

CSV Import and Custom Segments

You can import values for an existing custom segment using the CSV Import. For example, with the segment called Sales Channel, you could use the Import Assistant to import new values such as Catalog and Partner Outlet.

For more information about this import, see the following:

- [Prerequisites for Importing Values](#)
- [Segments Appear Under Classification Import Type](#)

Prerequisites for Importing Values

Before you can import values for custom segments, you must do both of the following:

- Enable the Custom Segments feature at Setup > Company > Setup Tasks > Enable Features, on the SuiteCloud subtab.
- Create at least one custom segment in your account. You can create custom segments at Customization > Lists, Records, & Fields > Custom Segments > New (Administrator).

By default, only administrators have permission to import custom segment values. However, you can grant permission to other roles. The following permissions are required:

- **The global Custom Segments permission** – You can add this permission on the Permissions > Setup subtab of the role record. At least the View level is required.
- **The Value Access Level permission for the custom segment** – You can add this permission on the Custom Record subtab of the role record. To be able to add values, the role needs at least the Create level. To be able to update values, or to be able to set the parent for a value, the user needs at least the Edit level.

Segments Appear Under Classification Import Type

To import values, set the Import Type to Classification. In the Record Type list, the system displays both the names of your custom segments and any other classifications enabled in your account. For example, custom segments named Brand and Product Line would be listed with Class, Department, and Location, if those features were enabled.

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IMPORT TYPE
Classification

RECORD TYPE
Brand
Brand
Class
Department
Location
Product Line

For each import, you can define values for the following fields:

- The name of the value.
- A parent for the value. For example, if your segment has a value called Retail Store, that value can be the parent of values such as Express Kiosk and Superstore.
- Inactive, which determines whether the segment value is available to be selected.
- Translations of the value's name, if your account uses the Multi-Language feature.

For more information, see [Custom Segment Value Import](#).

Related Topics