerce InStore (SCIS). You can create modified saved searches to create sales reports for viewing in NetSuite. For more information, see Custom SCIS Sales Reports.

SCIS Retail Tenders

- **ID**: customsearch_ns_pos_retail_tenders
- **Description**: Returns the information that is used in Sales Reports, on the Retail Tenders Chart.

### SCIS Sales by Department
- **ID**: customsearch_ns_pos_sales_by_department
- **Description**: Returns the information that is used in the Sales Report, on the Sales by Class Chart.

### SCIS Daily Sales
- **ID**: customsearch_ns_pos_daily_sales
- **Description**: Returns the Net Sales information that is displayed on the Sales Report in the SuiteCommerce InStore User Menu.

### SCIS Receipts
SuiteCommerce InStore (SCIS) uses the following custom record and custom list so that you can customize receipts. For more information about setup and configuration, see [Advanced Receipt Templates for SCIS](#).

#### SCIS Receipt Template
- **ID**: customrecord_ns_pos_receipt_templates
- **Description**: SCIS supports the Advanced PDF/HTML Templates feature for customizing receipts. The SCIS Receipt Template custom record links your customized receipt template to SCIS. NetSuite recommends that you use the template installed by SCIS as the basis for your custom receipt templates. You can create as many Advanced HTML/PDF templates as desired. For more information, read [Advanced Receipt Templates for SCIS](#).

#### SCIS Receipt Template Type
- **ID**: customlist_ns_pos_template_type
- **Description**: The SCIS Receipt Template Type is a custom list with two entries: **Print** and **Email**. You can create as many different SCIS Receipt Template records as you want, but there are only two template types.

⚠️ **Important**: Do not add or remove values from this list.

### Transactions
The following custom fields are associated with transactions entered using SuiteCommerce InStore (SCIS). Data displayed in custom fields on transaction records in NetSuite provide more information about each transaction.
- **SCIS Transaction Line-Item Fields**
- **Custom Subtab on Transaction Records**
- **Billing Subtab on Transaction Records**
- **Other Custom Lists and Records for Transactions**
SCIS Transaction Line-Item Fields

Transaction line fields are used to store and retrieve information about the line items within a transaction. These fields are typically displayed on the Items subtab on Invoices and Cash Sales generated from SCIS.

Void Quantity
- **ID**: custcol_ns_pos_voidqty
- **Description**: Stores the quantity of a voided item on an order. This field is used when you add an item back to the order, so the item retains its original quantity.

Void %
- **ID**: custcol_ns_pos_voidpct
- **Description**: Stores the ID for the percent discount applied to a line item voided from an order. The field is blank if the discount is a fixed amount.

Voided Item
- **ID**: custcol_ns_pos_voideditem
- **Description**: Stores the ID of the item voided in a transaction.

Returned Quantity
- **ID**: custcol_ns_pos_returnedqty
- **Description**: Stores the quantity of items returned. Used on validated returns to calculate returnable items.

SCIS Return Reason (TX)
- **ID**: custcol_ns_pos_returnreason
- **Description**: Stores the reason for the return. If an item is returned, a reason must be set.

Unvalidated Return
- **ID**: custcol_ns_pos_unvalidated_return
- **Description**: Used during a return transaction, this field stores the return validation setting. This hidden field applies to an item on a sales transaction. For more information, see Returns and Refunds.

Custom Subtab on Transaction Records

The following fields show on the Custom subtab on sales transactions. The custom fields described below may or may not be populated based on the type of transaction submitted in SuiteCommerce InStore. For example, if a credit memo was not issued, the SCIS Returns Credit Memo field remains empty.

SCIS Returns Credit Memo
- **ID**: custbody_ns_pos_returns_creditmemo
- **Description**: Stores information about the credit memo used in a return transaction when another item was purchased. This field is populated on an invoice form generated from an exchange transaction. It links the invoice with the return by showing the credit memo transaction number.

**SCIS Created From**
- **ID**: custbody_ns_pos_created_from
- **Description**: Used to create a reference to the original transaction. This field applies to sales transactions, for example, an invoice created from a sales order.

**Sales Associate**
- **ID**: custbody_ns_pos_sales_associate
- **Description**: Stores the sales associate's name on the transaction.

**POS Status**
- **ID**: custbody_ns_pos_transaction_status
- **Description**: Defines the status of a transaction. The POS Status field appears on all transactions entered with SCIS. This field contains values that are not part of the standard transaction record. This is a read-only field that is set automatically as transactions are created and processed with SCIS. It requires no configuration. For more information, see POS Status Definitions.

**Billing Subtab on Transaction Records**

The following fields are displayed on the Billing subtab of sales transactions.

**Total Tendered**
- **ID**: custbody_ns_pos_total_tendered
- **Description**: Stores the total amount of money accepted from the customer to complete a transaction. This field applies to sales and customer payments.

**Credit Card Signature**
- **ID**: custbody_ns_pos_signature_image
- **Description**: Stores the electronic signature provided by the customer after performing a credit card transaction.

**Change Due**
- **ID**: custbody_ns_pos_change_due
- **Description**: Lists the amount of change due when performing a cash transaction.

**Suspended Total**
- **ID**: custbody_ns_pos_suspended_total
- **Description**: Stores the total for each suspended transaction. This field stores the total of the transaction at the moment when the transaction was suspended, and displays it in the list of
suspended orders. For more information, about suspended transactions, see the help topic Saving an Order.

Other Custom Lists and Records for Transactions

The following custom lists and records are also associated with transactions, but they do not appear on the transaction record.

SCIS Transaction Status

- **ID**: customlist_ns_pos_transaction_status
- **Description**: Used internally to store the status of transactions generated by SCIS. The values in this list are displayed in the POS Status field on transactions. Do not modify the values in this list. The POS Status field is updated automatically as transactions are submitted and processed.

SCIS Audit Log

- **ID**: customrecord_ns_pos_audit_log
- **Description**: Stores information about every transaction generated from SuiteCommerce InStore related to authorization requests based on permissions.

  To view the audit log, go to Customization > Lists, Records, & Fields. Next, find SCIS Audit Log in the list. Then, click List in that row. You can click a column header on the list page to sort data. For more information, see SCIS Audit Log.

SCIS Open Credit Memos

- **ID**: customsearch_ns_pos_open_credit_memos
- **Description**: Saved search that returns Open Credit Memos for a specific customer. Supports the refund to Credit Memo feature.

SCIS Transaction Notes Types

- **ID**: customrecord_ns_pos_notes_types
- **Description**: This record is configured by administrators, and then used by sales associates to capture additional information on orders. For more information for administrators about configuring SCIS Transaction Note Types, read Defining SCIS Transaction Notes.

Fallback Custom Records

This section includes reference information about the custom records used for SCIS Fallback. Read this section to learn about how the custom records are used with SCIS Fallback and reconciliation. To view or configure custom fields in NetSuite, go to Customization > Lists, Records, & Fields, and then make a selection from the list.

SCIS Fallback Settings

- **ID**: customrecord_ns_pos_fallback_settings
- **Description**: Configuring the SCIS Fallback Settings record is the first step in setting up Fallback. For more information, read [SCIS Fallback Settings](#).

**SCIS Fallback Transaction**

- **ID**: customrecord_ns_pos_fallback_proto_tran
- **Description**: This record captures all the data from a transaction submitted in Fallback. This is the parent record to the SCIS Fallback Line and SCIS Fallback Payment records. For more information, read [Transaction Creation Process](#).

**SCIS Fallback Line**

- **ID**: customrecord_ns_pos_fallback_line
- **Description**: This record displays data from each line of each transaction submitted using Fallback. This record is a child record of the SCIS Fallback Transaction record. You can view data from SCIS Fallback Line records on SCIS Fallback Transactions. For more information, read [Fallback Data Delivery](#).

**SCIS Fallback Payment**

- **ID**: customrecord_ns_pos_fallback_payment
- **Description**: This record captures payment information from orders submitted using SCIS Fallback. This is a child record of the SCIS Fallback Transaction record. For more information, read [SCIS Fallback Payment Methods](#).

**SCIS Fallback Session**

- **ID**: customrecord_scis_fallback_session
- **Description**: The SCIS Fallback Session record in NetSuite represents each new session created each time a sales associate logs in to Fallback. For more information, read [SCIS Fallback Session and SCIS Transmission Batch Records](#).

**SCIS Fallback Transmission Batch**

- **ID**: customrecord_scis_fb_transmission_batch
- **Description**: SCIS Transmission Batch records are grouped according to session and linked to SCIS Fallback Session records.