Order Fulfillment
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Order Fulfillment Automation

The automation features available for order fulfillment in NetSuite are part of the Advanced Order Management module included in NetSuite. Automation lets you configure NetSuite to run some processes in the order fulfillment workflow automatically in the background. When the Automatic Location Assignment (ALA) feature is enabled, you can automate the assignment of fulfillment locations to sales order lines according to predefined business rules. When the Fulfillment Request feature is enabled, you can automate the creation of fulfillment requests.

Automation Overview

Use order fulfillment automation in NetSuite to do the following:

- To assign fulfillment locations to sales order lines, determined by location attributes, item attributes, and one or more location assignment rules in a configuration.
- To create fulfillment requests for locations, based on the fulfillment location entered on a sales order line.

Automation relies on the occurrence of events in the order management workflow, such as the creation of a sales order or the deletion of an item fulfillment.

Automation comes with usage and limits and this is tracked on the sales order. It is free up to a certain number of automated sales orders and then you need to purchase additional automation capacity. See Automation Capacity and Usage Fees.

Automatic location assignment can run in response to events included with the Automatic Location Assignment (ALA) feature, and events defined in a script which then call a macro. See Automatic Location Assignment Macro for more information about the macro.

Automatic Location Assignment

Automatic Location Assignment (ALA) is a feature that lets you manage how NetSuite assigns fulfillment locations to sales order lines automatically. Locations can be assigned in either of the following ways:

- **Asynchronously** – If automatic location assignment relies on business events, the process runs asynchronously. This means you can continue to work in NetSuite while the automatic location assignment engine processes sales orders in the background.
- **Synchronously** – If you run automatic location assignment with a macro, the process runs synchronously. This means that if you have configured other processes in a workflow or a script on the sales order, each process must wait until the previous one has run.

**Note:** With the macro you can trigger automatic location assignment to run in response to other events that are not included with the Automatic Location Assignment feature. See Business Events for more information about ALA events.

Any locations in your NetSuite account can be used as fulfillment locations, which can be classed as warehouses or stores, or left as undefined. Automatic location assignment fulfills orders automatically based on the items in the order and the delivery address, thereby reducing shipping costs and improving customer satisfaction.

NetSuite determines the ideal fulfillment location according to how the feature is configured. Setting up regions and locations permits you to set fulfillment locations within a specific geography as well as exclude locations. Defining automatic location assignment rules lets you choose the business criteria you
want the system to evaluate to find the ideal fulfillment location. See Automatic Location Assignment for more information about configuring the system for automatic location assignment.

For example, you might have a customer in San Diego who orders an item that is located in both northern Mexico and northern Washington State. The northern Mexico location may be closer to San Diego, but it is possible that items from that location cannot ship to San Diego or the cost may be prohibitive. Therefore, you can set up automatic location assignment to disallow fulfillment from Mexico to the United States or a specific region with the United States.

How Automatic Location Assignment Runs

Automatic location assignment can be triggered by the following:

- Business events. Business events is a framework that enables the automation of business processes such as the assignment of locations to sales order lines in an asynchronous way. See Business Events for more information.
- A script that calls a macro. The macro for automatic location assignment offers an additional way to assign fulfillment locations automatically. See Automatic Location Assignment Macro for more information.

**Note:** Business events and the macro work independently. Even if you have not configured the business events for automatic location assignment, the macro still runs.

You can also trigger automatic location assignment by clicking the Auto Assign Locations button on the sales order form.

Fulfillment Requests

The Fulfillment Request feature adds the fulfillment request transaction to your order fulfillment workflow. A fulfillment request is a demand to fulfill an order at a location. You can create a fulfillment request from a sales order after line items have a fulfillment location, the sales order status is Approved, and there is no payment hold.

When you automate fulfillment requests, NetSuite runs the fulfillment request creation process immediately after a sales order is created or after an expected ship date is reached. Similar to creating fulfillment requests manually, the sales order must be approved and there must be no payment hold before fulfillment requests are created automatically. See Fulfillment Request Creation, and Fulfillment Requests for more information.

Enabling Automation Features

Before you can automate order fulfillment, you need to enable the relevant features in NetSuite. To assign fulfillment locations automatically to lines in a sales order, you enable the Automatic Location Assignment feature. To create fulfillment requests automatically after a sales order is created, you enable the Fulfillment Request feature.

Before enabling either of the automation features, ensure the following prerequisites are in place:

- The **Location** feature is enabled. See the help topic Locations Overview.
- The **Multi-Location Inventory** feature is enabled. See the help topic Enabling the Multi-Location Inventory Feature.
- Inventory is associated with locations. See the help topic Features for Inventory and Locations.
- If you plan to use the Fulfillment Request feature, the **Pick, Pack, and Ship** feature must also be enabled. See Pick, Pack, and Ship.
If you plan to use the Automatic Location Assignment feature, make sure the **Perform Item Commitment After Transaction Entry** box is checked on the Accounting Preferences page. See the help topic **Inventory Allocation Preferences** for more information.

**Note:** The Automatic Location Assignment feature incorporates data from third-party services to calculate latitude and longitude coordinates (geolocation information) of postal codes. The geolocation information obtained for some postal codes is governed by the following terms and conditions:

- HERE/Nokia/NavTeq Terms of Use
- HERE Supplier Terms Applicable to Location Content
- Oracle Maps Enterprise Cloud Service Enterprise Hosting and Delivery Policies

To enable automation features for order fulfillment:

1. Go to Setup > Company > Enable Features.
2. Click the **Transactions** subtab.
3. To enable automatic location assignment, check the **Automatic Location Assignment** box under Shipping & Receiving. You must accept the terms of service to enable this feature.
   The Automatic Location Assignment feature requires the Multi-Location Inventory and Locations features. If not already enabled, you must enable them.
4. To enable fulfillment requests, check the **Fulfillment Request** box under Shipping & Receiving.
   The Fulfillment Request feature requires the Pick, Pack and Ship feature. If not already enabled, you must enable it.
5. Click **Save**.

When you enable the Automatic Location Assignment feature:

- The region record becomes available. You use regions to define the geographical areas in which shipping addresses are located.
- The Automatic Location Assignment subtab becomes available on the location record.
- Order management options are added to the Setup menu, enabling you to fully configure automatic location assignment.
- Additional fields become available on the item record and on the sales order record.

When you enable the Fulfillment Request feature:

- The fulfillment request record becomes available.
- If the Automatic Location Assignment feature is enabled:
  - The Daily Shipping Capacity and Total Shipping Capacity fields become available on the location record.
  - The fulfillment workload distribution (FWD) strategy becomes available in automatic location assignment rules. See **Choosing a Fulfillment Strategy** for more information.

After you enable the automation features, you need to configure them and run automation – see **Automatic Location Assignment** and **Fulfillment Request Creation**.

## Automation Capacity and Usage Fees

Order fulfillment automation is subject to usage fees and is a separate billable service in your NetSuite account. Usage fees are based on the number of sales orders that are automated with either of the following advanced order management (AOM) features in NetSuite:
Automation Overview

- **Automatic Location Assignment**
  Assigns fulfillment locations automatically to sales order lines.

- **Fulfillment Request**
  Creates one or more fulfillment requests automatically from a sales order.

**Note:** Both of these features require setup and configuration before automation runs on sales orders. See Automatic Location Assignment for more information about setting up automatic location assignment. See Fulfillment Request Creation for more information about setting up fulfillment requests.

When a sales order is automated, the system sets the **AOM Automated** field on the sales order to True. This field is used to count the number of automated sales orders in your account. The AOM Automated field is hidden by default on sales order forms, but you can customize a sales order form to show it. The AOM Automated field appears as a box on the sales order form – if it is checked, it means the sales order was automated.

Usage fees are based on the total number of automated sales orders in your account. Your account includes a complimentary tier of 5,000 automated sales orders. If you create less than 5,000 automated sales orders in a year, you do not need to pay for automated sales orders. If you create more than 5,000 automated sales orders, you must purchase additional automation capacity. To purchase additional automation capacity, contact your NetSuite account representative. The following table describes automation capacity levels and usage examples.

<table>
<thead>
<tr>
<th>Automation Capacity</th>
<th>Description</th>
<th>Usage Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 5,000</td>
<td>Provides free capacity for 5,000 automated sales orders. Included with your account.</td>
<td>If you create 4,250 automated sales orders per year, the complimentary tier of 5,000 automated sales orders is sufficient. You do not need to purchase additional capacity.</td>
</tr>
<tr>
<td>5,000</td>
<td>Provides additional capacity for 5,000 automated sales orders. Additional charges apply.</td>
<td>If you create 18,000 automated sales orders per year, you need to purchase 3 units of 5,000. The complimentary tier of 5,000 automated sales orders covers the remaining 3,000 orders.</td>
</tr>
<tr>
<td>100,000</td>
<td>Provides additional capacity for 100,000 automated sales orders. Additional charges apply.</td>
<td>If you create 212,000 automated sales orders per year, you need to purchase 2 units of 100,000 and 2 units of 5,000. The complimentary tier of 5,000 automated sales orders covers the remaining 2,000 orders.</td>
</tr>
</tbody>
</table>

The complimentary tier of 5,000 automated sales orders is renewed annually on the same date as the anniversary date of your contract with NetSuite. For example, if your contract renews on 15 March, you will get 5,000 automated sales orders for free every year on 15 March.

Automation capacity (both free and purchased) does not accumulate from year to year. If you create more than 5,000 automated sales orders, you must repurchase additional automation capacity each year according to your business requirements.

**Viewing Usage Data**

Usage data about automated sales orders is readily available in your NetSuite account. You can view the data in several ways:

- On the Billing Information page.
- In a SuiteAnalytics workbook.
Viewing Usage Data on the Billing Information Page

View the Billing Information page in your NetSuite account to see usage data related to automated sales orders.

The Advanced Order Management (AOM) features use two types of billing information figures - a corrective entry and a daily usage count. Entries for both figures appear on the Billing Information page on the days that at least one automated sales order was created. Each figure has two values - a change in quantity and a cumulative quantity.

A corrective entry is an adjustment by the system to account for changes in usage figures between the current day and the previous day on which usage data was logged in the system. The two values for a corrective entry show the following information:

- **Change in Qty** - Corresponds to the number of uncounted automated sales orders since the last day on which the system processed orders.
- **Cumulative Qty** - The sum of the change in quantity (uncounted orders from the previous day) and the cumulative total usage count from the previous day.

The daily usage count is the calculated total of usage data available in the system. The two values for a daily usage count show the following information:

- **Change in Qty** - Corresponds to the first automated sales order of the current day. This value is always 1.
- **Cumulative Qty** - The sum of the first automated sales order of the current day and the total number of orders counted from the previous day. Only the first automated sales order processed by the system on the current day is included in this figure — sales orders created later in the day are not included in this figure.

If there are no usage figures for a particular date, it means that the system did not automate sales orders on that date. For example, if your business is closed on weekends, the Billing Information page will not show AOM usage figures for weekend days.

The following screenshot illustrates how usage figures might appear on the Billing Information page. The daily usage count on 1/31/2020 (A) shows that the system has automated seven sales orders in total since the account anniversary date. (The daily usage count only includes the first automated sales order on 1/31/2020. It does not include orders created later in the day.) The corrective entry on the same day (B) shows that the system counted an additional two automated sales orders from the previous day.

To view automation usage figures

2. Under Component Usage, look for the component named “Adv Order Mgmt Automated Orders”.

Order Fulfillment
3. Note the latest figures for the corrective entry. The Change in Qty column shows the last increment in usage since the previous day.

4. Note the latest figures for the daily usage count. The Cumulative Qty column shows the latest total number of automated sales orders, excluding orders created on the date of the usage count.

**Viewing Usage Data in a SuiteAnalytics Workbook**

You can create a SuiteAnalytics workbook that shows the number of automated sales orders in a given period. To view data according to the billing period of your account, filter data by date range. Set the start date to the same date as the anniversary date of your NetSuite account. Set the end date to today or any day between the anniversary date and today.

**Note:** In contrast to the Billing Information page, SuiteAnalytics workbooks can display the total number of automated sales orders processed on the current day.

**Workbook Configuration:**

The following table describes the components of this workbook. You can further customize this workbook by adding fields from the root record, removing fields, creating criteria filters, or creating your own pivot tables and charts. See the help topic Custom Workbooks and Datasets for more information.

<table>
<thead>
<tr>
<th>Root Record</th>
<th>Joined Record(s)</th>
<th>Custom Formula Field(s)</th>
<th>Data Grid</th>
<th>Criteria Filters</th>
<th>Pivot Tables and Charts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction</td>
<td>Not Applicable</td>
<td>Not Applicable</td>
<td>Keep the default record fields and include the following record field in the workbook source data:</td>
<td>Include the following criteria to filter the workbook source data:</td>
<td>You can create pivot tables and charts from your workbook source data and add them to the Analytics portlet of your home dashboard. See the help topic Adding an Analytics Portlet for more information.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>■ AOM Automated</td>
<td>■ Type is Sales Order</td>
<td>■ AOM Automated is True.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>■ Date Created specifies start date and end date of your subscription</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** You can also create a saved search to view usage figures. Choose a saved search of type Transaction. On the Criteria subtab, set the criteria fields as follows:

- **Main Line** is True
- **Type** is Sales Order
- **Date created**
- **AOM Automated** is True

On the Results subtab, include the AOM Automated field in the list of results columns.

**Automatic Location Assignment**

The Automatic Location Assignment feature lets you configure NetSuite to assign fulfillment locations automatically to sales order lines. To enable the feature, go to Setup > Company > Enable Features.
On the Transactions subtab, under the Shipping & Receiving section, check the Automatic Location Assignment box. After enabling the feature, you must then complete several setup tasks. Some setup tasks are required, whereas others are optional and depend on how you want to use the feature. Mandatory setup tasks include the following:

- Configure locations
- Create an automatic location assignment configuration
- Create automatic location assignment rules
- Choose automatic location assignment settings
- Run automation

See Setting Up Automatic Location Assignment for details about the steps involved.

Automatic Location Assignment and Cross-Subsidiary Fulfillment

When the Intercompany Cross-Subsidiary Fulfillment feature is enabled in your account, you can assign locations from other subsidiaries to sales order lines automatically. Additional configuration steps are required to set up the Cross-Subsidiary Fulfillment feature. See the help topic Cross-Subsidiary Fulfillment for more information.

You assign locations from other subsidiaries automatically by creating rules that take locations in other subsidiaries into account. You can select individual subsidiaries or all subsidiaries, as well individual locations or all locations in the subsidiaries. See Specifying Location Criteria in a Rule.

When you enable the Intercompany Cross-Subsidiary Fulfillment, the Inventory Location column is shown on all sales order forms, but can be hidden by customizing the form. The automatic location assignment engine sets the fulfillment location in the Inventory Location column. If you want to set a fulfillment location manually, you must also specify it in the Inventory Location column.

**Note:** If you configure a preferred location for an item, the location is set in the Location column when you add the item to the sales order. It is not set in the Inventory Location column. When Cross-Subsidiary Fulfillment is enabled, ALA takes the Inventory Location column into account when assigning locations to sales order lines. Because the Inventory Location column does not have a location, ALA may assign a location that is different from the preferred location.

Setting Up Automatic Location Assignment

The following steps describe the basic tasks required to configure automatic location assignment in your account.

**Step 1: Configure locations**

You must configure each location in your account to work with automatic location assignment. Configuring locations involves selecting the most suitable location type, entering the location postal code, and allowing the automatic location assignment engine to assign the location.
To configure a location for automatic location assignment

1. Go to Setup > Company > Classifications > Locations.
2. Enter a name for the location.
3. Select a location type. Later, you will create rules that assign locations to sales order lines based on their location types. You can leave the location type blank (or undefined) if you want, but your rules must take that into account.
4. Make sure the Make Inventory Available box is checked.
5. Enter the address details of the location, including the postal code.

**Note:** You can also enter the latitude and longitude coordinates of the location.

6. Click Save, and then edit the location record again to configure specific automatic location assignment settings.
7. Select the Automatic Location Assignment tab.
8. Choose a geolocation method. To use postal codes, the location address details must have a postal code. To use lat/long coordinates, make sure you entered valid latitude and longitude coordinates.
9. In the Automatic Location Assignment field, select Allow Worldwide to allow NetSuite to assign the location automatically to sales orders with shipping addresses anywhere in the world.
   
   If orders are not shipped worldwide from the location, you can allow automatic location assignment on a regional basis. See Configuring Locations for Automatic Location Assignment for more information.
10. Click Save.

**Step 2: Create an automatic location assignment configuration**

An automatic location assignment configuration is a collection of rules and backorder rules. You must create at least one configuration with at least one rule in it. If you create multiple rules in a configuration, you can order the list of rules in the configuration – rules at the top of the list are evaluated first. You can create multiple configurations with different rules and then set one of the configurations as the default configuration in your account. In a OneWorld account, you can create multiple configurations per subsidiary. See Automatic Location Assignment Configurations for more information.

**To create an automatic location assignment configuration:**

1. Go to Setup > Order Management > Automatic Location Assignment Management > Configurations > New.
2. Enter a name for the configuration and click Save.
3. If you have a OneWorld account with more than one subsidiary, select a subsidiary.
   
   **Note:** The subsidiary cannot be changed after you save the configuration.
4. Click Save.

**Step 3: Create automatic location assignment rules**

An automatic location assignment rule is a combination of settings and options that tells the automatic location assignment engine how to assign fulfillment locations to sales order lines. In each rule, you must
specify which line items the rule is valid for, specify valid locations, and choose a fulfillment strategy. See Automatic Location Assignment Rules for more information.

**To create an automatic location assignment rule:**

1. Go to Setup > Order Management > Configurations.
2. Click **Edit** next to the configuration to which you want to add a rule.
3. Click the **New Rule** button.
4. Enter a name for the rule.
5. Under Line Items, choose whether the rule is valid for all line items, or whether it is only valid for a selection of items (based on the results of a saved search).
6. Under Locations, choose which locations can be assigned to a sales order line. You can limit locations by location type, by a specific set of locations, and by distance (in a radius) to the shipping address.
7. Under Strategies, choose the strategy to use when assigning locations:
   - Minimize Fulfillment Locations attempts to assign as few locations as possible to items in the sales order – it is checked by default.
   - The optimal fulfillment strategy determines what method the automatic location assignment engine uses to assign a fulfillment location to a sales order line.
   - If the Fulfillment Request feature is enabled, an additional strategy called Fulfillment Workload Distribution is available. This lets you distribute orders evenly across locations. Additional configuration is required – see Fulfillment Workload Distribution (FWD).
8. Click **Save**.

**Step 4: Choose automatic location assignment settings**

As well as creating configurations and rules for automatic location assignment, you need to define when automatic location assignment runs. For example, you can configure automatic location assignment to run when a sales order is approved (in response to the Sales Order Approved business event). You can also select a default configuration for sales orders in your company – see About Default Configurations for Automatic Location Assignment for more information.

**To set options for automatic location assignment:**

1. Go to Setup > Order Management > Setup Tasks > Advanced Order Management.
2. On the Automation tab, select the Shipping Orders subtab.
   a. Under Automation Processes, select the **Automatic Location Assignment** option.
   b. Under Automatic Location Assignment, choose when you want automatic location assignment to run by selecting at least one event. At a minimum, you should select Sales Order Approved and Payment Hold Released. See Business Events Related to Automatic Location Assignment for an explanation of each event.
3. On the Automatic Location Assignment tab, under the Configurations subtab, select a default configuration.
   - In a OneWorld account, select a default configuration for each subsidiary.
4. Click **Save**.
   - Automatic location assignment is now set up and ready to run.
Step 5: Run automation

Run automation for automatic location assignment to start assigning fulfillment locations automatically.

To run automation for automatic location assignment:

1. Go to Setup > Order Management > Setup Tasks > Advanced Order Management.
2. On the Automation tab, select the Shipping Orders subtab.
3. Check the **Run Automation** box.
4. Under Automation Process, choose **Automatic Location Assignment**.
   If the Fulfillment Request feature is enabled in your account, you can also choose **Both** to run automation for both automatic location assignment and fulfillment request creation.
5. Click **Save**. The automatic location assignment process starts immediately.

See **Running Automation** for more information.

Additional Setup Steps

You can configure additional aspects of automatic location assignment to refine how fulfillment locations are assigned automatically.

- **Create regions**
  Create regions to define the geographical areas to which your business ships orders. You can then configure automatic location assignment to work with regions in the following ways.
  - Allow automatic assignment of a location based on the region in which the shipping address is located.
  - Rank locations in a region and then choose to assign fulfillment locations automatically based on the location ranking.

For more information about creating region records, see **Configuring Regions for Automatic Location Assignment**.

- **Rank locations in regions**
  If you want to assign locations in a preferred sequence, such as bigger warehouses before smaller warehouses, you can rank locations in a region. Then, when a sales order has a delivery address in that region, the automatic location assignment engine assigns the top ranked location first – provided other criteria in the rule are met. To rank locations, you must set up regions first. See **Configuring Regions for Automatic Location Assignment** for more information. Note that a fulfillment location does not need to be physically located in a region to be able to ship to the region.

- **Verify item attributes**
  You can change attributes on an item record to modify how NetSuite assigns locations automatically. For example, you can set a preferred location or mark the item as ships individually, in which case the automatic location assignment engine will not attempt to assign a location. See **Configuring Items for Automatic Location Assignment** for more information.

- **Customize the sales order form**
  You can customize a sales order form to show additional fields related to the automatic location assignment feature. The automatic location assignment engine runs as normal regardless of whether the fields are shown or hidden on the form. See **Customizing the Sales Order Form for Automatic Location Assignment**.

- ** Automate fulfillment request creation**
  If the Fulfillment Request feature is enabled in your account, you can rerun automatic location assignment on a sales order when a fulfillment request is rejected. Employees at a fulfillment location
might reject a fulfillment request for various reasons, for example if there is no inventory or the workload is too high. Rerunning automatic location assignment helps to ensure another fulfillment location is assigned to the sales order. See Rejecting and Canceling Fulfillment Requests.

Configuring Regions for Automatic Location Assignment

A region determines a geographical area to which goods can be shipped from one or more fulfillment locations. You use regions when you want to assign fulfillment locations automatically by location ranking. You can define a region according to any of the following criteria:

- **Country** – The highest level at which you can create a region. NetSuite provides a default list of countries.
- **County, state, or province** – Counties, states, and provinces are smaller administrative areas in a country. In NetSuite, the counties of some countries are predefined. In countries without a predefined list of counties, states, or provinces, you can create your own list – see the help topic Setting Up States, Provinces, and Counties.
- **Postal code** – The lowest level at which you can create a region. In regions that use numerical postal codes, you can specify a range of postal codes by entering the start and end code of the range. Creating regions based on postal codes might be useful when you deliver to addresses in large population centers or when you have several stores or warehouses that are located relatively close to each other.

To create a region:

1. Go to Setup > Company > Regions.
2. Enter a name to identify the region.
3. In the Region subtab, define the region by adding countries, states, or postal codes to the region detail entry. (Your place of business might use provinces or counties instead of states.) You must add at least one entry.
   - To create a region at state level or postal code level, first select the country and then specify the state or postal code. To specify a single postal code, enter it in the Zip Code Start field. The same code is copied automatically to the Zip Code End field. To specify a range of postal codes, change the value in the Zip Code End field to the last value in the range.
4. Click Save.

After you set up regions, you can configure location records and specify the regions to which each location is allowed to ship goods. See Configuring Locations for Automatic Location Assignment.

To delete a region, go to and click View next to the region you want to delete. In the Actions menu, select Delete. If the region record is associated with other records in the system, such as a location record, you need to dissociate the records first and then delete the region record.

Location Ranking in Regions

Location ranking in a region record lets you specify the order in which locations are assigned to sales orders. It is used when the optimal fulfillment strategy in an automatic location assignment rule is set to location ranking and the shipping address on the sales order is located in the region. Locations that have a higher priority (with a lower rank number) are assigned first.

You can view how locations are ranked in both the region record and the automatic location assignment settings (see Activating Automatic Location Assignment). You manage the regions to which a location can ship by allowing automatic location assignment in the location record - see Configuring Locations for Automatic Location Assignment. All locations that are allowed to be assigned automatically as a fulfillment location can be ranked in the region.
Note: If a location does not appear in the ranking list, check that automatic location assignment is allowed for the region in which you want to specify location ranking. You need to do this in each location record.

For example, you might create two regions in the United States of America for automatic location assignment: USA-West, which includes all states in the western US, and USA-East, which includes all states in the eastern US. You can set up fulfillment locations in both regions and allow locations to ship to a specific region or to ship countrywide to both regions. In the table below, four locations can ship to the USA-West region and three locations can ship to the USA-East region. The St. Louis warehouse can ship to both regions, but it is ranked fourth in the USA-West region to ensure the automatic location assignment engine selects it last.

<table>
<thead>
<tr>
<th>Region</th>
<th>Location</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA-West</td>
<td>Warehouse Seattle</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Warehouse San Diego</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Warehouse Denver</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Warehouse St. Louis</td>
<td>4</td>
</tr>
<tr>
<td>USA-East</td>
<td>Warehouse Raleigh</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Warehouse St. Louis</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Warehouse Newark</td>
<td>3</td>
</tr>
</tbody>
</table>

To rank locations in a region:

1. Go to Setup > Company > Regions and click Edit next to the region you want to work with.
2. Click the Fulfillment Location Priority subtab.
3. Drag locations up and down in the list to the desired position.
   - Locations at the top of the list (with a lower rank number) have higher priority. The first time you assign a rank to any location in the list, all other locations are ranked according to their current position in the list.
4. Click Save.

Configuring Locations for Automatic Location Assignment

Locations are used as a record of the physical offices or buildings in your organization, such as corporate offices, warehouses, or retail premises. When you enable automatic location assignment (ALA), you use locations to represent the fulfillment locations in your business. Changing the following attributes of a location can affect how automatic location assignment works:

- **Location type** – Describes the kind of location. Location types can be Store, Warehouse, or blank. Later, you can choose a location type as an attribute of an automatic location assignment rule.
- **Automatic location assignment options** – In the Automatic Location Assignment subtab, you can allow or disallow automatic location assignment. If you allow fulfillment from a location, you can include or exclude specific regions. Automatic location assignment is disallowed by default, meaning NetSuite does not take the location into account when assigning locations automatically to sales order lines. Additionally, the location does not appear in any regions you create.
- **Buffer stock** – To prevent a shortage of stock at a retail location, you can set the minimum quantity of inventory that must always be available at the location. The automatic location assignment engine will not assign a location to a sales order line if doing so causes the inventory to drop below the...
buffer stock. You might want to specify buffer stock to reserve inventory at a store location for walk-in customers.

For example, in a kitchenware store, there are currently 12 units available of a stoneware dish. The buffer stock quantity for the store is set to 10. If you create a sales order for five dishes, automatic location assignment will disregard the location because assigning the sales order line to the store would cause inventory of the dish to go below the buffer stock.

**Note:** The buffer stock quantity applies to all inventory items at the location regardless of the type, class, or category of item. For example, in a store that sells kitchenware, the same buffer stock quantity would apply to a silver fork, a stoneware dish, and a gas-fired stove.

**Note:** If the Store Pickup feature is enabled, the same buffer stock level on the location record also applies to store pickup orders. If the line item quantity in the sales order causes the inventory of the item at the location to drop below the buffer stock, you cannot select the location for store pickup. See Store Pickup for more information.

- **Geolocation method** – In the Automatic Location Assignment subtab, you can choose how NetSuite calculates the geographic position of the location. By default, automatic location assignment uses the postal code entered in the address fields to calculate the geographical position of the location. However, you can also enter the precise latitude and longitude coordinates of the location and set the geolocation method to use those coordinates instead.

For general information about working with the location record, see the help topic Locations Overview.

**Shipping Regions**

When you enable automatic location assignment in a location record, you can limit the regions to which goods can be shipped from the location. There are two methods you can use to restrict shipments to regions:

- Allow shipments worldwide but exclude some regions
- Allow shipments to specific regions by explicitly including and excluding regions

An excluded region can be a subset of another larger region. For example, if you want to allow shipments to all states in the United States except Hawaii, you might create a region at the country level for the United States of America (USA) and another region for the state of Hawaii; you can then add USA to the list of included regions and add Hawaii to the list of excluded regions.

**Geolocation Method**

The geolocation method used by automatic location assignment determines how NetSuite calculates the geographical position of a location. NetSuite uses the postal code specified in the location address fields by default. Because the geographical area covered by a postal code is usually irregular in shape, NetSuite uses the centroid (or geometrical center) of the postal code area.

**Note:** Countries with a higher density of postal codes generally provide a higher degree of precision.

You can also enter the latitude and longitude coordinates of a location on the location record and then set the geolocation method to use those coordinates. You might do this if you do not have a postal code for the location, or you want to use the precise geographic coordinates of the location. NetSuite accepts latitude and longitude coordinates in decimal form only. For example, to represent a latitude that is 37° 32' 12.5" north of the equator, enter the decimal coordinates “37.536798”. Include at least four decimal places to achieve a precise location.
Shipping Capacity

When the Fulfillment Request feature is enabled, you can enter the shipping capacity for locations in your company. Automatic location assignment takes the shipping capacity into account when assigning locations. If the shipping capacity at a location is reached, ALA does not assign sales order lines to the location. Two measures of shipping capacity are available:

- **Daily shipping capacity** – Daily shipping capacity refers to the maximum number of shipping sales orders that can be assigned to a location by automatic location assignment in one day (from 00:00 to 23:59). NetSuite measures the current number of shipping sales orders by counting the number of fulfillment requests created for the location.

  **Example**
  
  The daily shipping capacity for a retail store in San Diego is set to 15. On Monday, by 11 a.m., 10 fulfillment requests have been created for the store – the store can still receive additional fulfillment requests. At 2 p.m., 15 fulfillment requests have been created for the store. Because the daily shipping capacity has been reached, automatic location assignment will no longer assign the location to sales order lines during the day.

- **Total shipping capacity** – The total shipping capacity represents the maximum number of orders allowed to accumulate in the work queue at the location. NetSuite measures the shipping capacity by counting the number of open fulfillment requests for the location. Leave the total shipping capacity blank to indicate the location has unrestricted capacity. When the total shipping capacity at a location is reached, NetSuite stops assigning fulfillment requests until at least one of the fulfillment requests is fulfilled.

  If you plan to use fulfillment workload distribution as a strategy in a location assignment rule, NetSuite measures the current available work capacity of each location and assigns the location with the highest capacity.

It is useful to enter shipping capacity when using retail locations in a ship from store fulfillment workflow. For more information about fulfillment requests, see [Fulfillment Requests](#).

**To create a location for automatic location assignment:**

1. Go to Setup > Company > Classifications > Locations.
2. Enter a name to identify the location.
3. Select the type of location: blank, Store, or Warehouse.
   
   The location type for new records is set to blank by default. In automatic location assignment rules, you can select a blank location type as one of the rule attributes. See [Automatic Location Assignment Rules](#).
4. Ensure the Make Inventory Available box is checked.
5. In the Address subtab, click Edit next to the address box and enter the full address details of the location, including the location's postal code.

   **Important:** If you plan to create location assignment rules that use the closest location strategy, it is important to indicate the correct country and postal code in the address details of the location. When a rule uses the closest location strategy, NetSuite can only assign a location automatically if it has a postal code or you enter the precise latitude and longitude coordinates manually. The shipping address must also have a valid postal code.

6. Click Save to save the record and then click Edit to continue creating the location.
7. Click the Automatic Location Assignment subtab to enter automatic location assignment settings.
   
   a. Choose how you want to define the geographic coordinates of the location:
To use coordinates based on the location's postal code, select **Derive From Postal Code** as the geolocation method. The default setting for all locations is Derive From Postal Code.

**Note:** Make sure the postal code is specified in the address details of the location. If there is no postal code, NetSuite cannot assign the location automatically to a sales order line.

To use the exact geographic coordinates of the location:

1. In the **Latitude/longitude Coordinates** fields, enter the latitude and longitude of the location in decimal format (for example, “37.536798”). The decimal symbol is dependent on the number format of your user preferences – see the help topic **Number Formats** for more information.
2. In the Automatic Location Assignment subtab, select **Use Lat/Long Coordinates** as the geolocation method.

   b. In the **Automatic Location Assignment** field, choose to allow or disallow location assignment:
      
      ■ Disallow – Indicates that NetSuite does not take this location into account when assigning locations automatically.
      ■ Allow Worldwide – Indicates that this location can ship to any address worldwide.
      ■ Allow Worldwide Except Excluded Regions – NetSuite takes this location into account for all shipping addresses except addresses that are located in the excluded regions. You must specify at least one excluded region.
      ■ Allow Specified Regions Only – You must specify the regions to which shipments are allowed and the regions to which shipments are prohibited. You must specify at least one included region, and optionally, one or more excluded regions.

   c. If you allow automatic location assignment based on regions, make sure you specify the relevant regions in the **Included Regions** and **Excluded Regions** tables.

   d. In the **Buffer Stock** field, enter the buffer stock level for all items at the location.

   e. If you use the Fulfillment Request feature and you plan to use fulfillment workload distribution as a fulfillment strategy, define order capacity for the location:
      
      ■ In the **Total Shipping Capacity** field, enter the maximum number of shipping orders that can be allocated to the location regardless of when the orders are allocated. The total shipping capacity is typically higher than the daily shipping capacity and allows orders to accumulate at the location up to the specified number.

For more information about fulfillment requests, see **Fulfillment Requests**. For more information about fulfillment workload distribution, see **Choosing a Fulfillment Strategy**.

**Note:** The shipping capacity fields are only available when the Fulfillment Request feature is enabled.

8. Click **Save**.

### Preparing Existing Locations for Automatic Location Assignment

Location records in NetSuite are used for various purposes, including the automatic assignment of fulfillment locations in a sales order. If you already use locations in NetSuite, you might need to complete the following tasks to ensure the locations are assigned as expected by automatic location assignment:
Create a saved search for all locations with an empty postal code and those for which automatic location assignment is allowed. See the help topic Saved Searches for more information about saved searches.

Based on the results of the saved search, either update the postal code in the locations or specify the latitude and longitude manually.

Allow automatic location assignment for the locations.

Customizing the Sales Order Form for Automatic Location Assignment

To work with fulfillment locations on a sales order, you can create a custom sales order form with several additional columns in the Items subtab. It is not mandatory to add these columns, but it gives you more flexibility and visibility when using automatic location assignment for sales orders. For example, you can keep the columns hidden in the sales order form used by customer service representatives, but you can show the fields in another custom form used by fulfillment managers.

- **Location** – Displays the fulfillment location assigned to the sales order line, regardless of whether it was assigned automatically or you selected it manually. If a location is already assigned, you can change it and select a new location. When you select a location manually, the Do Not Auto Assign Location column is automatically set to Yes; the automatic location assignment engine will skip this line when assigning locations.

- **Location Auto Assigned** – Read-only column. Indicates if the fulfillment location was assigned automatically. When you select a location manually, this column is cleared.

- **Do Not Auto Assign Location** – Lets you prevent the automatic location assignment engine from assigning a location. When you select a location manually (or the location is set due to another process or field in the system, such as the Preferred Location field in an item record), this box is checked automatically.

You can also add the Automatic Location Assignment Configuration field to the Items subtab on the sales order form. Adding the field lets you select the automatic location assignment configuration you want NetSuite to use to assign locations. Only configurations associated with your subsidiary are shown in the field on the sales order – see Automatic Location Assignment Configurations for more information. Depending on how the Automatic Location Assignment feature is set up, a configuration might be selected by default when you open the sales order form. See Managing Automation Settings for Automatic Location Assignment for more information.
Automatic Location Assignment

**Note:** When you add the Location column, the Auto Assign Locations button also appears in the Items subtab. Clicking the button starts the automatic location assignment process and lets a user immediately view the locations assigned. The user can choose to either keep the locations assigned by saving the sales order, or change the locations assigned by editing the column and then saving the sales order. See the help topic Assigning Locations Automatically in a Sales Order for more information.

To customize the sales order form for automatic location assignment:

1. Go to Transactions > Sales > Enter Sales Orders.
2. Click Customize at the top of the form and then select Customize Form.
3. In the Name field, enter a name to identify the form.
4. Click the Screen Fields subtab and then click Columns.
5. Add the Location, Location Auto Assigned, and Do Not Auto Assign Location fields to the form by checking the Show box for each item.
6. Move the items up and down in the list to the desired position. Items at the top of the list correspond to the leftmost columns in the sales order form.
7. To add the Automatic Location Assignment Configuration field:
   a. Click the Screen Fields subtab and then click Items
   b. Check the Show box next to the Automatic Location Assignment Configuration item.
8. Click Save.

Configuring Items for Automatic Location Assignment

The following attributes of an inventory item can affect the automatic assignment of locations:

- **Preferred Location** – You can set a default fulfillment location for an item in the Preferred Location field. When the item is added to the sales order, the preferred location is selected automatically. When automatic location assignment is activated, the Do Not Auto Assign Location box is also checked. Because the engine skips all sales order lines on which the Do Not Auto Assign Location box is checked, any lines with an item that has a preferred location are not assigned a location automatically. This attribute appears in the Purchasing/Inventory subtab.

- **Auto Loc. Assignment Allowed** – When this box is checked, the automatic location assignment engine is allowed to assign the location to lines in a sales order. The box for this attribute is checked by default for all locations. If the box is unchecked for a particular location, the location will not be assigned even if it meets all other criteria in the automatic location assignment rules. This attribute appears in the Locations list in the Purchasing/Inventory subtab.

- **Auto Loc. Assignment Suspended** – When this box is checked, the automatic location assignment engine is temporarily prevented from assigning the location to sales order lines. You might want to check this attribute if there are discrepancies in inventory at the location. To let the automatic location assignment engine assign the location again, clear the attribute for the location. This attribute appears in the Locations list in the Purchasing/Inventory subtab.

If the Fulfillment Request feature is enabled, NetSuite checks this attribute automatically when a user rejects a line in a fulfillment request. See Rejecting and Canceling Fulfillment Requests for more information.

- **Ships Individually** – If the Ships Individually box is checked, indicates that the item ships separately from other items in a sales order. The automatic location assignment engine assigns a location to the item, but it does not attempt to use a location already assigned to other items, even if a rule uses a Minimize Fulfillment Locations strategy. This attribute appears in the Sales/Pricing subtab.

Order Fulfillment
To change the attributes of an item record, go to Lists > Accounting > Items and click the **Edit** link of the item you want to work with. Change the attributes and save the item record.

### Creating Configurations and Rules

The way in which NetSuite assigns locations automatically to sales order lines is determined by the settings of an automatic location assignment configuration and the rules in the configuration. You need to create at least one configuration and then create at least one rule and add it to the configuration. Both the sequence of rules in a configuration, and the attributes of the rules themselves, are used by the automatic location assignment engine to assign the ideal fulfillment location.

### Automatic Location Assignment Configurations

A configuration is a collection of rules and backorder rules that are evaluated in sequence to determine the ideal fulfillment location for each line in a sales order. You can create multiple configurations, each with its own set of rules.

You can set a default configuration on a per-subsidiary basis. To do so, go to Setup > Order Management > Setup Tasks > Advanced Order Management and select a configuration in the Default Configuration field. In a OneWorld account, you can set one default configuration per subsidiary. A default configuration is the configuration NetSuite uses if an automatic location assignment configuration is not selected on a sales order.

A configuration is valid when it has at least one rule. When you add a rule to a configuration, the rule becomes exclusive to the configuration. To use a rule with the same attributes in another configuration, open the other configuration and create a new rule with the same attributes.

The rules in a configuration are evaluated in the order in which they appear in the configuration. You can change the evaluation order by moving a rule up or down in the list. It is important to ensure that the evaluation order of rules is correct because it directly affects how locations are assigned. For example, if there are two rules in a configuration and the automatic location assignment engine is able to assign locations to all sales order lines in the first rule, all subsequent rules are skipped.

When a rule is evaluated, NetSuite tries to assign locations to all open lines in the sales order according to the attributes in the rule. If the fulfillment locations for any lines remain unassigned after a rule is evaluated, NetSuite moves to the next rule in the list. Rule evaluation continues until either of the following occur:

- All lines in the sales order have a location.
- The automatic location assignment engine ignores any rules that occur later in the sequence.
- There are no more rules (both ordinary rules and backorder rules) left to evaluate in the configuration.

Some lines in the sales order might not have a location after all rules have been evaluated. There are a number of reasons why this might happen – see Reasons Why Locations Might Not Be Assigned Automatically for more information.

**Note:** In a OneWorld account, you can reuse a configuration for multiple subsidiaries or create separate configurations for individual subsidiaries. You can assign one default configuration per subsidiary. If you change a configuration that is used by multiple subsidiaries, the changes apply to all the subsidiaries.

### To create an automatic location assignment configuration:

1. Go to Setup > Order Management > Automatic Location Assignment Management > Configurations > New.
2. Enter a name for the configuration.

**Note:** Configuration names must be unique. In a OneWorld account, you can use the same configuration name for configurations in different subsidiaries.

3. If you have a OneWorld account with more than one subsidiary set up, select a subsidiary.

**Important:** After you save the automatic location assignment configuration, you cannot change the subsidiary.

4. Click Save.

You can now edit the configuration and add rules to it. A valid configuration must have at least one rule. See Automatic Location Assignment Rules.

**Note:** If you add more than one rule to a configuration, verify that the rules are in the correct order of evaluation. You can change the order in which the rules are evaluated by moving them up or down in the list.

## Automatic Location Assignment Rules

Automatic location assignment rules determine the way in which the engine assigns locations to lines in a sales order. You create rules in a configuration. You must create at least one rule. Rules are exclusive to the configuration in which they are created. The rules in a configuration can be used as both ordinary rules and backorder rules. See Backorder Rules for more information.

There are two aspects about rules that affect how NetSuite assigns locations automatically: the sequence of the rules and the attributes of the rules.

If a configuration has multiple rules, they are evaluated from top to bottom in the specified order in the sequence (called the evaluation order). If all the lines in a sales order have a location after a particular rule has been evaluated, all subsequent rules in the sequence are skipped. You can specify the evaluation order of rules when editing the configuration – see Automatic Location Assignment Configurations. The evaluation order you choose will depend on the characteristics of your business, such as inventory levels at locations, how you want to optimize fulfillment, your choice of shipping carriers, and the criteria of the rules themselves.

A rule can be more restrictive or less restrictive depending on the criteria you specify in the rule. Typically, the more criteria you specify, the more restrictive the rule. Add a more restrictive rule before a less restrictive rule in the evaluation order when you have particular fulfillment requirements for items, for example, when you want to ship heavy items from specially equipped warehouses. Conversely, by adding a less restrictive rule before a more restrictive rule, it is likely that a higher percentage of sales order lines are assigned a fulfillment location before all the rules are evaluated.

The attributes of a rule determine the criteria by which locations are assigned. As the automatic location assignment engine checks each attribute, the list of possible fulfillment locations is narrowed down until the ideal fulfillment location is selected.

You can define rules according to the following criteria:

- **Line items** - You can create a rule that applies to all line items in the sales order or only line items that have particular attributes. To match the line items that have specific attributes, you create a transaction saved search and use it as a filter. See Limiting Rules to Specific Line Items.

- **Locations** - You can restrict locations by location type, by a set of specific locations, and by radius from the shipping address. See Specifying Location Criteria in a Rule.
- **Strategies** – The strategies in an automatic location assignment rule enable you to define the maximum number of locations to assign to lines in the sales order and the method by which the optimal location is selected. The default strategy is to minimize fulfillment locations and assign the closest location. See *Choosing a Fulfillment Strategy* for more information.

**To create a rule:**

1. Go to Setup > Order Management > Configurations and click **Edit** next to the configuration in which you want to create a rule.
2. Select the **Rules** subtab.
3. Click the **New Rule** button.
   - To edit a rule, click the rule name and then click the Open button [ ] next to it.
4. Enter a name to identify the rule.
5. Under Line Items, choose how the rule applies to line items: all line items or line items that match criteria in a saved search – see *Limiting Rules to Specific Line Items*.
6. Under Locations, choose how to narrow down locations in the rule: by location type, by a pre-defined set of locations, or by distance from the shipping address – see *Specifying Location Criteria in a Rule*.
7. Under Strategies, choose fulfillment strategies for the rule – see *Choosing a Fulfillment Strategy* for more information.
   - To use as few locations as possible in the sales order, check the Minimize Fulfillment Locations box.
   - Select an optimal fulfillment strategy: closest location, highest ranked location, or fulfillment workload distribution.
8. Click **Save**.

After you set up rules, make sure the automatic location assignment process is running. See *Running Automation*.

To edit a rule, open the configuration in which the rule is defined, select the Rules tab, and then open the rule from the list of rules displayed. To remove a rule from a configuration, click the Remove button [x] on the rule line in the configuration.

**How Locations Are Assigned with Rules**

Here is an overview of the steps performed by the automatic location assignment engine when evaluating rules in a configuration:

1. Selects only the locations that can ship to the region in which the shipping address is located.
   - If there are multiple shipping addresses in a sales order, the engine evaluates the automatic location assignment rules for each shipping address separately. To use multiple shipping addresses, the Multiple Shipping Routes feature must be enabled – see the help topic *Multiple Shipping Routes*.
2. Selects only the locations that have inventory.
3. Selects all locations that match the specified location types. For example, if you have both store and warehouse locations and the location type in the rule is ‘warehouse’, the engine will only consider locations whose type is ‘warehouse’.
4. Selects locations that are within the specified radius around the shipping address. To select locations by radius, the shipping address must have a postal code, and the location must have either a postal code or latitude and longitude coordinates.
5. Selects locations based on the minimize fulfillment locations strategy.

6. Selects locations based on the optimal fulfillment location strategy. If the optimal fulfillment location is set to Closest Location, the shipping address must have a postal code, and the location must have either a postal code or latitude and longitude coordinates.

7. If there are still lines in the sales order that have an empty location, the engine goes to the next rule in the configuration and selects locations according to the rule attributes.

8. If all rules have been evaluated and there are backorder rules, the engine evaluates the backorder rules in sequence from top to bottom.

If all rules have been evaluated and there are still lines in the sales order with an empty location, you need to assign locations manually or backorder items.

**Reasons Why Locations Might Not Be Assigned Automatically**

Sometimes, a location that you expected to be assigned is not in fact assigned to a sales order line. There are a number of reasons why this might happen. Here are some of the most common things you can check to determine why a location was or was not assigned:

- Insufficient stock at the location. The automatic location assignment engine does not split a sales order line between multiple locations, so if the entire quantity ordered is unavailable at a location, the location is not assigned.

- Automatic location assignment is disallowed in the location record. If you disallow automatic location assignment for a location, or restrict a location to specific regions and the shipping address is not in one of the regions, the location will not be assigned – even if there is stock at the location.

- If you create a rule to assign the location that is closest to the shipping address, but the shipping address postal code is missing, the engine will be unable to assign a location.

- One or more attributes in the item record – such as the Preferred Location field or the Auto Loc. Assignment Allowed box – are preventing the engine from assigning a location. See Configuring Items for Automatic Location Assignment.

- Incomplete details in the shipping address. If the customer's shipping address does not have a valid postal code and there is a rule that uses Closest Location as an optimal fulfillment strategy, the engine cannot assign a location.

- Incomplete details in the location address. If the location does not have a postal code and the geolocation method is set to Derive From Postal Code, the engine will be unable to calculate the location's geographic position and will therefore discard the location.

- Item is marked for drop shipment. The automatic location assignment engine does not assign locations to sales order lines with a drop ship item because the item will be shipped directly from the vendor.

- NetSuite does not assign locations automatically if the Auto Loc. Assignment Suspended box is checked on the item record.

  If the Fulfillment Request feature is enabled, NetSuite checks the Auto Loc. Assignment Suspended box automatically when a line item in a fulfillment request is rejected or a picking fulfillment exception is entered for the line item.

**Limiting Rules to Specific Line Items**

You can create automatic location assignment rules that only apply to specific line items on a sales order. NetSuite only evaluates the rule when the line items have one or more of the specified attributes. If the line item does not have the specified attributes, the automatic location assignment engine skips to the next rule. You specify the attributes in a transaction saved search.
To use a line item saved search, under the Line Items section in the rule record, select the **Filter by Saved Search** option and then select the saved search.

If a suitable saved search is not in the dropdown list, you can create a new transaction saved search. Saved searches for location assignment rules must have a base set of criteria, as well as the criteria you want to use in the saved search. The base criteria are the following:

- **Main Line** – Set the value of this filter to **False**.
- **Type** – Set the value of this filter to **Sales Order**.

**Note:** Make sure the only selected value for the Type filter is Sales Order. Adding other transaction types results in an invalid saved search for location assignment rules. Consequently, the saved search will not be displayed in the dropdown list of saved searches on the Automatic Location Assignment Rule page.

You or other employees in your organization may have previously created transaction saved searches that are valid saved searches for location assignment rules. If so, those saved searches are selectable in the Filter by Saved Search field. All saved searches that have the base criteria are displayed in the field regardless of whether they are public (the Public box is checked) or private.

**Important:** If a saved search is changed by a user and the base criteria are removed or changed – which therefore makes the saved search invalid – the rule is skipped by the automatic location assignment engine.

**Note:** If you use the automatic location assignment macro, rules that have a line item saved search are skipped if the item attributes match the saved search criteria. Other rules in the configuration are evaluated as normal.

**To create a saved search for automatic location assignment rules:**

2. Click the **Transaction** record type.
3. In the **Search Title** field, enter a name to identify the search.

4. Click the **Criteria** subtab to specify search criteria.

5. In the **Standard** sublist, add the following filters:
   a. **Main Line** – Set the value of this filter to No. (When you click Save, the Description appears as ‘is false’.)
   b. **Type** – In the Type field, select ‘any of’, and then select Sales Order from the list of transactions. (When you click Save, the Description appears as ‘is Sales Order’.)

6. Add any other item filters you want to include as criteria for the saved search:
   a. In the **Filter** dropdown list, select Item Fields.... from the list of filters.
   b. In the **Item Filter** field, select an item attribute.
   c. Select the values of the attribute.

   **Note:** The values for each item attribute and the way in which you select the values depend on the selected attribute. For example, when you select the **Category** attribute, you can choose one or more individual categories, but when you select the **Is Available?** attribute, you must choose between the values Either, Yes, or No.

7. Click **Save**.

Saved searches you create for location assignment rules are available on the Saved Searches page in NetSuite. Users with access to the sales order transaction can use the saved search. To view all saved searches for which you have permission to access, go to Lists > Search > Saved Searches.

**Specifying Location Criteria in a Rule**

Limiting locations in a rule lets you set the locations you want the automatic location assignment engine to take into account. You can limit locations in a rule in several ways:

- Limit by location type.
- Define a set of specific locations.
- Limit to locations by distance from the shipping address.

Location types describe the kind of location. You specify the location type in the location record. In an automatic location assignment rule, you must select at least one location type (Store, Warehouse, or Undefined) for the rule. The Undefined location type refers to a location record in which the Location Type field is set to blank. When the automatic location assignment engine evaluates the rule, it only selects locations that have the specified location type.

When you define a specific set of locations, you limit possible fulfillment locations to one or more individual locations in your account. You can select locations that are active and have the same subsidiary as the automatic location assignment configuration. Select a set of locations when you have items with particular fulfillment requirements. For example, if you sell personalized items, such as monogrammed clothing, you can select the fulfillment locations that have the equipment required to personalize the items.

Geographical restrictions in a rule let you limit the list of possible locations according to the distance between shipping addresses in the sales order and fulfillment locations. You specify geographical restrictions by specifying a radius (in miles or kilometers) around the shipping address. When the rule is evaluated, only fulfillment locations that are within the specified radius are selected by the automatic location assignment engine. By default, a rule has no geographical restrictions and will take into account all available locations.
Note: NetSuite calculates the distance between shipping addresses and fulfillment locations by using the postal code of shipping addresses and the postal code (or latitude and longitude coordinates) of fulfillment locations. See Configuring Locations for Automatic Location Assignment for more information.

To limit locations in a rule:

1. In an automatic location assignment configuration, create a new rule or open the rule you want to work with. See Automatic Location Assignment Rules for more information.

2. In the Location Type field, select the location types for the rule.

   Note: The ‘Undefined’ location type refers to all locations in which the Location Type is blank.

3. To define a specific set of locations, check the Limit to a Set of Locations box and then select individual locations.

   Note: NetSuite only displays active locations whose subsidiary is the same as the subsidiary of the automatic location assignment configuration in which you create the rule. Locations from other subsidiaries are not selectable.

4. To limit locations in the rule by distance from the shipping address, check the Limit To Locations Within Radius From Shipping Address box. Specify a shipment radius around the location in miles or kilometers.

5. Change other attributes of the rule as required and then click Save.

Assigning Locations from Other Subsidiaries

With the Intercompany Cross-Subsidiary Fulfillment feature enabled in your NetSuite account, you can assign fulfillment locations from other subsidiaries automatically to lines in a sales order. You can
configure the rule to take all locations in another subsidiary into account or a selection of locations from one or more subsidiaries.

Prior to creating rules that assign locations from other subsidiaries, verify that the following requirements for cross-subsidiary fulfillment are met:

- A global inventory relationship record exists between the configuration subsidiary and the subsidiary of the locations you want to assign.
- Make sure the same inventory item is available in multiple subsidiaries.

See the help topic Intercompany Cross-Subsidiary Fulfillment for more information about setting up and using cross-subsidiary fulfillment.

**To assign locations from other subsidiaries:**

1. Create an automatic location assignment rule or open an existing rule.
2. Under the Locations section, check the **Allow Locations from Other Subsidiaries** box.
3. In **Select Subsidiaries**, select the subsidiaries of the locations you want to assign.

   **Note:** Only subsidiaries that have a global inventory relationship with the configuration subsidiary are shown in the list.

4. To choose specific locations in the selected subsidiaries, check the **Limit to a Set of Locations** box, and then select the locations. Note that locations of the configuration subsidiary are shown by default in this list. Locations from other subsidiaries are shown only when another subsidiary is selected.

5. Change any other attributes of the rule as required and then click **Save**.

**Choosing a Fulfillment Strategy**

You use configurations and rules to implement your desired automatic location assignment strategy. In a rule, a location assignment strategy determines the way in which fulfillment locations are assigned to sales order lines. A strategy is applied in a rule after locations have been filtered according to type and distance to the shipping address. The strategies available include the following:

- You can choose whether to **minimize fulfillment locations** in the rule. By default, NetSuite minimizes fulfillment locations and tries to assign as few locations as possible.
- You can choose one of the following strategies to determine the optimal fulfillment location:
  - **Closest location.** Assigns the location that is closest to the shipping address.
  - **Highest ranked location.** Assigns the highest ranked location in the region in which the shipping address is located.
  - **Fulfillment workload distribution.** Assigns the location with the current highest available work capacity.
Minimize Fulfillment Locations

When you choose to minimize fulfillment locations, NetSuite attempts to assign as few locations as possible, taking into account locations already assigned on other line items in the order. Minimizing the total number of fulfillment locations can help to reduce shipping costs and speed delivery. If you choose not to minimize locations, NetSuite assigns locations to sales order lines on a line-by-line basis.

Within the minimize fulfillment locations option you can choose how restrictive you want to be with the maximum number of locations assigned. You do this by specifying the maximum number of locations to be assigned. You can choose the number of locations in the following ways:

- **1 Location, 2 Locations, 3 Locations, 4 Locations, 5 Locations**
  You can indicate the maximum number of fulfillment locations (between one and five) you want to be assigned between all lines in the sales order. Selecting one location is similar to setting up the order so that it can be shipped complete.

  If there are multiple shipping addresses in the sales order, the rules are evaluated separately for each address. For example, if there are two shipping addresses in a sales order, NetSuite evaluates all rules for items shipping to the first shipping address and then evaluates all rules for the second shipping address. To use multiple shipping addresses, the Multiple Shipping Routes feature must be enabled – see the help topic Multiple Shipping Routes.

  Specifying a lower number of locations typically results in less shipments and therefore reduced shipment costs. However, a lower number of locations is also more restrictive, which might prevent the rule from assigning locations to all lines. Specifying a higher number of locations increases the likelihood that all lines in the order will be assigned a location, but might split lines in an order between several locations and result in increased shipping costs.

  **Note:** The number of locations you specify is the maximum number of locations that will be assigned automatically. The actual number of locations assigned might be less depending on the inventory available at each fulfillment location.

- **No Limit**
  NetSuite attempts to minimize the number of fulfillment locations in the sales order, but will use as many locations as required. This is the most flexible option because it helps to ensure a location is assigned to each sales order line, especially if inventory is spread between multiple locations. This is the default option when minimizing fulfillment locations.

If you choose not to minimize fulfillment locations in the rule, NetSuite evaluates sales order lines individually. Fulfillment locations already assigned to other lines in the sales order are not taken into account. Not minimizing fulfillment locations might result in more locations being assigned overall to a sales order.
When NetSuite starts to evaluate a rule, a sales order might already have a location assigned to one or more lines. This can happen when you assign a location manually (perhaps at the same time you create the sales order) or when a previous rule has assigned a location to some – but not all – of the lines. If a line already has a location assigned to it, the maximum number of locations refers to additional locations when the rule is evaluated. For example, if one of the lines in a sales order already has a location, and Minimize Fulfillment Locations is set to 1 Location, the engine assigns a maximum of two locations to the lines in the sales order.

Closest Location

The location that is closest to the shipping address is assigned to the sales order line. NetSuite determines the closest location by measuring the straight line distance between each fulfillment location and the shipping address. The geographic position of a fulfillment location is based on its postal code, or the latitude and longitude coordinates entered manually on the location record. The geographic position of the shipping address is based on the postal code in the address details.

For more information about the use of latitude and longitude coordinates, see Geolocation Method.

Highest Ranked Location

The highest ranked location in the region in which the shipping address is located is assigned to a line. You can create multiple regions and rank locations differently in each region. Regions define the geographical areas in which shipping addresses are located. For more information about location ranking, see Configuring Regions for Automatic Location Assignment.

Fulfillment Workload Distribution (FWD)

Note: The fulfillment workload distribution strategy is only available when the Fulfillment Request feature is enabled.

Use the fulfillment workload distribution strategy when you want to assign fulfillment locations to sales order lines based on the available work capacity of locations. Locations with a higher shipping capacity will be assigned a higher ratio of orders. Choosing this strategy in a rule distributes orders evenly across locations. NetSuite uses two measures to calculate the capacity of a location:

- The total shipping capacity of a location. You specify the total shipping capacity on a per location basis. Each location can have a different total shipping capacity.
- The total number of open orders already assigned to the location. NetSuite measures open orders by counting the number of pending fulfillment requests at a location.

Total shipping capacity is the maximum number of orders that employees can process and ship from a location. Only orders that need to be shipped count towards the total shipping capacity. Other orders, such as store pickup orders or transfer orders, do not count towards the total shipping capacity. Automatic location assignment continues assigning orders to a location until the total shipping capacity is reached. When employees start processing orders at a location, the work capacity at the location increases and automatic location assignment can resume allocating orders to the location.

Fulfillment workload distribution measures capacity by counting the number of open fulfillment requests at locations. An open fulfillment request is a fulfillment request that has been acknowledged by employees at the location but has not yet been shipped to the customer. Open fulfillment requests have one of the following statuses: In Progress, Picked, Packed, and Partially Fulfilled. The number of line items in the fulfillment request is irrelevant as regards capacity.

To use FWD, you need to complete several setup tasks:

- Verify the Fulfillment Request feature is enabled. See Enabling Automation Features.
- Specify the total shipping capacity at each location. If you omit the total shipping capacity on a particular location record, you can still specify a default total shipping capacity in a location assignment.
rule. When the automatic location assignment engine runs, the default capacity is applied to all locations that do not have a total shipping capacity defined.

- Create a fulfillment workload distribution rule in the configuration.
- Make sure fulfillment requests are set to be created automatically. See Fulfillment Request Creation for more information.

NetSuite recalculates the work capacity of locations each time the automatic location assignment rules are evaluated. NetSuite assigns the sales order to the location with the current highest available work capacity. The current highest capacity is calculated as the ratio of current open fulfillment requests at the location to the total shipping capacity specified on the location record. Locations with a lower ratio have a higher work capacity. For example, if a location has three open fulfillment requests and its total shipping capacity is "8", the calculated work capacity is 0.375 (3 divided by 8). The location has used 37.5% of its total shipping capacity.

**Example**

You create a rule with fulfillment workload distribution as a strategy. You have two locations, A and B, with a total shipping capacity of 10 and 15 respectively. Location A currently has two open fulfillment requests. Location B currently has seven open fulfillment requests. Both locations have sufficient inventory available when a new sales order is created. When automatic location assignment evaluates the rule, it calculates the current available work capacity for location A as 0.2 (2 divided by 10) and the work capacity for location B as 0.46 (7 divided by 15). Location A is assigned to the sales order because it has the current highest work capacity.

**To set the fulfillment strategy in a rule:**

1. In an automatic location assignment configuration, create a new rule or open the rule you want to work with. See Automatic Location Assignment Rules for more information.
2. Under Strategies, choose the fulfillment strategies you want to use in the rule:
   a. You can optimize shipping by minimizing the number of fulfillment locations in the sales order.
      To use the least number of locations possible across all lines in the sales order, check the Minimize Fulfillment Locations box. Then, in the Limit Number Of Locations To field, select the maximum number of locations you want the rule to assign. For example, you can select 1 Location if you prefer to send all items in the order in one shipment from a single fulfillment location.
   b. Select an optimal fulfillment strategy:
      - **Closest Location** – The location that is closest (in a straight line) to the shipping address is assigned to the sales order line.
      - **Highest Ranked Location** – The top ranked location is assigned to the sales order line.
      - **Fulfillment Workload Distribution** – The location with the highest capacity is assigned to the sales order line.

You must also enter a default total shipping capacity for locations. If the total shipping capacity is not specified for a particular location, NetSuite uses the default value you enter in the rule.

**Note:** The fulfillment workload distribution strategy is only available when the Fulfillment Request feature is enabled. See Fulfillment Request Creation for more information.

3. Continue setting other criteria in the rule. See Limiting Rules to Specific Line Items and Specifying Location Criteria in a Rule.
4. Click Save.

**Backorder Rules**

Backorder rules are evaluated after all other rules in a configuration have been evaluated. You use backorder rules to put items on backorder when there is no inventory at a location. Since backorder rules are evaluated after other rules, there is no check for inventory at locations. All other attributes of backorder rules are evaluated as normal. Like standard rules, backorder rules assign the best fulfillment locations to lines in a sales order. When the items become available at the locations, they are committed to the sales order lines, which can then be fulfilled.

For example, you create a sales order with two items – item A and item B. Item A has sufficient inventory, but item B has no inventory. If you create a configuration with just one rule and no backorder rules, a location is assigned to item A, but will be blank for item B. You will need to select a location manually for item B. If you include a backorder rule in the configuration, the automatic location assignment engine can assign a location to item B. Item B will then be marked as backordered.

Backorder rules have the following characteristics:

- They are evaluated only when all other rules have been evaluated and there are lines in the sales order without a fulfillment location.
- They do not check for inventory at locations.
- You typically only need to create one backorder rule in a configuration.

To add a backorder rule, open the automatic location assignment configuration you want to work with and select the Backorder Rules subtab. Select an existing rule or create a new rule, and then save the configuration.

Backorder rules in a configuration are optional; if a location cannot be assigned to a sales order line and there are no backorder rules, the Location field on the line remains empty. You can still assign a location manually. For more information about working with backorders, see the help topic Handling Backorders.

![Tip:](image)

**Tip:** If your primary business goal is to have NetSuite assign a fulfillment location to all sales order lines, NetSuite recommends to add at least one backorder rule to an automatic location configuration.

**Managing Automation Settings for Automatic Location Assignment**

In addition to enabling automatic location assignment (ALA) as a feature, you must choose automation settings, and then run automation. After automation starts to run, NetSuite starts using the automatic location assignment process immediately. All new sales orders created thereafter are processed by ALA according to the chosen automation settings, configurations, and rules.

To manage the automation settings for automatic location assignment, you need to choose the business events that trigger ALA to run, and select an automatic location assignment configuration (known as the default configuration).

In a OneWorld account, you select a default configuration for each subsidiary. If you have only one configuration, you can use it with all subsidiaries. If you have multiple configurations, you can use a different configuration with each subsidiary. If you do not select a configuration for a subsidiary, automatic location assignment will not run on sales orders in that subsidiary.
Note: Automatic location assignment only assigns locations if the sales order is approved and there is no payment hold on the sales order.

With the Fulfillment Request feature enabled, you can run automation for fulfillment requests and location assignment simultaneously. When you run both processes, the Sales Order Approved and Payment Hold Released events you select for automatic location assignment are also used for fulfillment request creation. On the Advanced Order Management Setup page, under Fulfillment Request Creation, the Sales Order Approved and Payment Hold Released boxes appear as read only. For example, if you check the Sales Order Approved box, NetSuite automatically assigns locations when you approve a sales order and then creates the fulfillment requests.

To manage automation settings for automatic location assignment:

1. Go to Setup > Order Management > Setup Tasks > Advanced Order Management.
2. Click the Automation tab and then click the Shipping Orders subtab.
   - If the Fulfillment Request feature is enabled and you also want to use automation for fulfillment requests, select Both. See Fulfillment Request Creation for more information about automating fulfillment requests.
4. Under Automatic Location Assignment, choose when you want the process to run. Each option under Automatic Location Assignment corresponds to a business event in NetSuite. You must select at least one event. If no events are selected, the automatic location assignment process will not be triggered and NetSuite will be unable to assign locations automatically.
   - Sales order approved
   - Payment hold released
   - Sales order changed
   - Item fulfillment changed
   - Fulfillment request rejected

Note: The Fulfillment Request Rejected option only appears when the Fulfillment Request feature is enabled.

For more information about these business events, see Business Events.

5. Click the Automatic Location Assignment subtab.
6. In the Default Configuration field, select a configuration.
   - In a OneWorld account, you can select a configuration per subsidiary. To turn off automatic location assignment for a particular subsidiary, select Not Defined in the Configuration dropdown list. Automatic location assignment continues to work for all other subsidiaries that have a configuration selected.

Note: Default configurations can be overridden on a sales order in several ways, for example, when you specifically select another automatic location assignment configuration on the sales order form. See About Default Configurations for Automatic Location Assignment.

7. To view how locations are ranked in regions, click the Region/Location Mapping subtab. You can change the ranking order by editing a region record – see Location Ranking in Regions.
8. Click Save.
   - After you save the automation settings, you must run automation in your account by checking the Run Automation box. See Running Automation for more information.
About Default Configurations for Automatic Location Assignment

A default configuration is the automatic location assignment configuration (ALA configuration) that NetSuite sets on a sales order when you open a sales order form. You can specify one configuration as the default for all sales orders. If you have a OneWorld account with multiple subsidiaries, you can specify one default configuration per subsidiary. If you do not specify a default configuration for a subsidiary, the Automatic Location Assignment Configuration field on the sales order appears blank. Because the field is blank, NetSuite does not assign locations automatically for sales orders in that subsidiary.

To set a default configuration, go to Setup > Order Management > Setup Tasks > Advanced Order Management, click the Automatic Location Assignment tab and select a configuration as the default.

On a custom sales order form, the Automatic Location Assignment Configuration field can be shown or hidden. Even if the field is hidden on the sales order form, NetSuite will still take the default configuration into account and assign locations automatically according to the rules in the configuration.

As well as setting a default configuration for sales orders, you can set the automatic location assignment configuration on a sales order in other ways, each of which differs in how and when the field is set. You can do one or more of the following to set a configuration:

- **Select manually** – You can manually select an automatic location assignment configuration on the sales order. Provided that the field is shown on the sales order form, you can select any available configuration for the subsidiary.

  **Note:** If the field is hidden on the sales order form, you cannot change the automatic location assignment configuration manually. You can change the automatic location assignment configuration on the sales order with a workflow (SuiteFlow) or with a script (SuiteScript).

- **Use SuiteFlow** – You can create a workflow that sets the automatic location assignment configuration field on the sales order based on triggers and conditions. For example, you can create a workflow to set a configuration when the sales order form is loaded. If a default configuration exists for the subsidiary, the workflow overrides it. See for more information about workflows.

- **Use SuiteScript** – Scripts can set the automatic location assignment configuration field on a sales order. For example, you might write a script that sets a different automatic location assignment configuration if the number of lines in the order exceeds 100. If a default configuration exists for the subsidiary, the script overrides it. See the help topic SuiteScript for more information about how to work with scripting in NetSuite.

  Scripts are often run when a record is saved, meaning the configuration shown on the sales order might not be the same as the actual configuration used by the automatic location assignment process. To view the actual configuration used, reopen the sales order record and verify the Automatic Location Assignment Configuration field.

Stopping Automatic Location Assignment

You can stop automatic location assignment in several ways and to different degrees. The following ways of stopping automatic location assignment are listed in order of most comprehensive to least comprehensive.
Stop running automation – Turning off automation for shipping orders prevents the automatic location assignment engine from running in your account. Even if the ALA Configuration field is set on a sales order, the system does not assign locations automatically. When you stop running automation, it applies to all subsidiaries.

Clear the default configuration per subsidiary – When you clear the default configuration for a subsidiary, the Automatic Location Assignment Configuration field on the sales order form is set to blank. If the ALA Configuration field is displayed on the sales order form, users can still select a configuration. NetSuite continues to set the specified default configurations for other subsidiaries.

In addition to clearing the default configuration, you can do the following:

- **Hide the Automatic Location Assignment Configuration field** – By hiding the Automatic Location Assignment (ALA) Configuration field on the sales order form, you can prevent users from manually selecting a configuration. If you want to allow some users to edit the ALA Configuration field, you can create a separate form for those users and display the ALA Configuration field on the form. See the help topic Configuring Fields or Screens for information about showing and hiding fields.
- **Remove SuiteFlow workflows and SuiteScript scripts** – Workflows and scripts can set the Automatic Location Assignment Configuration field on the sales order. If you have a SuiteFlow workflow that sets the Automatic Location Assignment Configuration field on the sales order, you might need to modify the workflow or delete it. If you have a script that sets the field, you might need to modify or delete the script. See SuiteCloud Platform for more information.

### To stop running automatic location assignment:

1. Go to Setup > Order Management > Setup Tasks > Advanced Order Management.
2. Select the Automation tab and then do one of the following:
   - To stop all automation, clear the Run Automation box on the Shipping Orders tab. When you save, the system stops all automation for shipping orders.
   - If the Fulfillment Request feature is enabled and you want to continue running automation for fulfillment requests, on the Shipping Orders subtab, select the Fulfillment Request Creation option under the Automation Process section.
3. Click Save.

### To clear the default configuration for a subsidiary:

1. Go to Setup > Order Management > Setup Tasks > Advanced Order Management.
2. Under the Automatic Location Assignment tab, set the Default Configuration column to Not Defined for the subsidiary.
   - **Note:** If your account is not a OneWorld account, set the Default Configuration field to blank instead.
3. Click Save.

### Configuration Examples

Setting up automatic location assignment is a multi-step process. The following examples illustrate how to configure the different aspects of automatic location assignment including locations, regions, and rules.

- **Warehouse Locations First, Stores Second**
- **Closest Fulfillment Locations**
**Warehouse Locations First, Stores Second**

In this example, an online retailer with several warehouses and two physical store locations in the United States of America, wants to ship orders from both warehouses and stores. Because it is less expensive and faster to ship from warehouse locations instead of store locations, the retailer configures automatic location assignment to assign warehouse locations first and store locations second. The regions, fulfillment locations, and customer location used in the example are shown in the diagram below.

**Locations and Inventory**

The San Francisco warehouse is the retailer’s preferred fulfillment location because it is the largest warehouse and generally does not experience stock-outs. It is ranked as the highest priority (“1”) location in the USA West region. The Denver and St. Louis warehouses are smaller and are ranked second (“2”) and third (“3”) respectively. Note that the St. Louis warehouse is physically located in the USA East region, but it can also ship to customer addresses in the USA West region. The San Francisco and San Diego store locations are ranked last in the USA West region.

The location rank and inventory levels of items at each location in the USA West region are listed in the table below.

<table>
<thead>
<tr>
<th>USA West (Region)</th>
<th>San Francisco Warehouse</th>
<th>Denver Warehouse</th>
<th>St. Louis Warehouse</th>
<th>San Francisco Store</th>
<th>San Diego Store</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rank</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Item</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Automatic Location Assignment

Rules

To implement a fulfillment strategy for warehouses first, stores second, you need to create two rules. The first rule tells the automatic location assignment engine to only select warehouse locations. The locations can be within any distance from the shipping address. The rule also tells the engine to group lines in as few locations as possible, but there is no limit on the number of locations. Finally, the engine must select the highest ranked location.

The second rule tells the automatic location assignment engine to only select store locations. All other attributes of the rule are the same as the first rule.

<table>
<thead>
<tr>
<th>Rule No.</th>
<th>Rule Name</th>
<th>Location Types</th>
<th>Geographical Restrictions</th>
<th>Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>All Warehouses</td>
<td>Warehouse</td>
<td>All Available Locations = Yes</td>
<td>Minimize Fulfillment Locations = Yes, No Limit</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Optimal fulfillment = Location Ranking</td>
</tr>
<tr>
<td>2</td>
<td>All Stores</td>
<td>Store</td>
<td>All Available Locations = Yes</td>
<td>Minimize Fulfillment Locations = Yes, No Limit</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Optimal fulfillment = Location Ranking</td>
</tr>
</tbody>
</table>

For more information about creating automatic location assignment rules, see Automatic Location Assignment Rules.

Sales Order

One sales order is created for the customer, whose shipping address is in Phoenix, Arizona. The sales order has the following two lines:

- Two black shirts, size L
- One pair blue jeans, size 40

Locations Assigned

**Result:** After the sales order is approved, the automatic location assignment engine selects San Francisco Warehouse as the ideal fulfillment location.

**Reason:** The automatic location assignment engine runs the first rule as specified by the evaluation order. The engine starts rule evaluation by selecting all locations that can ship to Phoenix, Arizona. The rule states that only warehouse locations can be assigned. Both items in the sales order are available at the San Francisco warehouse and the Denver warehouse. The optimal fulfillment location in the rule is set to location ranking, so the engine selects the San Francisco warehouse because it has a higher ranking priority than the Denver warehouse. Note that although the San Diego store is the closest location by distance, its location type is Store and it is therefore not taken into account in the first rule.
The second rule in the configuration is not evaluated when processing this order because the engine was able to assign a location to all items in the sales order according to the first rule.

**Closest Fulfillment Locations**

In this example, a retailer wants to assign the fulfillment location that is closest to the customer address. Assigning the closest location can help to reduce shipping charges if a carrier's shipping rates are based on distance, ship goods faster to customers, as well as help to reduce the environmental impact of shipments.

The retailer also wants to configure automatic location assignment to assign the closest warehouse location and, if a warehouse location cannot be assigned, to assign the closest store location. The following diagram shows the geographical position of the retailer's fulfillment locations, the customer's location, and the regions as set up in the region records in the system.

![Diagram of retailer's fulfillment locations, customer location, and regions](image)

**Locations and Inventory**

The automatic location assignment setting of all fulfillment locations allows the locations to be assigned to sales orders with shipping addresses anywhere in the world. The fulfillment locations in this example also have the following individual attributes and inventory levels:

<table>
<thead>
<tr>
<th>Location</th>
<th>Type</th>
<th>Blue Jeans, Size 40</th>
<th>Black Shirt, Size L</th>
</tr>
</thead>
<tbody>
<tr>
<td>San Francisco</td>
<td>Warehouse</td>
<td>30</td>
<td>20</td>
</tr>
<tr>
<td>San Francisco</td>
<td>Store</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>St. Louis</td>
<td>Warehouse</td>
<td>15</td>
<td>25</td>
</tr>
<tr>
<td>San Diego</td>
<td>Store</td>
<td>0</td>
<td>3</td>
</tr>
</tbody>
</table>
Automatic Location Assignment

Fulfillment locations do not need to be ranked because the rules will assign locations to the sales order lines by distance. If locations are ranked, the automatic location assignment engine will ignore the ranking.

For more information about creating locations, see Configuring Locations for Automatic Location Assignment.

Rules

To implement a fulfillment strategy to ship from the closest location to the customer, you can create one rule. The rule tells the automatic location assignment engine to select warehouse or store locations. The locations can be within any distance of the shipping address. The rule also tells the engine to minimize fulfillment locations with a limit of one location – this means that all items in the sales order must be available at a single location. Finally, of all the locations that meet the previous criteria, the rule tells the engine to select the location closest to the shipping address.

<table>
<thead>
<tr>
<th>Rule No.</th>
<th>Line Items</th>
<th>Location Types</th>
<th>Minimize Fulfillment Locations</th>
<th>Optimal Fulfillment Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule 1</td>
<td>All Line Items</td>
<td>Warehouse</td>
<td>Yes</td>
<td>Closest Location</td>
</tr>
<tr>
<td>Rule 2</td>
<td>All Line Items</td>
<td>Store</td>
<td>Yes</td>
<td>Closest Location</td>
</tr>
</tbody>
</table>

For more information about creating automatic location assignment rules, see Automatic Location Assignment Rules.

Locations Assigned to Sales Orders after Automatic Location Assignment

Sales orders are created for two customers, both of which have addresses in Albuquerque, New Mexico. The sales orders have different items and quantities. The following table shows the items in each sales order, the fulfillment location assigned by the automatic location assignment engine after the sales order is approved, and an explanation of why the locations are assigned.

<table>
<thead>
<tr>
<th>Sales Order No.</th>
<th>Items</th>
<th>Location Assigned</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>123</td>
<td>– 1 x Blue Jeans, Size 40</td>
<td>Denver Warehouse</td>
<td>The San Francisco, St. Louis, and Denver warehouses all have the item in stock. Denver is the closest location to Albuquerque (540 km away), however, so the automatic location assignment engine assigns it to the line.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Note:</strong> The San Francisco store is not assigned because the first rule is a warehouse rule which assigns the San Francisco warehouse. Since the conditions of the first rule are met and a fulfillment location is assigned to the item, the automatic location assignment engine ignores the second rule.</td>
</tr>
<tr>
<td>124</td>
<td>– 1 x Blue Jeans, Size 40</td>
<td>San Francisco Warehouse</td>
<td>The San Francisco and St. Louis warehouses have both items in stock. All other warehouses or stores only have one of the items in stock. Because the San Francisco warehouse (1450 km away) is closer than the St. Louis warehouse (1505 km away), San Francisco is assigned as the fulfillment location.</td>
</tr>
</tbody>
</table>
Automatic Location Assignment Macro

The macro for automatic location assignment offers an additional way to assign fulfillment locations automatically. You can use the macro in a script to run the automatic location assignment engine in response to events that are not included with the Automatic Location Assignment (ALA) feature. See Business Events for more information about ALA events. To run the macro in a script, the Automatic Location Assignment feature must be enabled and configured correctly.

Usage of macros in NetSuite requires SuiteScript 2.0 — see the help topic Overview of Record Action and Macro APIs for more information.

The following example script shows how to use the autoAssignLocations macro on a sales order record object when it is the current record.

```javascript
// Use the autoAssignLocations macro to assign locations automatically on the current record.
require(['N/currentRecord'], function(currentRecord) {

    var salesOrder = currentRecord.get();
    salesOrder.executeMacro({id: 'autoAssignLocations'});
});
```

When the macro runs and a location is assigned to a sales order line, the sales order is counted towards the AOM automation capacity of your account. If a location is not assigned to a sales order line, the sales order is not counted towards AOM automation capacity. See Automation Capacity and Usage Fees for more information about usage limits and fees.

A script that calls the autoAssignLocations macro runs independently of the settings on the Advanced Order Management Setup page in NetSuite. This means that if the Run Automation box is not checked or a predefined business event is not selected, the macro runs regardless. For example, if you clear the Sales Order Approved box on the Advanced Order Management Setup page, you can still create a script that calls the autoAssignLocations macro when a sales order is approved. Likewise, if you clear the Run Automation box for shipping orders, a script that calls the macro will still run the automatic location assignment process.

**Note:** The autoAssignLocations macro is callable in a script in your NetSuite account even if the Automatic Location Assignment feature is not enabled. If you try to run the macro without enabling the feature, however, it returns an error.

## Return Values

The macro returns a different set of values depending on whether automatic location assignment ran successfully or an error occurred. Note that automatic location assignment might run successfully but not assign a location to a sales order.

```javascript
var runAutomaticLocationAssignment = salesOrder.executeMacro({id: 'autoAssignLocations'});

// If automatic location assignment runs successfully, it returns an object similar to the following, with the 'notifications' and 'response' properties:
{
    notifications: [{title: 'DONE'; message: 'Automatic Location Assignment executed.'}],
    response: {assignedLines: [0,1]}
}

// If automatic location assignment fails, it returns an object with an 'error' property:
{
    error: 'Text of error message from automatic location assignment engine.'
}
```
Known Limitations

The macro does not currently support running both advanced order management (AOM) automation processes (automatic location assignment and fulfillment request creation) in sequence. This means that even if you automate creation of fulfillment requests (on the Advanced Order Management Setup page), the system will not create fulfillment requests after the autoAssignLocations macro runs. If you want fulfillment requests to be created after automatic location assignment has run, you must configure automatic location assignment on the Advanced Order Management Setup page.

Fulfillment Request Creation

Setting up automated fulfillment requests involves two steps. First, you choose automation settings, and then you run the automation processes. Even when automation is running for fulfillment requests, you can continue creating fulfillment requests manually from sales orders – see Fulfillment Requests for more information.

To set up automation for fulfillment requests, you must complete the following steps:

1. Set the correct location type on location records.
2. Choose the location types for which you want to use fulfillment requests.
3. Choose automation settings for fulfillment requests.

To set the location type on a location record, go to Setup > Company > Classifications > Locations. Click Edit next to the location record you want to work with. In the Location Type field select a location type: Store or Warehouse, and then click Save. (You can also leave the location type blank.)

When you automate the fulfillment request creation process, NetSuite creates the fulfillment request when the selected business events occur on the sales order. For more information about the business events that trigger creation of fulfillment requests, see Business Events.

Note: Fulfillment requests are created only if the sales order is approved and there is no payment hold on the sales order.

To set up automation for fulfillment requests:

1. Go to Setup > Order Management > Setup Tasks > Advanced Order Management.
2. On the Fulfillment Requests subtab, choose the location types that will use fulfillment requests. Make sure you have set the correct location type on location records.
3. On the Automation subtab, under Automation Process, make sure Fulfillment Request Creation is selected. If the Automatic Location Assignment feature is enabled, you can also select Both.
4. Under Fulfillment Request Creation:
   - Choose the business events that will trigger creation of the fulfillment request. Options available are:
     - Sales Order Approved
     - Payment Hold Released
     - Expected Ship Date is Reached
   See Business Events for more information about the business events for fulfillment requests.
To delay the creation of fulfillment requests, check the Wait Period Between Sales Order Creation and Fulfillment Request Creation box and enter the delay interval in the Wait Period Duration field.

5. Click Save.

After choosing settings for fulfillment request creation, you need to make sure automation is running – see Running Automation.

Delaying Fulfillment Request Creation with a Wait Period

The automation settings for fulfillment requests include the option to specify a wait period, which lets you delay creation of fulfillment requests by the specified number of minutes. Delaying the creation of fulfillment requests lets you modify the sales order before fulfillment requests are created.

The wait period duration starts when you create the sales order in the system. It is not dependent on the approval status of the sales order or the release of a payment hold on the sales order.

If you specify a wait period and select the Expected Ship Date is Reached option, the process will run after the date is reached or the wait period ends, whichever occurs last.

For example, you configure fulfillment requests to be created on the expected ship date. You also specify a wait period of 3 hours. The expected ship date is set for today. You create a sales order at 10 p.m. today. The process to create fulfillment requests will run on the next day at 1 a.m. when the wait period ends even if expected ship date is today.

The following diagram shows the timeline of the fulfillment request creation process with a wait period of 90 minutes. The selected business event is Sales Order Approved. When the sales order is created, the wait period starts. The order is approved a few minutes after it is created. At the end of the wait period, the fulfillment request is created.

If the Automatic Location Assignment feature is enabled, you can run both automation processes (automatic location assignment and fulfillment request creation) at the same time.

The following diagram shows the timeline of the fulfillment request creation process with the automatic location assignment process and a wait period of 90 minutes. The selected business event is Sales Order Approved. The option to rerun automatic location assignment is selected to ensure the ideal fulfillment locations are assigned.
Using Automation for Fulfillment Requests

You can automate the creation of fulfillment requests only or both the assignment of fulfillment locations to sales order lines and the creation of fulfillment requests.

When you automate the creation of fulfillment requests only, consider the following:

- If you check either the Sales Order Approved or Payment Hold Released boxes or both, the Expected Ship Date Is Reached box appears as read only. Fulfillment requests are created after the sales order is approved or the payment hold is released on the sales order.
- If you check the Expected Ship Date Is Reached box, the Sales Order Approved and Payment Hold Released boxes appear as read only. Fulfillment requests are created when the expected ship date on the sales order line is reached.
- The Expected Ship Date Is Reached option is only available for shipping orders.
- If you select the Expected Ship Date Is Reached option, the Expected Ship Date field on the sales order must have a date for fulfillment requests to be created.
- When the expected ship date is changed or populated, fulfillment requests are scheduled to be created on the new expected ship date.

When you automate both the assignment of fulfillment locations to sales order lines and the creation of fulfillment requests, consider the following:

- The business events you checked under Automatic Location Assignment also determine when the Fulfillment Request Creation process runs. Fulfillment requests are created after automatic location assignment has run.

  **Note:** If you want to use automatic location assignment, you also need to complete additional setup steps separately to ensure fulfillment locations are assigned automatically. See Automatic Location Assignment for more information.

- If you select both automation processes to run, you should also select the option to rerun the automatic location assignment process. Check the Run Automatic Location Assignment Before Fulfillment Request Creation at End of Wait Period box.
- If you select the Expected Ship Date Is Reached option, fulfillment requests are created when the expected ship date occurs.

Differences Between Today and Future Date Expected Ship Dates

When you select the Expected Ship Date is Reached option, the expected ship date can be today or a future date.

If the expected ship date is a future date, consider the following:

- Fulfillment requests are created at 12:00 a.m. on the expected ship date. The system uses the UTC time zone.
- If the Supply Allocation feature is also enabled, supply may be reallocated at any stage before the expected ship date is reached.

  **Note:** See the help topic Supply Allocation for more information about the Supply Allocation feature.

If the expected ship date is today, consider the following:
If only Fulfillment Request Creation is selected, fulfillment requests are created today only after the sales order is approved or the payment hold is released.

If you select both automation processes to run, fulfillment requests are created today after automatic location assignment has run.

Viewing the Fulfillment Request Creation Log

NetSuite records information about the fulfillment request creation process in a log to give you more visibility into the creation of fulfillment requests. You can view this log on the sales order in Business Events Processing History, under the System Information subtab. A summary field displays the outcome of the fulfillment request creation process. Click See more to view more detailed information about this process. The information is classified as one of the following types:

- Information – Information about the process and its outcome.
- Warning – The process outcome may not be as expected.
- Error – An error occurred during the process that stopped it from completing.

The information is listed chronologically with the most recent events at the top.

To view information about fulfillment request creation on a sales order

1. Go to Transactions > Sales > Enter Sales Orders > List
2. Click View next to the sales order you want to work with.
3. Click the System Information subtab, and then click Business Events Processing History.
4. In the Summary Status column, you can view the outcome of the automation process.
5. Click See more. A popup window called Business Events Details opens that contains more information about the automation process. You can filter this information by the type of information.

You can also view information about the fulfillment request creation process by creating a saved search or a SuiteAnalytics workbook.

Running Automation

After you have configured how automation will run in your account, and completed the required setup steps of the Automatic Location Assignment and Fulfillment Requests features, you must set automation to run.

Note: Make sure you have configured the records and settings related to automation prior to running the automation processes. See Automatic Location Assignment for more information about setting up automatic location assignment. See Fulfillment Request Creation for more information about setting up automatic fulfillment requests.

You run automation separately for shipping orders and pickup orders. You can choose to run automation for both types of orders or for one type only. Automation for shipping orders includes the following two processes:

- Automatic location assignment
Fulfillment request creation

Automation for pickup orders includes the following process:

You must enable the Store Pickup feature, as well as the Fulfillment Request feature, to run automation for pickup orders. See Store Pickup for more information.

When you run automation in a OneWorld account, it runs for all subsidiaries in your company. With the Automatic Location Assignment feature, you can create multiple configurations and use the same configuration with all subsidiaries or use a different configuration for each subsidiary. If you do not want to run automation for a particular subsidiary, set its configuration to Undefined in the Advanced Order Management Setup page.

Note: You can also use a macro to run automatic location assignment. See Automatic Location Assignment Macro for more information about the macro.

To run automation:

1. Go to Setup > Order Management > Setup Tasks > Advanced Order Management.
2. To run automation for shipping orders:
   a. Click the Shipping Orders subtab and check the Run Automation box.
   b. Choose the automation processes you want to run for shipping orders: automatic location assignment, fulfillment request creation, or both.
   
   Note: The automation processes available to you depend on the features enabled in your account. See Enabling Automation Features for more information.
   
   c. Select the business events that will cause the selected automation processes to run. For the fulfillment request creation process, you can also specify a wait period – see Fulfillment Request Creation for more information.
3. To run automation for pickup orders:
   a. Click the Pickup Orders subtab and check the Run Automation box.
   b. Select the business events that will cause fulfillment requests to be created automatically.
4. Verify that the automation settings for automatic location assignment and fulfillment requests are configured correctly. See Managing Automation Settings for Automatic Location Assignment and Fulfillment Request Creation for more information about setting up each automation process.
5. Click Save.

Important: Automation starts immediately after you save the settings on the Advanced Order Management Setup page.

To stop all automation processes, clear the Run Automation box for shipping orders and pickup orders. NetSuite continues to process any transactions that have already been saved. For example, if you specified a wait period for the fulfillment request creation process, NetSuite processes all sales orders with a wait period that has not yet elapsed.

Because of the way in which automatic location assignment works and how it is configured, you have different options to stop automatic location assignment. See Stopping Automatic Location Assignment for more information.
Business Events

Business Events is the back-end technology in NetSuite that enables the automation of business processes. Examples of business processes include the assignment of locations to sales order lines and the creation of fulfillment requests. NetSuite runs the business processes when a business event occurs on a transaction or record in the system. A business event is the occurrence of an action on a transaction or record in the system. For example, when you approve a sales order, the Sales Order Approved business event occurs. Based on that business event, NetSuite can then start a business process, such as automatic location assignment.

The business processes that run in response to a business event do so in an asynchronous way. In NetSuite, this means that when you perform an action on a transaction that generates a business event, the business process runs in the background and you can continue working in the application, without having to wait for the process to finish.

Features that use business events in NetSuite include the following:

- Automatic Location Assignment. See Automatic Location Assignment.
- Fulfillment Requests. See Fulfillment Request Creation.
- Time-Off Management. See the help topic Time-Off Management.

When you enable any of these features, the business events framework is also enabled automatically in your account.

When a business event occurs on a sales order, NetSuite runs the corresponding automation processes according to the advanced order management settings. You can view the business events processing history of a sales order. To view the business events for a sales order, open the sales order record, click the System Information subtab, and then click Business Events Processing History. The business events processing history includes the following information:

- Date created – Shows the date and time at which the business event occurred.
- Event name – The name of the business event.
- Event handler – The action performed by the system when the event occurs. For example, when the Sales Order Approved event occurs, NetSuite might run the Automatic Location Assignment process.
- Status – Indicates the result of the action performed by the system. Statuses include Pending, Completed, Retrying, and Failed. See Business Events Statuses for more information about statuses.
- Summary status – Indicates the outcome of the automation process. Click See more to view more information about this process. Some automation processes may not provide detailed information.

To view business events on a sales order

1. Go to Transactions > Sales > Enter Sales Orders > List.
2. Click View next to the sales order you want to work with.
3. Click the System Information subtab, and then click Business Events Processing History.

Business Events Related to Automatic Location Assignment

The Automatic Location Assignment feature uses business events to assign or reassign a fulfillment location to sales order lines. You can choose which business events are used to run the automatic location assignment process. For example, when you approve a sales order, the Sales Order Approved
business event occurs in the system. Provided that you have configured the Sales Order Approved event for automatic location assignment, NetSuite will run the process.

**Note:** To use business events, automation must be running and the automatic location assignment process must be configured correctly in your account. See [Automatic Location Assignment](#) for information about choosing business events for automatic location assignment.

The following table describes the business events used by the Automatic Location Assignment feature:

<table>
<thead>
<tr>
<th>Business Event</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Order Approved</td>
<td>Occurs when a sales order is approved.</td>
</tr>
<tr>
<td>Payment Hold Released</td>
<td>Occurs when a payment hold is released on the sales order.</td>
</tr>
<tr>
<td>Sales Order Changed</td>
<td>Occurs when a sales order is changed. The following changes in a sales order cause the Sales Order Changed event to occur:</td>
</tr>
<tr>
<td></td>
<td>- A line item is deleted or added</td>
</tr>
<tr>
<td></td>
<td>- The quantity of a line item is changed</td>
</tr>
<tr>
<td></td>
<td>- The location of a line item is changed</td>
</tr>
<tr>
<td></td>
<td>- The shipping address is changed</td>
</tr>
<tr>
<td></td>
<td>- The shipping method is changed</td>
</tr>
<tr>
<td></td>
<td>Changes to other fields on a sales order do not cause this event to occur.</td>
</tr>
<tr>
<td>Item Fulfillment Changed</td>
<td>Occurs when an item fulfillment is deleted, or a line in an item fulfillment is deleted.</td>
</tr>
<tr>
<td>Fulfillment Request Rejected</td>
<td>Occurs when one or more lines in a fulfillment request are rejected. This event can only occur when the Fulfillment Request feature is enabled.</td>
</tr>
<tr>
<td>Automatic Location Assignment Executed</td>
<td>Occurs after the automatic location assignment engine has processed all lines on a sales order.</td>
</tr>
</tbody>
</table>

**Business Events Related to Fulfillment Requests**

The Fulfillment Request feature uses business events to create fulfillment request records automatically when a ship-from-store order or a pickup order is created in the system. A fulfillment request is a demand to fulfill a sales order and is designed to help store employees better manage orders at their location.

**Note:** To use business events, automation must be running and the fulfillment request creation process must be correctly configured. For more information about setting up automation for fulfillment requests, see [Fulfillment Request Creation](#).

The following table describes the business events used by the Fulfillment Request feature:

<table>
<thead>
<tr>
<th>Business Event</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Order Approved</td>
<td>Occurs when a sales order is approved.</td>
</tr>
<tr>
<td>Payment Hold Released</td>
<td>Occurs when a payment hold is released on the sales order.</td>
</tr>
<tr>
<td>Scheduled Fulfillment Request Date Reached</td>
<td>Occurs when the expected ship date is reached on a sales order line.</td>
</tr>
<tr>
<td>Sales Order Line Expected Ship Date Changed</td>
<td>Occurs when the expected ship date is changed on a sales order line.</td>
</tr>
</tbody>
</table>
Business Events

<table>
<thead>
<tr>
<th>Business Event</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic Location Assignment Executed</td>
<td>Occurs after the automatic location assignment engine has processed all lines on a sales order. This event can only occur when automatic location assignment is enabled.</td>
</tr>
<tr>
<td>End Of Fulfillment Request Process Schedule Reached</td>
<td>Occurs when the wait period has elapsed.</td>
</tr>
</tbody>
</table>

Business Events Related to Time-Off Management

The Time-Off Management feature uses business events to recalculate time-off accruals for employees. See the help topic Time-Off Management for more information.

The following table describes the business events used by the Time-Off Management feature:

<table>
<thead>
<tr>
<th>Business Event</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Time Off Data Change</td>
<td>Occurs when time-off data is changed. The Employee Time Off Data Change event is generated when any of the following actions occur in NetSuite:</td>
</tr>
<tr>
<td></td>
<td>❯ Changing the work calendar of an employee record.</td>
</tr>
<tr>
<td></td>
<td>❯ Changing a time-off plan that affects accruals.</td>
</tr>
<tr>
<td></td>
<td>❯ Assigning or unassigning a time-off plan to an employee.</td>
</tr>
</tbody>
</table>

Business Events Statuses

When a business event occurs on a record, NetSuite calls the event handlers associated with the event. An event handler refers to what the system does in response to the event. For example, if a payment hold is released on a sales order, the Payment Hold Released event occurs. Then, if automatic location assignment is configured to run when a payment hold is released, NetSuite starts assigning locations to sales order lines asynchronously and automatically.

Every occurrence of a business event has its own status, indicating the processing state of the handler. If business events processing is shown on the record, you can view the status of the event and its handler.

On the sales order record, business events statuses are shown on the System Information subtab. Other records that use business events might show business events statuses on a different tab.

The following table lists the most common business events statuses.

<table>
<thead>
<tr>
<th>Business Event Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>Indicates the event handler has not yet run.</td>
</tr>
<tr>
<td>Business Event Status</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Completed</td>
<td>The event handler has completed. The Completed status does not necessarily mean that the desired outcome of the event handler was achieved. For example, the Automatic Location Assignment event handler attempts to assign locations to all lines in a sales order. If there is no inventory at any location, the event handler cannot assign a location, but can finish correctly (without errors). Therefore, the status appears as Completed.</td>
</tr>
</tbody>
</table>
| Retrying              | A failed status indicates an error occurred during the event handler processing that stopped it from completing. If available, details of the error are displayed on the related record. Details can include the following:  
  - “An unknown error occurred” – An unexpected technical error occurred in the system. Contact your support representative to resolve this error.  
  - An error message indicating why the event handler failed.  
  - Blank – An error occurred but no message was provided. This might happen if there is a script attached to the record or form, but an error message is not defined in the script. |
| Skipped               | The event handler was skipped. You might see this status when disabling a feature after a business event is generated, but before the handler is called. |

### Concurrency Limits

The handlers associated with business events typically run within a few seconds after the business event occurs. To ensure the system performs optimally, the number of handlers that can run simultaneously depends on the type of NetSuite account. Shared and dedicated accounts have different concurrency limits as described in the following table. A concurrency limit refers to the maximum number of handlers that can run at the same time in your account.

<table>
<thead>
<tr>
<th>Account Type</th>
<th>Concurrency Limit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared</td>
<td>2</td>
</tr>
<tr>
<td>Dedicated</td>
<td>10</td>
</tr>
</tbody>
</table>

If you are unsure of your NetSuite account type, contact your account representative.

### Business Events Saved Searches

The business events processing saved search lets you view information about business events that occurred in your account. You can use a business events processing saved search to do the following: view which events occurred in a time period; view the number of events per event type, event handler or record type.

- **Note:** The business events processing saved search is only available when you enable a feature that uses business events. The following features use business events: Automatic Location Assignment, Fulfillment Request, and Time-Off Management.

**To define a business events processing saved search**

1. Go to Lists > Search > Saved Searches > New.
2. Click Business Events Processing.
3. Enter a name for the title of the saved search.
4. On the Criteria subtab, specify criteria for the saved search by selecting filters.
5. On the Results subtab, specify columns and sorting for the search results.
6. Specify other options as required – see the help topic Defining a Saved Search for detailed information about creating saved searches.
7. Click Save.

Viewing Business Events on Sales Orders in your Account

If you use the Automatic Location Assignment or Fulfillment Request features, you can view the status of the business events associated with those features. There are several ways to view a list of business events, but a useful search might include the following information: event names, event handlers, event status, and the number of events per status.

The following screenshot shows what the result of a business events processing saved search might look like. On the first line, the process to create fulfillment requests ran once (1) in response to the Automatic Location Assignment Executed event, and the process completed successfully. On the second line, the process to assign locations automatically ran six times (6) in response to the Sales Order Approved event, and the process completed successfully.

![Custom Business Events Processing Search: Results](image)

To monitor the processing of business events in your account whenever you log in to your NetSuite account, you can add this saved search to your home dashboard in NetSuite. See the help topic Displaying Saved Search Results in Dashboard Portlets for more information.

To view the status of business events on sales orders in your account

1. Go to Lists > Search > Saved Searches > New.
2. Click Business Events Processing.
3. Enter a name for the title of the saved search.
4. On the Results subtab, specify the following fields and summary types in the Columns sublist:

<table>
<thead>
<tr>
<th>Field</th>
<th>Summary Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record Type</td>
<td>Group</td>
</tr>
<tr>
<td>Event Name</td>
<td>Group</td>
</tr>
<tr>
<td>Event Handler</td>
<td>Group</td>
</tr>
</tbody>
</table>
5. Click **Preview** to view the results of the saved search.
6. Click **Save**.
Order Fulfillment

Fulfilling an order is shipping the items to fill an open order. When you fulfill an order, you pull the items from inventory, package them and send them to the recipient. You can fulfill sales orders that go to customers or transfer orders that go to other company locations. See Order Fulfillment Overview for a summary of the main aspects of order fulfillment in NetSuite.

Order Fulfillment Overview

Order fulfillment is the process of preparing items for delivery, shipping the orders to the customer, and recording the item fulfillment in NetSuite. Depending on the features enabled in your account, you can fulfill orders in different ways.

The following diagram illustrates an order fulfillment workflow with several order management features enabled, as well as an indication of optional tasks in the workflow. For more specific examples of order fulfillment workflows, see Fulfillment Workflow Charts.

Aspects of Order Fulfillment

The main aspects of order fulfillment cover advanced shipping, fulfillment requests, fulfillment documents and forms, item fulfillment, “pick, pack, and ship”, and post-fulfillment tasks.
Advanced Shipping

With the Advanced Shipping feature, you can fulfill and bill a sales order in two separate transactions. When not using advanced shipping, NetSuite bills the sales order when it is fulfilled. Advanced shipping can also be used with the Advanced Billing feature. See Advanced Shipping for more information.

Fulfillment Requests

A fulfillment request is an intermediary transaction between a sales order and an item fulfillment. It lets employees at a location - usually a store location - better manage orders assigned to their location by accepting or rejecting the orders according to workload and inventory at the location. For more information about fulfillment requests, see Fulfillment Requests.

Cross-Subsidiary Fulfillment

With the Intercompany Cross-Subsidiary Fulfillment feature, you can fulfill sales orders from locations that belong to another subsidiary in your account. Cross-subsidiary fulfillment can be used for shipping orders and store pickup orders. You must complete additional setup steps in your account to use cross-subsidiary fulfillment – see the help topic Intercompany Cross-Subsidiary Fulfillment.

If you use the Automatic Location Assignment feature, you can also configure NetSuite to assign locations from other subsidiaries automatically. See Automatic Location Assignment.

Order Fulfillment Documents

Before you start to fulfill an order, you can print a picking ticket, which lists the items to be pulled from inventory. At the packing stage of order fulfillment, you can print packing slips and return forms to include in the shipment.

For more information, see these help topics:
- Printing a Picking Ticket
- Packing Slips and Return Forms

Item Fulfillment

To fulfill an order, you must create an item fulfillment record in NetSuite. You can fulfill orders individually or in bulk. If you use a third-party logistics (3PL) service for fulfillment, you can mark orders as fulfilled by importing a CSV file from the service provider. For more information, see Fulfilling Orders.

Pick, Pack, and Ship

The Pick, Pack, and Ship feature gives your warehouse and shipping departments separate processes for each step to fulfill orders. This enables greater flexibility to process and track the status of orders through the fulfillment and shipment processes.

You use separate transactions for each step: to pick the items from inventory (Fulfill Orders), to pack the items to prepare them to be shipped (Mark Orders Packed), and then to ship the items to the customer (Mark Orders Shipped). For more information, read Pick, Pack, and Ship.

Post-Fulfillment Tasks

When you have shipped items to the customer, you can then bill the customer. If you use the Advanced Shipping feature, you can bill a customer separately from the item fulfillment. Otherwise, NetSuite creates an invoice at the same time you create the item fulfillment.

To inform customers that their order has been fulfilled, you can configure NetSuite to send an order fulfillment confirmation email message automatically. You can customize the email message text to suit your business needs.
You can close line items in a sales order if the items cannot be fulfilled. By closing line items, you can keep a record of the original order quantity.

For more information about post-fulfillment tasks, see these help topics:

- Advanced Shipping
- Order Fulfillment Confirmation Email
- Closing Line Items That Will Not Be Fulfilled

### Fulfillment Workflow Charts

Your fulfillment workflow will be different depending on whether the Advanced Shipping feature or the Fulfillment Request is enabled. When fulfilling an order without the Advanced Shipping feature, you fulfill and bill sales orders at the same time. When the feature is enabled, you first fulfill the sales orders, and then you bill the sales orders.

- Sales Order Fulfillment Workflow without Advanced Shipping
- Sales Order Fulfillment Workflow with Advanced Shipping
- Sales Order Fulfillment with Fulfillment Requests

### Sales Order Fulfillment Workflow without Advanced Shipping

In a sales order fulfillment workflow without advanced shipping, you fulfill and bill a sales order in a single transaction.

![Fulfillment Workflow Diagram](image-url)
Sales Order Fulfillment Workflow with Advanced Shipping

In a sales order fulfillment workflow with advanced shipping, you fulfill a sales order and bill a sales order in separate transactions.

Sales Order Fulfillment with Fulfillment Requests

In a sales order fulfillment with fulfillment requests workflow, you first create a sales order. You then request fulfillment of the sales order. A fulfillment request (FR) is an intermediate step between the sales order and the item fulfillment that lets retail locations in your organization better manage their order fulfillment process. After you confirm the request to fulfill the sales order, you then fulfill the order. If one or more lines in the request cannot be fulfilled, you can reject the request.

See Fulfillment Requests for more information.
Fulfillment Requests

Note: The Fulfillment Request feature is available in the following editions of NetSuite: U.S., Canada, UK, Australia, and OneWorld.

A fulfillment request is a transaction that acts as an intermediary step between the sales order and the fulfillment stage of the order fulfillment workflow. It is a request or demand to fulfill a sales order. It lets employees at a fulfillment location — typically a store — manage orders that need to be shipped to or picked up by customers. Employees at a store can view fulfillment requests for their location, accept or reject the request, and process the request to fulfill the order.

Depending on the type of fulfillment request, you then fulfill an order from a fulfillment request in one of two ways. For shipping orders (an order that you ship to the customer's address), you create an item fulfillment. For pickup orders (an order that the customer picks up at the store), you create a store pickup fulfillment.

When To Use Fulfillment Requests

Fulfillment requests are typically used in the following two fulfillment scenarios:

Ship From Store

Orders are shipped from a store location instead of a warehouse location.
When you create a fulfillment request to ship from a store, the fulfillment request type is Ship. To fulfill a shipping order, you pick the items and create an item fulfillment record. You mark the items as packed and then mark the items as shipped. After the items are marked as shipped, the order status is Fulfilled.

**Store Pickup**

Customers order items by phone or through a web store, but choose to pick up items from a store location instead of having the items shipped to their work or home address.

When you create a fulfillment request for a store pickup order, the fulfillment request type is Store Pickup. To fulfill a pickup order, you pick the items and create a store pickup fulfillment record. You then mark the items as picked up when the customer visits the store to collect the items. For detailed information about fulfilling store pickup orders, see [Store Pickup](#).

The following diagram illustrates the basic workflow of a sales order with the fulfillment request transaction. The workflow is valid for both store pickup orders and shipping orders.

![Fulfillment Workflow Diagram](image)

Depending on whether a sales order is a shipping order or a pickup order, the features and fields on a fulfillment request are different.

<table>
<thead>
<tr>
<th>Feature/Field</th>
<th>Shipping Order</th>
<th>Store Pickup Order</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fulfillment Type</strong></td>
<td>Ship</td>
<td>Store Pickup</td>
</tr>
<tr>
<td><strong>Fulfillment record</strong></td>
<td>Item Fulfillment</td>
<td>Store Pickup Fulfillment</td>
</tr>
<tr>
<td><strong>Pickup Hold</strong></td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Exceptions</strong></td>
<td>Picking, Packing</td>
<td>Picking, Picking Up</td>
</tr>
</tbody>
</table>

See [Exception Types and Reasons](#).
Using Fulfillment Requests

You can create multiple fulfillment requests from a single sales order. Likewise, when fulfilling the order from the fulfillment request, you can create multiple item fulfillment records or store pickup fulfillment records from a single fulfillment request.

If multiple locations are specified at line-item level in a sales order, you must create at least one separate fulfillment request per location. For example, in a sales order with two line items, if the first line has a store location in Berkeley and the second line has a store location in San Mateo, you must create two fulfillment requests.

Fulfillment requests can be created manually after a sales order is saved and approved, or automatically when fulfillment request creation is set as an automation process.

To be able to create fulfillment requests in a sales order, you need to specify the location types that will use the fulfillment request transaction – see Setting Up Fulfillment Requests. To let NetSuite create fulfillment requests automatically, you also need to run the fulfillment request automation process and specify options for the process – see Fulfillment Request Creation.

Fulfillment Requests + Cross-Subsidiary Fulfillment

When the Intercompany Cross-Subsidiary Fulfillment feature is enabled in your account, the fulfillment location on a fulfillment request is sourced from the Inventory Location column on the sales order. Consequently, when the order is fulfilled from the fulfillment request, the item fulfillment (for a shipping order) and the store pickup fulfillment (for a pickup order) also use the inventory location as the fulfillment location.

Setting Up Fulfillment Requests

Prerequisites

The following features are required to enable the Fulfillment Request feature. If the features are not currently enabled in your account, they will be enabled automatically when you enable the Fulfillment Request feature.

- Locations
- Multi-Location Inventory
- Advanced Shipping
- Pick, Pack and Ship

Fulfillment Requests Setup Steps

Complete the following steps to set up fulfillment requests:

1. Enable the Fulfillment Request feature.
2. Choose which types of locations will use fulfillment requests.
3. Verify that location records have the correct location type.
4. Create fulfillment exception reasons.
5. Automate creation of fulfillment requests.
Step 1. Enable the Fulfillment Request feature.

To enable the Fulfillment Request feature, you also need to enable the following features at the same time if they are not already enabled: Locations, Multi-Location Inventory, Advanced Shipping, and Pick, Pack and Ship.

To enable the Fulfillment Request feature:

1. Go to Setup > Company > Setup Tasks > Enable Features.
2. Click the Transactions subtab.
3. Under Shipping and Receiving, check the Fulfillment Request box.
4. Click Save.

When you enable the Fulfillment Request feature, the following changes occur in your NetSuite account:

- The fulfillment request record becomes available.
- The fulfillment exception reason record becomes available.
- Options and settings related to fulfillment requests appear on the Advanced Order Management Setup page.
- If the Automatic Location Assignment feature is enabled, the Fulfillment Workload Distribution strategy becomes available in automatic location assignment rules. See Choosing a Fulfillment Strategy.

Step 2. Choose which types of locations will use fulfillment requests.

You can limit usage of fulfillment requests based on location type. The default setting for fulfillment requests limits usage to locations that have the type Store.

Important: The following settings apply to shipping orders only. If the Store Pickup feature is enabled, all store pickup orders will use the fulfillment request record automatically. See Fulfilling Store Pickup Orders for more information.

To set which location types use fulfillment requests:

1. Go to Setup > Order Management > Setup Tasks > Advanced Order Management.
2. Click the Fulfillment Requests subtab.
3. Choose the location types with which you want to use fulfillment requests. The Store location type is selected by default.

Important: The fulfillment request transaction will be mandatory for all locations that have the selected location types.

4. Click Save.

If you want to automate the creation of fulfillment requests, you must also choose automation settings – see Fulfillment Request Creation for more information.

Step 3. Verify that location records have the correct location type.

Check that the Location Type field on location records is correct. Location records must have the same location type as one of the location types you selected for fulfillment requests on the Advanced Order Management Setup page.
For example, if you want to use fulfillment requests for stores only, make sure that each location record for your stores has the location type set to Store. The Location Type field is set to blank by default. See the help topic Creating Locations for more information about location records.

To verify the location type of location records:

1. Go to Setup > Company > Classifications > Locations.
2. Click Edit next to the location you want to check.
3. Verify that the Location Type field matches the fulfillment requests setting on the Advanced Order Management Setup page. If not, edit the location record, select the relevant location type, and save your changes.

Step 4. Create fulfillment exception reasons.

Optional. You can log a fulfillment exception in the system when a problem occurs with the fulfillment of an order. If you want to enter exceptions on fulfillment requests, you must create fulfillment exception reasons. See Defining Fulfillment Exception Reasons.

Step 5. Automate creation of fulfillment requests.

Optional. You can configure NetSuite to create fulfillment requests automatically after a sales order is saved in the system. See Fulfillment Request Creation.

Note: You can combine the automatic creation of fulfillment requests with the automatic assignment of locations. You must enable the Automatic Location Assignment feature in your account to assign fulfillment locations automatically to sales orders. See Automatic Location Assignment for more information.

Defining Fulfillment Exception Reasons

Before you can enter exceptions on a fulfillment request, you must have a list of fulfillment exception reasons defined in the system. A fulfillment exception reason indicates why a fulfillment exception was entered on a fulfillment request. You can create a list of fulfillment exception reasons that suit your business needs to track the reasons why orders cannot be fulfilled at a location. Each exception reason must be associated with an exception type. When entering an exception on a fulfillment request, you select an exception type first, and then select the exception reason.

Exception types are not customizable and are limited to picking, picking up, packing, and shipping, each of which corresponds to a step in the fulfillment process. The picking up exception type is only available when the Store Pickup feature is enabled.

Here are some examples of fulfillment exception reasons. Note that each exception reason is dependent on an exception type.

<table>
<thead>
<tr>
<th>Exception Type</th>
<th>Exception Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Picking</td>
<td>Out Of Stock</td>
</tr>
<tr>
<td>Picking</td>
<td>Damaged</td>
</tr>
<tr>
<td>Pickup Up</td>
<td>Customer No Show</td>
</tr>
<tr>
<td>Picking Up</td>
<td>Items Not As Described</td>
</tr>
</tbody>
</table>
To create a fulfillment exception reason:

1. Go to Setup > Order Management > Fulfillment Preferences > Fulfillment Exception Reasons > New.
2. Enter a name for the exception reason. The name will appear in the list of possible exception reasons on the fulfillment request record.
3. Select an exception type that corresponds with the fulfillment step.
4. Enter a description.
5. Click Save.

To view a list of all fulfillment exception reasons, go to Setup > Order Management > Fulfillment Preferences > Fulfillment Exception Reasons. To make an exception reason inactive, open the relevant fulfillment exception reason record and check the Inactive box.

To delete an exception reason, go to Setup > Order Management > Fulfillment Preferences > Fulfillment Exception Reasons, click View next to the reason and then click Delete under Actions. You can only delete an exception reason if it is currently not assigned to a fulfillment request.

Fulfillment Request Statuses

Fulfillment requests can have one of the following statuses:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Next Possible Statuses</th>
</tr>
</thead>
</table>
| New             | The fulfillment request has been created for the location and is awaiting acknowledgement by an employee at the location. Fulfillment requests can be created manually from a sales order, and automatically when advanced order management automation is running. For more information about creating fulfillment requests automatically, see Fulfillment Request Creation. | In Progress  
                 |                                                                              | Canceled  
                 |                                                                              | Rejected       |
| In Progress     | The fulfillment request has been acknowledged at the location, indicating the intention to start fulfillment of the order. A fulfillment request can also have the In Progress status in the following circumstances:  
                 | Only some lines are picked.  
                 | Only some lines are packed.  
                 | Only some lines have been shipped to the customer  
                 | For example, if a fulfillment request has two lines and only the first line is picked, the fulfillment request has the status In Progress. When the second line is picked, the fulfillment request status is set to Picked.  
                 |                                                                              | Picked  
                 |                                                                              | Packed  
                 |                                                                              | Partly Fulfilled  
                 |                                                                              | Fulfilled  
                 |                                                                              | Fulfilled With Exceptions  
                 |                                                                              | Cancelled  
                 |                                                                              | Rejected       |
| Picked          | Indicates that all items in the fulfillment request have been picked from shelves. If only some line items have been picked, the fulfillment request status is In Progress. | Packed     |
| Packed          | Indicates that all items in the fulfillment request have been packed and are ready for shipment.  
<pre><code>             | The Packed status is only used with shipping orders. It is not used with pickup orders. | Fulfilled     |
</code></pre>
<p>| Partially Fulfilled | Indicates that some items have been shipped to the customer. A fulfillment request with this status typically has at least two item fulfillment records associated with it. Items in one of the item fulfillments have been shipped | Fulfilled     |</p>
<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Next Possible Statuses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fulfilled with Exceptions</td>
<td>Some items in the fulfillment request have been fulfilled, but other items have been rejected. A fulfillment request with this status cannot be changed or updated.</td>
<td>None</td>
</tr>
<tr>
<td>Fulfilled</td>
<td>All items in the fulfillment request have been shipped to the customer.</td>
<td>None</td>
</tr>
<tr>
<td>Rejected</td>
<td>All items in the fulfillment request have been rejected.</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td>If the Automatic Location Assignment feature is enabled, no new fulfillment requests with the rejected line items will be assigned automatically to the location. See Rejecting and Canceling Fulfillment Requests for more information.</td>
<td></td>
</tr>
<tr>
<td>Cancelled</td>
<td>The fulfillment request has been canceled. A fulfillment request with this status cannot be changed or updated.</td>
<td>None</td>
</tr>
</tbody>
</table>

Creating Fulfillment Requests

Creating a fulfillment request lets you send a request to a location to fulfill a sales order. At the location, employees can decide whether to accept the request and fulfill the order, or reject the request and not fulfill the order. When you create a fulfillment request, its status is set to New by default. The New status indicates the request is assigned to a location, but employees at the location have not yet decided to accept it and fulfill it. When employees are ready to work on the request, they mark the request as In Progress.

To create a fulfillment request from a sales order, lines on the sales order must have a fulfillment location, which is specified in the Location column on each line.

**Note:** When the Intercompany Cross-Subsidiary Fulfillment feature is enabled in your account, the fulfillment location on a fulfillment request is sourced from the Inventory Location column on the sales order.

You can create more than one fulfillment request from a single sales order. If a sales order has multiple line items with different fulfillment locations, you must create separate fulfillment requests per location. For example, if a sales order has four lines and the location on the last line is different than the location on the first three lines, you must create two separate fulfillment requests – one for the first three items and one for the last item.

You can only create fulfillment requests when at least one of the locations on the line items has a valid location type for fulfillment requests. You can set the valid location types for fulfillment requests on the Advanced Order Management setup page – see Setting Up Fulfillment Requests.

Fulfillment requests can also be created automatically in NetSuite if fulfillment request automation is running in your account. If automation is running, you do not need to create a fulfillment request manually. You can check if a fulfillment request exists for a sales order by viewing the Related Records subtab on the sales order.

For more information about automating fulfillment requests, see Fulfillment Request Creation.

**To create a fulfillment request:**

1. Go to Transactions > Sales > Enter Sales Orders > List.
Fulfillment Requests

2. Click View next to the sales order from which you want to create the fulfillment request.
3. Click Request Fulfillment. The Fulfillment Request page is displayed.
4. Set the status of the fulfillment request.
   The default status for a new fulfillment request is New. Setting the status to In Progress indicates that the request has been accepted or acknowledged at the fulfillment location.
5. Make sure the Fulfill box next to the line items you want to request is checked.

   **Note:** You can only create a fulfillment request for one location at a time. If there are lines with different locations, check the Fulfill box on the lines that have the same location. After creating the fulfillment request, you need to return to the sales order record and click the Request Fulfillment button again to create additional fulfillment requests for the other locations.

6. In the Quantity column, enter the quantity you want to request. The quantity entered on the sales order appears by default.

   **Note:** If you enter a quantity on the fulfillment request that is less than the quantity ordered, you must create an additional request from the sales order to fulfill the order.

7. Click Save.

After you create a fulfillment request, you cannot add other line items from the same sales order to the request. If there are still line items on the sales order that need to be fulfilled, you must create another fulfillment request separately. You can create as many fulfillment requests as required to fulfill the sales order.

After you create a fulfillment request, you cannot modify the line items on the sales order, except to change the quantity. If you increase the quantity, you must create an additional fulfillment request for the difference. For example, if you increase the quantity of a line from 12 to 15, you must create another fulfillment request for the remaining three units of the item.

When you create a fulfillment request, its status is New. You can then acknowledge the fulfillment request to indicate you intend to fulfill it – see Acknowledging Fulfillment Requests.

Shipping Groups on Fulfillment Requests

The Multiple Shipping Routes feature lets you choose per-line shipping options on a sales order. For example, on a sales order with two lines, you can select different shipping addresses on each line to ship the items to the same customer at two different addresses, such as a work address and a home address.

A shipping group is a unique combination of line attributes used to group lines in a fulfillment request. Line attributes used to determine shipping groups include delivery address and shipping carrier. The Ship Group column in the Items list on a fulfillment request shows the shipping group number for each line. Lines with the same ship group number belong to the same shipping group. When creating fulfillment requests, you must create one fulfillment request per shipping group.

If you automate the creation of fulfillment requests, NetSuite calculates shipping groups automatically and creates as many fulfillment requests as required.

The following screenshot shows a fulfillment request with two shipping groups. Two of the items have the same shipping address or carrier on the sales order, whereas the third item has a different shipping address or carrier. To save the fulfillment request, you must check the Fulfill box of the items in one shipping group only. Then, you must return to the sales order and create another fulfillment request for the items in the other shipping group.
Acknowledging Fulfillment Requests

To start processing an order from a fulfillment request, you must first acknowledge the fulfillment request, by marking it as in progress. After you make a fulfillment request as in progress, its status changes to In Progress.

Note that a fulfillment request at a particular location might be for all items in a sales order or only some of the items in a sales order. You can view the original sales order by clicking the link under the Primary Information section in the fulfillment request.

If a fulfillment request has two or more lines, you can choose to acknowledge only some of the lines. Lines you do not mark for fulfillment are removed from the fulfillment request when you save. A new fulfillment request must then be created to ensure the remaining items in the order are fulfilled.

Note: Acknowledging a fulfillment request is the same for both shipping orders and pickup orders.

To acknowledge a fulfillment request:

1. Go to Transactions > Sales > Manage Fulfillment Requests.
2. In the Filters section, set your location as the fulfillment location.
3. Click View next to the fulfillment request that you want to acknowledge. The fulfillment request must have the status New.
4. Click Mark In Progress to confirm that you intend to fulfill all items in the fulfillment request.
   If you only want to acknowledge some of the lines in the fulfillment request, click Edit. In the Items subtab, check the Fulfill box next to each item you intend to fulfill. Clear the Fulfill box next to the line items you do not want to request.
5. Click Save.

You can then start to fulfill the order – see Fulfilling Orders from Fulfillment Requests.

Managing Exceptions on Fulfillment Requests

Sometimes when fulfilling orders, an unexpected problem might occur with inventory of the ordered items. In NetSuite, you can manage these problems in different ways on the fulfillment request record,
depending the fulfillment request type. For fulfillment requests of type Ship, you can reject lines in the fulfillment request. For fulfillment requests of type Store Pickup, you can enter “exceptions”. Examples of exceptions include out of stock inventory and damaged or spoiled items on the store shelves. Exceptions interrupt the normal store pickup workflow. The usage of exceptions on the fulfillment request record offers the following benefits:

- Enables you to record and track problems with inventory.
- Lets you view orders on hold because of inventory problems.
- Prevents further shipping orders from being assigned to a store automatically. This only applies if the Automatic Location Assignment feature is enabled and configured to assign locations to sales order lines automatically.

A fulfillment exception is a deviation from the expected fulfillment workflow, typically because of inventory problems. Two types of exceptions are available for store pickup orders: Picking and Picking Up. You enter the Picking exception type before or during the picking stage. You enter the Picking Up exception when the customer visits the store to collect the items.

Fulfillment request exceptions can be entered on a fulfillment request for both shipping orders and store pickup orders.

**Exception Types and Reasons**

To enter an exception on a fulfillment request, you must select an exception type and an exception reason. Exception types are predefined in NetSuite and cannot be changed. Exception reasons are not predefined in the system. You must create a list of fulfillment exception reasons that suit your business requirements prior to entering an exception – see Defining Fulfillment Exception Reasons. Exception types depend on the fulfillment request type. The following table describes each exception type and on which fulfillment request type you can enter it.

<table>
<thead>
<tr>
<th>Exception Type</th>
<th>Description</th>
<th>Available For These Fulfillment Request Types</th>
</tr>
</thead>
</table>
| Picking        | A picking exception is entered when a problem occurs in the picking stage of the fulfillment workflow. You can enter a fulfillment request when it has the status New or In Progress. | ■ Ship  
■ Store Pickup |
| Picking Up     | A picking up exception is entered when the customer visits the store to collect the order and decides not to pick up one or more of the items in the order. You can only enter a picking up exception after items have been picked. | ■ Store Pickup |
| Packing        | Packing exceptions are entered when a problem occurs in the packing stage of the fulfillment workflow. You can only enter an exception of type packing after items have been picked (on the item fulfillment). | ■ Ship |
| Shipping       | Shipping exceptions are entered when a problem occurs in the shipping stage of the fulfillment workflow. You can only enter an exception of type shipping after items have been packed (on the item fulfillment). | ■ Ship |

**Note:** You can enter fulfillment exceptions for fulfillment requests of type Ship, however, only as a record of the occurrence of the exception.
Fulfillment Exceptions for Store Pickup Orders

You record exceptions for store pickup orders by entering fulfillment exceptions on the fulfillment request record. To view which fulfillment requests have exceptions, you must create a custom view of the Fulfillment Requests page – see Viewing a List of Fulfillment Requests with Exceptions.

Working with exceptions on fulfillment requests consists of the following steps:

1. Store sales associates enter a picking type exception. See Entering Picking Fulfillment Exceptions.
2. Customer service employees (or store employees) set fulfillment instructions to fulfill or not fulfill based on customer feedback. See Resolving Fulfillment Exceptions.
4. If the customer does not pick up the order, enter a pickup type exception. (No further actions are required after this.) See Entering Pickup Fulfillment Exceptions.

To record exceptions for shipping orders, reject the lines in the fulfillment request instead of entering a fulfillment exception – see Fulfillment Exceptions on Shipping Orders.

Viewing a List of Fulfillment Requests with Exceptions

To work with fulfillment requests for store pickup, you need to create a custom view of the Fulfillment Requests page. Add the Pickup Hold field to the list of columns shown on the page. The Pickup Hold field is used to indicate the status of a fulfillment request when exceptions have been entered for one or more line items. See Using the Pickup Hold Field for more information about the Pickup Hold field.

To create a custom view to show fulfillment requests with the Pickup Hold field:

1. Go to Transactions > Sales > Manage Fulfillment Requests.
2. Click Customize View.
3. Click the More Options button.
4. In the Search Title field, enter a name for the custom view.
5. On the Criteria subtab, in the Standard sublist, add Type as a filter with its value set to Fulfillment Request.
6. On the Results subtab, in the Columns sublist, add the Pickup Hold field to the list of fields.
7. To specify a default sort order and column on the Fulfillment Requests page, select a field in the Sort By field. To sort in descending order, check the Descending box.
8. To show the Pickup Hold field as a filter in the custom view:
   a. Click the Available Filters subtab.
   b. Add the Pickup Hold field to the list of fields in the Filter column.
9. Add any other criteria, fields, or filters you want to be displayed in the custom view.
10. Click Save.

Entering Picking Fulfillment Exceptions

View a related video: Fulfillment Request Exceptions

You can enter a fulfillment exception when the fulfillment request has the status New or In Progress. To enter a fulfillment exception, you specify the exception quantity, the exception type, and the reason for the exception. The exception quantity you are able to specify depends on two factors: the exception type and the quantity of items already fulfilled.

The following screenshot shows how a picking fulfillment exception is entered on the fulfillment request record. The quantity requested is 1 (A) – this is usually the same as the quantity entered on the sales
order. You enter the quantity of the items in the exception (B). You select the kind of exception – Picking or Picking Up (C). You enter the cause of the exception in the Exception Reason column (D).

⚠️ **Important:** If you change the exception type after entering an exception quantity, verify that the exception quantity is correct.

![Fulfillment Requests](image)

Using the Pickup Hold Field

To indicate an exception has been entered and further action is required to process the order, NetSuite sets the Pickup Hold field on the fulfillment request. The field is only set when all line items in the fulfillment request are either picked or have a fulfillment exception. You and other employees can then view a list of fulfillment requests according to the pickup hold status.

**Note:** The status of the fulfillment request record is not affected by the Pickup Hold field.

The Pickup Hold field can have one of the following values:

- **Customer Feedback Requested** – NetSuite sets the Pickup Hold field to this value after a new fulfillment exception is entered on the fulfillment request and all other line items in the request are either picked or have a fulfillment exception. This is the first pickup hold status.
- **Customer Feedback Received** – After contacting the customer, you enter the customer’s instructions on the fulfillment request. NetSuite sets the Pickup Hold to this value when all items have an instruction. This is the second pickup hold status.
- **Instructions Acknowledged** – This is the final pickup hold status. NetSuite sets the Pickup Hold field to this value to indicate that you have viewed instructions on all lines. When viewing the list of fulfillment requests, you can then filter out fulfillment requests with this pickup hold status.

**To enter a picking fulfillment exception:**

1. Go to Transactions > Sales > Manage Fulfillment Requests and click **Edit** next to the fulfillment request you want to work with.
2. Click the **Fulfillment Exceptions** tab.
3. In the **Item** column, select an item. Only unfulfilled items in the fulfillment request appear in the dropdown list.
4. In the **Exception Type** field, select Picking.
5. In the **Exception Quantity** column, enter the number of items for the fulfillment exception.
6. Select the reason for the exception. The list of reasons in the dropdown list depends on the selected exception type. See **Exception Types and Reasons**.
You can also enter a comment if you want to add more details about the reason for the exception.

7. **Click Save.**

After you enter picking exceptions in a fulfillment request, NetSuite checks whether the pickup hold status needs to be updated. If the sum of the exception quantity and the picked quantity is equal to the requested quantity, NetSuite sets the pickup hold status to Customer Feedback Requested.

If the Pickup Hold field is not updated, make sure all line items in the fulfillment request are either picked or have a fulfillment exception.

**Note:** The pickup hold status is independent of the fulfillment request status. The status of the fulfillment request remains In Progress (or New) regardless of the Pickup Hold status.

### Examples of Picking Fulfillment Exceptions

#### Fulfillment Request with One Line Item

In this scenario, the fulfillment request has a quantity of five for item Blue Jeans Size M. During the picking stage of fulfillment, the store employee discovers that one of the items is damaged. The employee enters a fulfillment exception by specifying "1" as the quantity, "Picking" as the type, and "Damaged" as the reason. When the employee saves the fulfillment request with the exceptions, the Pickup Hold field is set to Customer Feedback Requested (because the sum of the picked quantity and the exception quantity is equal to the requested quantity).

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Picked Qty</th>
<th>Exception Type</th>
<th>Exception Reason</th>
<th>Exception Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue Jeans Size M</td>
<td>5</td>
<td>4</td>
<td>Picking</td>
<td>Damaged</td>
<td>1</td>
</tr>
</tbody>
</table>

#### Fulfillment Request with Multiple Line Items

In this scenario, the fulfillment request has three line items (Blue Jeans Size M, Black Shirt Size M, and Scarf). The line item Blue Jeans Size M is fully available in the store, but the line item Black Shirt Size M is only partially available, and the item Scarf is not available. Because the line items for the black shirt and the scarf cannot be picked, the employee enters a fulfillment exception for the line items, specifying the "Picking" exception type and the "Damaged" and "Inventory mismatch" reasons respectively. When all lines have been fully picked or exceptions have been entered, the Pickup Hold field is set to Customer Feedback Requested.

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Picked Qty</th>
<th>Exception Type</th>
<th>Exception Reason</th>
<th>Exception Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue Jeans Size M</td>
<td>3</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black Shirt Size M</td>
<td>2</td>
<td>1</td>
<td>Picking</td>
<td>Damaged</td>
<td>1</td>
</tr>
<tr>
<td>Scarf</td>
<td>1</td>
<td>0</td>
<td>Picking</td>
<td>Inventory mismatch</td>
<td>1</td>
</tr>
</tbody>
</table>

#### Picking Exceptions + Automatic Location Assignment

If the Automatic Location Assignment feature is enabled and you enter a picking exception, NetSuite suspends automatic location assignment of the item. Entering a picking exception is typically an indication of an anomaly or problem with inventory of the item at the location. NetSuite therefore suspends automatic location assignment of the item to prevent further fulfillment requests being created for the location. After you save the exception on the fulfillment request record, NetSuite no longer assigns locations automatically to sales order lines that have the suspended items.
Important: Store pickup orders are not affected by suspension of the item because the customer explicitly chooses the store pickup location at the time the order is created.

To start receiving fulfillment requests again at the location for suspended items, you must clear the Auto Loc. Assignment Suspended box on the item record. To restore an item suspended for automatic location assignment, go to Lists > Accounting > Items and click Edit next to the item you want to restore. On the Purchasing/Inventory subtab, in the Locations sublist, clear the Auto Loc. Assignment Suspended box for the location, and then click Save.

Resolving Fulfillment Exceptions

When there are pickup exceptions in a fulfillment request, you typically need to contact the customer to determine how to proceed with the order. Based on the customer’s wishes, you can set instructions to either continue with fulfillment of the items or cancel fulfillment of the items on the order.

To resolve fulfillment exceptions, you must first identify the fulfillment requests that have exceptions requiring customer feedback. Then, you need to set fulfillment instructions on each line in the request.

Viewing Fulfillment Requests That Require Customer Feedback

The Pickup Hold field on a fulfillment request record indicates the status of the request as regards the fulfillment exceptions entered on it.

Note: The status of the fulfillment request itself remains either New or In Progress irrespective of the Pickup Hold status.

To view fulfillment requests requiring customer feedback:

1. Go to Transactions > Sales > Manage Fulfillment Requests.
2. Select a custom view that displays the Pickup Hold field.
   - If a suitable custom view is not available, you can create one – see Viewing a List of Fulfillment Requests with Exceptions
3. Filter the list to show fulfillment requests with the Pickup Hold field set to Customer Feedback Requested.
4. Click View to open a fulfillment request.

After you identify the items for which a fulfillment request exception was entered, you contact the customer to explain the reason for the exception and to determine how to proceed with order fulfillment.

Setting Fulfillment Instructions on a Fulfillment Request

Fulfillment instructions indicate how to continue order fulfillment after receiving customer feedback. NetSuite offers two possible fulfillment instructions:

- **Fulfill**
  
  When you set fulfillment instructions to Fulfill, it indicates that the customer still wants to pick up the items. For example, if an exception was entered because of an inventory mismatch, but the store is expecting inventory the next day, the customer might still want to pick up the order despite the extra day wait.

- **Do Not Fulfill**
  
  When you set fulfillment instructions to Do Not Fulfill, it indicates that the customer no longer wants to purchase the item. If the quantity of the fulfillment exception is the same as the line item quantity, the line item is rejected (the quantity in the Rejected column is set to the same value as the Quantity column). If all line items in a fulfillment request are rejected, the fulfillment request status is Rejected.
If line items on the fulfillment request have already been picked (and a store pickup fulfillment record created) and you set Do Not Fulfill on all lines (including picked lines), the fulfillment request is rejected and the store pickup fulfillment records are cancelled.

When a fulfillment request has exceptions, you must set fulfillment instructions on all line items in the fulfillment request, even if only one line item has an exception.

To set fulfillment instructions:

1. Go to Transactions > Sales > Manage Fulfillment Requests.
2. Select a custom view that shows the Pickup Hold column.
3. Click Edit next to the fulfillment request you want to work with.
4. On the Items subtab, set the fulfillment instruction in the Instruction column of each line item to one of the following:
   - Fulfill
   - Do Not Fulfill

   **Important:** You must set fulfillment instructions on all lines in the fulfillment request to ensure the pickup hold status is updated.

5. Click Save.

When all line items in the fulfillment request have a fulfillment instruction, NetSuite sets the pickup hold status of the fulfillment request to Customer Feedback Received. Store employees can then view all fulfillment requests with customer feedback and confirm the instruction to continue processing the orders.

**Note:** If no lines in the fulfillment request have been picked, you can cancel the fulfillment request by clicking the Cancel Request button.

**Confirming Fulfillment Exceptions**

After fulfillment instructions are set on the fulfillment request (see Setting Fulfillment Instructions on a Fulfillment Request), you can continue processing an order. If the instruction on a line is set to Fulfill, you continue preparing the item for pickup by the customer. If the instruction is Do Not Fulfill, the line is rejected and you do not need to prepare the item for pickup.

**Note:** A line is defined as rejected when the rejected quantity (in the Rejected column) is the same as the requested quantity (in the Quantity column) on the Items subtab.

To finalize the fulfillment exception workflow, you must acknowledge the fulfillment instructions received. When you acknowledge all lines in a request, NetSuite sets the pickup hold status to Instructions Acknowledged. You can then filter out completed requests on the Fulfillment Requests page and view reports based on the pickup hold status. You must acknowledge instructions on all lines, regardless of whether the instruction is Fulfill or Do Not Fulfill, otherwise the pickup status remains as Customer Feedback Received.

In the following screenshot, the instructions on a fulfillment request have been acknowledged. A fulfillment exception was entered for the first line (Black Shirt Size L) due to physical damage and the second line (Blue Jeans Size 40) was picked. The customer decided to cancel the first line in the order. The instruction was set to Do Not Fulfill (A). Because the quantity requested was the same as the quantity in the fulfillment exception, NetSuite set the rejected quantity to 1 (B). The customer still wanted to pick up the second item, therefore the instruction was set to Fulfill (C).
To view fulfillment requests with fulfillment instructions entered, you must display a list of fulfillment requests that have the pickup hold status set to Customer Feedback Received. See Viewing a List of Fulfillment Requests with Exceptions for information about showing additional fields in the fulfillment requests list.

**To confirm fulfillment instructions:**

1. Go to Transactions > Sales > Manage Fulfillment Requests.
2. Select a custom view that shows the Pickup Hold column.
3. Click **Edit** next to the fulfillment request (with pickup hold status of Customer Feedback Received) you want to work with.
4. Click the **Items** subtab.
5. Check the box in the **Acknowledge Instruction** column for all line items.
   - If the Instruction column is set to Fulfill, you can continue preparing the order for the customer for pickup.
   - If set to Do Not Fulfill, you do not need to pick the item. If the item is already picked, you can restock it.
6. Set the value of the **Pickup Hold** field in the header section to Instructions Acknowledged.
7. Click **Save**.

### Entering Pickup Fulfillment Exceptions

When a customer visits the store to pick up an order, the customer might decide to not pick up all items in the order. You can enter a pickup fulfillment exception to record the fact that the customer did not pick up one or more items. You can only enter a pickup fulfillment exception after goods have been picked. When entering a pickup fulfillment, you must also select an exception reason. You can enter comments to provide additional information about the reason. See Exception Types and Reasons for a list of exception reasons.

**Important:** Entering a pickup exception does not affect the status of the fulfillment request or the store pickup fulfillment. You might need to update related documents or transactions in the system separately, such as the sales order or store pickup fulfillment. The business workflow in use at your company will determine the next steps you need to complete. Possible actions might include canceling the store pickup fulfillment and then canceling the fulfillment request to remove it from the list of requests.

**To enter a pickup fulfillment exception:**

1. Go to Transactions > Sales > Manage Fulfillment Requests and click **Edit** next to the fulfillment request you want to work with.
2. Click the **Fulfillment Exceptions** subtab.
3. Select the item in the **Item** column.
4. Set the exception type as Picking Up and then select an exception reason.
5. Enter the exception quantity and then click **Add**.
6. Click **Save**.

### Fulfillment Exceptions on Shipping Orders

Record exceptions on fulfillment requests for shipping orders by rejecting lines in the fulfillment request. You can reject lines on a fulfillment request provided that the lines have not been picked. If you reject a line, you must reject the full quantity of the line.

You can also cancel a fulfillment request provided that no items in the request have been picked and the request has a status of New or In Progress. After you cancel a fulfillment request, you can no longer change it. If there are still items on the sales order to be fulfilled, you must create a new fulfillment request.

The main differences between rejecting and canceling a fulfillment request are as follows:

<table>
<thead>
<tr>
<th>Rejecting</th>
<th>Canceling</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applies to one or more unpicked lines in the fulfillment request. You can choose which lines to reject.</td>
<td>Applies to all line items in the fulfillment request.</td>
</tr>
<tr>
<td>Lets you enter a reason for the rejection.</td>
<td>No way to record a reason for the cancelation.</td>
</tr>
<tr>
<td>Rejected line items can no longer be changed in the fulfillment request, except to enter a reason for the rejection in the Request Note field. You can continue working with the remaining line items in the fulfillment request.</td>
<td>The fulfillment request becomes read only. No lines can be changed.</td>
</tr>
<tr>
<td>If the Automatic Location Assignment feature is enabled, the Automatic Location Assignment Suspended box is checked on each item record for the location that rejects the lines.</td>
<td>No changes are made to the item records.</td>
</tr>
<tr>
<td>Later fulfillment requests will not contain the rejected line items at the location that rejected the items until the box is cleared on the item record.</td>
<td>Subsequent fulfillment requests can include the same line items.</td>
</tr>
</tbody>
</table>

### Rejecting and Canceling Fulfillment Requests

When fulfilling shipping orders from a fulfillment request, you might encounter problems with inventory that prevent you from fulfilling the order or part of the order. In the order fulfillment workflow, such inventory problems are called “exceptions”. To record these exceptions on a fulfillment request properly for shipping orders, you reject the lines in the fulfillment request.

**Note:** The fulfillment request type for shipping orders is Ship; the fulfillment request type for store pickup orders is Store Pickup.

You can reject lines in a fulfillment request provided the items have not yet been picked. If you reject all lines in a fulfillment request, the fulfillment request status is set to Rejected. If you reject only some lines the fulfillment request status remains In Progress. After you fulfill the remaining lines, the fulfillment request status is Fulfilled with Exceptions.

If the fulfillment request is for a store pickup order (the fulfillment request type is Store Pickup), enter a fulfillment exception instead of rejecting the lines. See **Fulfillment Exceptions for Store Pickup Orders** for more information.
To reject all unpicked lines in a fulfillment request:

1. Go to Transactions > Sales > Manage Fulfillment Requests.
2. Click View next to the fulfillment request record in which you want to reject lines.
3. Click Reject Unpicked Lines to reject all lines which have not yet been picked.
4. Click Yes to confirm the rejected line items and quantities.
   
   If you rejected all requested lines in the fulfillment request, the status is set to Rejected and the record becomes read only. If you only rejected some of the lines (because you already started to fulfill other lines in the request), the status of the fulfillment request remains In Progress until the line items are shipped.

You can also reject an individual line in a fulfillment request without having to reject all unpicked lines. The following two conditions must be met to reject a line:

- The quantity you reject must be the same as the quantity requested.
- The picked quantity of the line must be zero.

To reject an individual line, edit the fulfillment request you want to work with, and then enter the rejected quantity of the line in the Rejected column. The Rejected column must have the same value as the Quantity column. The following screenshot shows a rejected line in a fulfillment request. The requested quantity (A) and the rejected quantity (B) are the same.

To cancel a fulfillment request:

1. Go to Transactions > Sales > Manage Fulfillment Requests.
2. Click View next to the fulfillment request record you want to cancel.
3. Click Cancel Request.
   
   After you cancel a fulfillment request, you can no longer change it.

   **Note:** You can also cancel a fulfillment request when editing the fulfillment request record. To do so, in the Status field, select Cancelled and then click Save.

Rejected Fulfillment Requests + Automatic Location Assignment

When the Automatic Location Assignment feature is enabled in your account, you can configure NetSuite to assign fulfillment locations to sales order lines and then create fulfillment requests automatically. When you reject a fulfillment request or a line in a fulfillment request, however, the system performs a number of actions depending on how automatic location assignment is configured.

Firstly, automatic location assignment is suspended on the item record for the fulfillment request location. Specifically, on the item record, the Automatic Loc. Assignment Suspended attribute is checked for the location. This means that the automatic location assignment engine will not assign the same location to new sales orders until the box is cleared.
To resume the automatic creation of fulfillment requests for an item at a location, clear the Auto Loc. Assignment Suspended on the item record. See Configuring Items for Automatic Location Assignment for more information.

Secondly, if automatic location assignment is configured to run when fulfillment requests are rejected, the automatic location assignment engine will run again on the sales order to assign another location to the line. The Automatic Loc. Assignment Suspended attribute on the item ensures that the same location is not assigned to the line. If the engine assigns another location, a new fulfillment request is created for the other location. See Managing Automation Settings for Automatic Location Assignment about configuring automatic location assignment.

**Note:** If you create a fulfillment request manually on a sales order, it is possible to create it for a location at which automatic location assignment is suspended.

### Rejected Fulfillment Requests

When a fulfillment request has the Rejected status, it indicates that the fulfillment request has been discarded. Rejected items in the fulfillment request will not be fulfilled. You reject fulfillment requests in different ways, depending on the type of order:

- For shipping orders, you reject all lines.

  **Note:** The Rejected status is set only when all lines in the fulfillment request are rejected. If some lines are already picked (and will be shipped to the customer) and you reject all unpicked lines, the status of the fulfillment request is not set to Rejected.

- For store pickup orders, you add a fulfillment exception.

  **Note:** The Rejected status is set when the Instruction column of all lines in the request is set to Do Not Fulfill. See Resolving Fulfillment Exceptions for information about how to set fulfillment instructions.

To ensure the fulfillment request workflow remains valid, and information on the fulfillment request is consistent, most fields on a rejected fulfillment request record are read only. Fields and information that is read only includes the following:

- The Quantity and Rejected columns under the Items subtab are read only.
- Line items cannot be removed.
- Fulfillment exceptions already entered on the Fulfillment Exceptions tab cannot be removed.

You can continue to edit the following fields on a rejected fulfillment request record:

- Custom fields you added to the fulfillment request record.
- The Date, Memo, and Assignee fields on the record header.
- Notes entered at the line level under the Items subtab.

### Fulfilling Orders

Orders are fulfilled by shipping the items to the recipient. Fulfilling an order includes pulling the items from inventory, packaging them and sending them to your customer. You can fulfill orders in several ways:
Fulfilling Orders

- Fulfill a single order – You can fulfill orders on an individual basis. See Fulfilling Orders Individually.
- Bulk fulfill orders – You can fulfill many orders at the same time. See Bulk Fulfilling Orders.
- Bulk fulfill orders with a CSV import – You can import a CSV file that contains a list of fulfilled orders. See Bulk Fulfilling Orders Using a CSV Import.
- Fulfill shipping orders from a fulfillment request – If you use the Fulfillment Request feature, you can acknowledge the fulfillment request and then fulfill it by picking, packing, and shipping the requested items. See Fulfilling Orders from Fulfillment Requests.
- Fulfill store pickup orders – You fulfill store pickup orders by picking the items from store inventory and creating a store pickup fulfillment record. Store pickup orders can be fulfilled from a fulfillment request, or if the Fulfillment Request feature is not enabled, from a sales order. See Fulfilling Store Pickup Orders.

Fulfilling an item affects the general ledger by posting a debit to the Cost of Goods Sold (COGS) account and a credit to the Inventory Asset account. See the help topic Sales Transaction GL Impact for more information about the accounting impact of fulfilling orders.

**Note:** For details about fulfilling an order without Advanced Shipping enabled, please read the help topic Billing or Invoicing a Sales Order.

### Fulfilling Orders Individually

You can fulfill a single order when you are ready to ship the ordered items to the customer. When you fulfill an order, an item fulfillment is created. If you use the Pick, Pack, and Ship feature, you can also fulfill orders using separate processes for picking, packing, and shipping goods – see Fulfilling Orders Using Pick, Pack, and Ship for more information.

#### To fulfill an order:

1. Go to Shipping > Shipping > Fulfill Orders.
2. Optionally, filter the list of available orders to be fulfilled according to any of the following criteria:
   - Customer – Select a customer in the Customer field.
   - Fulfillment location – Select a location in the Bulk Fulfill From Location field and make sure the Filter box is checked.
   - Item availability – Filter orders based on the availability of items in each order. You can choose to show orders that have some items committed, show orders that have all items committed, show ship complete orders, or ignore item availability on orders.
3. Click **Fulfill** next to the order you want to fulfill.
4. On the New Item Fulfillment page, verify or enter information in the following fields:
   - **Ref. No.** – A number or code you can later use to reference this item fulfillment. If To Be Generated is displayed as the reference number, the number is created only after you save the item fulfillment. Otherwise, an autogenerated item fulfillment number is displayed; you can enter a different number if desired.
   - **Customer** – The customer for whom the sales order was created.
   - **Created From** – The name and number of the original transaction on which the item fulfillment is based. You can click the number to view the transaction.
- **Date** – The date of the item fulfillment.
- **Posting Period** – The accounting period to which the transaction will be posted. You can only choose open accounting periods.
  
  This field appears only when the Accounting Period feature is enabled.

5. In the **Items** subtab, enter the details of the line items to be fulfilled:
   
a. In the **Quantity** column, verify that the quantities showing match the items you are shipping.
   - If you want to fulfill the entire order, make sure the amount in the Quantity column equals the amount in the Remaining column for each item.
   - To partially fulfill the order, enter the actual quantity of each item that you are shipping.

b. If an item is a serialized item or a lot numbered item, enter the serial or lot number in the **Serial/Lot Numbers** field.
   - Separate each serial number with a space, a comma, or by pressing **Enter** after each one.
   
   You must enter a serial number for each serialized item. For example, if you enter a quantity of 2, then you must enter two serial numbers.
   - Lot numbers must be entered in this format: **LOT#(Quantity)**
     
     For example, to enter a quantity of 100 items as Lot number ABC1234, enter ABC1234(100).

c. In the **Bin Numbers** column, the preferred bin for that item displays. After this item is picked, you can edit this field if items were pulled from other bins associated with the item. The Bin Numbers field can be edited only if the item is stored in bins.
   - To edit bins, click the **Bins** icon, change the quantity pulled from each bin associated with the item, and click **Done**.
   
   The Bin Numbers column appears only when the Bin Management feature is enabled.

6. In the **Shipping** subtab, verify the shipping information and shipping address.
   
   The Shipping Cost field appears only when charges are enabled for shipping.

7. In the **Packages** subtab, verify package weights, content description, insured value, and tracking numbers.

**Note:** If the initial package weight or insured value have been manually updated, then the weight or value is not auto-calculated when an item quantity is changed on an item fulfillment using the Select Item field. Package weight and insured value must be manually updated.

8. Click **Save**.
   
   After an item fulfillment posts to the General Ledger, the fulfillment cannot be edited if the transaction date falls within a closed period.

### Fulfilling Orders from Fulfillment Requests

**Note:** The following information relates to fulfilling **shipping orders** from fulfillment requests.
To fulfill a store pickup order from a fulfillment request, see **Fulfilling Store Pickup Orders from Fulfillment Requests**.

Fulfilling orders from a fulfillment request uses the pick, pack, and ship workflow. To fulfill a shipping order from a fulfillment request, you create an item fulfillment record. The fulfillment request record
must have the In Progress status before you can proceed with fulfillment. You can create multiple item fulfillments from a single fulfillment request.

When you create the item fulfillment, its status is initially set to Picked. At this stage, the fulfillment request status is also Picked provided that all items in the fulfillment request have been picked; otherwise, the status remains In Progress until the items are marked as Shipped in the item fulfillment. The number of items you pick, pack, and ship in the item fulfillment are also shown in the fulfillment request. After you start fulfillment, you can no longer reject or cancel the line items in the fulfillment request.

If you delete an item fulfillment created from a fulfillment request, the fulfillment request reverts to In Progress. You can then start to fulfill from the fulfillment request again.

**To fulfill a shipping order from a fulfillment request**

1. Go to Transactions > Sales > Manage Fulfillment Requests.
2. Click View next to the fulfillment request you want to fulfill.
3. Click Fulfill. The Item Fulfillment page appears.
4. If both the status and quantities are correct, click Save to create an item fulfillment record.
   - The status is set to Picked by default, which is the first status in the pick, pack, and ship workflow. You can also skip the Picked status and select the Packed or Shipped status instead.
5. Continue working on the item fulfillment record until the items in the order are shipped:
   a. First, in the item fulfillment record with status Picked, click Mark Packed. After you mark an item fulfillment as packed, it status changes to Packed.
   b. Then, in the same item fulfillment record with status Packed, click Mark Shipped. After you mark an item fulfillment as shipped, it status changes to Fulfilled.

After items are marked as shipped in the item fulfillment record, the quantity shipped appears in the Fulfilled column in the fulfillment request.

**Fulfillment Requests + Automatic Location Assignment**

If the Automatic Location Assignment feature is enabled, and depending on how the feature is set up, deleting an item fulfillment can cause NetSuite to run the automatic location assignment process again. NetSuite might then assign a different fulfillment location to the line items in the sales order, in which case a new fulfillment request will be created. See Automation Overview for more information about the main aspects of automatic location assignment and the automatic creation of fulfillment requests.

**Bulk Fulfilling Orders**

You can fulfill many orders simultaneously from the same location. You select the location from which you want to fulfill the orders and submit the orders for processing. NetSuite processes the orders in the background.

**To bulk fulfill orders:**

1. Go to Shipping > Shipping > Fulfill Orders.
2. Optionally filter the list of orders by selecting a customer you want to fulfill an order for.
3. Select the period you want the fulfillments to post to.
4. In the Set Shipment Status To field, select the status you want these fulfilled sales orders to be set to.
5. In the **Transaction Type** field, select to filter the list for sales orders or transfer orders.

6. To choose the location from which you want to fulfill the orders, select a location in the **Bulk Fulfill From Location** field and clear the Filter box.

7. In the **Filter By** field, choose one of the following to filter the orders shown:
   - **Some Items Committed** – The list shows orders that have one or more items committed to be fulfilled.
   - **Respect Ship Complete** – The list shows only the orders that are committed according to their ship complete setting. This includes all orders that are not restricted to ship complete.
   - **All Items Fully Committed** – The list shows orders that have all items committed to be fulfilled.
   - **Ignore Item Availability** – The list shows all open orders regardless of the availability of items on the orders.

   If you use the Multiple Shipping Routes feature, you generate an item fulfillment for each address. The shipping address and the corresponding shipping method for each order is displayed in the list of orders for fulfillment.

   **Note:** You cannot fulfill or bill sales orders with the status Pending Approval. You also cannot close lines on a sales order with this status. If you need to make changes to an order that is pending approval, you can remove line items.

   For more information, see the help topic **Item Fulfillments and Multiple Shipping Routes**.

8. In the **Ship Via** field, choose the shipping method for the selected sales orders. To use the shipping method as specified on the sales order, select Default From Order.

9. Check the **Fulfill** box next to the orders you want to fulfill.

   You can also select the orders you want to process by scanning the sales order barcode in the **Select Order Number** field in the Orders subtab. This field appears only when the Bar Coding and Item Labels feature is enabled.

   The Customize button in the Orders subtab lets you add more columns to the list or add more filters above the list.

10. **Important:** In this step, the selected sales orders will enter the processing queue and will be fulfilled with the values selected.

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

    All orders you checked are processed together as one Job. If it takes more than 10 seconds to process, the Job Status page opens to show the jobs being processed. For each job being processed, the page shows the Job ID and name, date initiated, status, and percent complete. You can process several fulfillment jobs at once and track them on the Job Status page. Go to Shipping > Shipping > Fulfill Orders > Status > Status to view the status of the sales order fulfillment process.

    When fulfillments are in the processing queue, they no longer appear on the Fulfill Orders page.

    You can enable a preference to send a confirmation email showing the total quantity shipped upon fulfillment of orders. For more information, read **Order Fulfillment Confirmation Email**.

### Bulk Update Fields

The bulk fulfillment page includes a Set Fields subtab where you can enter updates for orders being fulfilled.
For example, if you bulk fulfill a group of sales orders, you may want to update the memo field on all of the orders to say "Q1 Rush processing." You are able to enter the memo text on the Set Fields subtab and all orders processed show the new text.

To update fields during a bulk process:

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

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

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

Bulk Fulfilling Orders Using a CSV Import

You can bulk fulfill orders by importing a CSV file that contains a list of fulfilled order numbers. Similar to bulk fulfilling on the Fulfill Orders page, you choose the accounting posting period for the orders, the transaction date, and a shipment status (if the Pick, Pack, and Ship feature is enabled). You can also select the bulk fulfill location if the Multi-Location Inventory feature is enabled.

The fields required in the CSV file depend on how the following preferences and features are configured in your NetSuite account:

- The Charge for Shipping preference.
- The Advanced Shipping feature.
- The Multi-Location Inventory feature.
- Shipping integration with FedEx, UPS, or USPS.

To determine the fields required in the CSV file, you can download a sample CSV file. If a field is in the sample file for your company, you must include it in the CSV file to be imported. For example, if you charge for shipping, but do not use the Advanced Shipping feature nor shipping integration, the CSV file contains two fields only: Order Number and Tracking Number.

To download a sample CSV, go to Shipping > Shipping > Fulfill Orders and click the Import-CSV button. Click the link next to the File field to download a sample file.
The following table describes the possible fields in a CSV file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Number</td>
<td>The order number as it appears in NetSuite. If order numbers have prefixes, you must include the prefix, for example, “SO160089” instead of “160089”.</td>
</tr>
<tr>
<td>Transaction Type</td>
<td>This field must be one of the following transaction types:</td>
</tr>
<tr>
<td></td>
<td>■ Sales Order</td>
</tr>
<tr>
<td></td>
<td>■ Transfer Order</td>
</tr>
<tr>
<td>Weight</td>
<td>The total weight of the order.</td>
</tr>
<tr>
<td>Tracking Number</td>
<td>The tracking number of the package. 64 digits maximum.</td>
</tr>
<tr>
<td>Label Integration</td>
<td>A boolean value indicating the sales order uses label integration. This field must be one of the following values:</td>
</tr>
<tr>
<td></td>
<td>■ T</td>
</tr>
<tr>
<td></td>
<td>■ F</td>
</tr>
<tr>
<td></td>
<td>T (True) indicates the sales order uses label integration. F (False) indicates the sales order does not use label integration.</td>
</tr>
</tbody>
</table>

The first line in the CSV file must be a header line with the exact field names as they appear in the sample file. You will be unable to upload the CSV file if you omit the header line or name the header fields incorrectly. For information about naming and formatting CSV files, see the help topic General CSV File Conventions.

**Note:** Columns and custom fields cannot be added to this type of import.

**To bulk fulfill orders using a CSV Import:**

1. Go to Shipping > Shipping > Fulfill Orders.
2. On the Fulfill Orders page, click the Import-CSV button to open the Import CSV page.
3. If you need to prepare a CSV file, click the link next to the File field to download a sample file. You can enter information in this file or create a file like it.

**Note:** The first line (header) in the sample file lists the required fields. A brief explanation of the fields is shown below the first line. To use the file, delete all lines in the sample file except the first line and then enter the fulfillment information in the file.

4. In the File field, select the CSV file containing the list of fulfilled orders you want to import.
5. Enter a posting period and a date.
6. If the Pick, Pack, and Ship feature is enabled, select a value for Set Shipment Status To. If the CSV import process is completed successfully, the status of the item fulfillment is set to the value you selected in the Set Shipment Status To field.
7. If Multi-Location Inventory is enabled, select a location in the Bulk Fulfill from Location dropdown.
8. If the Advanced Shipping feature is enabled, select a value for Ship Via.
9. To specify the values for other fields in the orders, select a field in the Field column and enter the value in the Selection, Checked, Text, or Date columns. The value you specify will be used for all orders in the CSV file.
10. Click Submit

When you click Submit, the Process Status page shows the submission status of the CSV import process. Click the Refresh button to update the status. When the status is Complete, you can view the results of the import. See Checking the Processing Status of Bulk Fulfilled Orders for more information about the Process Status page.

When working with a third-party logistics service, you typically need to send a list of orders to the third-party before the orders can be processed and fulfilled in bulk. You can export a list of orders from NetSuite to a CSV file. To export a list of sales orders, go to Export – CSV button. For more information about exporting to CSV, see the help topic Exporting Lists.

Checking the Processing Status of Bulk Fulfilled Orders

After submitting orders for bulk fulfillment, you can check the processing status of the orders. Orders are processed asynchronously, so you can continue to work in NetSuite and check back on the processing status at intervals. You can submit several bulk fulfillment jobs at once and track them on the Process Status page.

You can view the processing status of previous bulk fulfillment jobs by filtering by date. NetSuite shows bulk fulfillment jobs for the current date by default.

Depending on the number of records in the job, processing begins either immediately or after a short delay. If there are less than 25 records, processing starts immediately. Otherwise, the bulk processing job is queued and starts after a short delay.

The Process Status page shows the following information:

- Submission ID – A unique identifier of the bulk processing job.
- Process Type – When fulfilling sales orders, the process type is Fulfill Sales Orders.
- Submission Status:
  - Not Started – The job has been submitted but has not yet started.
  - In Progress – Records in the job are currently being processed. The Percent Complete column indicates progress.
  - Complete – All records in the job have been processed. If errors occurred, the number of errors is shown in the Message column.
- Percent Complete – The percentage of records processed.
- Message – Indicates the number of errors that occurred during the processing.
- Date Created – The date and time the bulk processing was started.
- Created By – The user that submitted the bulk process job.
After the processing job is complete, you can view the results of the bulk processing on the Processed Records page. Information on the Processed Records page includes the result status, the result record ID, and an error message if an error occurred. The result record of fulfilling a sales order is an item fulfillment.

**To check the processing status of bulk fulfilled orders**

1. Go to Transactions > Sales > Fulfill Orders > Status.
2. Click Filters to choose the time period for which you want to view bulk fulfillment jobs. NetSuite uses the current date by default.
3. To view the results of a processing job, click the status link in the Submission Status column.
4. If errors occurred during the processing, the number of errors is shown in the Message column. Click the link to open the Bulk Processing Errors page and view the errors.
5. To view the latest status of the bulk processing jobs, click Refresh.

If you use the Pick, Pack, and Ship feature, you can check the processing status of orders when you bulk fulfill orders and set the shipping status to Picked, or Packed, or Shipped. The Process Status page is also used when bulk processing other records in NetSuite, for example, when invoicing sales orders or entering memorized transactions.

**Fulfilling Orders Across Multiple Accounting Periods**

When the Pick, Pack, and Ship feature is enabled, you can enable the Update Transaction Date Upon Fulfillment Status Change preference to pick items in one accounting period and ship in another accounting period.

For example, you may want to enter the following transactions for an order:

<table>
<thead>
<tr>
<th>Order entered</th>
<th>March 1</th>
<th>Accounting period not yet selected.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order picked</td>
<td>March 26</td>
<td>Post to a closed accounting period.</td>
</tr>
<tr>
<td>Order packed</td>
<td>March 27</td>
<td>Post to a closed accounting period.</td>
</tr>
<tr>
<td>Order shipped</td>
<td>April 2</td>
<td>An open accounting period must be selected.</td>
</tr>
</tbody>
</table>

After the order status is marked Shipped, to save the order, the transaction date of the item fulfillment must be in an open accounting period and an accounting period must be selected. The period based on the shipped date shows by default in the Accounting Period field.

To fulfill across periods, you must enable the Update Transaction Date Upon Fulfillment Status Change preference. Preferences can be set at Setup > Accounting > Accounting Preferences by a user who has the Set Up Accounting permission.

After this preference is enabled, NetSuite can update the transaction date based on status changes. When you initially enter the fulfillment, the transaction date field is populated with the current date. Orders function depending on their status, as described below:

**Picked**

- If the Pick Date field is empty, it populates with the current date and the Transaction Date field is populated with the current date.

**Packed**

- If the Pick Date field is empty, it populates with the current date.
- If the Pack Date field is empty, it populates with the current date and the Transaction Date field is populated with the current date.
Fulfilling Orders

Shipped

- If the Pick Date field is empty, it populates with the current date.
- If the Pack Date field is empty, it populates with the current date.
- If the Ship Date field is empty, it populates with the current date and the Transaction Date field is populated with the current date.
- The Accounting Period field is required and it is populated based on the Ship Date.

**Note:** You cannot edit, delete, or save a transaction with a Shipped status that is posting to a closed accounting period.

For details about the Pick, Pack and Ship feature, read *Pick, Pack, and Ship Overview*.

Closing Line Items That Will Not Be Fulfilled

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

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

**To close a line item on an order manually:**

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

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

Store Pickup

**Note:** The Store Pickup feature is available in the following editions of NetSuite: U.S., Canada, UK, Australia, and OneWorld.

**Important:** The Store Pickup feature is not compatible with the SuiteTax feature. See the help topic *General SuiteTax Topics* for more information.

Store pickup, also known as store pickup fulfillment, lets you fulfill orders from a retail location instead of a warehouse or distribution center. Instead of customers having their order shipped to their home or workplace address, they can visit a retail location of their choice to collect the order. By enabling store pickup, you can offer your customers an additional convenient way to receive their orders, eliminate shipping charges for your customers, and increase foot traffic and cross-selling opportunities at your retail locations.

You can use the Store Pickup feature either with or without the Fulfillment Request feature. A fulfillment request is an intermediary record between the sales order and the store pickup fulfillment record. If you
do not use fulfillment requests, you can fulfill a store pickup order directly from the sales order record – see Fulfilling Store Pickup Orders from Sales Orders.

NetSuite recommends using fulfillment requests for store pickup orders.

Store Pickup Workflow

In a typical store pickup workflow, you create a sales order with line items that have the fulfillment choice set to Store Pickup and a location that allows store pickup. On the sales order record, you then “request fulfillment” of the order. NetSuite creates a fulfillment request record with status New. When you are ready to accept the fulfillment request, you mark it as in progress and pick all items in the request. You can then fulfill the order from the fulfillment request, at which stage NetSuite creates a store pickup fulfillment record with the status Picked. Later, when the customer collects the order, you mark the store pickup fulfillment as picked up.

If there are problems with fulfilling the order, you can enter fulfillment request exceptions on the fulfillment request record. After a customer service representative contacts the customer, instructions are entered on the sales order indicating how to proceed. When you acknowledge the instructions, you can continue with fulfillment of the store pickup order. For more information about working with fulfillment exceptions, see Managing Exceptions on Fulfillment Requests.
The recommended workflow for store pickup orders in NetSuite uses the Fulfillment Request feature. You can also create and fulfill store pickup orders without using fulfillment requests – see Fulfilling Store Pickup Orders from Sales Orders.

Setting Up Store Pickup

To create and fulfill store pickup orders, you must enable the Store Pickup feature in your account and complete additional setup tasks.

Store Pickup Setup Steps

Complete the following steps to set up store pickup:

1. Enable the Store Pickup feature.
2. Configure locations to allow store pickup.
3. Verify store pickup settings for items.
4. Create a customized sales order form.
5. Turn on store pickup email notifications.

These steps describe the minimum requirements to set up the Store Pickup feature. See the help topics related to each step for additional details.

Step 1. Enable the Store Pickup feature.

To create and fulfill store pickup orders in NetSuite, you must enable the Store Pickup feature.

To enable Store Pickup

1. Go to Setup > Company > Setup Tasks > Enable Features (Administrator).
2. Click the Transactions subtab.
3. Under Shipping & Receiving, check the Store Pickup box.
   The Store Pickup feature uses the Pick, Pack, and Ship feature. If not already enabled, you must enable it.
4. Click Save.

See Enabling Store Pickup for more information about enabling the Store Pickup feature.

Step 2. Configure locations to allow store pickup.

You must configure store locations to allow store pickup. You can also enter the business hours of the location. See Configuring Locations for Store Pickup.

To allow store pickup at a location:

1. Go to Setup > Company > Classifications > Locations (Administrator).
2. Click Edit next to the location you want to set up.
3. Click the Store Fulfillment tab and check the Allow Store Pickup box.
4. On the Business Hours tab, enter the daily opening and closing hours of the location. See Defining Store Business Hours for more information.
5. Click Save.

Step 3. Verify store pickup settings of items.
Verify store pickup settings for individual items. All items are eligible for store pickup by default. See Configuring Items for Store Pickup.

To verify the store pickup settings of items:
1. Go to Lists > Accounting > Items (Administrator).
2. Click Edit next to the item you want to modify.
3. On the Purchasing/Inventory subtab, verify the Allow Store Pickup box in the Locations sublist for each location at which you want to enable store pickup. All items are enabled for store pickup by default.
   Clearing the Allow Store Pickup box prevents store pickup fulfillment for the item at the location.
4. Click Save.

Step 4. Create a customized sales order form.
Customize the sales order form by adding the Fulfillment Choice and Location columns to the Items sublist. See Customizing the Sales Order Form for Store Pickup.

To customize a sales order form for store pickup:
1. Go to Transactions > Sales > Enter Sales Orders (Administrator).
2. Click Customize at the top of the form and then select Customize Form.
3. In the Name field, enter a name to identify the new form.
4. Click the Screen Fields tab.
5. Click the Columns subtab and add both the Location and the Fulfillment Choice columns to the form by checking the Show box for each item.
6. Click Save.

Step 5. Turn on store pickup email notifications.
Optional. Send email notifications to customers when their order is ready for pickup. See Store Pickup Email Notifications.

**Note:** The Fulfillment Request feature must be enabled to send automatic email notifications – see Enabling Store Pickup.

Optional. Create fulfillment requests automatically for stores after sales orders are saved in the system. See Fulfillment Request Creation for more information.
After you complete the setup tasks for store pickup, you can create sales orders for store pickup (see the help topic Creating Store Pickup Sales Orders) and then fulfill the orders (see Fulfilling Store Pickup Orders).

**Important:** Additional configuration steps are required if you want to offer store pickup as a fulfillment method on a SuiteCommerce Advanced web store. See the help topic Pickup In Store.

### Store Pickup + SuiteCommerce

When both the Store Pickup and the **SuiteCommerce Advanced** features are enabled in your account and you want to enable store pickup on a SuiteCommerce web store, you must complete additional configuration steps. See the help topic Pickup In Store for more information about the prerequisites and configuration steps for a SuiteCommerce Advanced web store.

### Store Pickup + Cross-Subsidiary Fulfillment

When both the Store Pickup and the **Intercompany Cross-Subsidiary Fulfillment** features are enabled in your account, you can fulfill store pickup orders from store locations in other subsidiaries, as well as locations in the current subsidiary. You use the Inventory Location column (in the Items sublist) on a sales order to specify the store pickup location. The Inventory Location column appears on all sales order forms after you enable the Intercompany Cross-Subsidiary Fulfillment feature.

### Enabling Store Pickup

To fulfill store pickup orders in NetSuite, you must enable the Store Pickup feature. You should also enable the Fulfillment Request feature to benefit from all aspects of the Store Pickup feature, including email notifications, fulfillment exceptions, and automatic creation of fulfillment requests.

**Note:** If you do not use the Fulfillment Request feature in your account, you can still create store pickup orders and fulfill them directly from the sales order. See Fulfilling Store Pickup Orders from Sales Orders.

For more information about access to the Store Pickup feature, contact your account manager.

**To enable store pickup:**

1. Go to Setup > Company > Setup Tasks > Enable Features (Administrator).
2. In the **Transactions** subtab, under Shipping & Receiving, do the following:
   - Check the **Store Pickup** box under Shipping & Receiving.
     - The Store Pickup feature uses the Pick, Pack, and Ship feature. If not already enabled, you must enable it.
   - Check the **Fulfillment Request** box to use fulfillment requests in the store pickup workflow.
3. Click **Save**.

   After you enable the Store Pickup feature, configure other records and settings in your account. See Setting Up Store Pickup.

When you enable the Store Pickup feature:

- The store pickup fulfillment record becomes available. You use store pickup fulfillments to manage pickup orders at a store location.
- The Store Fulfillment and Business Hours tabs appear on the location record.
Additional fields are made available on the item record and the sales order record.
If the Fulfillment Request feature is also enabled, the Notifications subtab appears on the Advanced Order Management Setup page.

Configuring Locations for Store Pickup

To set up locations for store pickup, complete the following steps:

■ Allow store pickup at the location and define a buffer stock value. Only locations that you enable for store pickup will appear in the sales order form as possible pickup locations.
■ Specify buffer stock for store pickup.
■ Define opening and closing hours of the location.

You can reserve a minimum quantity of items, called “buffer stock”, at a location. If buffer stock is specified for a location, NetSuite can calculate the quantity available for store pickup. The formula to calculate the quantity available for store pickup is: Quantity Available - Buffer Stock. For example, if the quantity available at a store is 24, and the buffer stock value for the location is 5, the quantity available for store pickup is 19. Specifying a buffer stock level at a location helps to ensure that inventory is reserved for walk-in customers at the location.

You can also specify a buffer stock level for individual items on the item record. See Configuring Items for Store Pickup. If buffer stock is specified on an item record and a location record, NetSuite uses the value on the item record instead of the value on the location record.

Important:  On the Sales Order page in NetSuite, you can create a store pickup sales order for items even if the quantity available for store pickup of the item is less than the ordered quantity.

Note:  If the Automatic Location Assignment feature is enabled, you can specify a separate buffer stock level on the location record for the automatic location assignment engine. See Configuring Locations for Automatic Location Assignment for more information.

To allow store pickup at locations:

1. Go to Setup > Company > Classifications > Locations (Administrator).
2. Click Edit next to the location you want to set up.
3. Click the Store Fulfillment tab and check the Allow Store Pickup box.
4. Enter the email address of the store. Notifications can be sent to the store at the specified email address.
5. Enter notes about the location in the Memo field.
6. If you want to specify a minimum reserve level of stock at the location, enter the quantity in the Store Pickup Buffer Stock field.
7. Click Save.

Note:  Although you typically enable store pickup for locations that have the location type “Store”, you can choose to enable store pickup for any location, regardless of its location type.

Note:  The buffer stock level applies to all items at the location. If you need to specify different buffer stock levels for items, you can edit an item record and enter a specific buffer stock level for the item. See Configuring Items for Store Pickup for more information.
Defining Store Business Hours

Defining store business hours lets you indicate the opening and closing hours of individual stores for each day of the week. When entering business hours, NetSuite checks that the hours entered are valid and do not conflict with the hours entered on previous lines. To ensure business hours are valid, be aware of the following:

- The “same day pickup cut-off time” must be within the start and end time.
- Each week day must have only one same day pickup cut-off time.
- The end time must be later than the start time.
- The business hours specified on one line must not conflict with the business hours specified on another line.

The same day pickup cut-off time is the latest time at which a customer can enter an order and pick up the order later on the same day. For example, if you set the pick up cut-off time to 2:00, the sales order must be saved in NetSuite before 2 p.m. Otherwise, the customer will have to pick up the order on the following business day. When editing or viewing an existing location record, the next pickup cut-off time is displayed on the Business Hours subtab. Note that the next pickup cut-off time might be the current day or the next business day.

To define the business hours of a location:

1. Go to and click Edit next to the location record you want to work with.
2. Click the Business Hours subtab on the location record.
3. In the Start Time and End Time column, enter the opening and closing times of the store respectively.
4. Select the days of the week on which the times are valid – every day of the week is selected by default.
5. Enter a time in the Same Day Pickup Cut-Off Time field.
6. Make sure the days and times you entered are compatible with the days and times already defined on other lines.
7. Click OK to add the line.
8. Click Save after you have entered all business hours for the location.

Configuring Items for Store Pickup

When you enable store pickup at a location, all items are eligible for store pickup at the location by default. On the item record, the Allow Store Pickup box is checked for all locations in the Locations sublist. You can exclude certain inventory items from store pickup by changing the store pickup settings on the item record. For example, you might want to prevent store pickup of bulky or heavy items. To exclude all items from store pickup at a location, clear the Allow Store Pickup box on the location record instead – see Configuring Locations for Store Pickup.

When the Allow Store Pickup box is checked for at least one location in the Locations sublist on the item record, the Store Pickup Allowed box is checked automatically. If you clear the Allow Store Pickup box for all locations on the item record, the Store Pickup Allowed box is also cleared.

If you use the SuiteCommerce Web Store feature, the Store Pickup Allowed box is used to determine which items are eligible for store pickup when ordered on the web store. See the help topic Commerce Product Overview for more information about SuiteCommerce features.
The following screenshot shows both store pickup fields on an item record – the Store Pickup Allowed box is checked because the Allow Store Pickup field is checked for at least one location.

**Note:** The Store Pickup Allowed field is read only.

To ensure sufficient inventory is maintained at a store location for in-store shoppers, you can specify a buffer stock level for each location. Buffer stock is the minimum quantity of an item that must be maintained at a store when a store pickup order is created. If buffer stock is specified on an item record, NetSuite can calculate the quantity available for store pickup. The Quantity Available For Store Pickup is Quantity Available minus Store Pickup Buffer Stock, for example, Quantity Available (23) – Store Pickup Buffer Stock (5) = Quantity Available For Stock Pickup (18). The quantity available for store pickup is shown in the Locations sublist on the item record.

Store pickup buffer stock quantities can be entered on both the item record and the location record in NetSuite. The quantity entered on the item record supersedes the quantity on the location record. If you leave the Store Pickup Buffer Stock blank, it indicates that all available inventory at the location can be used for store pickup orders.

If you use the SuiteCommerce Advanced web store feature, the quantity available for store pickup can be displayed on your web site. Then, customers can only choose store pickup as a fulfillment option if the quantity available for store pickup is higher than zero.

**Note:** You can also specify store pickup buffer stock on the location record. Buffer stock on the item record overrides buffer stock on the location record. See Configuring Locations for Store Pickup for information about how to specify buffer stock for a location.

To change store pickup settings of individual inventory items:

1. Go to Lists > Accounting > Items (Administrator).
2. Click **Edit** next to the item you want to modify.
3. On the Purchasing/Inventory subtab, check the **Allow Store Pickup** box in the Locations sublist for each location at which you want to enable store pickup. All items are enabled for store pickup by default.
   
   Clearing the Allow Store Pickup box prevents store pickup fulfillment for the item at the location.
4. Enter a buffer stock quantity for each location in the Store Pickup Buffer Stock column.

**Note:** If you leave the Store Pickup Buffer Stock field blank on the item record, NetSuite uses the buffer stock on the location record to calculate the quantity available for store pickup.

5. Click **Save**.
Customizing the Sales Order Form for Store Pickup

To create a sales order for store pickup, the Fulfillment Choice and Location fields must appear on the sales order form. You add the Fulfillment Choice and Location fields as line item columns on the Items subtab. You can also add the Fulfillment Choice field on the Items subtab to let the person creating the order apply the same fulfillment choice (Ship or Store Pickup) to all lines in the sales order.

To create a customized sales order form for store pickup:

1. Go to Transactions > Sales > Enter Sales Orders (Administrator).
2. Click Customize at the top of the form and then select Customize Form.
3. In the Name field, enter a name to identify the new form.
4. Click the Screen Fields subtab.
   - Click the Columns subtab and add the Location and Fulfillment Choice columns to the form by checking the Show box for each item.
   - Optionally, click the Items subtab and then check the Show box next to Fulfillment Choice item. Doing this lets you apply the same fulfillment choice to all lines in a sales order.
5. Move the items up and down in the list to the desired position. Items at the top of the list correspond to the leftmost columns in the sales order form.
6. Click Save.

For more information about customizing forms in NetSuite, see the help topic Creating Custom Entry and Transaction Forms.

Custom Sales Order Forms and SuiteCommerce

If you have a SuiteCommerce web store and want to enable store pickup as a fulfillment option, you must also create a custom sales order form. If you already have a custom sales order form to enter store pickup sales orders in NetSuite, you can use the same form for your SuiteCommerce web store. After you create the custom sales order form, take note of the internal ID of the form.

The internal ID is generated automatically and is displayed in the ID field of the customized form. A customized form ID always starts with “custform_”. You will need the internal ID of the custom sales form when enabling store pickup in SuiteCommerce. For more information about the steps to configure store pickup for a SuiteCommerce web store, see the help topic Pickup In Store.

The following screenshot shows the internal ID of a customer sales order form.
When both the Store Pickup and the SuiteCommerce Advanced features are enabled in your account and you want to enable a web store with store pickup as a fulfillment option, take note of the customized form ID (in the ID field) when you save the form. See the help topic Pickup In Store for more information about the prerequisites and configuration steps for a SuiteCommerce Advanced web store.

Custom Sales Order Forms and Cross-Subsidiary Fulfillment

When the Store Pickup and the Intercompany Cross-Subsidiary Fulfillment features are enabled in your account, the Inventory Location column and the Inventory Subsidiary column appear on all sales order forms. You must use the Inventory Location column to specify the store pickup location.

By default, the Inventory Location column lists locations in the customer subsidiary as well as locations in other subsidiaries that are allowed to fulfill orders from the customer subsidiary. If you show the Allow Cross-Subsidiary Fulfillment box under the Items subtab, clearing the box lists on those locations in the customer subsidiary. The Allow Cross-Subsidiary Fulfillment box is hidden and checked by default. See the help topic Intercompany Cross-Subsidiary Fulfillment for more information.

If you have forms that still show the Location column in the Items sublist, you should ensure users specify the store pickup location in the correct column (the Inventory Location column).

You can continue to use the Location column in the Items sublist, but as a method of classification, instead of as the fulfillment location. If you do not want to use the Location column for classification, consider removing it to avoid confusion.

Store Pickup Email Notifications

A pickup email notification is a message sent to a customer’s email address informing the customer that an order is ready for pickup at the store. Pickup email messages are sent when the status of a fulfillment request is Picked. Only one message is sent to the customer. You can check if a pickup email notification was sent successfully by viewing the customer record – see Checking if the Store Pickup Email Notification Was Sent.

In some cases, you might need to create more than one store pickup fulfillment record from a fulfillment request. Each store pickup fulfillment record can have the status Picked or Picked Up. When the status of all store pickup fulfillment records is Picked, NetSuite sets the status of the fulfillment request record to Picked. NetSuite then sends the email notification to the customer.
To send pickup email notifications automatically:

1. Go to Setup > Company > Email > System Email Templates.
2. Click the **Notifications** tab.
3. Check the **Order Ready To Be Picked Up Confirmation Email** box.
4. Select the email template you want to use.
5. Click **Save**.

To stop sending email notifications automatically, clear the **Order Ready To Be Picked Up Confirmation Email** box.

### Changing the Content of the Pickup Email Message

When you set up advanced order management to send pickup email messages automatically, NetSuite uses a predefined message. You can change the message content by creating a customized email template. The default email template is in HTML format and contains basic information from the sales order such as the sales order ID, the customer name, and the items ordered. For more information about working with email templates, see the help topic Creating New Email Templates.

You can add information to the template by inserting variables in the template. Variables use the FreeMarker format – see [www.freemarker.org](http://www.freemarker.org) for more information about FreeMarker. The default email template uses the following variables from the sales order and other records in the system:

<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>${transaction.createdFrom}</td>
<td>The ID of the sales order (from which the fulfillment request was created).</td>
</tr>
<tr>
<td>${transaction.entity}</td>
<td>The customer name.</td>
</tr>
<tr>
<td>${transaction.location}</td>
<td>The location name.</td>
</tr>
<tr>
<td>${transaction.location.address1}</td>
<td>The first address line of the store pickup location address details.</td>
</tr>
<tr>
<td>${transaction.location.address2}</td>
<td>The second address line of the store pickup location address details.</td>
</tr>
<tr>
<td>${transaction.location.city}</td>
<td>The city of the store pickup location address details.</td>
</tr>
<tr>
<td>${transaction.location.state}</td>
<td>The state of the store pickup location address details.</td>
</tr>
<tr>
<td>${transaction.location.zip}</td>
<td>The postal code of the store pickup location address details.</td>
</tr>
<tr>
<td>${transaction.item}</td>
<td>The list of items in the sales order. You can show information about individual items by referencing the values of the individual items with the list directive. Examples of individual item values include <code>item</code> (the name of the item) and <code>quantity</code> (the quantity ordered).</td>
</tr>
<tr>
<td>${transaction.location.phone}</td>
<td>The phone number of the store pickup location.</td>
</tr>
<tr>
<td>${companyInformation.companyName}</td>
<td>The company name as entered on the Company Information page – see the help topic Configuring Company Information.</td>
</tr>
</tbody>
</table>

```html
<html>
<body>
  <b>Dear ${transaction.entity},</b><br/>
  Your order ${transaction.createdFrom} for the items listed below is now ready to be picked up at ${transaction.location}, ${transaction.location.address1}, ${transaction.location.address2}, ${transaction.location.city}, ${transaction.location.state} ${transaction.location.zip}.
</body>
</html>
```
To customize the pickup notification template:

1. Go to Setup > Company > Email > System Email Templates.
2. Click Edit next to the Standard Order Ready for Pickup Notification Email template.
3. Enter a name for the custom template.
4. If you want to provide a description of the template, enter it in the Description field.
5. On the Template subtab, enter the subject of the email message.
6. Choose how you want to compose the email message – from a file or in the text editor.
7. To use a predefined template from a file, select the File option and then select the template file.
8. To compose a new email template, select the Text Editor option and do the following:
   a. Change the text of the message to suit your business needs.
   b. To add information from the order:
      i. In the Field Type field, select a record from which you want to insert a field.
      ii. In the Insert Field field, select the field from the record.
10. Click Save.

When you save the template, it becomes selectable on the Notifications subtab on the Advanced Order Management Setup page.

Fulfilling Store Pickup Orders

To fulfill a sales order for store pickup, you open a sales order and create a fulfillment request with the status New. When employees at the store are ready to acknowledge the fulfillment request, they mark
it in progress. Then you can fulfill the sales order from the fulfillment request and create a store pickup fulfillment.

If a problem is detected during fulfillment at the store, you can enter fulfillment exceptions on the fulfillment request record – see Managing Exceptions on Fulfillment Requests. You can then manage how fulfillment proceeds based on feedback from the customer. When fulfilling a store pickup order from a fulfillment request, you create a store pickup fulfillment record. On the store pickup fulfillment record, you can then mark the items as picked. When the customer collects the items at the store, you mark the items as picked up.

The tasks related to fulfilling store pickup orders are often performed by people with different roles in your company. The following table lists the roles typically associated with each task. Roles within your company may be shared by the same person.

---

**Note:** The roles listed in the table refer to the store pickup workflow only. They are not related to the standard roles available in NetSuite, which are used to configure access and permissions to the system.

<table>
<thead>
<tr>
<th>Task</th>
<th>Performed By</th>
</tr>
</thead>
</table>
| Create the initial fulfillment request for the store. See Creating Fulfillment Requests | - Customer service representative when taking phone orders.  
- NetSuite – Fulfillment requests can be created automatically by the system if the relevant automation process is running in your account. See Fulfillment Request Creation for more information. |
Order Fulfillment

### Task and Performed By

<table>
<thead>
<tr>
<th>Task</th>
<th>Performed By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acknowledge the fulfillment request at a store. See Acknowledging</td>
<td>Store employee</td>
</tr>
<tr>
<td>Fulfillment Requests.</td>
<td></td>
</tr>
<tr>
<td>Enter a fulfillment exception on the fulfillment request. See</td>
<td>Store employee</td>
</tr>
<tr>
<td>Managing Exceptions on Fulfillment Requests.</td>
<td></td>
</tr>
<tr>
<td>Enter instructions after receiving customer feedback about a</td>
<td>Customer service representative</td>
</tr>
<tr>
<td>fulfillment exception. Resolving Fulfillment Exceptions.</td>
<td></td>
</tr>
<tr>
<td>Fulfill the sales order by marking items as picked and picked up. See</td>
<td>Store employee</td>
</tr>
<tr>
<td>Fulfilling Store Pickup Orders from Fulfillment Requests.</td>
<td></td>
</tr>
</tbody>
</table>

<i>Note:</i> If you use the Web Store feature of SuiteCommerce Advanced, fulfillment requests are typically configured to be created automatically. See the help topic SuiteCommerce Development Overview for more information about SuiteCommerce Advanced.

<i>Note:</i> If you don't use the Fulfillment Request feature, you create the store pickup fulfillment record directly from the sales order. See Fulfilling Store Pickup Orders from Sales Orders.

### Store Pickup + Cross-Subsidiary Fulfillment

If the Intercompany Cross-Subsidiary Fulfillment feature is enabled in your account, you may receive store pickup orders that were created in another subsidiary in your company, but which need to be fulfilled from your subsidiary. With cross-subsidiary fulfillment, the **Inventory Location** column on a sales order is used to specify a fulfillment location.

When fulfilling store pickup orders from another subsidiary, the fulfillment location on the store pickup fulfillment transaction is taken from the **Inventory Location** column on the sales order. If you also use the Fulfillment Request feature, the fulfillment location on a fulfillment request is also taken from the **Inventory Location** on the sales order.

### Fulfilling Store Pickup Orders from Fulfillment Requests

After a fulfillment request is acknowledged (marked as In Progress), you can fulfill the store pickup order. When you fulfill a store pickup order from a fulfillment request, NetSuite creates a store pickup fulfillment record.

<i>Note:</i> When fulfilling from a fulfillment request for a shipping order – as opposed to a store pickup order – NetSuite creates an item fulfillment record. See Fulfilling Orders from Fulfillment Requests for more information.

If there are picking fulfillment exceptions on a fulfillment request, the exceptions need to be resolved first. Fulfillment requests with resolved exceptions have the pickup hold status set to Customer Feedback Received and fulfillment instructions for each line on the fulfillment request. You can then acknowledge the instructions and continue with fulfillment – see Confiming Fulfillment Exceptions for more information.
Fulfilling a store pickup order from a fulfillment request typically involves two steps:

- Picking items from store shelves and marking them as picked. See Marking Items as Picked.
- Marking the items as picked up when the customer visits the store to collect them. See Marking Items as Picked Up.

**Marking Items as Picked**

When you are ready to start fulfilling a store pickup order, you pick the items from the shelves, create a store pickup fulfillment record from the fulfillment request, and enter the quantity of items picked. When all items on the store pickup fulfillment are picked, the status of the store pickup fulfillment is Picked. You can enter a quantity less than the ordered quantity; you might do this if there is insufficient stock at the location.

After you create a store pickup fulfillment, the original sales order is updated with information from the store pickup fulfillment record. For example, the quantity picked on the fulfillment request is also shown in the Picked column on the sales order record.

All lines in a store pickup fulfillment must have the same location. If you create a pickup from a sales order with multiple locations for store pickup, you must create a separate store pickup fulfillment for the items at each location.

In a sales order that has some line items set to Ship and other line items set to Store Pickup, you fulfill the order in two separate processes. For line items set to Ship, you create an item fulfillment; for line items set to Store Pickup, you create a store pickup fulfillment. You perform both of these actions from the same sales order.

**To mark all items as picked:**

1. Go to Transactions > Sales > Manage Fulfillment Requests (Administrator).
2. Click View next to the fulfillment request on which you want to mark items as picked.
3. Click Fulfill. The Store Pickup Fulfillment page is displayed.
4. In the Items subtab, make sure the Fulfill box of each item is checked and the quantity picked is correct.

**Important:** If all items cannot be picked because of an exception – for example, insufficient inventory or damaged items – you create a fulfillment exception. See Managing Exceptions on Fulfillment Requests.

The Remaining column shows the quantity of each item in the sales order that still needs to be picked.

**Note:** If there are lines in the store pickup fulfillment with different locations, you must choose a single location at which to mark the items as picked. You do this by clearing the Fulfill box of the lines with different locations. You can then create a separate store pickup fulfillment record at a later stage for the lines you cleared. You can create as many store pickup fulfillment records as required to fulfill the sales order.

5. Click Save to create the store pickup fulfillment.

After you mark all items as picked, the status of the store pickup fulfillment is Picked. The status of the fulfillment request is Picked.

**Marking Items as Picked Up**

When a customer visits the store to collect the store pickup order, you mark the items (in the store pickup fulfillment) as picked up. You can mark all items picked up or just some of the items.
You can also cancel a store pickup order after items have been picked (and the corresponding store pickup fulfillment record has been created). After the pickup is canceled, no further actions can be performed on the store pickup fulfillment document. If you still want to fulfill the canceled items at a later stage, you need to create a new store pickup fulfillment record from the original sales order.

To cancel a store pickup fulfillment, go to Transactions > Sales > Manage Store Pickup (Administrator), click View next to the store pickup fulfillment record, and then click the Cancel Fulfillment button.

**To mark all items as picked up:**

1. Go to Transactions > Sales > Manage Store Pickup (Administrator).
2. Click View next to the store pickup fulfillment you want to confirm.

   ![Note: Store pickup orders ready for pickup have the status Picked.](Image)

3. Click Mark Picked Up to confirm the customer has collected all the items.

   **Important:** If the customer only picks up some of the items, you can mark the collected items as picked up and create a pickup fulfillment exception (on the fulfillment request) for the other items. See Entering Pickup Fulfillment Exceptions.

   If the customer does not pick up any of the items, you can cancel the store pickup fulfillment. Click the Cancel Fulfillment button to cancel the store pickup fulfillment. See Canceling a Store Pickup Order.

After you mark an order as picked up, the status of the store pickup fulfillment record is Picked Up. The status of the fulfillment request record is also Picked Up.

**Fulfilling Store Pickup Orders from Sales Orders**

If you do not use the Fulfillment Request feature to fulfill store pickup orders, you fulfill a store pickup order directly from the sales order. First, you create a store pickup fulfillment record and mark the items as picked. Then, when the customer visits the store to collect the items, you mark the items as picked up on the store pickup fulfillment record.

![Note: If the Fulfillment Request feature is enabled, you have to create a fulfillment request to fulfill a store pickup order. You create the fulfillment request from the sales order and then you create the store pickup fulfillment record. See Fulfilling Store Pickup Orders from Fulfillment Requests for more information.](Image)

**To mark items as picked:**

1. Go to Transactions > Sales > Enter Sales Orders > List and click View next to the sales order you want to fulfill.
2. Click Create Pickup. The Store Pickup Fulfillment page is displayed, with the Status field set to Picked.
3. In the Items subtab, make sure the Fulfill box is checked for each item you want to mark as picked.

   ![Note: If there are lines in the store pickup fulfillment with different locations, you must choose a single location at which to mark the items as picked. You do this by clearing the Fulfill box of the lines with different locations. You can then create a separate store pickup fulfillment record at a later stage for the lines you cleared. You can create as many store pickup fulfillment records as required to fulfill the sales order.](Image)

4. Click Save to create the store pickup fulfillment.
Marking items as picked up.

1. Go to .
2. Click View next to the store pickup order you want to fulfill.
3. Click Mark Picked Up to confirm the customer has collected the items.

   After you mark all items as picked up, the status of the store pickup fulfillment record is Picked Up. The status of the original sales order changes to Pending Billing if payment has not yet been received.

If you only want to mark some items as picked up, open the store pickup fulfillment record for editing. Check the Fulfill box next to the picked up items and then set the Status field to Picked Up. When you save the record, only the selected items are included in the store pickup fulfillment. Other items that were not picked up are unpicked. You must create another store pickup fulfillment record to fulfill those items.

Canceling a Store Pickup Order

You can cancel a store pickup order at several stages in the store pickup workflow, provided the items have not been picked up by the customer.

- **Store pickup fulfillment**
  If you cancel from a store pickup fulfillment record, the status of the store pickup fulfillment record is Canceled. After you cancel a store pickup fulfillment record, you can no longer edit the record. The status of the fulfillment request (on which the store pickup fulfillment is based) changes to In Progress. You can choose to create a new store pickup fulfillment record from the original fulfillment request.

- **Fulfillment request**
  When you cancel at the fulfillment request stage, the status of the fulfillment request record is Canceled. You can no longer edit the record. You can choose to create a new fulfillment request record from the original sales order.

- **Sales order**
  To cancel the original sales order, you close the order. See the help topic Closing a Sales Order.

Checking if the Store Pickup Email Notification Was Sent

NetSuite can send an email notification to the customer when all items in a fulfillment request have been picked and the order is ready to be picked up. You can check if the pickup email notification was successfully sent to the customer.

**Note:** The pickup email message is only sent when the fulfillment request status is Picked.

**Note:** The order ready for pickup email notification is sent only if the setting is turned on. See Store Pickup Email Notifications for more information.

To check pickup email messages sent:

1. Go to Lists > Relationships > Customers and open the customer record you want to work with.
2. Click the Communications subtab.
3. Click Messages to view all email messages sent to the customer from your NetSuite account.
4. To view the content of an email message, click View or the message number.
Advanced Shipping

Advanced shipping gives your shipping and accounting departments separate processes for fulfilling and billing orders. Your shipping department fulfills part or all of an order when it is ready to ship. Then, your accounting department creates an invoice or cash sale for the shipped items and rendered services.

With Advanced Shipping, you can track partial shipments and invoice customers for partial or entire orders. Your picking tickets reflect the items on the order that are actually shipped.

If you want to create invoices for a whole order even if the order hasn’t been completely fulfilled, enable the Invoice in Advance of Fulfillment preference. Then, even if you ship only part of an order, you can create an invoice or cash sale for the entire order. For information on enabling this preference, read the help topic Accounting Preferences.

Note: If an item is manually added to an invoice, the on-hand quantity displayed for the item on the invoice and on any linked fulfillments shows the corresponding reduction.

You can also optionally use the Advanced Billing feature with the Advanced Shipping feature. For more information, read Fulfilling Orders Using Advanced Shipping with Advanced Billing.

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

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

To enable Advanced Shipping:

1. Go to Setup > Company > Enable Features.
2. Click the Transactions subtab.
3. Check the Advanced Shipping box.
4. Click Save.

After you have enabled Advanced Shipping, certain roles may need to be customized to allow them to fulfill orders. Administrators should ensure that the required role has the following permissions:

- Item Fulfillment — this permission adds the fulfill button on sales orders.
- Fulfill Orders — this permission adds the menu option to the bulk Fulfill Orders page.

To add fulfillment permissions to a role:

1. Go to Setup > Users/Roles > Manage Roles.
2. Click Customize on the role you want to add the fulfill permission to.
3. On the Permissions subtab under Transactions, select Item Fulfillment.
4. In the Level column, select Full and click OK.
5. Repeat the above steps for the permission Fulfill Orders.
6. Click Save.

Once the role has been customized to include the fulfillment permission, the role should then be assigned to the user. For more information on customizing roles see the help topic Customizing or Creating NetSuite Roles.
Fulfill a Single Order Using Advanced Shipping

Use this process to fulfill one order at a time.

For details about enabling the Advanced Shipping feature, read Advanced Shipping.

To fulfill a single order:

1. Go to Shipping > Shipping > Fulfill Orders.
2. Select a customer to show only orders for that customer.
3. In the Transaction Type field, select to filter the list for sales orders or transfer orders.
4. In the Filter By field, choose one of the following to filter the orders shown:
   - Some Items Committed – the list shows orders that have one or more items committed to be fulfilled.
   - All Items Committed – the list shows orders that have all items committed to be fulfilled.
   - Respect Ship Complete - the list shows only the orders that are committed according to their ship complete setting. This includes all orders that are not restricted to ship complete.
   - Ignore Item Availability – the list shows all open orders regardless of the availability of items on the orders.

5. In the Process column, click Fulfill next to the order you want to fulfill.
6. On the Item Fulfillment page, verify or enter information in the following fields:
   - Customer or Project – the customer or project the order is for
   - Address – the customer's address where the order will be shipped
   - Order # – the number of the order you are fulfilling
   - Date – the date on which the order was fulfilled.
   - Ref. No. – a number you can later use to reference this item fulfillment
   - Ship Via – the shipping method being used for this order
   - Shipping Cost – the total cost of shipping for this order
   - Tracking Numbers – any numbers used to track this shipment
7. At the bottom of the page, in the Quantity column, enter the amount of each item you are fulfilling.
   If you want to fulfill the entire order, make sure the amount in the Quantity column equals the amount in the Remaining column for each item.
8. In the Serial/Lot Number field, enter the serial or lot number of the item.
   - Separate each serial number with a space, comma or by pressing Enter after each one.
   You must enter a serial number for each serialized item. For example, if you enter a quantity of 2, then you must enter two serial numbers.
Lot numbers must be entered in this format: LOT#(Quantity)
For example, to enter a quantity of 100 items as Lot number ABC1234, enter ABC1234(100).

9. In the Bin Numbers column, the preferred bin for that item displays. After this item is picked, you can edit this field if items were pulled from other bins associated with the item.
To edit bins, click the Bins icon, change the quantity pulled from each bin associated with the item, and click Done.

10. When you have finished, choose one of these options:
- Click Save & Bill to convert the order to an invoice.
- Click Save.
  If you save without billing, later you will need to go to Transactions > Sales > Bill Sales Orders to bill the order.

**Note:** If you fulfill items across periods, additional fields show on this form. For details, read Fulfilling Orders Across Multiple Accounting Periods.

Your inventory is updated for the items that you fulfilled. To see what has been fulfilled and invoiced for an order, go to the History subtab on the order and click Fulfillments & Invoices.

You can also print a label for your shipment. To do this, go to Transactions > Management > Print Checks and Forms, and then click the Shipping Labels item. For more information about printing shipping labels, read the help topic Printing Shipping Labels.

For information on how to process multiple orders at once, read Fulfill Multiple Orders Using Advanced Shipping.

### Fulfilling Overages

Sometimes when you are fulfilling an order, the amount you are processing is more than the quantity shown on the receipt. This additional amount is called an overage, and NetSuite enables you to process overages using the Allow Overage on Item Fulfillments preference.

If the Advanced Shipping feature is enabled, there is a setting to allow the fulfillment of more items than the original quantity entered on purchase orders.

1. Go to Setup > Accounting > Accounting Preferences.
2. Click the Order Management subtab.
3. Under Fulfillment, check the Allow Overage on Item Fulfillments box.
4. Click Save.

With the preference enabled, you can enter a quantity larger than the quantity remaining for an item when processing an item fulfillment.

### Fulfill Multiple Orders Using Advanced Shipping

Use this process to fulfill many orders at one time when Advanced Shipping is enabled. For details about enabling the Advanced Shipping feature, read Advanced Shipping.

**To fulfill multiple orders:**

1. Go to Shipping > Shipping > Fulfill Orders.
2. Select a customer to show only orders for that customer.
3. Select the period these fulfillments are posting to.
4. Accept or enter the date.
5. Set the shipment status you want to apply to these orders.
6. In the Transaction Type field, select to filter the list for sales orders or transfer orders.
7. In the Bulk Fulfill From Location field, choose the location you want to fulfill these orders from.
8. In the Filter By field, choose one of the following to filter the orders shown:
   - Some Items Committed – the list shows orders that have one or more items committed to be fulfilled.
   - All Items Committed – the list shows orders that have all items committed to be fulfilled.
   - Respect Ship Complete - the list shows only the orders that are committed according to their ship complete setting. This includes all orders that are not restricted to ship complete.
   - Ignore Item Availability – the list shows all open orders regardless of the availability of items on the orders.

   **Note:** You cannot fulfill or bill sales orders with the status Pending Approval. You also cannot close lines on a sales order with this status. If you need to make changes to an order that is pending approval, you can remove line items.

9. In the Fulfill column, check the boxes next to the orders you want to fulfill or click Mark All to select all available orders.
10. Click Submit.
    The Processed Orders list appears. It lists the item fulfillment created for each order fulfilled.

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

All orders you checked are processed together as one Job. If it will take more than 10 seconds to process, the Job Status page opens to show the jobs being processed. For each job being processed, the page shows the Job ID and name, date initiated, status, and percent complete. You can process several fulfillment jobs at once and track them on the Job Status page.

Your inventory is updated for the items that you fulfilled. To see what has been fulfilled and invoiced for a sales order, go to the History subtab on the order and click Fulfillments & Invoices.

You can also print a label for your shipment. To do this, go to Transactions > Management > Print Checks and Forms, and then click the Shipping Labels item. For more information about printing shipping labels, read the help topic Printing Shipping Labels.

Fulfilling Orders Using Advanced Shipping with Advanced Billing

When you process orders using both the Advanced Billing and Advanced Shipping features, fulfillment forms function differently than when you do not use both of these features.

When you use both features and bulk fulfill orders by going to Shipping > Shipping > Fulfill Orders, the fulfillment list automatically filters out orders that do not include any fulfillable items. Orders that include both fulfillable items and non-fulfillable items show in the list only until all fulfillable items have been fulfilled.
The Fulfill button appears on orders only if the order includes fulfillable items with a remaining quantity to be fulfilled. When you click the Fulfill button, a new fulfillment opens that includes the remaining items.

**Note:** When both the Advanced Shipping and Advanced Billing features are enabled, your setting for the Fulfill Based on Commitment preference does affect fulfillments.

**Warning:** If this preference is set to Limit to Committed even though the Fulfill button is not available on an unfulfillable sales order, the order does show in the fulfillments list when the Filter By option is set to Ignore Item Availability. However, if you click the Fulfill link on this sales order, it cannot be fulfilled. You receive the message “There are no items committed in this transaction—it cannot be fulfilled.”

For detailed instructions on fulfilling an order, read [Fulfill a Single Order Using Advanced Shipping](#).

### Fulfilling Progress Sales Orders Using Advanced Shipping

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

When using progress billing, a progress sales order is created and approved. After a portion of the job has been completed, the progress sales order is fulfilled. Then, a progress invoice is created for a percentage of the total cost. Progress sales orders must be fulfilled individually.

**To fulfill a progress sales order using advanced shipping:**

1. Go to Shipping > Shipping > Fulfill Orders.
2. Select a customer to show only orders for that customer.
3. Select the period these fulfillments are posting to.
4. In the Filter By field, choose one of the following to filter the orders shown:
   - **Some Items Committed** – the list shows orders that have one or more items committed to be fulfilled.
   - **All Items Committed** – the list shows orders that have all items committed to be fulfilled.
   - **Respect Ship Complete** – the list shows only the orders that are committed according to their ship complete setting. This includes all orders that are not restricted to ship complete.
   - **Ignore Item Availability** – the list shows all open orders regardless of the availability of items on the orders.

**Note:** You cannot fulfill or bill sales orders with the status Pending Approval. You also cannot close lines on a sales order with this status. If you need to make changes to an order that is pending approval, you can remove line items.

5. In the Process column, click **Fulfill** next to the order you want to fulfill.
6. Click **Submit**.
7. On the **Item Fulfillment** page, verify or enter information in the following fields:
   - **Posting Period** – the period in which this fulfillment is recorded
   - **Customer or Project** – the customer or project the order is for
   - **Address** – where the order will be shipped
   - **Order #** – the number of the order you are fulfilling
   - **Date** – the date on which the order was fulfilled
Advanced Shipping

- **Ref. No.** – a number you can later use to reference this partial fulfillment
- **Ship Via** – the shipping method being used for this order
- **Shipping cost** – the total cost of shipping for this order
- **Tracking Numbers** – enter any numbers associated with tracking this shipment

8. In the **Quantity** field, for each item, enter the percentage that has been completed as a decimal.
   For example, for a project that has been 50% completed, enter 0.5.
   If you want to fulfill the entire order, enter the number 1 for each item.

9. When you have finished:
   - Click **Save** to save the information.
   - Click **Save & Invoice** to save the information and create an invoice for the completed portion of the sales order.
   If you save without billing, you will need to create an invoice for the completed portion of the invoice at Transactions > Sales > Bill Sales Orders.

To see what has already been fulfilled and invoiced for an order, go to Transactions > Sales > Enter Sales Orders > List. Click View next to the sales order you want to view. Then, in the sales order record, click the Related Records subtab to view invoices, item fulfillments, and other related records.

**Automating the Ship Date**

By default, an order’s ship date is the same date that the order was entered. You can set a preference to automatically set the ship date at a certain number of days after the order is entered.

For example, if you normally ship orders three days after the order is received, you can set an automated ship date for every order that is three days past the date the order is entered, including or excluding weekends and holidays.

When you fulfill the order, the real ship date is displayed in the Actual field next to the Ship Date field.

**To set up automated ship dates:**

1. Go to Setup > Accounting > Shipping.

2. In the **Number of Days to Shipment** field, set the average number of days between the date a sales order is entered and the date the order is shipped. This number of days is added to the date of the order to set the ship date on sales orders. The actual ship date updates when the order is fulfilled.
   
   The ship date respects weekends and holidays unless you ship on Saturday or Sunday. You can set the holidays you observe on the **Preferences** subtab.
   
   For example, if you have estimated three days to shipment and do not ship Saturday or Sunday, orders entered on Friday have an estimated ship date of the following Wednesday.

3. In the **Cutoff Time for Shipments** field, enter the time of day after which orders stop being shipped.
   
   Orders entered after this time begin counting days to shipment with the next business day.

4. Check the **Ship on Saturday** box to include Saturday in the days to shipment calculation.
   
   For example, if you ship on Saturday and have 3 days to shipment for an order placed before the cutoff time on Friday, the order is estimated to ship on Tuesday.

5. Check the **Ship on Sunday** box to include Sunday in the days to shipment calculation.
6. Click **Submit**.

## Printing a Picking Ticket

You can print a picking ticket for an order to indicate the items to pull from inventory to fulfill an order.

### Note:
If Bin Management, Units of Measure, and Advanced Bin/Numbered Inventory Management are enabled, bin quantities on hand display in the base unit of measure.

You need Adobe Reader to print PDF forms. Visit the [Adobe Web site](https://www.adobe.com) to download the latest version at no charge. Next, in NetSuite, go to Home > Set Preferences, clear the Print Using HTML box and click Save.

### To print a picking ticket:

1. Go to Transactions > Management > Print Checks and Forms.
2. On the Print Checks and Forms page, click **Picking Tickets**.
3. On the Print Picking Ticket page, you can filter the list in the **Filter By** field to show only orders with All Items Fully Committed or orders with at least Some Items Committed.
   - If you choose to Ignore Item Availability, all open orders show in the list.
4. If you use locations, select a location to print picking tickets for.
5. If you use the Multiple Shipping Routes feature, a picking ticket is generated for each shipping route. The Print Picking Tickets queue shows a separate line for each shipping route on the same order.
   - For more information, see the help topic [Item Fulfillments and Multiple Shipping Routes](https://www.oracle.com).  
6. Check the **Allow Reprinting** box to be able to reprint previously printed transactions.
   - When you check this box, all documents appear at the bottom of the page in segments.
7. Click **Customize** to include additional information on the page.
   - This additional information is not added to the printed picking ticket.
8. In the **Print** column, place a check mark next to the orders you want to print picking tickets for, or click **Mark All** to print picking tickets for all orders on the page.
9. Click the **Print** button.
10. If you are using Adobe Acrobat, click the printer button in the Adobe application frame.
    - A Print window opens.
11. Specify the printing details.
    - For example, if you want to print multiple copies of each picking ticket, specify the number.
12. Click **OK**.

Now, you can use picking tickets to pull the items you need to ship.

You can also print a picking ticket by viewing the order and clicking **Print Picking Ticket**.

- To view a sales order, go to Transactions > Sales > Enter Sales Orders > List. Click on the sales order number.
- To view a transfer order, go to Transactions > Inventory > Enter Transfer Orders > List.

NetSuite forms can be purchased from the [NEBS Web site](https://www.nebs.com). You can print picking tickets on blank paper as well.
Sorting Picking Tickets

You can sort picking tickets to make your warehouse and order management more efficient. Sort picking tickets based on picking ticket fields, including custom fields you have created.

To sort your picking tickets, you must customize a picking ticket form to determine the sorting order. To customize a picking ticket, complete the steps below:

1. Go to Customization > Forms > Transaction Forms. Click Customize next to Standard Picking Ticket.
2. On the Custom Transaction Form page, click the Columns subtab.
3. At the top of the Columns subtab, two sorting fields have dropdown lists that include all column fields that can be displayed on the picking ticket, including custom column fields.
   a. In the Sort Line Items By field, choose a field to sort the picking tickets.
   b. In the Then By field, choose a field for a secondary sort for picking tickets.

   For example, if you use the Bin Management feature and also customized your item records with a Widget Number field, you can sort your picking tickets in this manner:

   In the Sort Line Items By field, choose Bin Numbers.
   In the Then By field, choose your custom Widget Number field.
   Using this custom picking ticket, picking tickets are first grouped by bin numbers. Also, within each bin number group, items are secondarily grouped by widget number.

4. The sort order on custom forms is ascending by default, but you can check the Descending box to change the sort order.
5. Click Save.

Kit Items on Picking Tickets

You can give your warehouse employees more information when you use the Always Print Kit Items on Picking Tickets preference. With this preference enabled, you show individual kit items when you print picking tickets.

Kit items are made up of several individual inventory items that are sold as a unit. When you enable the preference, the picking ticket shows each individual item that makes up the kit. Then, warehouse employees who pick orders will know exactly which items to pull from stock to fulfill the kit.

To print kit items on picking tickets:

1. Go to Setup > Accounting > Preferences > Accounting Preferences.
2. Click the Order Management subtab.
3. Under Picking/Packing, check the Always Print Kit Items on Picking Tickets box.
4. Click Save.

Bin Numbers on Picking Tickets

If you use a bin management feature, bin numbers are automatically printed on picking tickets for orders with items associated with bins. The preferred bin number for an item is listed by default.
If the item quantity on an order is greater than the on-hand amount for the preferred bin, another associated bin containing enough items to fill the order is listed. If no single bin contains enough items on-hand, bins are listed by quantity on-hand, largest to smallest.

Lines on the picking ticket are sorted by item name. To sort the lines by another column, such as bin number or serial number, you can create a custom picking ticket and choose a column by which to sort. You can sort by any available column in the picking ticket, including custom fields. See Sorting Picking Tickets for more information.

**Note:** Items tracked by bin that have been received but have not yet been put away cannot be fulfilled. To put away items that need to be fulfilled, go to Transactions > Inventory > Bin Putaway Worksheet.

For details about tracking items with bins, read the help topic Bin Management.

### Packing Slips and Return Forms

You can print a packing slip and return form to include in your shipments to customers.

The packing slip contains your company name, the customer’s name and shipping information, and a detailed account of your customer’s order.

The return form includes the customer’s identification number, the sales order number, and company information like company return policy and address.

To set up how you want your packing slips and return forms to print and to enter a message for packing slips or your return policy for return forms, go to Setup > Company > Preferences > Printing & Fax. Click the Printing subtab.

You can also choose to enable the Show All Ordered Items on Packing Slips preference. When the preference is enabled, your packing slip shows all items being fulfilled in the shipment and any remaining open items. Disable this preference for the packing slip you print to show only items being fulfilled in the shipment.

For details on setting this preference, read the help topic Accounting Preferences.

To customize packing slips and return forms, go to Customization > Forms > Transaction Forms. Click Customize next to Standard Packing Slip or Standard Return Form. For more information, read Printing Packing Slips and Return Forms.

### Printing Packing Slips and Return Forms

You can print a packing slip and return form to include in your shipments to customers.

The packing slip contains your company name, the customer’s name and shipping information, and a detailed account of your customer’s order.

The return form includes the customer’s identification number, the cash sale number, and company policies like your return policy and address.

To set up how you want your packing slips and return forms to print and to enter a message for packing slips or your return policy for return forms, go to Setup > Company > Preferences > Printing & Fax.

You can print packing slips and return forms for cash sales and sales orders you have already created.
To print a packing slip and return form:

1. Go to Transactions > Management > Print Checks and Forms.
2. On the Print page, click Packing Slips and Return Forms.
3. Enter or pick the dates of the packing slips and return forms you want to print.
   The Packing Slips in Queue field automatically updates as you select what you want to print.
4. In the Packing Slip Form field, select a packing slip form to use for this print run.
   This field defaults to the preferred packing slip form, but you can choose from all packing slip forms you have previously customized.
   To customize a packing slip form, go to Customization > Forms > Transaction Forms . Click Edit next to Standard Packing Slip.
5. Place a check mark next to each transaction you want to print a packing slip and return form for.
6. Place paper or blank forms in your printer.
7. Click the Print button.
8. If you are using Adobe Acrobat, click the printer button in the Adobe application frame.
   A Print window opens.
9. Specify the printing details.
   For example, if you want to print multiple copies of each picking ticket, specify the number.
10. Click OK.

Now, you can include packing slips and return forms in your shipments to customers.

Printing Packing Slips with Advanced Shipping

If you use the Advanced Shipping feature, you can use a custom packing slip or invoice form when printing packing slips. This enables you to customize the information that prints on packing slips.

For example, you can customize an invoice form to show information on the packing slip such as item rate and amount, as well as the order total. Then, when you print the packing slip using the custom form, the packing slip shows the additional information.

To customize a form to print packing slips, go to Customization > Forms > Transaction Forms . On the Transaction Forms page, click Customize next to the form you want to customize.

To print packing slips using a custom form, go to Shipping > Shipping > Print Checks and Forms . Click Packing Slips and Return Forms. In the Packing Slip Form field, select the name of a custom form you created. The list of forms on the packing slip queue includes all packing slip forms and invoice forms.

Then, check the Print box next to the slips you want to print. When you click Print, these packing slips print with the information indicated on your custom form.

Pick, Pack, and Ship

The Pick, Pack, and Ship feature lets you fulfill sales orders in different stages: you first pick the items, then you pack the items, and finally you ship the items. You can use pick, pack, and ship with advanced shipping, which lets you bill sales orders in a separate transaction. Otherwise, NetSuite bills the items in a sales order when you mark the items as shipped.
See the following topics for more information:

- Pick, Pack, and Ship Overview
- Pick, Pack, and Ship Workflow Charts
- Fulfilling Orders Using Pick, Pack, and Ship
- Order Fulfillment Confirmation Email
- Marking an Order Packed
- Marking an Order Shipped
- Setting Up Pick, Pack, and Ship

Pick, Pack, and Ship Overview

The Pick, Pack, and Ship feature allows greater flexibility to process and track the status of orders through the fulfillment and shipment processes. You use separate transactions to pick the items from inventory, pack the items to prepare them to be shipped, and then ship the items to their destination.

Using Pick, Pack and Ship, you can send items to your customers or to your other locations, if you use the Multi-Location Inventory feature. For details, read the help topic Pick, Pack, and Ship with Transfer Orders.

When the Pick, Pack, and Ship feature is activated, orders are fulfilled in three stages: Fulfill Orders (Pick), Mark Orders Packed and Mark Orders Shipped.

When you fulfill an order, you pick the items from inventory in the warehouse that you need to fill the order. Mark the order packed when you physically package them to be ready to ship. Finally, you mark orders shipped when the order is on the way to its destination.

You can track orders through each step of the fulfillment process. Possible statuses for a fulfillment are:

- **Picked** – The items on the order have been picked from inventory and are waiting to be packed and shipped.
  
  This is a non-posting transaction.

- **Packed** – The items on the order have been packed and are waiting to be shipped.
  
  This is a non-posting transaction.

- **Shipped** – The items have been shipped out, and the order is completely fulfilled.
  
  This is a posting transaction.

To view a list of item fulfillments and their statuses, go to Shipping > Shipping > Fulfill Orders > List. In the Status field of the footer, filter the list by type of status for fulfillments you want to see. Select All, Picked, Packed or Shipped.

Select a Default Item Fulfillment Stage at Setup > Accounting > Setup Tasks > Shipping. The default status populates the Status field on new item fulfillments, as well as in the Set Shipment Status To field on the Bulk Fulfill Orders page.

It is possible for one order to be partially picked, partially packed and partially shipped, so an order may have several fulfillments, each with a different status.

For example, an order with six items is picked in two fulfillments:

- First fulfillment – items #1 - 3 are picked and awaiting packing.
- Second fulfillment – items #4 - 6 are picked, packed, and shipped out.

  The first fulfillment has a status of Picked.
The second fulfillment has a status of Shipped.

Pick, Pack, and Ship Workflow Charts

Your pick, pack, and ship fulfillment workflow will be different depending on whether the Advanced Shipping feature is enabled. When fulfilling an order without the Advanced Shipping feature, an invoice is created automatically for sales order lines when the lines are marked as shipped. When the Advanced Shipping feature is enabled, you first fulfill the sales orders by marking lines as picked, packed, and shipped. You then bill the sales order in a separate transaction.

See the following topics for more information:

- Pick, Pack, and Ship Sales Orders Without Advanced Shipping
- Pick, Pack, and Ship Sales Orders With Advanced Shipping

Pick, Pack, and Ship Sales Orders Without Advanced Shipping

In a pick, pack, and ship fulfillment workflow without advanced shipping, you fulfill a sales order by picking, packing, and shipping the items in it. When you mark items in the sales order as shipped, an invoice is created at the same time for the shipped items.

Pick, Pack, and Ship Sales Orders With Advanced Shipping

In a pick, pack, and ship fulfillment workflow with advanced shipping, you fulfill a sales order by picking, packing, and shipping the items in it. After you mark items in the sales order as shipped, you can then bill the shipped items in a separate transaction.
Setting Up Pick, Pack, and Ship

To use Pick, Pack and Ship, you must enable the feature and set preferences.

**To enable the feature:**

1. Go to Setup > Company > Enable Features.
2. On the Transactions subtab, check these boxes:
   - Pick, Pack and Ship
   - Advanced Shipping
3. Click Save.

**To set preferences:**

1. Go to Setup > Accounting > Setup Tasks > Shipping.
2. In the **Default Item Fulfillment Integration Stage** field, select the Picked, Packed, or Shipped stage you want to use as the default fulfillment status in your sales order process. When you fulfill an order, this is the status of the sales order on the Item Fulfillment page. You can always select a different stage when fulfilling an order.

3. If you use the Shipping Label Integration feature, in the **Shipping Label Creation Stage** field, select the earliest stage when you can get tracking numbers and print shipping labels. This does not have to be the same as the Default Item Fulfillment Stage.

   For example, you generally want to mark sales orders as Shipped when you fulfill them. For part of your inventory, you know you will change the order fulfillment status to Picked, and need to be able to get tracking numbers and print shipping labels at that stage. You can do so if you set the Shipping Label Creation stage to Picked.

   - Select **Picked** to receive a tracking number and print a bar-coded shipping label when the fulfillment status of an order is at least picked.
   - Select **Packed** to receive a tracking number and print a shipping label when orders are marked packed.
   - Select **Shipped** to have the tracking number and shipping label made available only when the order is marked shipped.

4. Click **Submit**.

### Fulfilling Orders Using Pick, Pack, and Ship

The Pick, Pack, and Ship feature gives your warehouse and shipping departments separate processes for each step to fulfill orders. To use Pick, Pack and Ship, you must enable the feature and set preferences – see **Setting Up Pick, Pack, and Ship**.

Warehouse employees pick the items needed to fulfill the order from inventory and then physically package them for shipping. Then, the shipping department marks an order shipped when the order is on the way to its destination.

You can track orders through each step of the fulfillment process. Possible statuses for a fulfillment are Picked, Packed, or Shipped.

To view a list of item fulfillments and their statuses, go to Shipping > Shipping > Fulfill Orders > List. In the **Status** field of the Filters, select a status to filter the list of item fulfillments. Select All, Picked, Packed, or Shipped.

The Fulfill Orders page lists all orders that have not yet had all items picked from inventory.

Note the following guidelines when fulfilling orders using the Pick, Pack, and Ship feature:

- You can enable a preference to send a confirmation email showing the total quantity shipped upon fulfillment of orders. For more information, read **Order Fulfillment Confirmation Email**.
- When you use the Pick, Pack and Ship feature, you can fulfill in one accounting period and ship in another. For details, read **Fulfilling Orders Across Multiple Accounting Periods**.
- You cannot disable the Pick, Pack, and Ship feature when you have existing fulfillments in Picked or Packed status.

### To fulfill (pick) an order using Pick, Pack, and Ship:

1. To pick the orders, go to Shipping > Shipping > Fulfill Orders.
2. To filter the list of orders by customer, select a customer in the **Customer** field.
3. In the **Process** column, click **Fulfill** next to the order you want to fulfill.
4. On the Item Fulfillment page, verify or enter information in the following fields:
   - **Customer** or **Project** – the customer or project for the sales order
   - **Ref. No.** – the reference number to identify the fulfillment
   - **Status** – the status assigned to the fulfillment when you save the record.
     The status defaults based on your setting for the Default Item Fulfillment Stage preference. Set this preference at Setup > Accounting > Setup Tasks > Shipping.
   - **Date** – the date of the fulfillment.

5. Click the **Items** subtab.

6. Verify that items checked in the Fulfill column are the items you are actually picking.

7. Verify or enter the quantities to pick for each item.
   If you want to pick the entire order, make sure the amount in the Quantity column equals the amount in the Remaining column for each item.

8. Click the **Shipping** subtab.

9. Verify or enter information under Shipping Address to show the customer address the order will be shipped to.

   **Note:** When picking an order, you cannot enter information on the Shipping or Packages subtabs unless you change the Status to Packed or Shipped.

10. Click **Save**.

    Now, the items you included in this fulfillment are marked Picked.

### Unpicking Items Already Picked

If you have picked items to fulfill an order, but then need to “unpick” or cancel the picking of the items, you must edit the item fulfillment record. To edit an item fulfillment, go to Transactions > Sales > Fulfill Orders > Lists, click **Edit** next the record you want to edit, and then do one of the following:

- To unpick one or more items – but not all items – clear the **Fulfill** box next to each item, and then click **Save** to confirm the changes. The unpicked items are removed from the item fulfillment. You can continue to fulfill the other picked items.
- To unpick all items, select Delete from the Actions menu. The item fulfillment record is deleted from the system.

### Marking an Order Packed

The Pick, Pack, and Ship feature gives your warehouse and shipping departments separate processes for each step to fulfill orders.

After you have picked/fulfilled items for an order, they need to be packed and then shipped to the customer.

**To mark orders packed:**

1. Go to Shipping > Shipping > Mark Orders Packed.
2. In the **Customer** field, optionally filter the list to show orders from one customer or all customers that need to be packed.
3. In the **Order Type** field, select a transaction type you want to filter this list to show.
4. If you want to set the location on the orders you choose to pack, in the **Bulk Fulfill from Location** field, select the location from which you want to fulfill all of the orders you select.
   If you want to do not want to change the location that is set on each individual order, select **Unchanged**.
   This field only shows if you use the Locations feature.

5. In the **Ship Via** field, select the shipping method you want to set on all orders you choose to pack.
   If you want to do not want to change the shipping method that is set on each individual order, select **Unchanged**.

6. To find a specific order, enter the order number in the **Select Order Number** field.

7. In the **Pack** column, check the box next to each order you want to packed.
   You can click **Mark All** to select all orders in the list.

8. Click **Submit**.

When you bulk pack orders, the orders are processed together as one job. If it will take more than ten seconds to process them, the Job Status page opens to show the jobs being processed.

You can process several jobs at once and track them on the Job Status page. For each job being processed, the page shows the following:

- Job ID and name
- Date and time the job was initiated
- Status of the job
- Percentage of the job complete
- Any related error messages
- Results column with a link to a processing log

Click the Order Processing Log link in the Results column to open the Processed Orders page. This page details the following information about each transaction in the job:

- Original transaction type, date, and number
- Processed transaction type, number, and status
- Errors associated with a transaction being processed

Now, the items are packed and need to be shipped to the customer. To mark orders shipped, go to Shipping > Shipping > Mark Orders Shipped.

### Marking an Order Shipped

The Pick, Pack, and Ship feature gives your warehouse and shipping departments separate processes for each step to fulfill orders.

After you have marked items on an order as picked and packed, they need to marked shipped to the destination.

**To mark orders shipped:**

1. Go to Shipping > Shipping > Mark Orders Shipped.
2. On the Mark Orders Shipped page, in the **Customer** field, optionally filter the list to show orders from one customer or all customers that need to be marked shipped
3. In the **Mark Shipped** column, check the box next to each order you want to mark shipped.
4. Click **Submit**.

When you check multiple orders, the orders are processed together as one job. If it will take more than 10 seconds to process them, the Job Status page opens to show the jobs being processed.

You can process several jobs at once and track them on the Job Status page. For each job being processed, the page shows the following:

- Job ID and name
- Date and time the job was initiated
- Status of the job
- Percentage of the job complete
- Any related error messages
- Results column with a link to a processing log

Click the Order Processing Log link in the Results column to open the Processed Orders page. This page details the following information about each transaction in the job:

- Original transaction type, date, and number
- Processed transaction type, number, and status
- Errors associated with a transaction being processed

**Order Fulfillment Confirmation Email**

NetSuite lets you send a confirmation email message to customers when you fulfill their orders. The features you use and the preferences you set determine how NetSuite generates this email message. In all cases, you can create a customized email template that communicates information about the order fulfillment.

- If you do not use the Web Store feature, read **Sending Order Fulfillment Email** to learn more.
- If you are only concerned with customizing email for Web store orders, read the help topic **Templates for Website Email Messages**.

**Sending Order Fulfillment Email**

You can configure NetSuite to send an order fulfillment confirmation email message for orders placed over the phone or with sales reps.

**To send the order fulfillment email:**

1. Go to Setup > Accounting > Preferences > Accounting Preferences.
2. Click the **Order Management** subtab.
3. Under **Fulfillment**, check the **Send Order Fulfilled Confirmation Emails** box.
4. Click **Save**.

When you process an order, NetSuite sends an email message to the customer email address on the sales order, indicating the total quantity shipped.

- If you use the Advanced Shipping feature, the email message is sent when the order is fulfilled.
- If you do not use the Advanced Shipping feature, the email message is sent when the order is billed.
If you use the Pick, Pack, and Ship feature, the email message is sent when the order is shipped.

**Note:** If you check the Use Web Site Template For Fulfillment Emails box, the text specified on the Custom Web Site Text page is used for fulfillment email messages, sent for sales orders entered from the Transactions tab in NetSuite. However, fulfillment email messages, sent for web store order, do not use this text. It is no longer possible to use the same email template for fulfilment emails for orders from both sources. For information about customizing and sending fulfillment email for web store orders, see the help topic Templates for Website Email Messages.

## Customizing Order Fulfillment Email Text

You can customize the text of the order fulfillment confirmation email message for each language available to you in the system. Depending on whether or not the Advanced Site Customization feature is enabled in your account, NetSuite uses the custom text from the Custom Web Site Text page or the Customize Fulfillment Email page respectively. See the help topic Advanced Site Customization for more information about the Advanced Site Customization feature.

To customize the order fulfillment email text:

1. Open the customization page according to the features enabled in your account.
   - If the Advanced Site Customization feature is enabled, go to Setup > Site Builder > Setup Tasks > Customize Text (Administrator).
   - If the Advanced Site Customization feature is enabled, go to Setup > Accounting > Preferences > Customize Fulfillment Email (Administrator).
2. Select the language you want to customize.
3. If you are on the Custom Web Site Text page, look for the custom text row that corresponds to sales order fulfilled text. On the Customize Fulfillment Email page, there is only one custom text row.
4. In the **Customization** column, enter the text you want to use.
   - The Default Text column displays the HTML source code for the fulfillment email message. The blank fields in the Customization column are for your customized version of the fulfillment email message.
   - Depending on how familiar you are with HTML and CSS, it might be easier to copy the HTML from the Default Text column to the Customization column and then change the customized text to suit your business needs.
5. **Click** Save.

   Now, when an order is fulfilled, the customer receives an email message that contains the information you want to communicate about the order.

You can use NetSuite's attribute tags to display information from the sales order (such as the customer name and the sales order number) in the fulfillment confirmation email message. For more information, see the help topic Attribute Tags for use in Email Messages. Attribute tags function in the fulfillment email message whether or not you use the Web Store or Advanced Site Customization features.

### Email Templates for OneWorld Accounts that Support Multiple Languages

In OneWorld accounts that support multiple languages, checking the Use Web Site Template for Fulfillment Emails box might not always result in all fulfillment email messages using the same customized web site text group because of dependencies on language preferences. See the help topic Using Web Site Text Groups for more information about customized web site text group.

**Note** the following:

- If you check the **Use Web Site Template For Fulfillment Emails** box, the text specified on the Custom Web Site Text page is used for fulfillment email messages, sent for sales orders entered from the Transactions tab in NetSuite. However, fulfillment email messages, sent for web store order, do not use this text. It is no longer possible to use the same email template for fulfillment emails for orders from both sources. For information about customizing and sending fulfillment email for web store orders, see the help topic Templates for Website Email Messages.

- A user’s language preference defaults to the language that is configured for the user’s subsidiary at Setup > Company > Classifications > Subsidiaries.

- Each customized web site text group for order fulfillment has a locale (preferred language) defined, and this locale may differ from the locale set for some customers. Any customer that has a locale different from that of the customized web site text group cannot use the customized web site text group.

**Important:** When using customized web site text groups for order fulfillments, verify that a customized web site text group has been created for every language used by customers. If a customized web site text group with a matching language is not found for a customer, that customer’s orders default to using the standard order status email message.