Enhanced Validations and Defaulting
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- Do you need more examples?
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Enhanced Validations and Defaulting

To get you started with using Enhanced Validations and Defaulting, read the following topics:

- Enhanced Validations and Defaulting Overview
- Enhanced Validations and Defaulting Process Flow
- Enhanced Validations and Defaulting SuiteApp Availability
- Installing the Enhanced Validations and Defaulting SuiteApp
- Setting Up Enhanced Validations and Defaulting
  - Required Permissions for Enhanced Validations and Defaulting
  - Creating Item Sets
  - Enabling the Prevent Negative Inventory Preference
  - Setting Default Discounts
- Enabling Validations on Transactions
  - Enabling Item Set Validation
  - Enabling Negative Inventory Validation
  - Enabling Default Discounts
- CSV Imports for Enhanced Validations and Defaulting

Enhanced Validations and Defaulting Overview

The Enhanced Validations and Defaulting SuiteApp is designed to implement item and inventory validations on sales transaction and inventory adjustment records. The SuiteApp includes the following key features that you can use separately or in combination on sales and inventory adjustment transactions:

- **Item Set Validation** - Assigns items to different categories and applies restrictions when selling items to a customer group
- **Negative Inventory Validation** - Creates restrictions when you enter an item quantity that is more than the on-hand quantity of items across locations. The system warns you that the item quantity entered will result to a negative inventory. If the Prevent Negative Inventory preference is enabled, you cannot save any transaction that includes an item with a negative inventory.
- **Default Discounts** - Applies a default header-level discount for a specific customer or customer group.

The following table lists the transactions available for each validation type:

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Validation Types</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Item Set Validation</td>
<td>Negative Inventory Validation</td>
<td>Default Discounts</td>
<td></td>
</tr>
<tr>
<td>Cash Sale</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Invoice</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Sales Order</td>
<td>Y</td>
<td>Y</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Work Order</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
<td></td>
</tr>
</tbody>
</table>
Enhanced Validations and Defaulting Process Flow

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Validation Types</th>
<th>Negative Inventory Validation</th>
<th>Default Discounts</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Item Set Validation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transfer Order</td>
<td>N</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Inventory Adjustment</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
</tbody>
</table>

For more information about the validation types, see [Enabling Validations on Transactions](#).

Enhanced Validations and Defaulting Process Flow

The diagram shows the process flow for the different key feature validations of Enhanced Validations and Defaulting SuiteApp.

Negative Inventory Validation validates the inventory in the location selected for the added line-item. If the item quantity entered is more than the on-hand stock in the selected location, the system displays a message that warns you of the negative inventory for the item. If the Prevent Negative Inventory preference is enabled, you cannot save the transaction. Otherwise, you can save the record. For more information, see [Negative Inventory Validation](#).
Note: In accounts where the Multi-Location Inventory feature is enabled, the system validates the inventory in the locations specified on the transaction. For more information, see the help topic Multi-Location Inventory.

Default Discounts automatically applies the header level discount that you set for a customer or customer group. Discounts are applied on transactions based on the discount level available for the customer or customer group. For more information about the application of discounts, see Default Discounts Scenarios.

In Item Set Validation, items that are restricted for a customer group cannot be added as line-item. The system validates the item restrictions for the selected customer and prevents saving of transactions. For more information, see Enabling Validations on Transactions.

Enhanced Validations and Defaulting SuiteApp Availability

The Enhanced Validations and Defaulting SuiteApp is a public and managed SuiteApp that is automatically updated whenever enhancements or new features are added.

For instructions on installing the SuiteApp, see Installing the Enhanced Validations and Defaulting SuiteApp.

Installing the Enhanced Validations and Defaulting SuiteApp

Note: Only administrators can install this SuiteApp.

To install the Enhanced Validations and Defaulting SuiteApp:

1. Go to Customization > SuiteBundler > Search and Install Bundles.
2. On the Search and Install Bundles page, use the following information to search for the SuiteApp:
   - Bundle Name: Enhanced Validations and Defaulting
   - Bundle ID: 213294
3. Click the Enhanced Validations and Defaulting link to display its Bundle Details page.
   - To review the documentation for the SuiteApp, click the Documentation link.
   - The Overview subtab displays the abstract and description of the SuiteApp.
   - The Components subtab lists bundle objects, including their custom script IDs, referencing objects, and lock status.
   - For more information, see the help topic Bundle Details.
4. Click Install.
   - If asked, indicate your agreement to allow NetSuite to automatically upgrade the SuiteApp in your account when new updates become available.
   - During the installation, you can click Refresh to get the latest status.
Feature Dependencies

After installing the SuiteApp, you must enable the NetSuite Inventory feature. The feature enables tracking of item quantities for the validation of item sales. To enable this feature, go to Setup > Company > Enable Features. Click the Items & Inventory subtab, then check the box for Inventory.

⚠️ **Important:** If you want to use Negative Inventory Validation for work orders, enable Work Order, also under the Items & Inventory subtab.

For more information, see the help topic Items and Inventory Features.

Required Permissions for Enhanced Validations and Defaulting

The following table lists the minimum permission levels required to use Enhanced Validations and Defaulting:

<table>
<thead>
<tr>
<th>Permissions</th>
<th>Minimum Permission Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRM Groups</td>
<td>View</td>
</tr>
<tr>
<td>Custom Record Entries</td>
<td>View</td>
</tr>
<tr>
<td>Customers</td>
<td>View</td>
</tr>
<tr>
<td>Items</td>
<td>View</td>
</tr>
<tr>
<td>Locations</td>
<td>View</td>
</tr>
</tbody>
</table>

Setting Up Enhanced Validations and Defaulting

Read the following topics to learn more about the required records you must set up before you can apply any validation to a transaction:

- Creating Item Sets
- Enabling the Prevent Negative Inventory Preference
- Setting Default Discounts

For instructions on how to enable the validations on a transaction, see Enabling Validations on Transactions.

Creating Item Sets

Before you create an item set validation record, you must first create an item set. An item set contains items that can be excluded from a customer group. Excluded items are items that are not available to sell to a customer that belongs to a customer group. If the item set is selected to exclude from a customer group, the items that belong to the specific item set will not be available for customers included in the customer group.
When excluded, the items are not available to be sold to a customer that belongs to the customer group.

- If an item set is excluded from a customer group, the items that belong to the item set are not available to customers included in the customer group.

To sell the excluded items to a specific customer, you must remove the customer from the customer group.

**To create an item set:**

1. Go to Lists > Enhanced Validations > Item Set > New.
2. In the Name field, specify a name for the item set. Ensure that you use a descriptive name to help you identify the items included in the item set.
   
   **Important:** The item set name must be unique.

3. Ensure that you clear the Inactive box to keep the item set record as active.
4. In the Items To Include In The Item Set field, select the items that you want to include in the item set.
   
   If the item set that you created is excluded from the customer group, the included items become restricted from the customer group.

   **Note:** You can select an inventory item, assembly item, or item group to include in the item set.

   To select multiple items, press the Ctrl key on your keyboard as you click the items.

5. Click Save.

**To exclude an item set from an existing customer group:**

1. Go to Lists > Relationships > Groups.
2. Search for the customer group to which you want to assign an excluded item set.
3. Click the Edit link for the record.
4. In the Customer Group record, select an item set in the Item Sets Excluded From Customer Group field. Items that belong to the selected item set become restricted for the specific customer group.
5. Click Save.

   **Note:** You can also exclude an item set when you create a new customer group record. To exclude items in the new customer group record, select the item set in the Item Sets Excluded From Customer Group before saving the record.

**Enabling the Prevent Negative Inventory Preference**

Use the Prevent Negative Inventory preference in Negative Inventory Validation.

After you enable this preference, you cannot save any transaction that includes an item with a negative inventory. If this preference is not enabled, a warning message appears when you try to save the transaction with a negative inventory.
To enable the Prevent Negative Inventory preference:

1. Go to Setup > Company > General Preferences.
2. Click the Custom Preferences subtab.
3. In the Enhanced Validations and Defaulting section, check the Prevent Negative Inventory box.

   **Note:** If the preference is not visible, follow the instructions in Installing the Enhanced Validations and Defaulting SuiteApp.

4. Click Save.

Setting Default Discounts

To use the Default Discounts feature of Enhanced Validations and Defaulting SuiteApp, you must set a default discount for customers or customer groups. Default discounts are automatically applied when you sell items to the customer or customer group. For more information about default discounts, see Default Discounts.

Refer to the following topics for instructions on how to set default discounts for customers:

- Setting Default Discounts for Customers
- Setting Default Discounts for Customer Groups

Setting Default Discounts for Customers

To set a default discount on a customer record:

2. Specify the details for the customer record. See the help topic Customers.
3. In the Classification field group, select the applicable discount in the Default Discount field.
   
   To create a new discount, see the help topic Configuring Discounts.
4. Click Save.

   **Important:** Read the Default Discounts topic. Certain scenarios may result to different default discounts being applied to customers on transactions.

Setting Default Discounts for Customer Groups

Default discounts for customer groups are automatically applied to all customers that belong to the customer group.

To set a default discount for a customer group:

2. Create a customer group. For instructions, see the help topic Working with Groups.
3. In the Default Discount field, select the applicable discount for the customer group.
   
   To create a new discount, see the help topic Configuring Discounts.
4. Click Save.

Enabling Validations on Transactions

After setting up the validations, you can apply any of the validations separately or in combination on sales transactions and inventory adjustments. When you create or use a specific transaction that has an enabled validation type, the validation that you set applies to the transaction.

Read the following topics for instructions on how to enable the validations in transactions:

- Enabling Item Set Validation
- Enabling Negative Inventory Validation
- Enabling Default Discounts

Item Set Validation

This validation enables you to apply restrictions when selling items to a customer group. You can select which items are restricted to a specific customer group during the setup for Enhanced Validations and Defaulting SuiteApp.

When adding line items on a transaction, the item set validation applies when one or both conditions occur:

- The item belongs to an item set that is excluded for the customer group.
- The customer belongs to a customer group that is restricted to purchase the item.

For more information about applying customer restrictions, see Setting Up Enhanced Validations and Defaulting.

Negative Inventory Validation

On supported transactions, this feature restricts the entry of an item quantity that is more that on-hand inventory across locations.

Multi-Location Inventory Feature is Enabled

If the Multi-Location Inventory feature is enabled in your account, you can select different locations for each line item that you are add to the transaction. The system then validates the inventory in each specified location to verify enough stock for the line item.

If the item quantity entered results in negative inventory, the Negative Inventory Validation prevents saving of the record. A message appears to show how many stock there is currently on-hand for the item. This occurs when the Prevent Negative Inventory preference is enabled for Negative Inventory Validation.

When this preference is not enabled, you can save the transaction even with negative inventory. The system displays a warning message to show the negative inventory. To review information about this preference, see Enabling the Prevent Negative Inventory Preference.

Multi-Location Inventory Feature is Not Enabled

When the Multi-Location Inventory feature is not enabled, the system validates inventory across all locations when you add line items. A message appears when you enter an item quantity that is more
Enabling Validations on Transactions

than the on-hand inventory. The item quantity must be changed before you can add the item to the transaction.

A warning message is also displayed when you add multiple items to a transaction. The message identifies which items do not have enough on-hand inventory. It also shows the number of available items for a selected location. You can then change the item quantity or select a different location for each item before you can add the item to the transaction.

For more information about Multi-Location Inventory, see the help topic Multi-Location Inventory.

Default Discounts

Default Discounts enables you to assign header-level discounts for a specific customer or customer group. The default discount automatically applies to the customer on supported transactions.

Default Discounts Scenarios

By default, the discounts you set on the customer or customer group record automatically applies. However, some scenarios may occur that may change the default discounts applied to customers. Read the following examples to better understand how default discounts are applied:

Scenario 1: Customer has default discount and also belongs to the customer group with default discount

Default discounts on the customer record and customer group are both assigned to the customer. For this scenario, the system applies the default discount set on the customer record.

Scenario 2: Customer belongs to two or more customer groups with default discounts

If there is no default discount set on the customer record, the system applies the default discount from the customer group with the higher percentage or value.

For example, Customer A belongs to Customer Groups X and Y. Customer Group X has a default discount of 25% while Customer Group Y has 40%. The system applies the default discount of Customer Group Y.

If the applicable default discounts are in currency value, the system applies the discount of the customer group with the higher value.

Scenario 3: Customer is a parent subsidiary and default discount on customer record is for Child Subsidiaries

In this scenario, the default discounts selected on the customer record is for child subsidiaries. On a sales transaction, no default discounts apply for the parent subsidiary customer because the default discounts set is for a child subsidiary.

Scenario 4: Customer is a parent Subsidiary and belongs to two customer groups with different subsidiary discounts

In this scenario, Customer B is a parent subsidiary that belongs to Customer Groups F and G. The default discount for Customer Group F is 50% discount for child subsidiaries. Customer Group G has a default discount of 40% for parent subsidiaries.

In this example, no discount is applicable for parent subsidiary Customer B because the customer group with the higher default discount percentage (Customer Group F) sets discounts only for child subsidiaries.

Scenario 5: Customer is a parent subsidiary and belongs to customer groups with child subsidiary discounts

If there is no default discount set on the customer record, no discounts can be applied for the customer on the transaction.
Enabling Validations on Transactions

The same result as in this scenario applies if a customer is a child subsidiary (with no discounts set on its record) and the customer group it belongs to have discounts only for parent subsidiaries.

**Scenario 6: Customer belongs to two or more customer groups with mixed default discounts in percentage and currency value**

This scenario illustrates a case where the customer groups where a customer belongs to – differ in default discounts. For example, Customer C is a parent subsidiary that belongs to Customer Groups J and K that both have default discounts for parent subsidiaries. Customer Group J has a default discount of 50% and Customer Group K has a default discount of 100USD.

In this example, the system applies the discount from Customer Group J because the discount is in percentage. The percentage discount is always applied to transactions regardless of whether it has the lesser value in actual computation.

For a visual representation of the process, see Enhanced Validations and Defaulting Process Flow.

Enabling Item Set Validation

When you enable Item Set Validation, validation applies to all item sets you created in the Create Customer Group page. To review, see Creating Item Sets.

**To enable item set validation:**

2. On the Enable Validations/Default Discount page, select Item Set Validation in the Transaction Validation Type field.
3. In the Transactions with Validation/Default Discount field group, select the transactions where you want the validation to apply.
   
   **Note:** The item set validation for the selected transactions applies to all item sets that you created.
4. Click Save.

Enabling Negative Inventory Validation

**Important:** The Enhanced Validations and Defaulting SuiteApp displays inventory warnings for negative inventory. To avoid duplicate alert messages, you should disable the NetSuite preference for inventory level warnings. For more information about disabling this NetSuite feature, see the help topic Inventory Level Warnings.

**To enable negative inventory validation:**

2. On the Enable Validations/Default Discount page, select Negative Inventory Validation in the Transaction Validation Type field.
3. In the Transactions with Validation/Default Discount field group, select the transactions where you want the validation to apply.
4. Click Save.
Enabling Validations on Transactions

**Note:** The system validates on-hand inventories for the selected locations in line-item level. If there is no selected location in line-item level, the system then validates on-hand inventories of selected locations on the transaction.

If there is no location selected on a transaction, the system validates on-hand inventories across all locations. This occurs if location is not required on the transaction.

To prevent users from saving a transaction that includes an item with negative inventory, enable the Prevent Negative Inventory preference. For more information, see Enabling the Prevent Negative Inventory Preference.

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## Enabling Default Discounts

**To enable default discounts:**

2. In the Enable Validations/Default Discount page, select **Default Discounts** in the **Transaction Validation Type** field.
3. In the Transactions with Validation/Default Discount field group, select the transactions where you want the validation to apply.

**Note:** The default discount set for a selected transaction applies to all customers and customer groups with a specified default discount. For more information, see Setting Default Discounts.

4. Click **Save**.

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### CSV Imports for Enhanced Validations and Defaulting

The Enhanced Validations and Defaulting SuiteApp supports CSV imports for item sets and transaction records with enabled validations.

When you use CSV Import for Enhanced Validations and Defaulting, ensure that the SuiteScript that triggers duplicate records is enabled to prevent importing duplicate validation records into your account. For more information about enabling the SuiteScript, see the help topic Setting CSV Import Preferences.

For more information about CSV Imports, see the help topic Importing CSV Files with the Import Assistant.