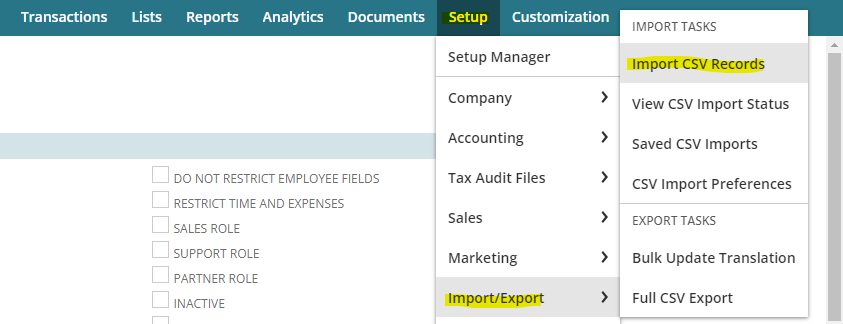
**DATA MIGRATION AND CSV IMPORTS ASSIGNMENT**

1. **What is CSV Import? What is the navigation for CSV import? Which steps are involved in this process?**

* CSV is known as Comma Separated Values.
* It is a text file format that uses commas to separate values, and newlines to separate records.
* A CSV file stores tabular data in plain text, where each line of the file typically represents one data record.
* It reduced the data processing time and manual human errors.

Navigate to, Setup -> Import/Export -> Import CSV Records



There are five steps involved in it.

1. ***Scan & Upload CSV File:***

* Choose the import type (e.g., item, relationship).
* Select the record type (e.g., groups, projects).
* Set the file encoding and column delimiter.
* Decide if you’re uploading a single or multiple files.

1. ***Import Options:***

* Choose how to handle data: Add (new records), Update (existing records), or Add or Update (both).
* Adjust advanced settings like custom forms and duplicate prevention.

1. ***File Mapping:***

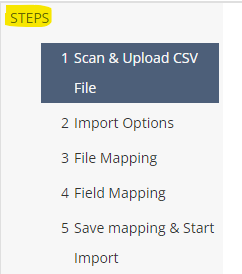
* For multiple files, map them by selecting primary and key columns to link data between files.

1. ***Field Mapping:***

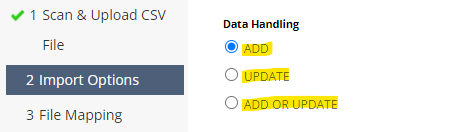
* Match CSV file fields to NetSuite fields by selecting them in the mapping interface.

1. ***Save Mapping & Start Import:***

* Name your import map and optionally describe it.
* Enter a unique Script ID for reference in SuiteScript.

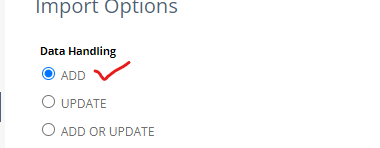


1. **What is ADD, UPDATE, ADD OR UPDATE? Explain.**
2. ***ADD***: We use it when we want to add an entirely new record. It won't update the existing record. If any record matches with it by its identifier, it will get skipped. It is useful when we import our data for the first time or add any new entries to the record.
3. ***UPDATE***: We choose this option when we have to update any existing record based on the matched identifiers. If a record is found with the same identifiers, the import will update the fields with the new data from the CSV. If in case, no matches are found then it adds as a new one.
4. ***ADD OR UPDATE***: This option combines both the “Add” and “Update” It will add new records and update existing ones based on matching identifiers. If a record exists, it will be updated; if not, a new record will be added.



1. **If you want to create new records in NetSuite by csv import, which import option must you use?**

If we want to create a new record in NetSuite by CSV import, then we must use ADD import option. Because we use it when we want to add an entirely new record. It won't update the existing record. If any record matches with it by its identifier, it will get skipped. It is useful when we import our data for the first time or add any new entries to the record.



1. **What is field mapping? How can we map CSV file fields with NetSuite** **fields?**

Field mapping is the process of linking or matching the fields (columns) in a CSV file to the corresponding fields in NetSuite. This ensures that the data from your CSV file is correctly imported into the appropriate fields in NetSuite.

To map CSV file fields with NetSuite fields:

Step 1 - When we upload a CSV file to NetSuite, it allows us to import data such as customers, items, or transactions.

Step 2 - During the import process, NetSuite will ask us to map the fields from the CSV file to the correct fields in NetSuite. You’ll see a list of columns from your CSV and a list of NetSuite fields.

Step 3 - You manually match each CSV column to the correct field in NetSuite. For example: If the CSV file has a column called “Customer Name", you would map it to the "Customer Name" field in NetSuite. If there's a column for "Date," you would map it to the "Transaction Date" field in NetSuite.

Step 4 - Once the mapping is done, NetSuite will use that information to import the data correctly into the system.

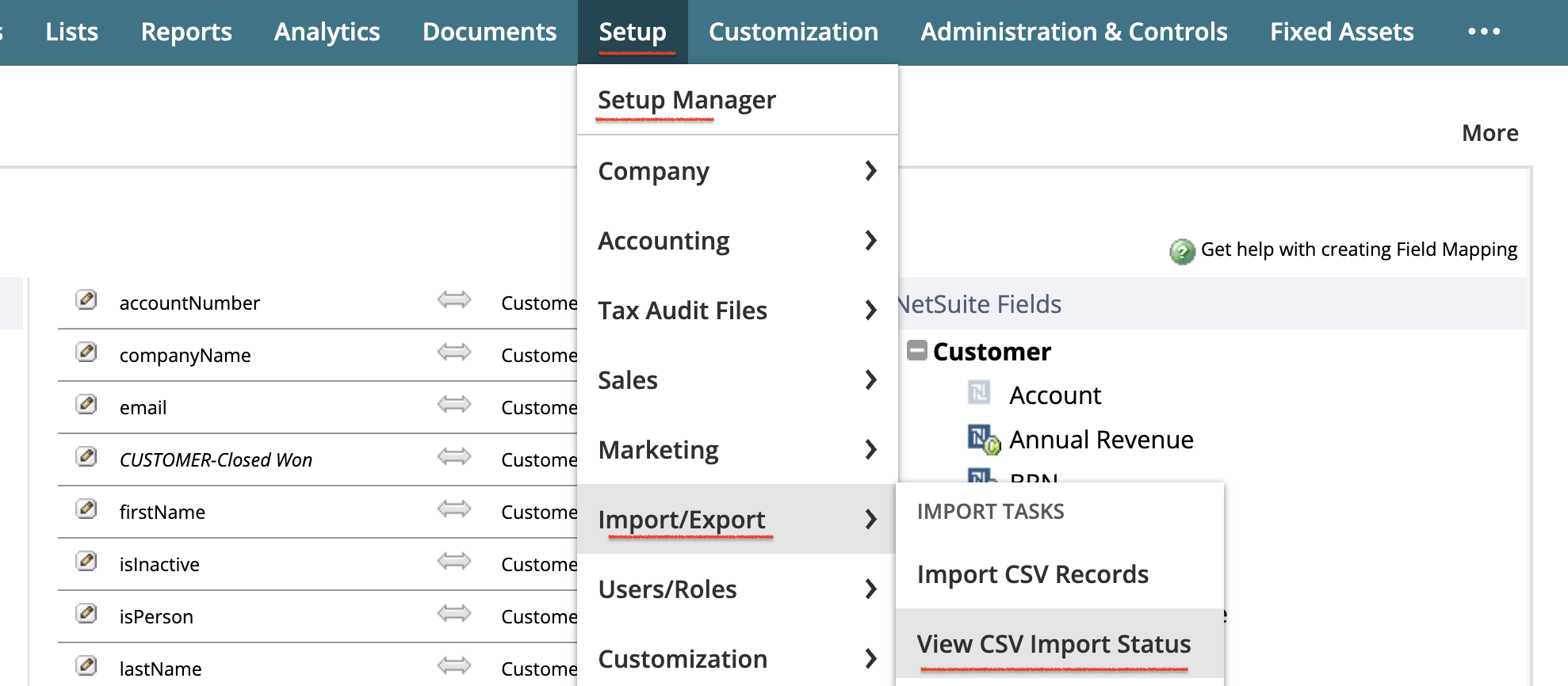
Now to map the column manually for each field on the left (your CSV file), drag the corresponding field from the right (NetSuite fields) to map it. If NetSuite automatically maps some fields but does so incorrectly, you can manually remove them and remap.

For example,

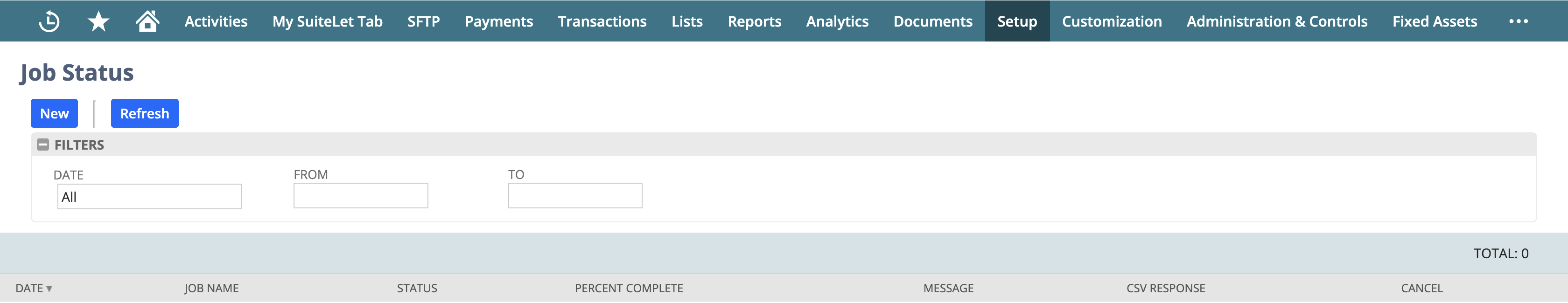
* Customer Email: Match your CSV field (e.g., "email") to Customer : Email (Req).
* Phone: Match to Customer : Phone (Req).
* Subsidiary: Match to Customer : Subsidiary (Req) if applicable.
* Individual: Match to Customer : Individual (Req) to indicate whether the record is for a person or a company.

1. How can we check our csv import job status? What is navigation?

Navigate to, Setup -> Import/Export -> View CSV import status.

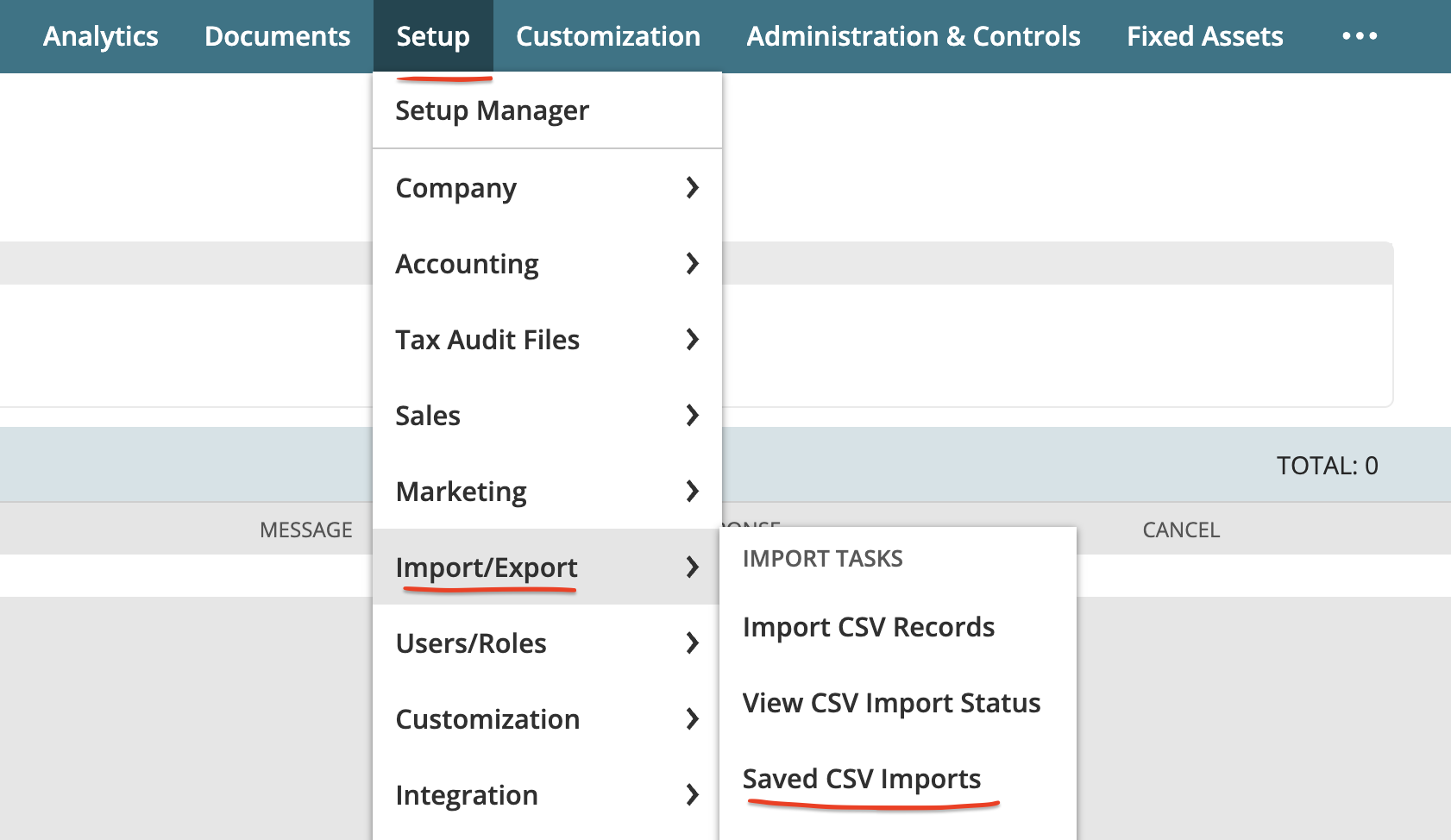


Here you can find the job status. It shows the current status of the imports: Pending, Processing, Completed, or Canceled along with how much percent is yet to complete.

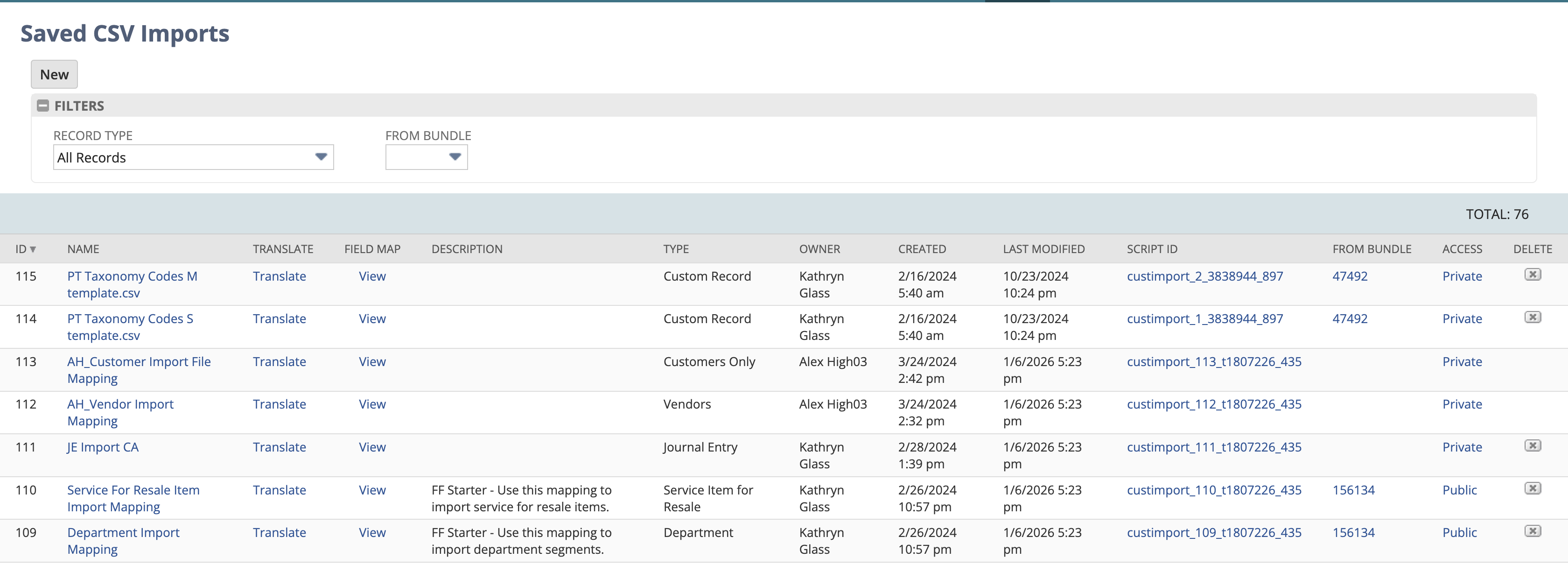


1. How can we find our existing csv imports? What is navigation?

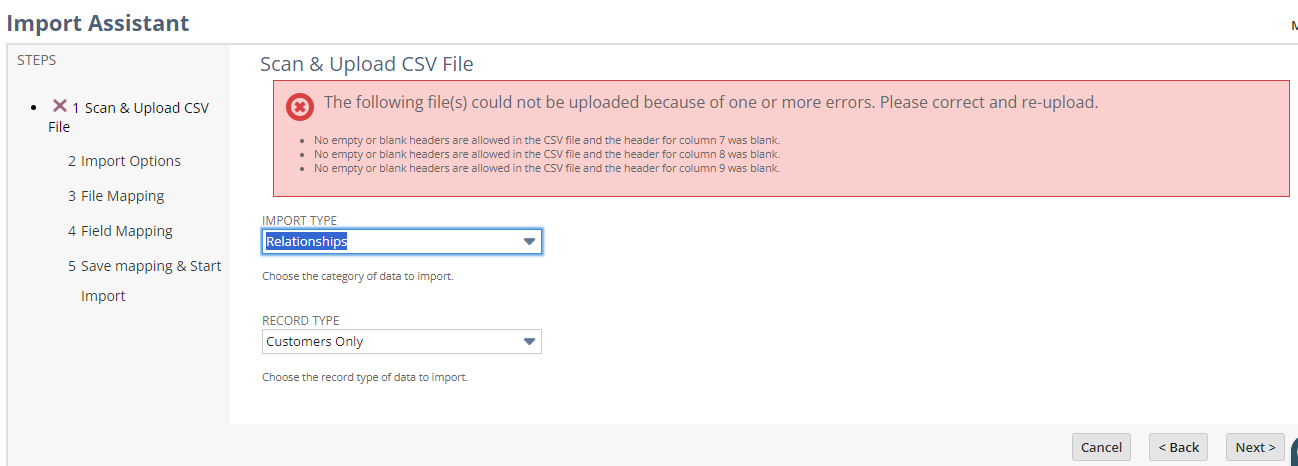
Navigate to, Setup -> Imports/Exports -> Saved CSV imports.

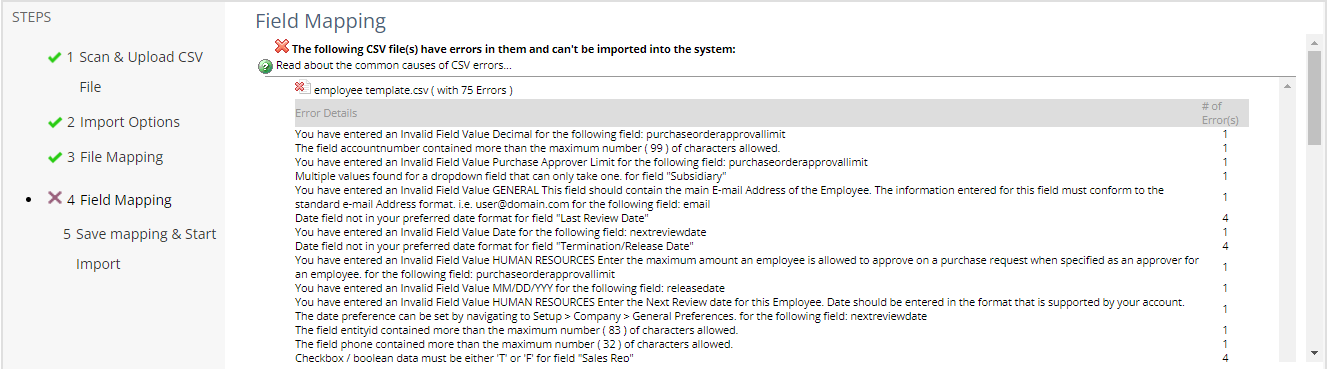


Now you will be able to access all the existing CSV files inside our system.



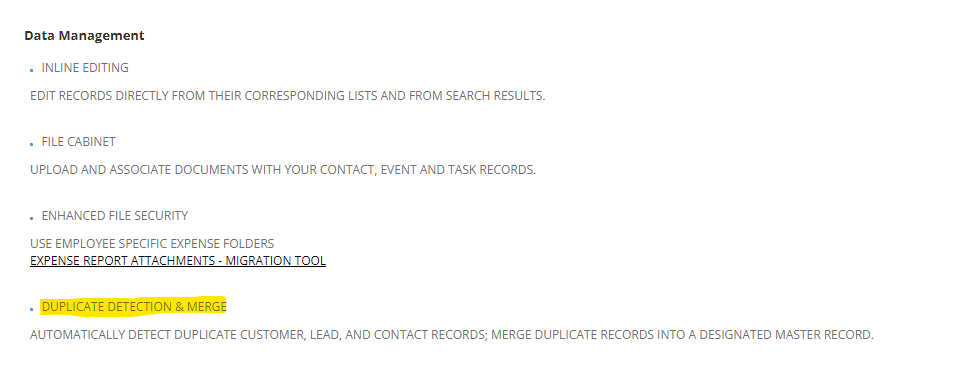
1. Find out the possible types of errors that occur while importing a CSV file in NetSuite? (User must implement and paste snippets in the assignment)

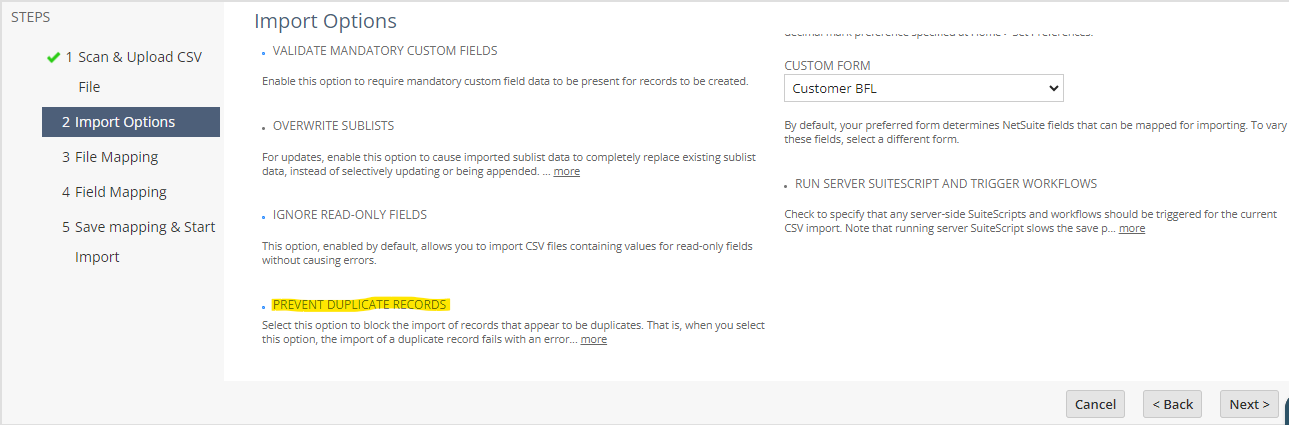




1. How can we block the import of records that appear to be duplicates?

* To block the import of records that appear to be duplicates, we have a feature called Duplicate deletion and merge.
* We can enable it by navigating to Setup -> Company -> Enable features.
* Then under company subtab and under Data Management we will find duplicate deletion and merge. Now this will automatically detect the duplicate and merge the duplicate records to a designated master record.

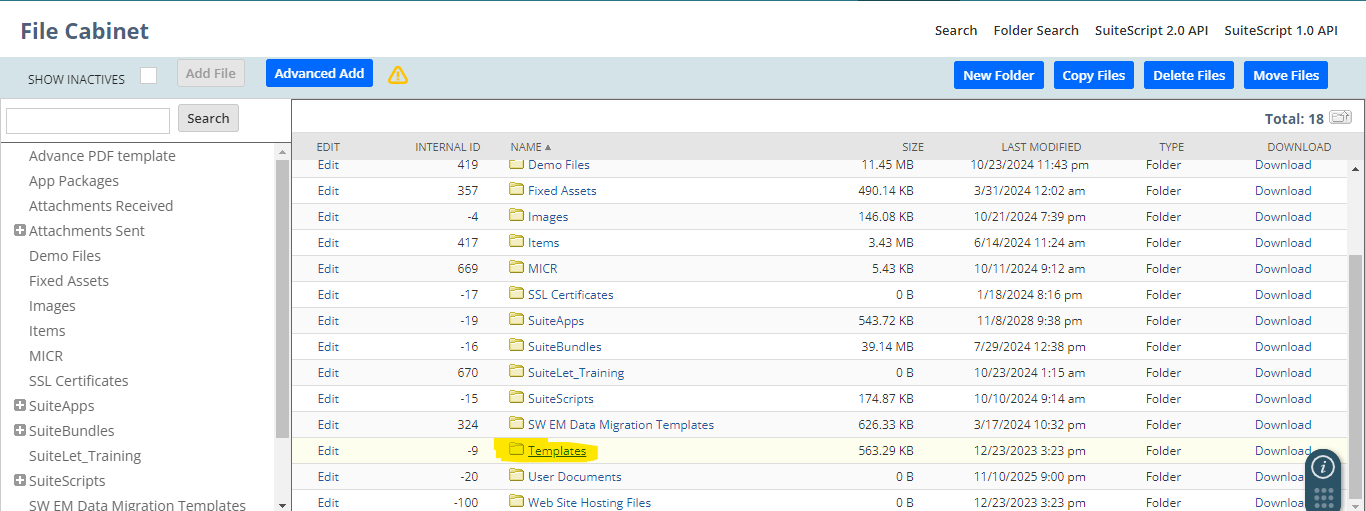
After enabling that just follow the steps to upload a CSV file and under Import Option you can check the prevent duplicate records check box, so that if it finds any duplicate records it will merge the same.



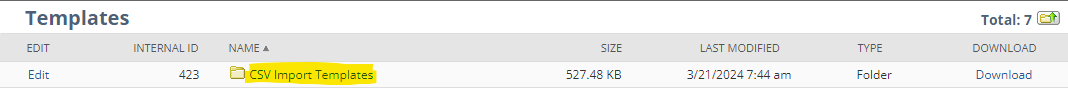
1. What is the navigation for CSV templates?

Step 1 – Navigate to, Documents -> Files -> File cabinet.

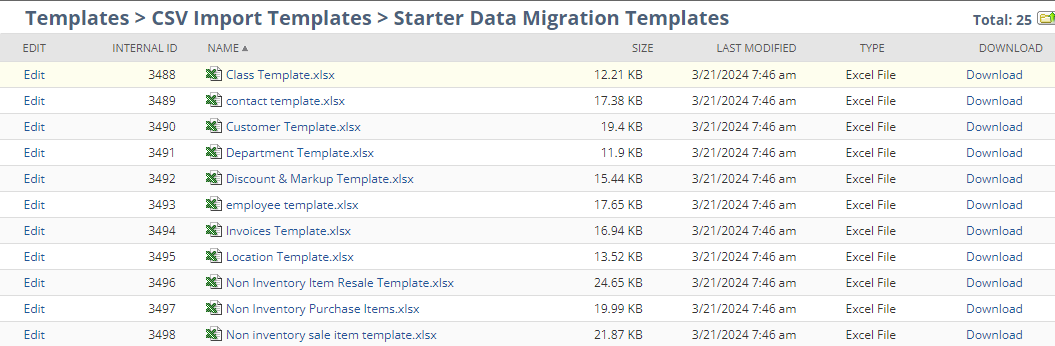
Step 2 – Click on Templates



Step 3 – Click on CSV Import Templates.



Step 4 – Click on Starter Data Migration Templates and you will be able to find your required templates for CSV imports. You can see the entire path in the image below.



1. Import the CSV file containing the following employee details?

* Name (First Name, Middle Name, Last Name)
* Email
* Phone
* Subsidiary
* Department
* Job Title