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NSPOS 2019.1.0 Release Notes

 Applies to: NetSuite Point of Sale (NSPOS)

This document lists the updates provided in NetSuite Point of Sale (NSPOS) version 2019.1.0. Updates are not available to NetSuite POS customers until they have upgraded to the release. NetSuite will modify these release notes when needed to provide our customers with additional information.

- Required User Actions
- Prerequisites
- Product Enhancements 2019.1.0
- Fixes 2019.1.0
- Update your NSPOS Bundle to 2019.1.0

Required User Actions

To use the functionality included in this release, your business must perform the following steps:

- Update your NSPOS Bundle to 2019.1.0
- If listed as a requirement, modify configurations for specific enhancements or fixes.

Assistance and User Acceptance Testing (UAT)

- Your assistance will be required to perform the upgrade. Technical Support or another representative will contact you in advance to agree on the details.
- Upgrade verification and UAT: When your NSPOS upgrade is complete, we recommend testing at least one register in each store.
  
  You can find our Terminal Verification Checklist – NSPOS 2019.1.x in the NetSuite Help Center > User Guides > NetSuite Point of Sale section.
  
  You can use the checklist for verification after the upgrade and as a guide for performing initial User Acceptance Testing (UAT).

Prerequisites

- Your server and all registers must be on NSPOS release 2018.2.0 or greater prior to moving to 2019.1.0.

  Important: Backward compatibility is only available for the previous major release. If you upgrade to 2019.1.0 and some registers are still on 2018.1.0, it might impact your integration with NetSuite ERP.

- You must have the appropriate third-party applications installed. See the help topic Prerequisites for NSPOS under “Set up a Register” in the NetSuite Point of Sale Administrator Guide.

Product Enhancements 2019.1.0

This NetSuite Point of Sale (NSPOS) release includes enhancements to setting up gift certificates and cards, support for Microsoft SQL Server 2016, and features to maintain tenders in refunds from item returns.
Password Management Tools

As part of our mission to ensure security throughout your NetSuite Point of Sale (NSPOS) register network, NSPOS 2019.1.0 introduces new password management tools. The criteria, tools and requirements meet Oracle security standards.

Administrators can configure password policies for all non-Administrator Roles, increasing or decreasing most requirements as needed for your business. Per the Payment Application Data Security Standard (PA-DSS) and Oracle security guidelines, administrators cannot adjust the password expiration period or password complexity for the Administrator Role.

- **Password Requirements**
- **Updating a Password Policy**
- **Minimum Security Standards Warning**
- **Procedure Change for New Employee Setup**
- **No Backward Compatibility for Password Policy changes**

### Password Requirements

Beginning with NSPOS 2019.1.0, the default password policy for all non-Administrator Roles is:

- Length must be at least 8 characters, maximum 128 characters
- Must include at least 1 number (0 - 9)
- Must include at least 1 lowercase alpha character (a - z)
- Must include at least 1 uppercase alpha character (A - Z)
- Must include at least 1 non-alphanumeric character (!@#$%^&*.:;"'<>?/=\-_\)
- Passwords expire after 180 days
- Account is locked after 5 failed login attempts
- If left idle for 15 minutes, a register having a user signed in becomes locked or switched to closed mode

### Updating a Password Policy

Administrators make updates to a password policy by editing a Role's NetSuite ERP RA-Operator Password Policy record. Each Role has a separate record and can have a unique policy. Policy updates download to your registers during the normal synchronization process.

If a user is assigned a different Role, they might be required to change their password at the next login.
To set Password Policy Rules:

1. Log in to NetSuite as an administrator.
2. Go to Customization > Lists, Records & Fields > Record Types.
3. Locate the RA-Operator Password Policy row.
4. Click List.

The RA-Operator Password Policy List displays the current password setup for all Roles.

5. Click a Role’s Edit link to make changes.

6. Select the Operator Role/Group to which the password policy will apply.
7. Set the desired policy for the Role:
   - **Minimum Length** - Enter the minimum password character length allowed.
     - Values: 8 – 128
     - Default: 8
   - **Require Special Characters** - If checked, password must include at least one non-alphanumeric character (\[@#$%^&*:.;~`\'\"]\+\?\-\_\|\(\)\[\]{}<>).
     - Values: Yes (checked), No (cleared)
     - Default: Yes
- **Require Mixed-Case Characters** – If checked, password must include at least one uppercase alphabetic character (A - Z) and one lowercase alphabetic character (a - z).
  - **Values:** Yes (checked), No (cleared)
  - **Default:** Yes

- **Require Numbers** – If checked, password must include at least one number (0 - 9).
  - **Values:** Yes (checked), No (cleared)
  - **Default:** Yes

- **Expiration Period in Days** – Number of days after current password was set before user is required to change their NSPOS password.
  A value of 0 (zero) means that passwords do not expire.
  - **Values:** 0 – 365
  - **Default:** 180

- **Max Invalid Login Attempts** – Number of failed login attempts before the user’s account is locked. If a user is locked out, they cannot log in until an administrator unlocks their account.
  See **Unlock an Employee's Account for NSPOS** under Company > Employees in the NSPOS Administrator Guide.
  A value of 0 (zero) means the Invalid Login Attempts feature is disabled.
  - **Values:** 0 – 10
  - **Default:** 5

- **Auto Logout Period in Minutes** – If a register is left idle for this period, the register automatically logs the user out. They must log in again to resume activity.
  A value of 0 (zero) means the Auto Logout Period feature is disabled.
  - **Values:** 0 – 60
  - **Default:** 15

- **Require Password Change Next Login** – If checked, all users with the selected Role must change their password the next time they log in.
  - **Values:** Yes (checked), No (cleared)
  - **Default:** No

**Tip:** Use the **User Notes** subtab to list why a policy was changed. Click **New Note**.

8. Click **Save**.

**Minimum Security Standards Warning**

If an administrator sets one or more password fields to values that do not meet minimum recommendations, NetSuite displays a warning when they click **Save**. The administrator can click **Cancel** to make adjustments or click **OK** to keep the settings.
Administrator must click **OK** to proceed or **Cancel** to adjust the setting.

### Procedure Change for New Employee Setup

NSPOS 2019.1.0 includes a change to how the administrator sets up the temporary password for new employees. Employees and other users are often called operators in NSPOS.

Before 2019.1.0, the operator's password was set directly on the *Create Operator* form. Now, the administrator must click the search icon and enter it a separate form. If a password does not meet the current policy, the requirements for the role display to guide you.

---

**Warning:** This change will allow your users to set passwords below minimum-security standards. Your system will be less secure.

---

No Backward Compatibility for Password Policy changes

The NSPOS 2019.1.0 password policy feature will not synchronize to registers that are on a previous release. For a policy to apply to all registers, you must upgrade all registers to 2019.1.0 or later.
**Important:** Upgrade all registers to ensure your password policy applies to your entire register network.

**NSPOS Normal State Monitoring**

NetSuite Point of Sale (NSPOS) 2019.1.0 introduces a new monitoring feature. The feature can alert you in the event that NSPOS components or associated systems installed on a register are not functioning within their “normal state” parameters.

An icon at the top left provides the **Normal State** status:

- **Green** (OK) — All components are functioning normally.
- **Amber** (Alert/warning) — Minor errors are occurring in one or more components, but the cashier can continue using the register.
- **Red** (Error) — Major errors are occurring in one or more components. The register should not be used until corrections are made.

Tapping the **Normal State** icon displays a list of NSPOS components and their status.

To provide NetSuite Customer Support with information about an error state, the NSPOS Workstation Status page includes an option to **Export and save logs**. This option is described in the next section, **Pack and Download Register Logs for Troubleshooting**.

**NSPOS Workstation Status Saved Search**

To give you an overview of all registers in your network, we've added a saved search to your NetSuite ERP account for NSPOS. The search returns information about all registers that are in an **Error** or **Warning** state. Results include the:
- Workstation Name
- Location
- Lane Number
- State (status)
- Details about the workstation state

You can export the results in .csv or other formats.

**Running a Workstation Status Search**

1. Log in to NetSuite as an administrator.
2. Go to Reports > Saved Searches > All Saved Searches.
3. Locate the **NSPOS Workstation Status** row.
4. Click **View**. The results display.
5. To save and share the results, click an export icon.

---

**Pack and Download Register Logs for Troubleshooting**

NetSuite Point of Sale (NSPOS) 2019.1.0 **Normal State Monitoring** includes a download feature you can use to send Customer Support the logs used for troubleshooting. To simplify gathering the information, NSPOS packs logged events into a .zip file that is saved to your replication server. Automatically saving log files to the server ensures that logs are available regardless of the state of a register's file system.

The log package contains logs from these register components:

- NSPOS
- ReplicationPushAgent
- AutoUpdater
- MonitoringAgent

In general, the faster Support receives a log package containing information about an issue, the faster they can resolve it. For this reason, downloading of the log package is available to both you and Support. If you want to send a downloaded log package to Support, but your email policies prohibit sending .zip files, you can attach the .zip to a Support Issue.

**To Pack and Download a Register Log Package:**

1. Sign in to an NSPOS register.
2. Tap the **Normal State** icon in the upper left. The appearance will vary depending on what issues, if any, are affecting the register.
3. Tap **Export and save logs**.
4. Tap **Save**.

**Frequency**

- NSPOS sends register log packages to the server one time per day.
- NSPOS removes log packages from the server after 30 days.

**Automatic Push of Unsent Transactions**

One of the highlights of NetSuite Point of Sale (NSPOS) is the ability to work offline, without an internet connection. NSPOS holds the transactions that are performed offline and “pushes” them to the server when the connection is reestablished.

However, if the connection cannot be reestablished and the register has to be restaged, unsent transactions could be lost. In the past, Customer Support had to manually extract those transactions and push them to the server prior to restaging.

**Solution**

Beginning with NSPOS 2019.1, when a register is restaged we automatically check the database for unsent transactions. If transactions are found, the installer moves the necessary data to a backup file. When restaging is complete, NSPOS recreates the transactions and pushes them to the server. These steps can normally be performed without the need for manual intervention.

**When Manual Intervention is Needed**

If issues prevent the file from being automatically pushed, NSPOS notifies you to seek assistance from Customer Support. They will work with you to locate the file and push it to the server. Files that hold unsent transactions use the extension .BCP.

Restaging a workstation as a different register will prevent an automatic push from being successful. The register must use the same RA-Workstation record and partner name as the original setup.

**Display all Items that have the same UPC**

In the event that two or more items have the same UPC, this NetSuite Point of Sale (NSPOS) 2019.1.0 feature displays the possible choices in a list. The feature is most relevant for matrix child items having the same UPC.
Background

Retailers can use matrix items to offer shoppers options that customize their purchase. One example is offering shoppers a choice of color or size. Another matrix-item example is a choice of related sub-items. This matrix setup uses parent > child, child, child choices.

An example is a rain coat matrix item where the shopper can purchase the coat and choose one accessory.

<table>
<thead>
<tr>
<th>Level</th>
<th>Item Name</th>
<th>Item ID</th>
<th>UPC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent</td>
<td>Rain Coat</td>
<td>ITM111</td>
<td>5555444441</td>
</tr>
<tr>
<td>Child</td>
<td>Rain Hat</td>
<td>ITM112</td>
<td>5555444443</td>
</tr>
<tr>
<td>Child</td>
<td>Rain Coat Storage Bag</td>
<td>ITM113</td>
<td>5555444443</td>
</tr>
<tr>
<td>Child</td>
<td>Rain Coat Extension</td>
<td>ITM114</td>
<td>5555444443</td>
</tr>
</tbody>
</table>

Notice that each child has the same UPC. The desired behavior is that the cashier can easily ensure that the item added to the Journal is the item that was scanned. Instead, having multiple items with the same UPC meant that scanning one item at checkout could add a different item to the Journal.

Solution

NSPOS 2019.1 enhances behavior used for items with matching UPCs. Now, if a parent item includes multiple child items that have the same UPC, NSPOS displays all items that match. The cashier can select the correct item from a list. The following is an example list using NSPOS test data.

The behavior when matrix child items have different UPCs did not change.
Enable Features for NSPOS

In NetSuite Point of Sale (NSPOS) 2019.1.0, we introduce a new Enable Features record specifically for NSPOS. The design and concept is similar to the NetSuite ERP Enable Features page under Setup > Company > Enable Features.

The plan is to provide administrators with a single page from which to enable or disable common NSPOS features.

This release rolls out the new page with options to enable and configure gift cards and certificates. Future releases will include options for other aspects of your NSPOS environment.

To Enable/Disable Gift Cards / Certificates from the NSPOS Enable Features page:

**Warning:** If you currently use gift cards or certificates, do not clear the Enable Gift Cards check box unless you are 100% sure that you want to stop selling them. Disabling the feature, even if as a test, will block the ability to sell gift cards or certificates on NSPOS registers.

1. Log in to NetSuite as an administrator.
2. Go to Customization > Lists, Records & Fields > Record Types.
3. Locate the NSPOS Enable Features row.
4. Click List.
5. Select to Edit or View the Enable and Configure Gift Cards and Certificates record.
6. Leave the Custom Form set to Custom NSPOS Features Form.
7. Scroll to the Gift Cards section.
8. Use the Enable Gift Cards box to determine whether your business can sell and redeem gift cards and gift certificates.
   - Check the box to enable the option.
   - Clear the box to disable the option.
9. If desired, click the RA-GC Type to manage your gift card types. The link opens in a new tab.
You can add a new type or prefix from the page that opens. For more information, review the Help Center topic Set up NSPOS Gift Cards/Certificates in NetSuite ERP in the NSPOS Administrator Guide. Scroll to the sections on Types and Prefixes.

**Warning:** Use caution when updating existing types or prefixes. Changes can cause issues with cards already sold.

10. If you chose **Edit** and made changes, click **Save**.

![Gift Cards Settings](image)

Reprint Receipt Search

Reprinting receipts is a vital function for many retailers. The Reprint Receipt Search feature in NetSuite Point of Sale (NSPOS) 2019.1.0 expands your ability to find a prior transaction and print the associated receipt. The feature lets you print a receipt even when the originating register has been restaged and its database no longer has the requested transaction history. You can also use it when a reprint is requested from a different register.

The feature works by leveraging your server connection to locate any transaction that occurred within the same Subsidiary.

- **How Reprinting Receipts worked previously**
- **Guidelines for using Reprint Receipt Search**
- **Setting up a Button to Search for and Reprint Receipts**
- **Reprinting a Receipt**
- **Enabling Receipt Searches to Include All Stores**

**Important:** Due to the method used to dynamically recreate a receipt, receipts from transactions prior to NSPOS 2019.1.0 will not be available using this new Reprint Receipt Search feature.

**How Reprinting Receipts worked previously**

In previous versions of NSPOS, a cashier could only reprint a receipt from the register on which the original transaction occurred. However, when a NSPOS register is restaged to get an upgrade or to fix
an issue, all transaction information is removed from the register's database. Restaging meant that the information needed to recreate receipts for older transactions could be lost.

Due to the popularity of backward compatibility for upgrades, limiting reprints to the last restaging date no longer made good business sense. Moving forward, we believe this 2019.1.0 search and reprint feature will meet both your needs and those of your customers.

Guidelines for using Reprint Receipt Search

The following guidelines apply:

- Register used for reprinting must be online (connected to the replication server).
- Original transaction register and register used for reprinting must both be in the same Subsidiary.
- Reprints use the original receipt template. Logos and other images will use the most current image.
- You can reprint using any supported printer.
- Administrators can choose to enable an “all-store” search or keep it limited to a “same-store” search (default).

The search form has the option to Include server in search. Use this option to locate transactions made on other registers within the same store or on a register that was restaged after a the transaction was made.

Administrators have a behind-the-scenes option to Include all stores in a receipt search. Because an “all store” search can cause the lookup to run for an extended time, the form defaults to searching within the same store. The “same store” default is also in place for retailers who do not perform business across store locations. There is no check box on the search form to include all stores.

Setting up a Button to Search for and Reprint Receipts

To use the new Reprint Receipt Search feature, you can set up a new button or you can remap an existing button. One option is to remap your current Reprint Receipt button.

To set up a Reprint Receipt Search button:

The button setup should be applied to one register in each Workstation Group. If you do not use Workstation Groups, you can use any NSPOS register to “universally” set up the button.

**Tip:** The button will not appear on other registers until NSPOS is closed and restarted on those registers.

1. Sign in to an NSPOS register.
2. Tap Manager Functions > System Configuration > Button Edit.
   Or press Ctrl+F12, search for and tap Button Edit.
3. Select whether to put the button on the Side or the Main button bar.
4. Tap Pages.
5. Tap the Sales or other row in the Button Page list.
6. Tap Activate so that you can see the changes immediately.
7. Tap **Buttons**.

8. Choose whether to create a new button or remap an existing button. Either:
   - Tap **New** to create a button.
   - Select an existing button to remap it. For example, you can remap your current **Reprint Receipt** button.

9. Search for **reprint receipt search**.

10. Tap **Reprint Receipt Search**.

11. Tap **Done**.

12. If desired, choose a color from the **Style** list.

13. Set the placement for your button by changing the **Column** and **Row** fields.

14. If you want to make your button smaller or larger, adjust the **Width** and **Height**.
Tip: Because you tapped Activate earlier, you can see the changes behind the edit form.

15. Close the Button Edit form when your setup is complete.

The button will not appear on other registers until NSPOS is closed and restarted on those registers.

Important: If you use Workstation Groups, repeat these steps for one register in each group.

Reprinting a Receipt

Follow this procedure to reprint a receipt in NSPOS 2019.1.0 or greater. Note that the more specific your criteria, the faster and more specific the results will be.

To reprint a receipt in NSPOS 2019.1.0 or greater:

1. Tap Reprint Receipt Search.
2. At the Would you like to print the last receipt? prompt:
   - Tap Yes to print the receipt for the last transaction.
     The receipt prints and the task is complete.
   - Tap No to search for a transaction.
     Follow the remaining steps.
3. Enter search criteria in the form.

- **Transaction ID** — If known, enter the complete ID. This method provides the fastest results. Except for the **Include server in search** check box, entering a Transaction ID causes the other search fields to become unavailable.

- **Customer** — Enter a portion of the customer's name or tap **Look up customer**.

- **Item** — Enter a portion of the item name or tap **Look up item**.

- **Transaction amount** — Enter a **Minimum amount** or a **Maximum amount** to locate the transaction by how much the customer paid. For example, if the transaction is estimated to have been over $30.00, enter 30.00 as the minimum amount. You can enter amounts in both fields to search within a range. Enter positive amounts, even if the transaction was a return that listed negative amounts.

  **Note:** This form does not use decimal assumption to automatically add decimal places to an amount.

- **Transaction date** — Enter a **From** or **To** date to locate the transaction by when it occurred. You can enter dates in both fields to search within a range.

- **Include server in search** — If the transaction did not occur on the register used for the search, check this box to include all registers within the store.

Including the server also searches for transactions that took place before a register was restaged. If the register used in the search made the original transaction and has not been restaged since then, you can improve search efficiency by not checking **Include server in search**.
Important: Due to the method used to dynamically recreate a receipt, receipts from transactions prior to NSPOS 2019.1.0 will not be available using this new Reprint Receipt Search feature.

4. Tap Done.
   If no receipts match your criteria, NSPOS prompts you to search using different criteria.
5. Tap the desired receipt to print it.

Enabling Receipt Searches to Include All Stores

By default, searching past transactions to reprint a receipt is limited to the store in which the purchase was made. However, your business needs for reprinting receipts might include searching across all stores. This section describes how to enable the Include all stores in search option.

Although you can enable searching across all stores, note that it can slow down performance at the register. Depending on the number of stores and registers active in your business, the delay in returning the desired transaction could be long.

You can limit which registers can run an all stores search by choosing the appropriate tab. Options include limiting it to a registers in a Workstation Group, an individual register, or registers within a particular store.

- **Universal Settings** — Enable the option from this tab to authorize all registers in all stores.
- **Group Settings** — Open this tab to limit all store searches to registers within the enabling register’s Workstation Group.
- **Workstation Settings** — Open this tab to limit all store searches to the register used to enable the search option.
- **Store Settings** — Open this tab to limit all store searches to registers within the enabling register’s store.

Tip: The Reprint Receipt Transaction Lookup form will not show that the all stores option is enabled. The form does not include a check box for that purpose.

Important: Including All stores in a search can slow down search performance. We recommend restricting the option to a subset of your total register count.

To Include All Stores in a receipt search:

1. Sign in to an NSPOS register as an administrator.
If you want to use Workstation Groups, then the register should be a member of the desired group.

2. Tap Manager Functions > System Configuration > Settings and Flags.
   Or press Ctrl+F12, search for and tap settings.

3. Determine which registers can perform an “all stores” search:
   - To enable the search option for all registers in all stores, keep the Universal Settings form displayed.
   - To enable the search option for only registers within the register's Workstation Group, tap Group Settings.
   - To enable the search option for this register only, tap Workstation Settings.
   - To enable the search option for only registers within this register's store, tap Store Settings.

4. Search for all stores.

5. Check the Receipts > Include all stores in search Enabled box.

6. Tap Done.

Standardized Rounding for Discounts and Promotions

To ensure precise calculations when customers purchase or return items that had a promotion or discount applied, NSPOS has set a standard number of decimal places to be used for rounding. Starting with NetSuite Point of Sale (NSPOS) 2019.1.0, we will use three (3) decimal places for rounding.

The Journal will continue to show only two decimal places.

**Note:** A rounding discrepancy might occur in stores using backward compatibility, where some registers are on NSPOS 2019.1 but others are on NSPOS 2018.2.

Disable Partner Replication for Inactivated Workstations

You can inactivate a NetSuite Point of Sale (NSPOS) register workstation by checking the Inactive box on the NetSuite ERP > RA-Workstation record. Beginning with NSPOS 2019.1.0, inactivating a register also halts the replication process used to communicate transactions and other updates between the register and the server.
To assist you in ensuring a workstation is not inactivated by mistake, we added this confirmation warning prompt:

Clearing the Inactive check box by itself will not restart replication. If you want to reactivate an inactive register, you must do the following from that register:

1. Log into NetSuite using Internet Explorer.
2. Edit the register's RA-Workstation record.
3. Clear the Inactive box.
4. Check the Provision box and click Save.
5. Click the Installation URL to open the link.
6. Proceed with restaging the register.

**Important:** You should use Internet Explorer® to stage or restage registers. Using a different browser can produce undesired results.

If you have questions about inactivating or reactivating a register, please see the help topic Restage a Register in the NSPOS Administrator Guide. NetSuite Customer Support is also available.
Fixes 2019.1.0

In addition to behind-the-scenes fixes, this NSPOS release includes a correction for sales order deposit payments.

Void Sales Order Deposit Split-tender Payment

This fix corrects an issue with payments made to complete a sales order deposit. When a customer wanted to use two forms of tender (split tender) to pay a deposit, and the second form of tender failed to complete, attempting to void the current payment line could instead void the deposit line.

NSPOS 2019.1 corrects the issue so that only the current payment line is voided.

To assist the cashier, we added a prompt asking “Do you want to void current payment?” The prompt appears for sales orders and general sales transactions.

Update your NSPOS Bundle to 2019.1.0

To use the functionality provided in the 2019.1.0 release, you must log into NetSuite and update your NetSuite Point of Sale (NSPOS) bundle.

Updating or installing a bundle requires an Administrator Role. If you need assistance performing this update and verifying settings, please contact NSPOS Customer Support.

**Note:** In the bundle list, under the Version number, a blue icon indicates that a new version is available. Place your mouse over the blue icon to display more information. If you do not see this icon, your installed bundle is already up to date and no further action is required.

To update your NSPOS bundle:

1. Log in to NetSuite as an administrator.
2. Go to Customization > SuiteBundler > Search & Install Bundles > List.
3. Find Bundle ID ____ (TO BE PROVIDED).
   - If the list includes Bundle ID ____, place your mouse over the green icon and click Update.
If the list does not include **Bundle ID ____**:  
1. Click back in your browser.  
2. Search for **Bundle ID ____** using the **Keywords** field.  
3. Click the **Name** by the **Bundle ID**.  
4. Click **Install**.

4. NetSuite alerts you if conflicts exist between your previous installation and the current installation. If any of these conflicts appear, select **Replace existing object** and **Update deployments**.

For other issues, please stop and contact NetSuite Customer Support.

**Note:** If **Replace data** is required to update a custom list, contact NetSuite Customer Support for assistance.

5. Click **Update Bundle**.
6. Click **OK** at the prompt.

The Updated Bundles page displays the install progress. When complete, if the bundle updated correctly, a green check mark displays in the **Status** column.

Applies to: NetSuite Point of Sale (NSPOS)

This chapter provides resources, recommendations and additional verification points to ensure your NetSuite Point of Sale (POS or NSPOS) upgrade and day-to-day operations perform optimally and efficiently.

- Areas to Verify prior to Upgrading
- Resources and Recommendations

**Warning:** Do not update your bundle without discussion and approval from NetSuite Technical Support or Professional Services. Otherwise, the update could impact the functionality of your NetSuite POS registers.

Areas to Verify prior to Upgrading

We recommend verifying these areas before upgrading your NetSuite POS environment.

- **Day of your upgrade**
- **One week before your upgrade**
  - Verify your registers are ready to install the new release
  - Verify Microsoft SQL Server loaded on Workstations
  - Verify Gift Card and Gift Certificate setup
  - Verify RA-Location Type is set for all Location records

Day of your upgrade

Before the upgrade begins, ensure that:

- Your NetSuite administrator is available to update the bundle.
- Your administrator can allow remote access to a register if needed.
- NSPOS is closed (not running) on all registers. Exit out of NSPOS.
- Your register computers are turned on and power saving is disabled. Registers must not go into “sleep” mode when inactive.
- Your administrator can restage a register in the event an upgrade fails.

One week before your upgrade

Perform these checks in advance of your scheduled upgrade to ensure your registers and NetSuite ERP setup are ready to move forward to the next release.

**Verify your registers are ready to install the new release**

See the help topic Workstation Monitoring in the NSPOS Administrator Guide for the steps to view statistics about registers in your network.
Areas to Verify prior to Upgrading

- No disconnected registers (stale partners)
- No registers nearing 10GB size limit
- Hard drive (C:\) free space where NSPOS is installed is 25 GB or greater
- Replication push agent is running on each register
- Auto Updater Service is running on each register

### Verify Microsoft SQL Server loaded on Workstations

You must have one of the following versions of Microsoft® (MS) SQL Server installed on each workstation.

- MS SQL Server® 2008 R2 Express Edition Service Pack 3
- MS SQL Server® 2016 Service Pack 2 Express

You can use either of these methods to verify the pack installed. Note that the methods may vary across different versions of Windows.

- **Run a T-SQL command.** Enter the command `SELECT @@VERSION`.
- **View installed updates.** Go to Control Panel > Programs and Features > View installed updates.

Or you can use the following methods to obtain a version number you can combine with SQL Server 2008 for internet search criteria.

- **Use the SQL Server Management Studio.** Right-click on the instance name and select Properties.
- **Review the SQL server file.** Go to `C:\Program Files\Microsoft SQL Server\MSSQL10_50.MSSQLSERVER\MSSQL\Binn`. (Your file path may vary.) Right-click on sqlservr.exe and select Properties.

For the steps to download and configure the SQL Server, see the help topic Install MS SQL Server 2008 R2 Express Edition in the NSPOS Administrator Guide. Please contact NetSuite Technical Support if you require assistance.

**Note:** NSPOS 2018.2.0 and greater includes support for MS SQL Server 2016 in lieu of MS SQL 2008 R2 Express Edition SP3.

### Verify Gift Card and Gift Certificate setup

For your gift cards to work correctly, the **Location record > RA-Currency** field be set to the correct currency for **every** retail location selling a gift card or certificate. Otherwise, sales of gift cards or certificates on NSPOS registers might fail.

See the help topic Set up NSPOS Gift Cards/Certificates in NetSuite ERP in the NetSuite POS Administrator Guide for the steps to verify and configure your Location records for use with gift cards and certificates.

Log into NetSuite first. This action binds gift cards and certificates sold in each updated Location to use that currency only. By default, the **Location > RA-Currency** field is blank.

### Verify RA-Location Type is set for all Location records

After updating the bundle to the latest version, you should ensure that the RA-Location Type is set on each of your NetSuite ERP Location records. This field is required, but it may not have been set for customers that were using NetSuite ERP prior to being implemented on NetSuite POS. This one-time task is critical to allowing multiple NetSuite POS features to function correctly.
The possible values include Headquarters, Retail Store, Distribution Center and others. Please choose the value that meets your business needs for each Location.

A single Location must be set to Headquarters.

To review or set the RA-Location Type:

1. Log in to NetSuite as an administrator.
2. Go to Setup > Company > Locations.
3. Click View for the first Location.
4. If the RA-Location Type is not set:
   1. Click Edit.
   2. Select the RA-Location Type.
   3. Click Save.
5. Repeat for the next Location record as needed.

![Image of RA-Location Type settings]

Note: Only one Location can be set as Headquarters.

Resources and Recommendations

Use the guidelines in this section to help ensure your NetSuite Point of Sale (NSPOS) upgrade and daily operations are a success.

- Areas to Verify prior to Upgrading
- Resources and Recommendations
- Payment Application Data Security Standards (PA-DSS)
- Third Party Software and Licenses
- Verify your Registers after the upgrade
- Recommendations about mass Item and Customer updates
- Planning efficient rollouts for new Stores and Registers
- Backward Compatibility for NSPOS upgrades
- Windows Updates and Performance
Resources and Recommendations

- File Cabinet Changes
- Syncing Register Time with Server Network Time

Payment Application Data Security Standards (PA-DSS)

NetSuite POS is a PA-DSS validated application. The Payment Application Data Security Standard (PA-DSS) guide describes the Payment Card Industry (PCI) initiative and lists recommendations for using NetSuite POS in a PCI DSS compliant environment.

The guide includes details about installing and configuring a compliant system, best practices for maintaining compliance, and a list of operating systems (OS) validated for use on your NetSuite POS terminals.

**Important:** See the Payment Application Data Security Standard (PA-DSS) guide appropriate to your NSPOS release in the NetSuite Help Center > User Guides. Log into NetSuite ERP first.

Third Party Software and Licenses

A NetSuite POS implementation can include software governed by licenses from third parties (“Third Party Software” and “Third Party License”). All third party software licensed for use with NetSuite POS is subject to the terms and conditions of the corresponding Third Party License, notwithstanding anything to the contrary in the agreement governing the POS Software. NetSuite|Oracle makes no representation or warranty concerning Third Party Software and shall have no obligation or liability with respect to Third Party Software.

If you have questions about Third Party Software and Licenses used with NetSuite POS, we recommend logging into NetSuite ERP and reviewing the following PDF:

- NetSuite Point of Sale (NSPOS) Third Party Software and Licenses - 2018.2.X and later

Verify your Registers after the upgrade

When your NSPOS upgrade is complete, we recommend testing at least one register in each store. You can find a Terminal Verification Checklist in the NetSuite Help Center > User Guides NetSuite Point of Sale section. Log into NetSuite ERP first.

Recommendations about mass Item and Customer updates

We recommend against performing mass item and customer updates during business hours when transactions are occurring on your registers. NetSuite POS integrates with NetSuite to provide Enterprise Resource Planning (ERP) tools for managing your items, customers and other aspects of your business. You can update items and customers in NetSuite manually or through CSV imports.

Updates in NetSuite periodically download to your POS registers to ensure all information is synchronized and current. NetSuite POS performs synchronization uploads to NetSuite of sales and other transactions that occur at the register. This is distributed to other registers in your store through your assigned replication server.
Important: Item and customer updates of over 60,000 records per day can impact synchronization across the network. If mass updates must occur during business hours, we recommend limiting each update to 60,000 records or less within a single 24-hour period.

Planning efficient rollouts for new Stores and Registers

When opening one or more new stores, it is important to consider the time needed to prepare the registers with current information from your NetSuite ERP setup. This consideration also applies to registers that were previously active but have been turned off for a long time.

When a register is staged, all information is fully loaded and up to date. After staging, registers receive only the information needed to keep them current. When a register is turned off, NetSuite holds all new transactions, price changes and customer information for download to the register later.

If a register is turned off for an extended period and then turned back on, the size of the update can be large and take a while to download. This might delay a register from being ready when you need it.

Important: Excessive download times can delay registers from being ready to accept sales transactions and can affect overall server performance. This delay can be critical in the event of a new store opening.

To ensure your new registers are ready for business, NetSuite recommends the following:

1. Stage registers 24-48 hours before first use. If no major changes to NetSuite ERP data will occur before using the register, the time between staging and first use can be longer without a significant impact on performance.

2. If a store rollout requires new item and customer information, if possible, be sure to add or import the information to NetSuite ERP before staging new registers. Then the new information will be included during the staging process.

3. To reduce the impact to existing registers, large item and customer changes in NetSuite ERP should be performed in small increments. A good guideline is limiting changes to 60,000 records or less per day, performed outside of business hours.

4. For registers that have been turned off for a long time, restaging a register can be the fastest method for bringing it up to date. Staging is generally quicker than waiting for large downloads to complete.

Important: Before restaging a register workstation that was set to Inactive in NetSuite ERP, clear the Inactive box on the NetSuite RA-Workstation record, Save and then wait 15 minutes for the active status to sync between the server and the workstation.

Backward Compatibility for NSPOS upgrades

NSPOS includes an upgrade feature called Backward Compatibility. With this feature, we can upgrade a server to the latest release and then let you upgrade each register when it is convenient to your business. Registers still running the previous release will continue communicating with the upgraded server until time is available to make the change.

Backward Compatibility can help avoid downtimes that might occur if all registers in a store are upgraded at the same time. Note that compatibility can be extended to the current and previous major releases only, such as 2019.2 to 2019.1.
Resources and Recommendations

To start with Backward Compatibility

You must be at release 2017.2.2 or greater to use backward compatibility. Then, work with your Account Manager or Technical Support to have your server upgraded to the latest targeted release. After that, upgrade your registers to the new release on your time line.

Doing a self upgrade requires that you restage your registers. We recommend starting the process with only a few registers. See the help topic Stage a Register in the NSPOS Administrator Guide.

Note: To ensure all of your registers receive an upgrade, we will alert you through prompts in NSPOS (Closed mode) and NetSuite ERP (RA-Workstation record) that a new release is available for the terminal. In the event that another release is coming soon, the prompts to upgrade to the current version will include a do-by date.

Features are specific to registers on a release

Features made available through a new release will not appear on registers running the previous release. For example, if a register is upgraded to 20XX.2, and the release includes a new “promotions” feature, that feature will not be available on backward compatible registers running 20XX.1.

In addition, NSPOS settings configured for a feature on the current release will not work on registers running the previous release.

Windows Updates and Performance

Applying a Windows ® update to registers during business hours can significantly affect performance. NetSuite recommends applying updates only when the location is closed.

File Cabinet Changes

NetSuite POS uses the NetSuite ERP File Cabinet > File System folder to manage many system-wide configurations. An example of File Cabinet configuration is the template that determines the look of your printed receipts. Customers with advanced knowledge about the application can make some File Cabinet customizations themselves by signing into NetSuite and going to Documents > Files > File Cabinet > NSPOS.
Due to the complexities and risks associated with making File Cabinet modifications, we do not describe specific customization steps in the release notes guidelines. However, please note the following warning and important information:

**Warning:** Moving or modifying files in the File Cabinet can seriously affect NetSuite POS performance or cause it to cease functioning completely. If you are not certain about making a change, please contact NSPOS Customer Support.

**Important:** Do not make modifications to the File Cabinet shortly before or during an upgrade to a new release. Any modifications you make during that time might be lost.

## Syncing Register Time with Server Network Time

If a register is set to use its internal clock, the register time can get out of sync with the network time used by your NSPOS replication server. The server network time comes from time-keeping sources on the internet.

Register variations of minus or plus five minutes (–5min > x <+5min) can cause data replication functions to fail. Gift card functionality and other POS services are also dependent on keeping the time synchronized.

Your administrator or NetSuite Customer Support can use the NSPOS Push Agent log to determine if replication errors were caused by times being out of sync.

### To resynchronize a register’s clock using Windows 10:

1. Go to Settings > Time & Language > Date & Time.
2. Switch **Set time automatically** to **On**.
3. Close the window.

### To resynchronize a register’s clock using Windows 7:

1. Tap the Windows **Start** button and search for **change time zone**. Or go to Control Panel > Date and Time.
2. Open the **Internet Time** tab.
3. Tap **Change Settings**.
4. Tap **Update now** and then **OK**.
NetSuite POS Documentation Resources 2019.1.X

Applies to: NetSuite Point of Sale (NSPOS)

This topic provides descriptions and links to NetSuite Point of Sale (NSPOS) documentation resources. Use these resources to learn about using NSPOS, configuring NSPOS to meet the needs of your retail business, and troubleshooting NSPOS to solve common problems.

Watch a Related Video

Documentation Updates in this release

The following updates were made to the Administrator Guide:

- To be provided.

Documents & Videos

Use the links in this topic to access a PDF guide or Help Center topic. If PDF, you can review materials online or download a copy to your computer or register.

Tip: Log into NetSuite ERP before clicking a documentation link. Videos do not require logging in.

If a help link does not work for your account's URL, you can enter the document name in the Help Center search bar or use the table of contents.

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<th>Documentation Resource</th>
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<tr>
<td>NSPOS Release Notes</td>
<td>NSPOS release notes list the customer-facing updates included in each release. We modify these release notes on occasion to provide our customers with additional information.</td>
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<td>- Release 2019.1.X</td>
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<tr>
<td>NSPOS Administrator Guide</td>
<td>This document is a guide to configuring and maintaining NSPOS. It includes:</td>
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<td>▪ Overviews and steps for basic tasks, such as setting up employees and running reports.</td>
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Contacting Customer Support

Individual support is available to NSPOS customers via telephone or by issuing a case. Before reaching out, Customer Support asks that customers enter their concerns in the SuiteAnswers search field first to see if an answer is already available.

To contact Customer Support:

1. Log into NetSuite.
2. From the Support tab, click Go to SuiteAnswers.
3. Select from the options in the right pane to contact Support.