



ORACLE
NETSUITE

CSV Imports Guide

2022.2

March 15, 2023



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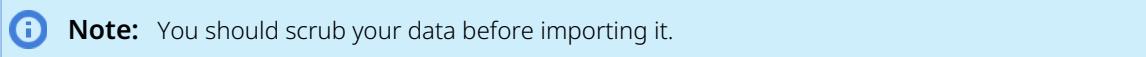
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CSV Imports Overview

CSV import is the most commonly used method for transferring small to medium-sized data sets from other applications into NetSuite. The CSV import process saves time and prevents errors, by submitting data in a CSV (comma-separated value) file. This data can add or update many records at one time, avoiding the need for manual data entry.



NetSuite provides an Import Assistant that you can use to step through the process for most CSV imports. If you have Full access level for the Import CSV File permission, the Import Assistant is available at Setup > Import/Export > Import CSV Files. The types of data that you can import with the Assistant depend upon your assigned role and permissions, and on your account's enabled features. For more information, see the help topic [NetSuite Permissions Overview](#).

The screenshot shows the 'Import Assistant' interface. On the left, a vertical navigation bar lists steps: 1 Scan & Upload CSV File (selected), 2 Import Options, 3 File Mapping, 4 Field Mapping, and 5 Save mapping & Start Import. The main panel is titled 'Scan & Upload CSV File' and contains the following fields:

- IMPORT TYPE:** Relationships (dropdown menu)
- RECORD TYPE:** Customers Only (dropdown menu)
- CHARACTER ENCODING:** Western (Windows 1252) (dropdown menu)
- CSV COLUMN DELIMITER:** Comma (dropdown menu)
- CSV File(s):**
 - ONE FILE TO UPLOAD
 - MULTIPLE FILES TO UPLOAD

At the bottom right are buttons for **Cancel**, **< Back**, and **Next >**. A 'More' link is located in the top right corner of the main panel.

In the Assistant, you select the type of records to be imported, specify the CSV file containing data to be uploaded, indicate whether CSV data adds new records or updates existing records, and map CSV file fields to NetSuite fields.

You can save an import job to be run later. After you have saved an import, you can reuse its mapping for later import jobs and share it with other users. When you run an import, a status page is available for you to view its progress.

Review the following for information about importing CSV data into NetSuite:

- For instructions for working with the Import Assistant, see [Importing CSV Files with the Import Assistant](#).
- For help preparing files for CSV import and a list of data record types that can be imported, see [Guidelines for CSV Import Files](#).

For details about alternate approaches to import tasks, see the following:

- After you have saved an import map, you can execute a SuiteScript API to programmatically import CSV file data using that mapping. For details, see the help topic [task.CsvImportTask](#).

- See [Additional Import and Export Options](#) for information about other imports that do not use the CSV Import Assistant, including Peachtree data.
- NetSuite SOAP web services provide a solution for large or ongoing data migration projects, and for migrating data for record types not currently supported for CSV import. For information, see the [SuiteTalk SOAP Web Services Platform Guide](#).

Note the following:

- Simplified versions of the Import Assistant are available to import budget data, single journal entry data, single inventory worksheet data, Microsoft Project tasks data, and website redirects data into NetSuite.
 - The budget import assistant is at Transactions > Financial > Set Up Budgets > Import, if you have the Set Up Budgets permission. For more information, see the [Budget Import](#) help topic.
 - The single journal entry import assistant is available at Transactions > Financial > Make Journal Entries > Import. If you use NetSuite OneWorld, the single intercompany journal entry import assistant is available at Transactions > Financial > Make Intercompany Journal Entries > Import. You need the Make Journal Entry permission. For more information, see the [Single Journal Entry Import](#) help topic.
 - The single inventory worksheet import assistant is available at Transactions > Inventory > Adjust Inventory Worksheet > Import. You need the Adjust Inventory Worksheet permission. For more information, see the [Single Inventory Worksheet Import](#).
 - The project tasks import assistant is at Activities > Scheduling > Project Tasks > Import, if the Project Management feature is enabled. For more information, see the [Project Tasks Import](#) help topic.
 - The website redirects import assistant is at Commerce > Hosting > Redirects > Import, when the Web Site and Host HTML Files features are enabled. You need the Set Up Web Site permission. For more information, see the help topic [Importing Website Redirects](#).
- The following CSV imports are template-based and are not available in the Import Assistant: [Bulk Fulfilling Orders Using a CSV Import](#), [Importing a Vendor Price List](#), [Importing Employee Commission Data](#), and [Importing Single-Use Coupon Codes](#).
- A SuiteScript API is available to automate CSV imports through scripting instead of using the Import Assistant. See the help topic [task.CsvImportTask](#). Note that scripted imports are not supported for data normally imported through simple (2-step) assistants.

Importing CSV Files with the Import Assistant

You can use the Import Assistant for most imports of CSV data to NetSuite. The Import Assistant is available at Setup > Import/Export > Import CSV Records, if you have the Import CSV File permission.

Before an import, review the information available in [Guidelines for CSV Import Files](#) for help formatting your CSV files correctly.

The Import Assistant includes five steps:

- Step One Scan & Upload File
 - Select an Import Type
 - Select a Record Type for Import
 - Choose Import Character Encoding
 - Choose CSV Column Delimiter
 - Select a File for Import
- Step Two Import Options
 - Choose Data Handling for Import
 - Set Advanced CSV Import Options
- Step Three File Mapping (required only for multi-file imports)
- Step Four Field Mapping
- Step Five Save Mapping & Start Import

The Assistant provides verification of each step and does not let you proceed to the next page if it encounters errors. After you complete these steps, you can run an import job immediately or save the import and run it later.



Warning: CSV Import of Published Saved Searches is not supported.

Step One Scan & Upload File

Complete the following tasks for step one of the Import Assistant:

- Select an Import Type
- Select a Record Type for Import
- Choose Import Character Encoding
- Choose CSV Column Delimiter
- Select a File for Import
- Click Next.
 - If your CSV file contains incorrect characters or other errors, an error message displays the type and number of errors.

You then can download a ZIP file containing the CSV files with an additional column in each file indicating the errors. After you fix the errors, you can launch the Import Assistant again and upload the files.

- If no errors are detected, the Assistant proceeds to [Step Two Import Options](#).

Import Assistant

STEPS	Scan & Upload CSV File
1 Scan & Upload CSV File	IMPORT TYPE <input type="text" value="Relationships"/>
2 Import Options	RECORD TYPE <input type="text" value="Customers Only"/>
3 File Mapping	CHARACTER ENCODING <input type="text" value="Western (Windows 1252)"/>
4 Field Mapping	CSV COLUMN DELIMITER <input type="text" value="Comma"/>
5 Save mapping & Start Import	CSV File(s) <input type="radio"/> ONE FILE TO UPLOAD <input checked="" type="radio"/> MULTIPLE FILES TO UPLOAD Primary File - Customer <input type="button" value="Select..."/> Linked File (Optional) - Customer Address <input type="button" value="Select..."/> Linked File (Optional) - Customer Credit Cards <input type="button" value="Select..."/> Linked File (Optional) - Customer Group Pricing <input type="button" value="Select..."/> Linked File (Optional) - Customer Item Pricing <input type="button" value="Select..."/>

Select an Import Type

On the Scan & Upload CSV File page of the Import Assistant, select the category of record to import from the Import Type dropdown list. Record types available for import are divided into categories, listed alphabetically:

Import Assistant

STEPS	Scan & Upload CSV File
1 Scan & Upload CSV File	IMPORT TYPE <input style="outline: none; border: 1px solid #ccc; width: 150px; height: 20px; margin-bottom: 5px;" type="text" value="Relationships"/> <div style="border: 1px solid #ccc; padding: 5px; background-color: #f9f9f9; min-height: 100px;"> Relationships Custom Records Employees Items Relationships Supply Chain Support Transactions </div>
2 Import Options	CSV File(s) <input type="radio"/> ONE FILE TO UPLOAD <input checked="" type="radio"/> MULTIPLE FILES TO UPLOAD
3 File Mapping	
4 Field Mapping	
5 Save mapping & Start Import	

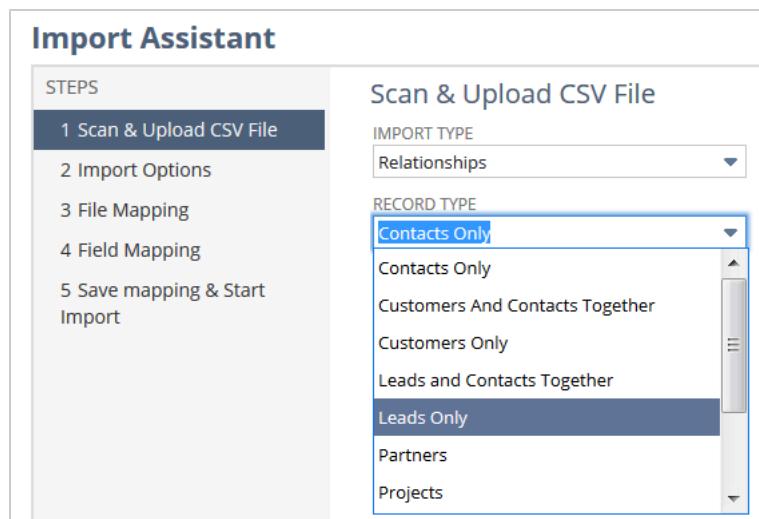
The following import types are available. Click on a link below to see the record types available for each import type, to help you determine which import type to select:

- [Accounting Import Type](#)
- [Activities Import Type](#)
- [Classification Import Type](#)
- [Communications Import Type](#)
- [Custom Records Import](#)
- [Customization Import Type](#)
- [Employees Import](#)
- [Items Import](#)
- [Relationships Import Type](#)
- [Rules Setup Import Type](#)
- [Subscription Billing Import Type](#)
- [Supply Chain Import Type](#)
- [Support Import Type](#)
- [Transactions Import Type](#)
- [Website Import Type](#)

For a list of all record types sorted by import type, see [Supported Record Types for CSV Import](#).

Select a Record Type for Import

After you select an import type, record types in that category display in the Record Type dropdown list. Choose a record type from the dropdown list.



You should read the CSV file guidelines specific to your selected record type, and prepare your CSV files before you do an import. For more details, see [Supported Record Types for CSV Import](#).

Choose Import Character Encoding

On the Scan & Upload File page of the Import Assistant, choose the type of character encoding for your CSV import. The type of character encoding you choose depends on the type of file you wish to import.

Encoding schemes generally act the same way for common characters, such as 'a', 'A', and '0'. For special characters that programs may generate automatically as you type, such as typographic quotation marks, and for characters with diacriticals, encoding schemes differ, for example 0xE9 vs. 0x8E for 'e' + acute accent.

NetSuite supports the following types of character encoding:

- **(Unicode) UTF-8 encoding** — UTF-8 character encoding is the most widely used format for international users importing a CSV file created in a language other than U.S. English.

If you intend to use the format, you should ensure your file contains valid UTF-8 characters. You may have to use a third party editor to convert your file to UTF-8 prior to the import into NetSuite. Some editors will append the BOM (Byte Order Marker) to the beginning of the file indicating that it is UTF-8 encoded. UTF-8 encoded CSV files are imported regardless of whether the BOM is present.

Note that on Windows platforms, you can use Notepad to convert your CSV file into UTF-8 format. Open your CSV file in Notepad, click File > Save As and select UTF-8 from the Encoding dropdown before clicking Save on the Save As dialog box.

- **Western (Windows 1252) encoding** — Typically, NetSuite users create CSV files for import in Microsoft Excel, which uses Windows 1252 character coding. Western (Windows 1252) is the default for the U.S. edition.
- **Western (ISO-8859-1) encoding** — ISO-8859-1 encodes what is commonly referred to as "Latin alphabet no. 1," consisting of 191 characters from the Latin script. The character-encoding is used throughout the Americas, Western Europe, Oceania, and much of Africa. It is also commonly used in most standard romanizations of East Asian languages.
- **Chinese Simplified (GB18030)** — GB18030 is the registered Internet name for the official character set of the People's Republic of China (PRC), superseding GB2312. The character set is formally called "Chinese National Standard GB 18030-2005: Information technology -- Chinese coded character set." GB abbreviates Guójia Biāozhun, which means national standard in Chinese. (Description cited from Wikipedia.) Chinese Simplified (GB18030) is the default when the Chinese language preference has been selected.
- **Chinese Simplified (GBK) encoding extension** — Used in mainland China and Singapore.
- **Traditional Chinese (Big5) encoding** — Typically used in Taiwan, Hong Kong, and Macau.
- **Japanese (Shift-JIS) encoding** — Shift-JIS character encoding is the most widely used format for Japanese users intending to import a CSV file. Japanese (Shift-JIS) is the default for the Japanese edition and when the Japanese language preference has been selected.
- **(Western) MacRoman** — CSV files created in Excel running on Macs use MacRoman character encoding.
- **Korean (ISO-2022-KR) encoding** — Character code structure for Korean text (ISO standard).
- **Korean (EUC-KR) encoding** — One of the more widely-used legacy character encodings (extended UNIX code).



Note: If invalid characters prevent a file from being processed for import, you receive an error and are able to fix it. For more information, see [CSV Import Error Reporting](#).

Choose CSV Column Delimiter

On the Scan & Upload File page of the Import Assistant, select the delimiter used to separate the columns in the CSV file you are importing. You can choose among the following:

- Comma (,) (the default separator)

- Semicolon (;)
- Pipe (|)
- Space ()
- Tab

The separator you specify here overrides any account-level column separator preferences set on the CSV Import Preferences page and your subsidiary's Preferences subtab.

Select a File for Import

On the Scan & Upload CSV File page of the Import Assistant, indicate the file or files to be the source of imported CSV data.

For some record types, you can choose an option button to indicate whether one file or multiple files will be uploaded. There is a limit of 25,000 records per uploaded file.

Select one or more CSV files to import by clicking the Select... buttons and browsing to the CSV files you want to import.

- If you have chosen One file to upload, the Assistant provides one Select... button.
- If you have chosen Multiple files to upload, the Assistant provides a Select... button for the primary file, and multiple, optional Select... buttons with descriptions of the types of files that can be linked to the primary file.

It is important that the data for the main fields in the imported records is included in the primary file, not in the linked files.

Linked files may contain sublist data that is stored separately, such as multiple addresses for each customer. For more information, see [Sublist Data Import](#).

Click the Select buttons corresponding to the types of data you want to upload, and browse to the correct files. After you have added a file, its name appears. You can click the Remove button to select an alternate file.



Important: If you need to edit or rename a file after having selected it, you must remove it and select it again after the changes. If you change the file in any way after having selected it and you click the Next > button, an error message will be displayed.

The following screenshot shows file selection for a multi-file import:

Import Assistant

STEPS

- 1 Scan & Upload CSV File
- 2 Import Options
- 3 File Mapping
- 4 Field Mapping
- 5 Save mapping & Start Import

Scan & Upload CSV File

IMPORT TYPE: Items

RECORD TYPE: Inventory Item

CHARACTER ENCODING: Western (Windows 1252)

CSV COLUMN DELIMITER: Comma

CSV File(s)

ONE FILE TO UPLOAD
 MULTIPLE FILES TO UPLOAD

File Type	Select...	File Name	Remove
Primary File - Item	Select...	InventoryItem.csv	REMOVE
Linked File (Optional) - Item Pricing	Select...	InventoryItem_Prices.csv	REMOVE
Linked File (Optional) - Item Presentation Items	Select...		
Linked File (Optional) - Item Site Category	Select...		

Buttons: Cancel, < Back, Next >

Note the following:

- The list of optional linked files shows sublists that may be available for import. The list does not reflect the disabling of related features, so it may include sublists not currently available for import.
- If you select multiple files, the Import Assistant's File Mapping page requires you to define the column in each file used to link data among files.

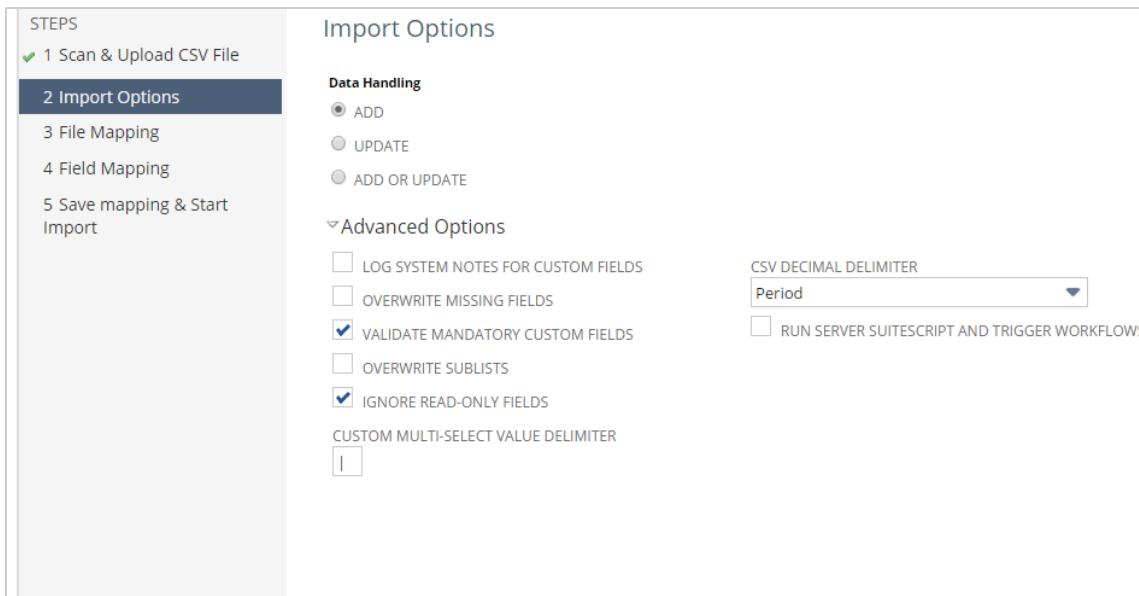


Important: If you are using a previously saved import map, your choice of one file or multiple files should be consistent with the original choice for the import map. If you choose one file for a map that previously used multiple files, or vice versa, some CSV file data may not be imported.

Step Two Import Options

Complete the following tasks for step two of the Import Assistant:

- Choose Data Handling for Import
- Set Advanced CSV Import Options
- Click Next to go to [Step Three File Mapping](#) or [Step Four Field Mapping](#).



Choose Data Handling for Import

On the Import Options page of the Import Assistant, choose a Data Handling option to indicate how the imported data will affect NetSuite data:

- **Add** — Select if all imported records are new to NetSuite.
- **Update** — Select if all imported records already exist in NetSuite, and the import is intended to modify these records.
- **Add or Update** — Select if imported records are a mixture of new and existing records.

Note: See [Required Permissions for CSV Imports](#) to get an understanding of the permission level a user must have for a record type to add or update records of that type via CSV import.

Be aware of the following issues for CSV data updates of NetSuite data:

- Your selection of a reference type in the Import Assistant's Field Mapping step determines how CSV file records are mapped to existing NetSuite records. Possible reference types are external ID, internal ID, or name. Issues with reference types may cause update errors; name references are more susceptible to errors because of matching failures. For more information, see [Select Reference Types](#).
- By default, NetSuite fields will **not** be cleared of data when the CSV file contains corresponding fields that do not contain data. You can change the default behavior by enabling the Overwrite Missing Fields advanced option. For information, see [Overwrite Missing Fields](#).
- Imports always populate dependent field values automatically when related field values are set, in the same manner that dependent field values are populated in the user interface. For updates, be sure to include all necessary values in CSV files, to avoid inadvertent changes of existing field values to defaults.
- Updates of sublist data depend on the setting for the Overwrite Sublists option, and on whether sublists are keyed. Overwrite Sublists can be set as an advanced option for an import job, or as a general preference for all imports at Setup > Import/Export > CSV Import Preferences.

If the Overwrite Sublists option is enabled, CSV file sublist rows completely replace existing sublist data. If the Overwrite Sublists option is disabled, for keyed sublists, CSV file sublist rows selectively

update existing sublist data, and for other sublists, CSV file sublist rows are appended to existing sublist data.

For more information about the option, see [Overwrite Sublists](#). To review which sublists are keyed, see [Supported Sublist Imports](#).

- Complete deletion of sublist data currently is not supported. Existing sublist data can only be overwritten with new CSV file sublist data, not with an absence of CSV file sublist data.

Required Permissions for CSV Imports

To be able to import CSV data, the Import CSV File permission must be assigned to the role. An administrator may assign the permission to a role.

To assign the Import CSV File permission to a role:

1. Go to Setup > Users/Roles > User Management > Manage Roles.
2. Locate the role you want to modify. Click the **Edit** or **Customize**.
3. On the Permissions subtab, click Setup.
4. In the Permissions dropdown list, select Import CSV File.
5. Click Add.
6. Click Save.

To learn how to view the permissions assigned to a role, see the help topic [Reviewing Permissions Assigned to Roles](#).

Set Advanced CSV Import Options

On the Import Options page of the Import Assistant, you can expand the Advanced Options menu to set preferences for the current import job. The following advanced options are available:

- Log System Notes For Custom Fields
- Overwrite Missing Fields
- Validate Mandatory Custom Fields
- Overwrite Sublists
- Ignore Read Only Fields
- Prevent Duplicate Records
- Custom Multi-Select Value Delimiter
- CSV Decimal Delimiter
- Custom Form
- Server Scripting and Workflow Execution
- Use Multi-Threading
- Queue Number

Some of these options also are available on the CSV Import Preferences page, where administrators and other users with the Set Up CSV Preferences permission can set preferences for all imports. For more information, see [Setting CSV Import Preferences](#).

Advanced Options settings for an individual import job override the general preferences set on the CSV Import Preferences page.



Important: As of Version 2010 Release 1, the Use Conditional Defaults option is no longer available. Now, imports always populate dependent field values automatically when related field values are set, in the same manner that dependent field values are populated in the user interface. For updates, be sure to include all necessary values in CSV files, to avoid inadvertently changing existing field values to defaults.

Log System Notes For Custom Fields

Enable to create system notes during the import of data from custom fields. The option is disabled by default. Disabling system notes for custom fields improves performance and is recommended for imports that add data.

The option is available in a check box on the step two Import Options page of the Import Assistant, when you expand the Advanced Options section.



Important: System-generated notes are used in NetSuite to track changes to a record, including what action was taken, when the record was modified, and the user who is responsible for the change. These notes are important for maintaining a complete audit trail. If you turn off system-generated notes for custom fields, specific changes related to custom fields within the imported record are **not** recorded in NetSuite, although all changes for standard fields are logged as usual. If a custom field contains sensitive information that is critical for audit purposes, you should **not** disable system-generated notes. For more information about system notes, see the help topic [System Notes Overview](#).

Overwrite Missing Fields

Enable the option during data updates, to clear NetSuite fields mapped to CSV file fields that do not contain data. The option is disabled by default.



Note: Using this option has no impact on any field that is not included in the mapping.

An alternative to enabling the Overwrite Missing Fields option is to set null values for fields without CSV data. For information, see [Assign Null Values during Field Mapping](#).

Be aware of the difference between the Overwrite Missing Fields option and the [Overwrite Sublists](#) option. The Overwrite Sublists option replaces sublist data as a whole, rather than checking for individual fields mapped to CSV file fields with no data.

Validate Mandatory Custom Fields

Enable the option to require mandatory custom field data to be present for records to be created. Disable the option to create records even though mandatory custom field data is not present. The option is enabled by default.

Overwrite Sublists

Your setting for the Overwrite Sublists option affects imports of sublist data when one of the following data handling option buttons is selected: Update, Add or Update. By default the option is disabled.

- **Overwrite Sublists = True** — If you enable the Overwrite Sublists option, the Import Assistant completely replaces all existing sublist values and replaces them with the CSV file sublist data. Be cautious in enabling the option, as all existing sublist values are removed.

- **Overwrite Sublists = False** — If you do not enable the Overwrite Sublists option, the effect varies according to whether the sublist import supports selective updates based on key field values.
 - For keyed sublists, if the Overwrite Sublists option is disabled, the Import Assistant:
 - Selectively updates existing sublist data with key field values that match CSV file sublist rows.
 - Adds CSV file sublist rows with key field values that do not match any values in existing rows as new sublist rows. (These rows represent new sublist key values, such as a new location or a new vendor.)
 - For non-keyed sublists, if the Overwrite Sublists option is disabled, the Import Assistant appends all CSV file sublist data as new rows.
 - For a list of all sublists supported for CSV import, see [Supported Sublist Imports](#).
- Notes —
 - Complete deletion of sublist data currently is not supported. Existing sublist data can only be overwritten with new CSV file sublist data, not with an absence of CSV file sublist data. For more information, see [Replacing the Bill of Materials Sublist with the CSV File](#).
 - Enabling the option cancels the effects of the [Overwrite Missing Fields](#) option on any sublists with mapped fields, because the result will be a sublist that looks exactly like the CSV file sublist data no matter what was there before.
 - You shouldn't enable the Overwrite Sublists option for imports that include item pricing data or item demand plan imports. Enabling the option may result in errors when imported sublist data overwrites existing sublist values driven by body field values such as pricing schedule.

Ignore Read Only Fields

Check the box to indicate that read-only fields should be ignored during import job processing. Enabling the option to import CSV files containing values for read-only fields, such as auto-generated numbers, without causing errors. The option is enabled by default.



Important: For imports of entities and contacts together (Customers and Contacts Together, Leads and Contacts Together, Prospects and Contacts Together), the option **must** be enabled.

Prevent Duplicate Records

You can use the Prevent Duplicate Records option to block the import of records that appear to be duplicates. That is, when you select the option, the import of a record identified as a duplicate fails with an error reading "Duplicate record was detected." Other records in the same CSV file will still be processed.

For more details, see:

- [Availability of the Prevent Duplicate Records Option](#)
- [Preventing Duplicate Imports vs. Manually Reviewing Duplicates](#)
- [Setting Criteria to Identify Duplicates](#)
- [Default Behavior of the Prevent Duplicate Records Option](#)
- [Cases In Which Duplicates Are Still Imported](#)

Availability of the Prevent Duplicate Records Option

When the Prevent Duplicate Records option is available, it displays under Advanced Options on page 2 of the Import Assistant.

The option is available only when the following statements are true:

- The Duplicate Detection & Merge feature is enabled at Setup > Company > Enable Features.
- On the page labeled Set Up Duplicates Detection Feature (Setup > Company > Duplicate Detection), you have selected one or more of the options labeled Detect (RecordType) Duplicates. When you detect duplicates for any of the available record types, the Prevent Duplicate Records option is available for imports of that record type. Note that the feature is available for only four record types: Contact, Customer, Partner, and Vendor.

Preventing Duplicate Imports vs. Manually Reviewing Duplicates

When you select the Prevent Duplicate Records option and then try to import a record that appears to be a duplicate, the import of that record fails with an error reading "Duplicate record was detected." If you do **not** select the Prevent Duplicate Records box, the duplicate record is created and marked as a duplicate. You can manage the new record, along with other duplicates, on the Lists > Mass Updates > Entity Duplicate Resolution page.

For this reason, if you prefer for potential duplicates to be reviewed on a case-by-case basis, you should **not** select the Prevent Duplicate Records option. As long as the Duplicate Detection & Merge feature is enabled, records identified as duplicates are marked as such and flagged for manual review.

Setting Criteria to Identify Duplicates

To identify duplicates, the Import Assistant uses the same criteria that you specify on the Setup > Company > Duplicate Detection page. For example, you might choose to specify that if two contact records have same phone number, one is probably a duplicate.

Default Behavior of the Prevent Duplicate Records Option

By default, the Prevent Duplicate Records box is not selected, and it is not possible to set a general preference for it. However, you can create a saved import that selects or de-selects this option as appropriate.

Cases In Which Duplicates Are Still Imported

Even when you select the Prevent Duplicate Records option for an import, it is possible for a duplicate record to be imported in the following situations:

- If two users are importing records at the same time, and both users are adding two similar records.
- If multi-threading is being used and two similar records are being processed in different queues at or around the same time.

Custom Multi-Select Value Delimiter

By default, the Import Assistant expects the pipe "|" to be the delimiter for multi-select field values. The Assistant also supports the use of any other single character as a custom multi-select delimiter. To use a custom character as a delimiter instead of the pipe, enter it in this field. The Import Assistant then interprets the custom character, and not the pipe, to indicate a multi-select relationship for this import job. The character you specify here overrides any account-level character set on the CSV Import Preferences page.

CSV Decimal Delimiter

The Import Assistant expects the period to be used as the decimal mark in CSV files. If the CSV data you are importing contains numbers that use the comma as the decimal mark, you can specify that on this

page. The decimal mark you choose here overrides any account-level decimal mark preferences set on the CSV Import Preferences page and your subsidiary's Preferences subtab.

Custom Form

When you import data for a record type, by default, the Field Mapping page includes the NetSuite fields available on your role's preferred form for the record type. Fields can be mapped for the import job if, on this form, they are displayed (not hidden) and not disabled.

Your preferred form may not include all the fields you need to import. For record types that allow custom forms, you have the option of selecting another form in the Import Assistant. You can specify an existing custom form that is available to your role, or you can create a custom form specifically for this purpose. The Custom Form dropdown in the Advanced Options section of the Import Assistant lists available custom forms for the record type to be imported.

If a custom form selected for a saved import is later deleted, an error displays when a user loads the saved import, indicating that the selected form cannot be found. The user can select a different form, or by default, their preferred form for the record type is used to determine mappable fields for the import.

The following table outlines how a selected custom form impacts a CSV import:

Action	Transaction Forms	Entry Forms
Add	<ul style="list-style-type: none"> ■ Fields on selected form are mappable. ■ Values for form's included fields can be added to transactions. ■ Form is saved with added transactions. 	<ul style="list-style-type: none"> ■ Fields on selected form are mappable. ■ Values for form's included fields can be added to records. ■ If a form has the Store Form with Record option enabled, it is saved with added records. If a form has this option disabled, it is not saved with added records.
Update	<ul style="list-style-type: none"> ■ Fields on selected form are mappable. ■ For each updated transaction, import does not update fields that are not on the form stored with that transaction. If Ignore Read-Only Fields option is enabled, these fields are ignored; if this option is disabled, an error occurs. ■ Form is not saved with updated transactions. 	<ul style="list-style-type: none"> ■ Fields on selected form are mappable. ■ Values for form's included fields can be updated on records. ■ If a form has the Store Form with Record option enabled, it is saved with updated records. If a form has this option disabled, it is not saved with updated records, but any stored forms are reverted to null, meaning that no forms are stored with updated records.



Warning: Popup Only forms are not supported as custom forms for CSV import. If you attempt an import with a Popup Only form as the custom form, the import fails with an invalid custom form reference error in the CSV response file. For more information about the Popup Only option, see the help topic [Creating Custom Entry and Transaction Forms](#).

For information about working with custom forms, see the help topic [Custom Forms](#).

Server Scripting and Workflow Execution

Your administrator specifies which roles cannot change the setting for server SuiteScripts and workflow triggers on individual CSV imports. If the Run Server SuiteScript and Trigger Workflows box is available, you can change the setting for the current import. Clear the box to disable all server SuiteScripts and workflow triggers during import job processing. Check the Run Server SuiteScript and Trigger Workflows box to allow server SuiteScripts to run and workflows to trigger during the CSV import.

The Run Server SuiteScript and Trigger Workflow box option is set to the company preference by default, but you can change the setting for the current import. If you save the import, your preference for this field is saved.



Warning: Use this setting with caution. Disabling the running of server scripts and workflow triggers can result in data corruption.

Use Multi-Threading



Important: This option is available only in accounts that have purchased a SuiteCloud Plus license.

By default, a single thread is used to process an import job, and all CSV file rows are submitted in order. The Use Multi-Threading option for an import enables the use of multiple threads to process the job, to optimize for best performance. By default, this option is disabled.

Check the Use Multi-Threading box only if the rows in your CSV files do not need to be submitted in order. Note that with multi-threading, the order in which rows are submitted cannot be predicted.

Your selection for this option is preserved if the import is saved, both when the import is reused in the same account and when it is bundled and reused in a different account.

For more information, see [Use Multiple Threads and Multiple Queues to Run CSV Import Jobs](#).

Queue Number



Important: This option is available only in accounts that have purchased a SuiteCloud Plus license.

By default, every import job is assigned to queue 1. To spread import processing across multiple queues to improve performance, users can select other queues from 2 to 5.

The queue number selected for an import displays in the Queue column on the import Job Status page. For information about this page, see [Checking CSV Import Status](#).

If you would like to change an import's queue number during the time that it is in progress, you need to cancel the job and resubmit it with the new queue number.

- If the job has a status of Pending, you can step through the Import Assistant again to change the queue number and resubmit.
- If the job has a status of Processing, you need to download the CSV results file, which has entries for every canceled CSV file row. You would need to use this results file as the CSV file when you step through the Import Assistant again to change the queue number and resubmit.

Your queue number selection is preserved if the import is saved and rerun is the same account. The queue number is always defaulted back to 1 for a saved CSV import that is bundled, so that users in a target account where the bundle is installed can make their own queue selection.

For more information, see [Use Multiple Threads and Multiple Queues to Run CSV Import Jobs](#).

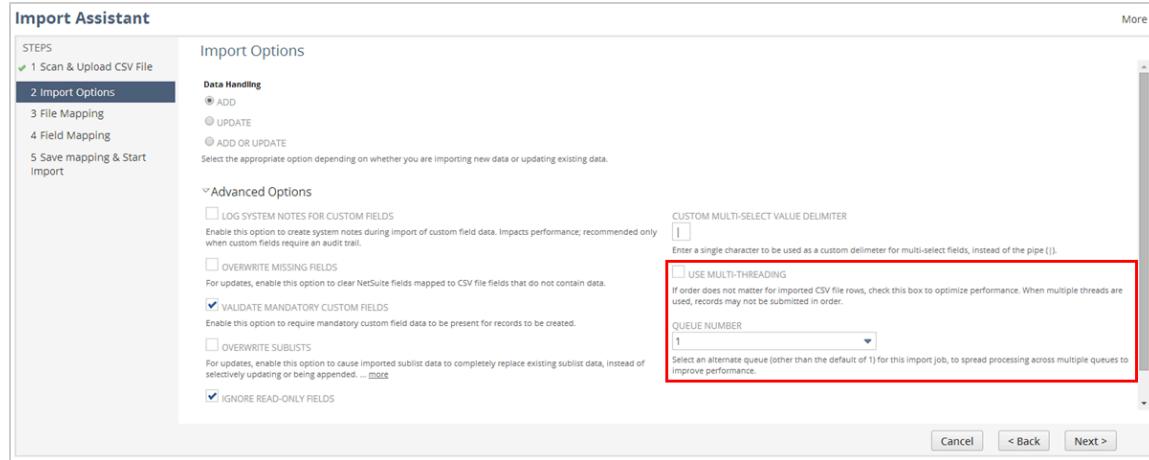
Use Multiple Threads and Multiple Queues to Run CSV Import Jobs

In accounts that have purchased one or more SuiteCloud Plus licenses, the Import Assistant includes two advanced import options that you can set to improve import performance.

For a summary of SuiteCloud Plus capabilities, see the help topic [SuiteCloud Plus Settings](#).

- You can check the Use Multi-threading box, to use multiple threads instead of a single thread to process an import job. See [Using Multiple Threads](#).
- You can set a queue number from 1 to 5, to spread the processing of import jobs across multiple queues, instead of using a single queue for all jobs. See [Using Multiple Queues](#).

These options are available on the step two Import Options page of the Import Assistant, under Advanced Options. For instructions for completing them, see [Set Advanced CSV Import Options](#).



i Note: In addition to supporting import job performance enhancement, the SuiteCloud Plus license also supports access to more concurrent web services sessions and to multiple processors for scheduled scripts and map/reduce scripts. To learn more about SuiteCloud Plus, or to purchase this add-on module, contact your NetSuite account manager.

Using Multiple Threads

By default, a single thread is used for processing CSV import jobs, and each CSV file row is submitted in order. In accounts that have purchased a SuiteCloud Plus license, an option is available to use multiple threads. If this option is enabled for an import job, processing is optimized across multiple threads for best performance, and the order in which CSV file rows are submitted cannot be predicted. Accordingly, you should only enable multi-threading for an import job, if the order in which rows are submitted does not matter, meaning later CSV file row data is not dependent on any earlier row data.

i Note: If you enable this option for an import job where order does matter, some records may fail to import, because they are dependent on records which have yet to be imported. When this situation occurs, you can rerun the job a second time to import the dependent records.

If you purchase one SuiteCloud Plus license, two threads are available for each import job. In some cases, you may be able to purchase three, six, or 12 licenses to support 10 threads per job.

For more information, see the help topic [SuiteCloud Plus Settings](#).

For information about service tiers, see the help topic [NetSuite Service Tiers](#).

Using Multiple Queues

By default, all CSV import jobs use a single queue. This queue is defined as queue 1. In accounts that have purchased a SuiteCloud Plus license, five queues are available for import jobs, instead of a single

queue. The queue to be used to process each import job can be specified in a dropdown list in the Import Assistant. This ability allows the division of import job processing across multiple queues, enhancing performance.



Important: There are never more than five import job queues regardless of how many SuiteCloud Plus licenses are purchased.

Import jobs in each queue execute serially. For example, if there are two import jobs in queue 1, the first import job must complete before the second import job begins. Across all five queues, the import jobs execute concurrently. For example, if there is one import job in each of the five queues, all import jobs run at the same time.

Should you choose to purchase the SuiteCloud Plus add-on module, be aware that all of your saved import jobs are, by default, initially put into queue 1. You need to go the step two Import Options page of each import job and assign a different queue as needed. Also note that if you do not assign a queue number to a new import job, the job is automatically assigned to queue 1.

A Queue column displays on the import Job Status page to indicate which queue is processing the job. Users can set the Queue filter to sort import jobs based on queue number.

Step Three File Mapping

Complete the following tasks for step three of the Import Assistant:

(Note that this step is required only if you have chosen to upload multiple files for import.)

- Select a primary key column for the primary file to indicate how data will be mapped between this file and other linked files.
- Select a key column from the linked files to map to the primary key column.
- Click Next to go to [Step Four Field Mapping](#).

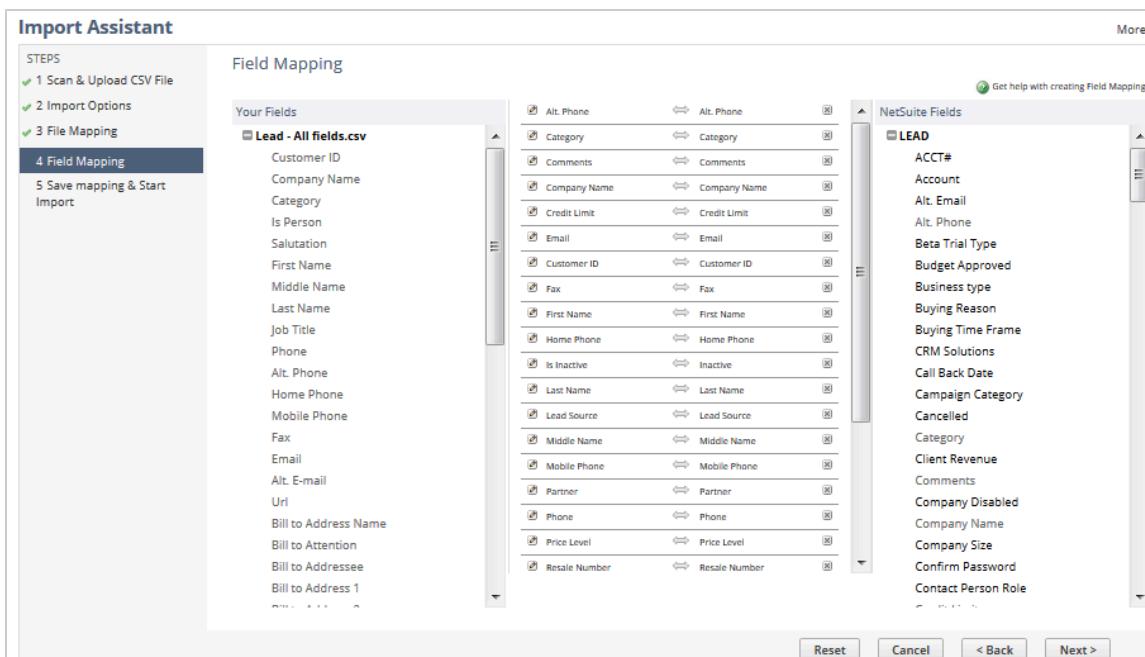
Step Four Field Mapping

Step four of the Import Assistant displays the automatic mappings of CSV file fields to NetSuite fields. For descriptions of tasks to complete in step four of the Import Assistant, see [CSV Field Mapping Tasks](#).

- CSV file fields are listed in the left pane.
- Field mappings display in the center pane; blank spaces indicate that a field needs to be mapped.

- Required fields are marked with (Req). You must map these fields or provide default values for them.
- NetSuite fields are listed in the right pane.
 - Fields that have already been mapped appear dimmed.
 - Fields available for mapping are in darker text.
 - Custom fields are marked with a special icon. ()
 - Key fields are marked with a special icon. ()

Note: Only NetSuite fields that can be edited on the user's preferred form for the record type are available for import mapping.



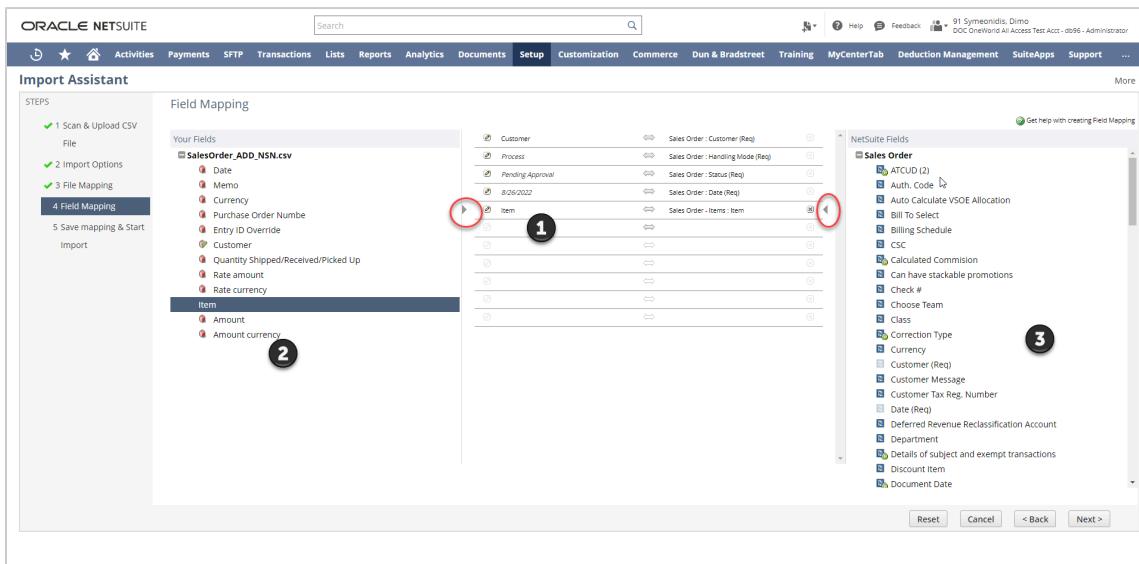
To get a better understanding of the NetSuite fields, you can do the following:

- Carefully review the NetSuite user interface form for the selected record type. You can click the field label for help that describes the field.
- See the [SOAP Schema Browser](#) for more descriptions of each field. For information about working with this tool, see the help topic [SOAP Schema Browser](#).

By default, mappable NetSuite fields are those available on your preferred form for the selected record type. Fields can be mapped for the import job if they are displayed (not hidden) and not disabled on your preferred form. If these fields do not include all of the data you want to import, you can specify a custom form that includes the fields you need, as an Advanced Option in the CSV Import Assistant. This specification changes the NetSuite fields listed on the Field Mapping page. See [Set Advanced CSV Import Options](#).

To manually map fields:

1. Click on the first available empty row in the center pane. The arrows on each side of the row, indicate the row you are editing.
2. Click on the CSV file field you want to map in the left pane.
3. Click on the NetSuite field in the right pane to map it with the CSV file field.



For help with completing the tasks in step four of the Import Assistant, review the following guidelines.

- [General CSV Field Mapping Tips](#)
- [Required Fields on Records](#)
- [Select Reference Types](#)
- [Assign Default Values during Field Mapping](#)
- [Assign Null Values during Field Mapping](#)

Note: If you make mistakes during mapping, you can click the Reset button to return the Field Mapping page to the automatic mappings or to the most recently saved mappings.

When you have completed field mapping tasks, click Next to go to [Step Five Save Mapping & Start Import](#).

- If the Assistant encounters fields that have not been mapped, an error popup appears and problem mappings are marked with a red X. You can add mappings, then click Next again.
- If the Assistant encounters improperly mapped fields, an error page appears. You then can download a zip of the CSV files with an additional column in each file indicating the errors. After you fix the errors, you can relaunch the Import Assistant and upload the files again.

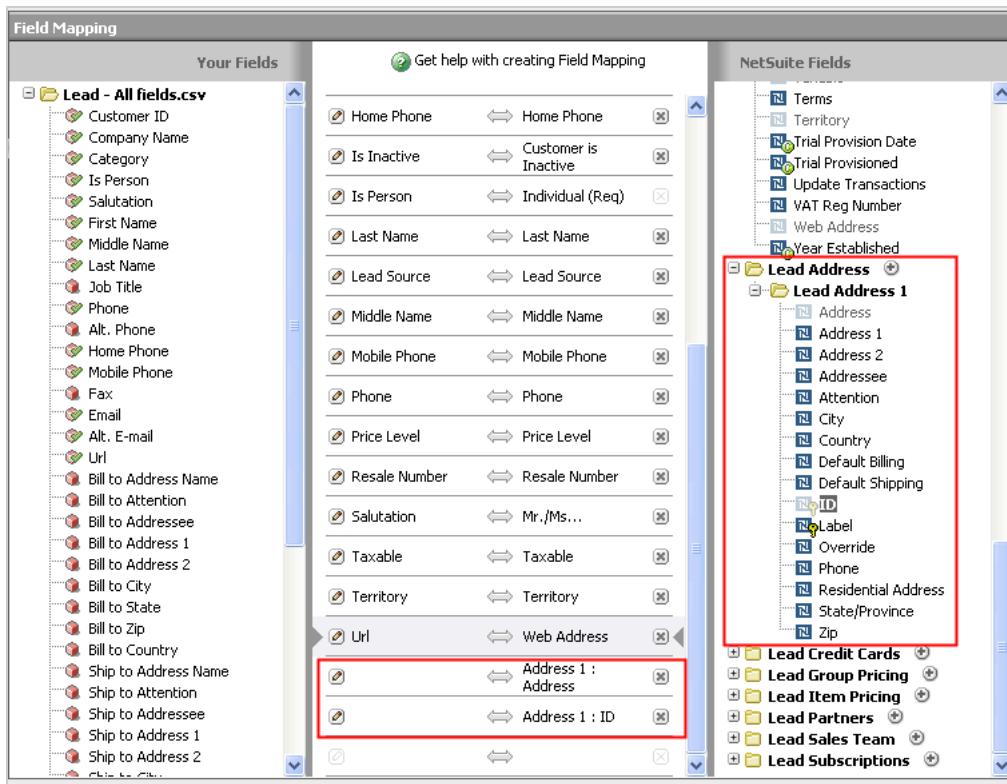
CSV Field Mapping Tasks

On the Field Mapping page of the Import Assistant, complete the following tasks:

- To add a field to the mappings, highlight a line in the center pane and single-click a field in the right or left pane, or drag a field from the right or left pane to the center pane.
- To provide a default value, null value, or reference type for a field, click its edit icon, and:
 - Choose Provide Default Value, and select or enter a value. For more information, see [Assign Default Values during Field Mapping](#).
 - Choose the Set Value to Null option. This option is available only for fields that can have null values. You can set fields with no values in CSV files to null instead of enabling the Overwrite Missing Fields advanced option on updates. For more information, see [Assign Null Values during Field Mapping](#).
 - Select a reference type. This option is available only for mapped fields that can have one or more list values, such as dropdown lists and multi-selects. For more information, see [Select Reference Types](#).

After you have made a selection, click Done to close the popup.

- To delete a row in the center mappings pane, click the small X button.
- If at any point you want to undo changes to field mappings and return to auto mappings or to the most recently saved mappings, click Reset.
- Available sublists are displayed at the bottom of the NetSuite Fields pane. You can map sublist fields in the same manner that you map other fields. Initially, the Field Mapping page provides one instance node per sublist. You can dynamically add sublist instances by clicking Add New (+). Up to 99 instances are supported per sublist. (Add New is not available for sublists with associated linked files.) For more information, see [Required Fields for Sublist Import Mapping](#).



- For some transaction imports, transaction item options may be included as a flat list under the Items sublist folder. Item options are custom fields that can be set up in your NetSuite account and may be included in transaction line items to represent item-specific choices. You can map item options to columns in your CSV file, and you can set default or null values for them. For more information, see [Importing Transaction Item Options](#).

General CSV Field Mapping Tips

- If your account is using NetSuite OneWorld, the Subsidiary field is a required field for the following record types: Chart of Accounts, Contacts, Customers, Employees, Jobs (Projects), Leads, Partners, Prospects, and Vendors. For imports of these record types, you must map the Subsidiary field to a field in your CSV file. If the import attempts to add or update records in a OneWorld account without identifying the subsidiary, the import will fail.
- NetSuite fields shown in the right pane of the Field Mapping page are dependent upon the fields available on the user's preferred form for that record type. If the user's preferred form does not allow access to certain NetSuite fields, those fields will not display or be available to map.

If a custom form is in use for data entry in the NetSuite user interface, you can specify this custom form as an advanced option on the Import Options page, to ensure appropriate fields are available for mapping. By default, the standard form is used. For more information, see [Set Advanced CSV Import Options](#).

- You can map a single CSV source field into multiple fields within the same NetSuite record or sublist.
- Be aware that if you do not map any fields for a sublist, no sublist data is imported, even if you set a default value for one or more sublist fields on the Field Mapping page. For more information about sublist data and the Import Assistant, see [Sublist Data Import](#).
- If you want to create your own CSV import template files with columns that map to NetSuite data automatically, review the [SOAP Schema Browser](#) for details about fields for each record type. For information about working with this tool, see the help topic [SOAP Schema Browser](#).

Required Fields on Records

Some NetSuite fields are required, meaning you must specify a value for them or the import cannot proceed. You can map these required fields to CSV column headers, or provide default values for them on the Import Assistant's Field Mapping page.

NetSuite required fields are shown in the NetSuite Fields column with (Req) after the field name. Usually, NetSuite required fields are shown automatically in the mapping column, to alert you that they must be mapped. However, required fields that do not show, meaning they are rolled up in the tree node in the right column, must be clicked on and mapped. Note that required fields for sublists are handled somewhat differently; for information see [Required Fields for Sublist Import Mapping](#).

Mapping a Required Field

1. On the Field Mapping page of the Import Assistant, click the required NetSuite field on the right if it is not already showing in the mapping column.
2. Click the appropriate field name from your CSV file on the left to add it to the mapping section next to the NetSuite required field.

Providing a Default Value for a Required Field

1. Click the edit icon next to your field.
2. Provide a default value for this field.

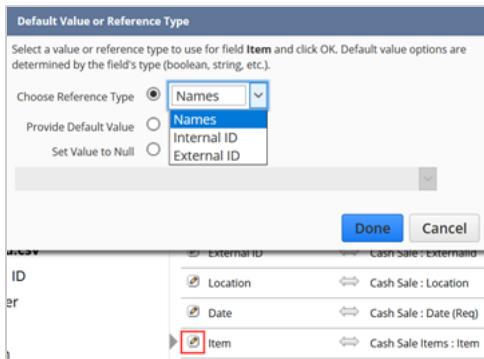
For more information, see [Assign Default Values during Field Mapping](#).

Be aware that even if you set a default value for one or more fields in a sublist, no sublist data is imported unless you map at least one field for that sublist. For more information about working with sublists, see [Sublist Data Import](#).

i Note: If Marketing Automation is enabled and you choose the "Add" data handling option on the Import Assistant's Import Options page, you will be required to map the Unsubscribe field on the Field Mapping page, even if this field is not displayed on your preferred form for the record type. If the Unsubscribe field has not been mapped to a value, an error is thrown and you must go back and rectify the error.

Select Reference Types

A reference type enables you to map a column in an imported CSV file to a NetSuite field that can have one or more list values, such as a dropdown list or a multi-select. You specify reference types on the Import Assistant's Field Mapping page by clicking the edit icon next to a mapped field that is a dropdown list or multi-select.



i Note: Reference types are not available for all fields.

Possible reference types include External ID, Internal ID, Name and Script ID.

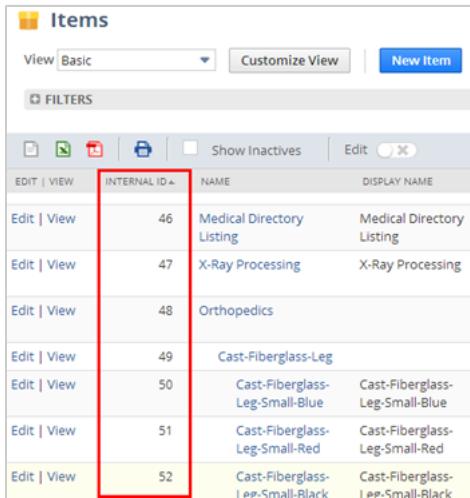
- **External ID.** If you select External ID as the reference type, the Assistant finds and references an identification string as defined by you (such as "CashSale_" or "Employee_") in the mapped field.
 - A reference type of External ID is recommended if you select one of the following Import Assistant Data Handling options: Add, Add or Update.
 - The External ID reference type also is recommended for records with parent-child relationships, and records with auto-generated numbers.
 - The External ID reference type is suited for ongoing integration with external databases, where you are repeatedly importing external data into NetSuite, because you can store the foreign key to the external system in NetSuite. This allows for upfront record references during data migration.
 - External IDs can be updated through a CSV import or through SOAP web services. Your organization should use a single method for maintaining External IDs to avoid conflicting updates through the two separate methods.
 - Some record types, such as custom lists or custom records, do not support the use of External IDs as reference types.
- **Internal ID.** If you select Internal ID as the reference type, the Assistant finds and references numbers (such as "123") in the mapped field.
 - A reference type of Internal ID is recommended if you select the following Import Assistant Data Handling option: Update.
 - The Internal ID reference type is suited for data that you export to an external application for manipulation and then reimport into NetSuite.
 - To include the Internal ID in your data, add it as a results column in a saved search of the data, and then export the search results to CSV.
 - You can set a preference to display internal IDs in the NetSuite user interface. For instructions, see [Displaying Internal IDs](#).
- **Name.** If you select Name as the reference type, the Assistant finds and references text strings (such as "Joe Public") for the mapped field.
 - Name references can be prone to error.
 - For names that contain spaces, HTML rendering can sometimes distort the number of spaces included, causing mismatches between CSV file values and existing records, that result in import errors. To verify the number of spaces in names, you can create a saved search with a list of names and export it.
 - If you are unsure or unable to verify the name reference for a record, you should use the External ID field instead. For updates, you can use the Internal ID.

- The requirements for name references are affected by the auto-generated numbering preference that you set in NetSuite. For information, see [Effects of Auto-Generated Numbers during Imports](#).
- If you use a name reference type, each child record in the CSV file must include a value for the parent name, in order for the import to successfully update records.
- Name matching is case insensitive.
- **Script ID.** You can use Script ID as a reference type for a NetSuite field that can have one or more custom list or custom record values.
 - For example, consider this scenario: You create a custom list with values, where each value has a Script ID or you create a custom record to which you assign a Script ID. Then, you create a custom field on a Sales Order. This field is of the List/Record type and it is referencing the custom list or the custom record you created earlier. When you import a Sales Order next time, you can reference each value of the list or the record by its Script ID.
 - To find the Script ID of custom list values, you must perform in the UI an advanced search on the custom list and include the Script ID column in the search results.
 - To find the Script ID of custom record type instances, you must perform in the UI an advanced search on the record type and include the Script ID column in the search results.
 - A Script ID can be assigned to a custom record only via SuiteScript during the creation of the record. It is not possible to assign a Script ID to an existing custom record when you update it.

Displaying Internal IDs

You can configure NetSuite to make internal IDs available in NetSuite. During development, internal IDs help you verify that the internal ID values submitted for import match those in the existing records.

Go to Home > Set Preferences and in the Defaults section of the General tab, check the **Show Internal IDs** box. Lists then include the Internal ID column, as shown in the following screenshot. This change affects the current user only.



	INTERNAL ID	NAME	DISPLAY NAME
Edit View	46	Medical Directory Listing	Medical Directory Listing
Edit View	47	X-Ray Processing	X-Ray Processing
Edit View	48	Orthopedics	
Edit View	49	Cast-Fiberglass-Leg	
Edit View	50	Cast-Fiberglass-Leg-Small-Blue	Cast-Fiberglass-Leg-Small-Blue
Edit View	51	Cast-Fiberglass-Leg-Small-Red	Cast-Fiberglass-Leg-Small-Red
Edit View	52	Cast-Fiberglass-Leg-Small-Black	Cast-Fiberglass-Leg-Small-Black

If lists include Internal IDs, you may be able to export data from a NetSuite list page to get Internal IDs into a CSV file, because an Export to CSV button may be available from the list pages.

The assignment of internal IDs to new records is sequential. However, the sequence of internal IDs does not indicate when or in which order records were added. This is true even within specific record groups where internal IDs are unique. Therefore, you should not conclude that records with lower internal IDs were added first, whereas those with higher internal IDs were added last.

For custom applications that rely on the chronological aspect of when data was entered, you should use the Date Modified or Date Created fields, as they are guaranteed to be chronological. Additionally, for transactions with auto-generated numbers, the sequence number (for example, "tranid") is guaranteed to be sequential based on the date transactions were entered. The internal ID of a record should never be used to determine when data was entered, and you should not build any functionality based on the sequence of internal IDs.

Note: The user preference setting specifies the display of the internal ID, however, some records have an ID that cannot be hidden. For example, customer J Wolfe has an ID of 87 and an internal ID of 18834. The ID column cannot be removed from the customer list page.

Assign Default Values during Field Mapping

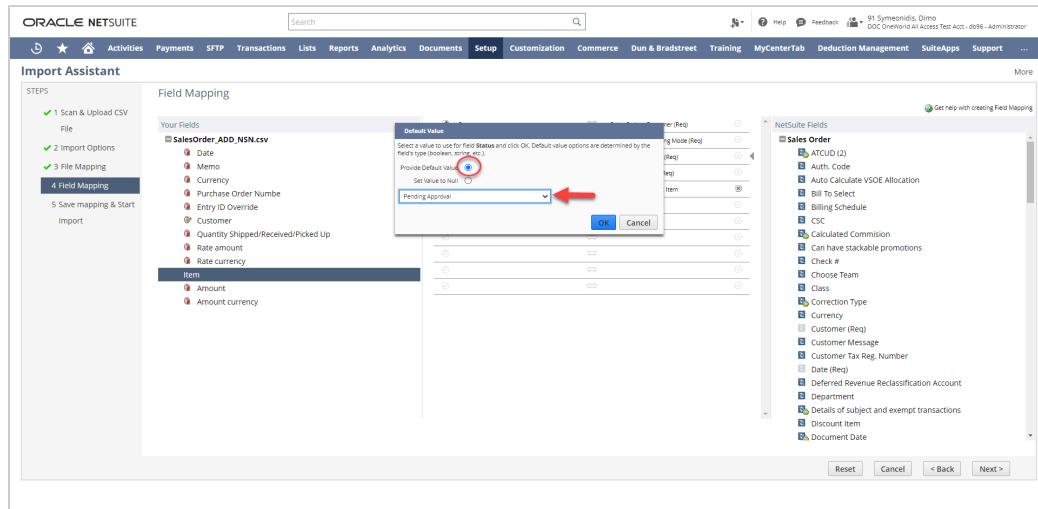
The Import Assistant automatically populates some dependent field values when related field values are set, in the same manner that many dependent field values are automatically populated in the user interface.

In addition, it is possible to assign default values for required fields on the Import Assistant's Field Mapping page. A default provides a consistent value for a record reference field across all imported records. For example, the simplest thing to do when you import new lead records would be to set a default value for the lead status column to "LEAD-New".

To provide a default value for a field on the Field Mapping page

- Click the edit icon in its row to open a popup.

- Choose **Provide Default Value**, and select a value from the dropdown or popup list.



Note: Whether the list of available values is a dropdown or popup list depends on the number of values and your setting for Maximum Entries in Dropdowns at Home > Set Preferences.

Be aware that even if you set a default value for one or more fields in a sublist, no sublist data is imported unless you map at least one field for that sublist. For more information about working with sublists, see [Sublist Data Import](#).

Using Dependent Field Values as Defaults

When you click the edit icon for a dependent field, meaning a field with available values that vary according to the value selected for another field, the list does not filter values in the same manner that they are filtered in the user interface. These cases are most likely to occur in OneWorld accounts, for fields that are dependent on subsidiary values.

For example, in a OneWorld account, available tax code values for a transaction item vary according to the customer, and to the customer's associated subsidiary. In the user interface, the Tax Code field dropdown list filters the listed tax codes to only those that are valid. In the Import Assistant, the Default Value field lists all tax codes without any filtering.

You need to be careful when you select a default value for a dependent field. Because the Default Value does not filter the values for these fields, it is easy to select an invalid value. For example, you could select a tax code value that is not valid for some of the customers or subsidiaries listed in your CSV file. This type of invalid value can cause validation errors when you attempt to complete the Field Mapping step.

If a dependent field is not required, you have the option of entering values in the user interface after the import is complete.

Assign a Default Value for the Primary Sales Rep Field

For Customer, Lead, or Prospect records added through CSV import, values for Primary Sales Rep do not default to be the user performing the import, so the Field Mapping page is a good place to specify a default value for this field. This behavior differs from the NetSuite user interface, where the user entering data on the form is the default for Primary Sales Rep.

Assign Null Values during Field Mapping

It is possible to assign null values to fields on the Import Assistant's Field Mapping page. This assignment causes the value for any existing fields to be set to an empty value.

- Null values are useful when a field has been assigned a default value that you do not wish to propagate across all of the records that you are importing.

For example, if you are a sales representative and enter a lead record in the UI, the Sales Rep field automatically defaults to be you. The Import Assistant uses the same default values that would be assigned through the NetSuite user interface, so if you are a sales representative and import 10,000 lead records, the Sales Rep field automatically defaults to be you for all imported leads. This behavior may not be preferred for such a large volume of leads.

- Null values also are useful for fields with no values in CSV files. For imports that update NetSuite data, you can set fields with no values in CSV files to null instead of enabling the Overwrite Missing Fields advanced option. For more information, see [Overwrite Missing Fields](#).

To provide a null value for a field on the Field Mapping page, click the edit icon in its row to open a popup, and choose the Set Value to Null option. This option is available only for fields that can have null values.

Step Five Save Mapping & Start Import

The screenshot shows the 'Import Assistant' interface at Step 5: Save mapping & Start Import. On the left, a vertical sidebar lists steps: 1 Scan & Upload CSV File, 2 Import Options, 3 File Mapping, 4 Field Mapping, and 5 Save mapping & Start Import (which is highlighted in blue). The main area contains the following fields:

- Save mapping & Start Import**: A sub-section with instructions: "Your CSV files are ready to be imported into your NetSuite account. You can save your Field Mapping to be used again later (optional). To work with a saved import, go to the 'saved Imports' page under the Setup > Import/Export Tab."
- Import Map Name**: A text input field containing "AddCustomers".
- Description**: A text input field containing "Imports new customers.".
- Script ID**: A text input field containing "0002".

At the bottom right are three buttons: "Cancel", "< Back", and "Save & Run".

Complete the following tasks for step five of the Import Assistant:

- In the Import Map Name field, enter a name that you can use as a reference when tracking the import's progress, or if you want to rerun or edit the import lager.
- (Optional) Provide a description of this import.
- In the Script ID field, enter a unique ID that can be used to reference this saved import mapping in SuiteScript.

- For example, you can execute the SuiteScript API [task.CsvImportTask](#) to programmatically run a CSV import job. In this case, you will need to reference the import map by script ID when you create the `nlobjCSVImport` object.
- Only alphanumeric characters plus underline are allowed in this ID.
- The characters you enter are checked for syntax, and then prefixed with CUSTIMPORT and checked for uniqueness. If an import mapping with the same script ID already exists, an error is returned and the mapping is not saved.
- If you do not enter anything, the script ID is left blank. You can edit the import mapping later to add a script ID as needed.

i Note: If the Multi-Language feature is enabled in your account, a separate page is available to enter translations for the import name and description. If you change the import name or description here, translations need to be edited to match the new values. See [Translating Import Map Name and Description](#).

- Choose one of the following options. Click:
 - Save to save the settings without starting the Import Job.
 - Run to start the import job without saving any of the settings defined on the previous page.
 - Save & Run to save this import's settings (including field mappings) of this import for reuse and start the import job.
 - Save As to save these settings under another name rather than overwriting the previously saved import job that you have edited.
 - Save As & Run to save these settings under another name and start the import job.

After you have clicked a button, the Finished page appears. On this page, you can:

- Click **Import Job Status** to review the status of this and other imports. (Not available if you saved the import without running it.) For information, see [Checking CSV Import Status](#).
- Click **View Saved Imports** to review the list of saved imports and/or start an import job based on one of those imports. For information, see [Working with Saved CSV Imports](#).
- Click **Share Import** to open the Share Import dialog, where you can make the import available to other users. For information, see [Sharing Imports](#).
- Click **Start Another Import** to launch the Assistant and start another import.

Immediately after you click the option to run an import, the job is put into a queue to be processed. Each company has its own work queue for CSV imports. If no other CSV import jobs are in the queue, an import job submitted by the Import Assistant is processed immediately. If other jobs are ahead of a newly initiated import, the new import job remains in a status of pending during the time that these other jobs are processed. You can cancel a job during the time that it is pending or being processed. For more information, see [Canceling a CSV Import](#).

i Note: To speed import processing time, you should break large jobs into smaller chunks, to improve performance. There is a limit of 25,000 records per imported file.

Checking CSV Import Status

You can check the status of an import job on the Job Status page. For details, see [Viewing the CSV Import Job Status Page](#).

After an import job has been processed, an email notification is sent to the email address used to log in when the import was initiated. This email provides the status of the import, the number of CSV file records imported successfully, and the number of records not imported. For details, see [CSV Import Email Notifications](#).

Viewing the CSV Import Job Status Page

To view the Job Status page, go to Setup > Import/Export > View CSV Import Status.

For each import, the Job Status page includes the following details:

- Date the import was initiated.
- Job name for the import: defaults to <import type> - <CSV file name> - <email address of logged in user>. (Scripted imports can optionally set another name.)
- Current status of the import: Pending, Processing, Completed, or Canceled.

There is also a less common Retry status. This status occurs when CSV import processing is stopped due to an infrastructure issue. Typically when the issue is resolved, the import should automatically start again from the point of stoppage.

- Percentage of the import that is complete.
- A message indicating the number of records imported of the total number of records in the CSV files (For example, "200 records of 205 imported").
- (In accounts that support the use of multiple queues for imports:) A queue number indicating the queue (1-5) to which the job has been assigned. (Default is 1; this default can be changed on the [Step Two Import Options](#) page of the Import Assistant. See [Queue Number](#).)
- For pending and processing jobs, a Cancel link. (For administrators, this link is available for all pending and processing imports. For other users, this link is available only for their own pending and processing imports.)
- For completed and canceled jobs, a link to a results.csv file that includes any records not processed due to errors or cancellation.
 - The results.csv file provides an opportunity to correct errors and rerun the import for the outstanding records. See [Post Processing Errors](#).
 - Note that users with access to the Job Status page can view the status of all import jobs in the company queue, but most users can only access results.csv files for their own import jobs. Only account administrators can access results.csv files for other users' jobs.
 - The CSV response also indicates if an afterSubmit script fails after a CSV import is finished. If an afterSubmit script runs after a CSV import and the script fails, the records are still created or updated in NetSuite. In this case, you only need to retry the user event script, but should not run the CSV import again. For more information, see [AfterSubmit Script failed, record created with internalId xxx](#).

CSV import job statuses are stored for 30 days and for up to a maximum of 1,000,000 jobs. Import jobs that occurred more than 30 days ago, or which exceed this number of jobs, are eventually purged. Note that this purging can be delayed for technical reasons, so it is possible to see jobs older than 30 days on the status page.

It is not possible to manually delete jobs listed on the status page.

CSV Import Email Notifications

For every CSV import job that is processed, an email is sent to the email address used to log in to NetSuite when the import was initiated. Each email has text like the following:

Greetings from NetSuite!

Thank you for using the CSV Import Assistant. The status of your import is Completed.

Type of records imported: Chart of Accounts
 Job Name: Chart of Accounts - Account - Required Fields.csv - jwolfe@netsuite.com
 File Name : Account - modifiedFile.csv
 Import Map Name : journal entry
 Date and time of import: 3.10.2014
 Number of records imported: 98
 Number of records not imported: 2

If any records were not imported:

- 1) Visit the Import status page at <https://system.netsuite.com/app/setup/upload/csv/csvstatus.nl>
- 2) On the Import status page, download the zip file of the record(s) that failed to import.
- 3) Review the error message(s) provided for each failed record and resolve the error(s).
- 4) Return to the CSV Import Assistant and re-import the record(s).

Sincerely,
 The NetSuite Staff

PLEASE DO NOT RESPOND TO THIS MESSAGE

The number of records not imported includes any records with errors for which import failed. If the import job was canceled during processing, this number also includes any records that had not yet been processed at the time of cancellation.

 **Note:** It is not possible to turn off email notifications.

 **Note:** Email notification is not sent for single journal entry imports.

Canceling a CSV Import

On the CSV import job status page, you can cancel a CSV import job before it is completed. For example, you may need to cancel an import job that you have discovered includes incorrect data. Or, you may want to cancel a large CSV import job to allow smaller jobs to be processed first, and then restart the larger job later.

To cancel a CSV import:

1. Go to Setup > Import/Export > View CSV Import Status.
2. Click **Cancel** in the far right column of the page.
 - The Cancel link is available for an import job during the time that its status is Pending or Processing.
 - Administrators see the Cancel link for all pending and processing import jobs, whereas other users see this link only for their own jobs.
3. The Status column displays "Canceling" until cancellation is complete.
4. The next import job in the queue, if any, begins immediately after cancellation is complete.

Other results of import job cancellation vary depending on the job's status when you click **Cancel**.

- If a job's status is Pending when you cancel it, the job is removed from the Job Status page after cancellation is complete.
- If a job's status is Processing when you cancel it, the following occurs after cancellation is complete:
 - The Status column of the Job Status page displays "Canceled".
 - The Message column lists the number of records imported before cancellation.
 - The CSV Response column displays a link to a results.csv file containing any rows that were processed before cancellation but had errors, and any rows not processed before cancellation.

- An email status notification is sent to the email address used to log in when the import was initiated.
 - This email indicates the number of CSV file records imported, and the number not imported.
 - The number of records not imported includes both records with errors and records that were not processed due to the cancellation.
 - For more details, see [CSV Import Email Notifications](#).



Note: Because the next import job in the queue begins immediately after an import job's cancellation is complete, if you need to cancel multiple import jobs, you should cancel them in reverse order, beginning with a job that is not yet processing.

CSV Import Error Reporting

The CSV Import Assistant provides robust error handling throughout all stages of the import process.

Some basic validation is performed on the fields before the import is performed. For example, if a number is expected and a string is encountered, an error appears.

Invalid Character Errors

If a file cannot be processed due to invalid characters, you receive an error message. The error message describes the type of error and provides the row number, column name, and value that caused the error.

Incorrect Character Encoding

In many cases, an invalid character error occurs because the incorrect character encoding has been chosen. You may elect to:

- Return to the Scan & Upload CSV File step, change the character encoding option, and click next to scan the files again, or
- Close the Import Assistant, correct the source files, and then upload again.

For information about supported character encodings, see [Choose Import Character Encoding](#).

Numbers Converted to Exponents

If you use Microsoft Excel to create your CSV file, you might notice that narrow columns containing long numbers appear with exponential notation. Excel uses exponential notation if the value is too long for the width of the column, which could result in the import taking longer than it should. To avoid a long import, open the CSV file in a text editor such as Notepad to ensure that the correct numbers are submitted in the import.

Invalid Country Codes

The Import Assistant does not support the use of country codes in imported CSV files. The following error is returned if a file includes country codes rather than localized country names: "Invalid country reference key US".

To avoid this error, change country codes to country names. For more information, see [Country Names for CSV Import](#).

Invalid Subsidiary Errors

For an import of entities such as customers, partners, or vendors, you may receive errors stating that subsidiaries are not valid for their associated entities, if the subsidiary names are not formatted as

expected. Errors are like the following: "Transaction subsidiary <subsidiary_name> is not valid for entity <customer_name>. Please choose a different entity."

To avoid these errors, your CSV file needs to include the full hierarchical names for subsidiaries, with colons used as separators. The format is <grandparent_name> : <parent_name> : <subsidiary_name>. An example is Consolidated Parent Company : UK Subsidiary : German Subsidiary.

Invalid Department Reference Key

You may receive errors like the following: "Invalid department reference key for xxx". If you receive this error, verify the following:

- Ensure that the department is spelled correctly. If a parent-child relationship exists, make sure that the names of the parent departments are included. For example, if Accounting is a child of Finance, the department must be entered as Finance : Accounting.
- Ensure that the department is active. Go to Setup > Company > Classifications > Departments. Check the **Show Inactives** box and make sure that the department specified in the error message is not inactive.
- If internal IDs are used, on the Field Mapping page, click the edit icon beside the **Department** field. Then, click **Choose Reference Type** and select **Internal Id**.
- If external IDs are used, on the Field Mapping Page of the CSV import, click the edit icon beside the **Department** field. Then, click **Choose Reference Type** and select **External Id**.

Exceeded Script Usage Limit Errors

You may receive errors stating that you exceeded the script execution usage limits. The SuiteScript governance model tracks usage points on the API level and script type level. When certain APIs are called in a script, their assigned usage points are added and the total is compared to the script's usage limit. If the total usage points consumed by all APIs in a script exceeds the usage limit for that script's type, the error is thrown. For more information, see the help topics [Script Type Usage Unit Limits](#) and SuiteAnswers article 45313.

Post Processing Errors

Post processing errors occur after the data has been imported into the NetSuite database. Application errors, such as an invalid value in an enumerated field, or a reference that does not match the record type, are examples of post processing errors.

Another example of a post processing error is a problem with an afterSubmit script. When an afterSubmit script runs after a CSV import, and the script fails, the records are still created or updated in NetSuite. The CSV response indicates that the record has been created or updated even if an afterSubmit script that runs after the CSV import fails. For more information, see [AfterSubmit Script failed, record created with internalId xxx](#).

If your import incurs post processing errors, the import email notification, that goes to the email address used to log in to the session that initiated the import job, contains a zip file that lists the errors, including the column name and number of rows affected. You can go back and fix these errors, start the Import Assistant, and upload your corrected file. For more details, see [CSV Import Email Notifications](#).

For additional information about CSV import errors, see [CSV Import Error Messages](#).

Deleting Incorrect CSV Data

If multiple records with data loaded through the CSV import are incorrect, you must delete each record one at a time. No mass delete option is provided at this time.

However, you can speed up the process of deleting the field data, instead of having to edit the data inline one field at a time.

To delete field data by editing inline :

1. Enable the **Edit** button on the search results of the data containing the fields you want to delete.
 2. Select an editable element, in the first row, then hold down the Shift key and select the same element in the last row.
 3. With all of those fields in the column highlighted, choose delete from the menu on the left.
- You can also set your segment size higher in Home > Set Preferences, to do more than 50 at a time.

For more information, see the help topic [Using Inline Editing](#).

Working with Saved CSV Imports

The Import Assistant can save import settings so that you can reuse them for later jobs. You can review mappings for your previously completed import jobs on the Saved CSV Imports page. If you are an administrator, you can review mappings for all previously completed import jobs in your account.

To work with a previously saved CSV import:

1. Go to Setup > Import/Export > Saved CSV Imports.
2. The Saved CSV Imports page lists all of the saved import mappings to which you have access. These include mappings you have saved as well as those saved by others that include you in the audience.
3. This page includes the following columns:
 - ID – unique internal ID for saved mapping
 - Name – name given to the field mapping in the Import Assistant
 - Translate – link to CSV Import Map Translation dialog (only in accounts where the Multi-Language feature is enabled)
 - Field Map – link to popup view of field mappings
 - Description – description entered in the Import Assistant
 - Type – record type of field mappings
 - Owner – user who created the field mapping in the Import Assistant, or another user selected in the Share Import dialog
 - Created – date when mapping was first saved
 - Script ID – unique ID defined on the Save Mapping & Start Import page, used to reference the import map in SuiteScript



Note: By default, import jobs created before Version 2012 Release 2, when this field was added, do not have script ID values. Import jobs created as of that release or later default to a script ID of CUSTIMPORT. If a script ID is set, it is prefixed with CUSTIMPORT.

- Last Modified - date when mapping was last changed
 - Access - indicator of whether mapping is private, shared, or public, and link to Share Import dialog
 - Delete - button to delete mapping, available only if you are the owner
4. On the Saved CSV Imports page, you can do the following:

- Select from the Record Type list to display mappings for a single record type.
- Open the saved import in the Import Assistant to edit its settings or rerun it, by clicking the link in the Name column. See [Editing a Saved Import](#).
- In accounts where the Multi-Language feature is enabled, enter translations for a saved import's name and description. See [Translating Import Map Name and Description](#).
- Review the import's mappings by clicking **View** in the Field Map column. A popup opens displaying the mapped source and target fields, helping you to identify the correct import without having to go through the pages of the Import Assistant.
- Make an import mapping available to other users, or define a different owner for it, by clicking the link in the Access column. For more information, see [Sharing Imports](#).
- Delete a saved import mapping, by clicking the  button in the Delete column. This button is available only for mappings that you own. Only an administrator can delete saved CSV imports owned by other users.
- Click the New button to start the Import Assistant and create another import job.

The popup available from the View link in the Field Map column looks like the following:



Note: You can use SuiteBundler to include CSV import maps in customization bundles. See [Including Import Maps and CSV Files in SuiteBundler](#).

Note: The SuiteCloud Development Framework (SDF) supports saved CSV imports. You can create, modify, import, and export saved CSV imports, and move your saved CSV imports between accounts. For more information, see the help topic [savedcsvimport](#).

Editing a Saved Import

A saved import map that is close to what you need for your import job may be available. You can edit this saved import to run your import job instead of creating a new import map.

To edit a saved import for reuse:

1. Go to Setup > Import/Export > Saved CSV Imports.
2. On the Saved CSV Imports page, find the import map that you want to edit, and click its link in the Name column. This action starts the Import Assistant.

3. In the Import Assistant, make changes to the import as necessary, as described in [Step One Scan & Upload File](#), [Step Two Import Options](#), [Step Three File Mapping](#), and [Step Four Field Mapping](#).

 **Note:** You cannot remove a previously mapped required field from a saved import.

4. On the Save Mapping & Start Import page, review the Import Map Name.
 - If you want your changes to overwrite the existing saved import map, and to maintain the same name, do not change the name here.
 - If you want to give the import map a different name, edit the name here.
 - If you want to edit the description, edit it here.

 **Note:** If the Multi-Language feature is enabled in your account, a separate page is available to enter translations for the import name and description. If you change the import name or description, translations need to be edited to match the new values. See [Translating Import Map Name and Description](#).

5. Review the options available under the Save button in the lower right corner of the Import Assistant:
 - If you want your changes to overwrite the existing saved import map, click **Save**, or click **Save & Run**.
 - If you want to create an additional import map, click **Save As**, or click **Save As & Run**. Be sure to change the name of the import from what it was previously.
6. You can use SuiteCloud Development Framework (SDF) to manage saved CSV import maps as part of file-based customization projects. For information about SDF, see the help topic [SuiteCloud Development Framework Overview](#).

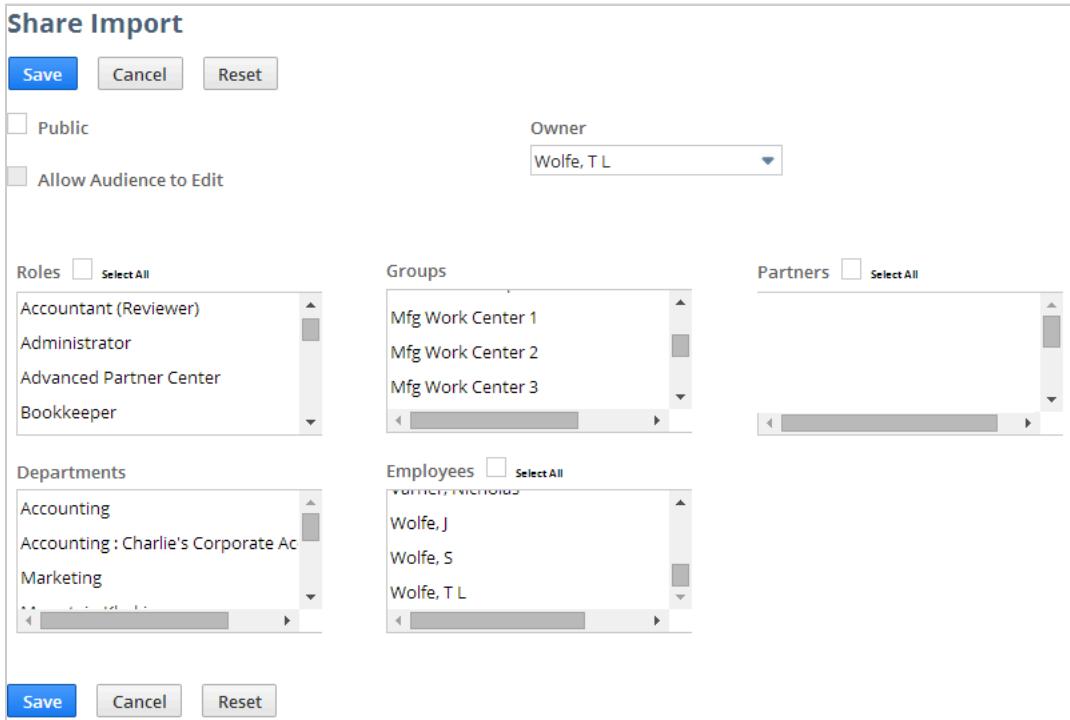
You can use the Copy to Account feature to copy an individual saved CSV import map to another of your accounts. When you open a saved CSV import map in the Import Assistant, a clickable **Copy to Account** option is available in the upper right corner. For information about Copy to Account, see the help topic [Copy to Account Overview](#).

Sharing Imports

You can share your saved import maps with other users. After you make an import available to other users, they can see the import on their Saved CSV Imports list, and can use it to run an import job. This feature prevents duplication of effort, and ensures consistency of imported data.

- In the Share Import dialog, you can:
 - Check the Public box to make the import map available to all users.
 - Check the Allow Audience to Edit box to allow users with whom you share the import map to make changes and save it with the same name. If you do not enable this option, users can make changes but can only select Save as to save the import map with a different name.
 - Change the owner by selecting another user from the dropdown list.
 - If you do not want to share the import map with all users, create a more limited audience by making selections from the fields provided.
 - Only roles and departments that include users with the Import CSV file permission are listed in this dialog.
 - Note that if you choose both role and department options, a user must belong to one of the selected roles **and** one of the selected departments to access the import map. For all other cases, a user need only belong to one **or** the other.

Note: You can open the Share Import dialog from the Finished page of the Import Assistant or from the Saved CSV Imports page.



Opening the Share Import Dialog from the Import Assistant

- After you have saved an import job, on the Finished page, click **Share Import**.

Opening the Share Import Dialog from the Saved CSV Imports Page

- Go to Setup > Import/Export > Saved CSV Imports to see all imports to which you have access.
- Review an import's setting in the **Access** column to see if it has been shared. Three settings are possible:
 - Private: Only the import owner (by default, the creator) can access the import map.
 - Public: All users with the Import CSV File permission can access the import map.
 - Shared: Selected users can access the import map.
- Click a link in the **Access** column to open the **Share Import** dialog.

Note: If you are an administrator, you can see all users' saved import maps on the Saved CSV Imports page, and you can set them to be shared with other users.

Translating Import Map Name and Description

If the Multi-Language feature is enabled in an account, saved import owners and account administrators can define translations for saved CSV imports' names and descriptions so they match the language of the NetSuite user interface.

When the NetSuite user interface is set to a different language, translated import names and descriptions display in the Saved CSV Imports list page.

Before you can translate import map names and descriptions, translation languages need to be selected at Setup > Company > General Preferences, on the Languages subtab. For details, see the help topic [Configuring Multiple Languages](#).

Note: The Languages subtab at Setup > Company > General Preferences lists both system-supported languages that can be used for the NetSuite user interface (and are available at Home > Set Preferences), and additional languages that can be used for website translations only (and are not available at Home > Set Preferences). You should only enter translations for role names in system-supported languages, because these are the only languages that can be displayed in the user interface.

When languages have been set, you can enter translations in the CSV Import Map Translation dialog, available from the Saved CSV Imports list page.

Important: It is not possible to translate in the UI saved imports you have uploaded via SDF.

To define translations for a saved CSV import map:

1. Go to Setup > Import/Export > Saved CSV Imports.
2. On the Saved CSV Imports page, click **Translate** for the import.

ID	NAME	TRANSLATE	FIELD MAP	DESCRIPTION	TYPE	OWNER	CREATED	LAST MODIFIED	SCRIPT ID	FROM BUNDLE	ACCESS	DELETE
23	IC Journal Entry	Translate	View		Journal Entry	Smith, Jane	04.08.2014 6:52 am	04.08.2014 6:52 am		Private		

Important: This link is only available if you are the owner of a saved import or an account administrator.

3. In the **CSV Import Map Translation** dialog, enter translations for the name and click **Done**, enter translations for the description and click **Done**, and click **Save**.

NAME	TRANSLATION	DESCRIPTION	TRANSLATION
IC Journal Entry		Intercompany Journal Entry	

OK **Cancel**

Save **Cancel**

Bosnian
Czech
English (International)
Done

- You can return to this page as needed to edit translations later.

- You also can edit the original Name and Description values on this page. (Be sure to edit related translations after you edit an original value.)
- In the Name and Translation fields in the CSV Import Map Translation page you can enter up to 64 characters.

Including Import Maps and CSV Files in SuiteBundler

Saved import mappings are available on the Saved CSV Imports page, according to the access and audience defined for them, as described in [Sharing Imports](#). All of the mappings listed on your Saved CSV Imports page also are available to you in SuiteBundler, a NetSuite tool for packaging customization and configuration objects for sharing among accounts, if you have access to SuiteBundler.

You can add saved import mappings to a customization bundle by selecting the Saved CSV Imports object type in the Bundle Builder.

The screenshot shows the 'Select Objects' step of the SuiteBundler Bundle Builder. The 'Object Types' section on the left has 'CSV Imports' and 'Saved CSV Imports' selected (highlighted with red boxes). The 'Choose Objects' section in the center lists various objects, with 'Saved CSV Imports' checked. The 'Bundle Contents' section on the right shows files like CSV Imports, contact map 2, etc.

You also can include CSV files in SuiteBundles. These CSV files may be used as import template files or to store actual data to be imported. If you want to include a CSV file in a SuiteBundle, upload the file to the File Cabinet, and after it has been uploaded, edit the file record to check the Available for SuiteBundles box, as shown in the following screenshot. The file is then listed under the Files object type in the Bundle Builder, as shown in the above screenshot.

Note: When including CSV files in a bundle, do not specify default field values, because the target account field values use internal IDs that are different between accounts. SuiteBundler does not remap those values to ones on the target account. After the bundle has been installed in the target account, the default values can be manually mapped using the Import Assistant.

The screenshot shows the 'File Cabinet' interface. A file named 'TestCustomers.csv' is selected. In the top right corner, there are several checkboxes: 'Inactive' (unchecked), 'Available for SuiteBundles' (checked and highlighted with a red border), 'Hide in SuiteBundle' (unchecked), and 'Available Without Login' (unchecked).

For more information about using the File Cabinet, see the help topic [File Cabinet Overview](#). For information about building SuiteBundles, see the help topic [Creating a Bundle with the Bundle Builder](#).

Setting CSV Import Preferences

Note: These preferences do not apply to simple imports.

If you are an account administrator, or you have the Set Up CSV Preferences permission, you can set the following CSV preferences. These settings appear on the Import Assistant's Import Options page, and the settings that you enter are the defaults seen by all users.

Any changes that users make in the Import Assistant override the default preferences entered on the CSV Import Preferences page.

To set CSV import preferences:

1. Go to Setup > Import/Export > CSV Import Preferences.
2. On the CSV Import Preferences page, enable or disable options, and click **Save**.

See the sections below for information about available preferences:

- [Custom Multi-Select Value Delimiter](#)
- [Log System Notes For Custom Fields](#)
- [Run Server SuiteScript and Trigger Workflows](#)
- [CSV Column Delimiter](#)
- [CSV Decimal Delimiter](#)

Custom Multi-Select Value Delimiter

By default, the Import Assistant expects the pipe “|” to be the delimiter for multi-select field values. The Assistant also supports the use of any single character as a custom multi-select delimiter.

To specify that a custom character be used as a delimiter, instead of the pipe, for all import jobs in your account, enter the character in this field. The Import Assistant then interprets the custom character, and not the pipe, to indicate a multi-select relationship. Users can enter an alternate character in the Advanced Options area of the Import Options page, that overrides the account-level character for a specific import job.

Log System Notes For Custom Fields

Enable this option to create system notes during the import of data from custom fields. This option is disabled by default. Disabling system notes for custom fields improves performance and is recommended for imports that add data.



Important: System-generated notes are used in NetSuite to track changes to a record, including what action was taken, when the record was modified, and the user that was responsible for the change. These notes are important for maintaining a complete audit trail. If you turn off system-generated notes for custom fields, specific changes related to custom fields within the imported record are **not** recorded in NetSuite, although all changes for standard fields are logged as usual. If a custom field contains sensitive information that is critical for audit purposes, you should **not** disable system-generated notes. For more information about system notes, see the help topic [System Notes Overview](#).

Run Server SuiteScript and Trigger Workflows

Enable this option to run any server-side SuiteScript during the CSV import process. Note that running server SuiteScript will slow the save process.

This option must be enabled for a CSV import to trigger a workflow that is based on record creation or update. If this option is not enabled, workflows do not run when a CSV import creates or updates records.

You typically should enable this option when you are synching “live” data or running a partner application (for example, Outlook synchronization).

You should disable this option when you are doing a historical import.



Note: To enable or disable this option, you must be logged in to NetSuite with a Role that has full permission to:

- Import CSV File.
- Control SuiteScript and Workflow Trigger per CSV Import.

For more information on how to set up permissions for a role, see the help topic [Setting Permissions](#) under the [Customizing or Creating NetSuite Roles](#) topic, or look for the Answer Id 63674 in SuiteAnswers.

CSV Column Delimiter

By default, the Import Assistant expects comma-separated values. However, you can also import CSV data that uses a different type of separator. Other valid options are the colon (:), semicolon (;), pipe (|), space (), and tab.

CSV Decimal Delimiter

By default, the Import Assistant expects the period to be used as the decimal mark in numbers. If you use the comma as the decimal mark in the CSV files you import, you can set it to be the default decimal delimiter for CSV data.

Guidelines for CSV Import Files



Note: You should scrub your data before importing it into NetSuite.



Note: To use the Import Assistant, you need full permission for the Import CSV File feature. The types of data that you can import with the Assistant depend upon your assigned role and permissions, and on your account's enabled features. For more information, see the help topic [NetSuite Permissions Overview](#).

Before you attempt to import data with the Import Assistant, you need to set up CSV files and review their formatting carefully, to avoid errors that prevent import and to ensure that data is imported with correct values.

To help with the setup of your CSV files:

- Review guidelines particular to each record type, available from links in [Supported Record Types for CSV Import](#).
- Review general tips that apply to imports of all record types, in [Tips for Successful CSV Imports](#).

You can create a CSV import template file using the list view for the record type, even if the list is empty. Select the view that displays the most appropriate columns, set the view to show only the columns needed for your import, and then click the Export — Microsoft Excel icon at the top of the list. Open the exported file and save the values to be imported. The following example shows a customized view of the Items list page. Click Export — Microsoft Excel, and then use the exported file to create the CSV import file.

NAME A	DISPLAY NAME	CATEGORY	BIN NUMBER	BASE PRICE	LAST PURCHASE PRICE	TAX SCHEDULE
Stainless-Steel Scalpel Handle	Stainless-Steel Scalpel Handle	Equipment > Surgical Equipment		13.75	\$1	
Weislauer Retractor	Weislauer Retractor 2 X 3 Teeth	Surgical Equipment		13.75	\$1	
Weislauer Retractor	Weislauer Retractor 2 X 3 Teeth	Surgical Equipment		119.70	\$1	
Wiener Skin Hook	Wiener Skin Hook	Equipment > Surgical Equipment		119.70	\$1	
Wiener Skin Hook	Wiener Skin Hook	Surgical Equipment		32.00	\$1	
Ten Percent		Equipment > Surgical Equipment		32.00	\$1	
Thousand Dollar Item	For Sale			10.00%	\$2	
Tongue Depressor				1,000.00	\$1	
Training	For Sale	Comprehensive equipment training for up to 100 employees. Training starts at \$100.00 per employee.	Services	14.00	7.51	\$1
Wheelchairs				100.00	\$2	
Invacare IVC 9000 XT Recliner Wheelchair	Invacare IVC 9000 XT Recliner Wheelchair	Stretchers and Wheelchairs		945.00	\$1	
Invacare IVC 9000 XT Recliner Wheelchair	Invacare IVC 9000 XT Recliner Wheelchair	Equipment > Stretchers and Wheelchairs		945.00	\$1	
Winco Transport Wheelchair 116	Winco Transport Wheelchair 116	Equipment > Stretchers and Wheelchairs		190.00	\$1	
Winco Transport Wheelchair 116	Winco Transport Wheelchair 116	Stretchers and Wheelchairs		190.00	\$1	
Writing tablets				5.00	1.00	\$1
X-Ray Processing	X-Ray Processing	For Resale	Services	68.80	\$2	
X-ray Shield	Inv Reporting bug			350.00	\$1	

If you want to create your own CSV import template files with columns that automatically map to NetSuite data, review the [SOAP Schema Browser](#) for details about fields for each record type. For information about working with this tool, see the help topic [SOAP Schema Browser](#).

For information about the available import types, see the following:

- [Accounting Import Type](#)
- [Activities Import Type](#)
- [Classification Import Type](#)

- Communications Import Type
- Custom Records Import
- Customization Import Type
- Employees Import Type
- Items Import
- Payment Instruments Import Type
- Relationships Import Type
- Rules Setup Import Type
- Subscription Billing Import Type
- Supply Chain Import Type
- Support Import Type
- Transactions Import Type
- Website Import Type

Supported Record Types for CSV Import

The Import Assistant includes an Import Type list where you can select the category of data you want to import. After you select an import type, you select the record type of data to import. The Import Assistant supports the following record types. Click a link below to review guidelines for a record type, so that you can prepare your CSV data for import.



Note: The data that you can import depends on your assigned role and permissions, and on your account's enabled features. To use the Import Assistant for most record types, you must have the **Import CSV File** permission. For questions about roles or permissions, contact your administrator.

- Accounting Import Type
 - Budget Exchange Rates Import
 - Chart of Accounts Import
 - Consolidated Exchange Rates Import
 - Currency Exchange Rates Import
 - Expense Categories Import
 - Fair Value Price CSV Import
 - Global Account Mapping Import
 - Item Account Mapping Import
 - Item Collection Import
 - Item Collection Item Map Import
- Activities Import Type
 - Events Import
 - Phone Calls Import
 - Resource Allocations Import

- Tasks Import
- Classification Import Type
 - Class Import
 - Custom Segment Value Import
 - Department Import
 - Location Import
 - Merchandise Hierarchy Node Import
- Communications Import Type
 - Messages Import
 - Notes Import
- Custom Records Import
- Customization Import Type
 - Custom List Import
- Employees Import Type
 - Bonus Import
 - Employees Import
 - Expense Report Import
 - Imported Employee Expense Import
 - Job Import
 - Time-Off Change CSV Import
 - Track Time Import
- Items Import
- Payment Instruments Import Type
- Relationships Import Type
 - Billing Account Import
 - Contacts Only Import
 - Customer-Subsidiary Relationship Import
 - Customers Only Import
 - Customers and Contacts Together Import (See [Importing Entities and Contacts Together](#))
 - Group Import
 - Projects (Jobs) Import
 - Leads Only Import
 - Leads and Contacts Together Import (See [Importing Entities and Contacts Together](#))
 - Partners Import
 - Prospects Only Import
 - Prospects and Contacts Together Import (See [Importing Entities and Contacts Together](#))
 - Sales Channel Import
 - Vendor-Subsidiary Relationship Import
 - Vendors Import
- Rules Setup Import Type

- Foreign Currency Variance Posting Rule Import
- Subscription Billing Import Type
 - Price Book Import
 - Price Plan Import
 - Subscription Import
 - Subscription Change Order Import
 - Subscription Line Import
 - Subscription Plan Import
 - Usage Import
- Supply Chain Import Type
 - Bill of Materials Import
 - Bill of Materials Revision Import
 - Bin Import
 - Item Location Configuration Import
 - Item Process Family Import
 - Item Process Group Import
 - Item Revision Import
 - Manufacturing Cost Template Import
 - Manufacturing Routing Import
 - Order Type Import
 - Pick Strategy Import
 - Zone Import
- Support Import Type
 - Issues Import
 - Solutions Import
 - Support Cases Import
 - Topics Import
- Transactions Import Type
 - Advanced Intercompany Journal Entry Import
 - Cash Sale Import
 - Check Import
 - Credit Card Charge Import
 - Credit Card Refund Import
 - Credit Memo Import
 - Custom Transactions Import
 - Customer Payment Import
 - Estimate Import
 - Fixed Assets Import (see the help topic [Updating Asset Records Using CSV Import](#))
 - Inventory Details on an Inbound Shipment
 - Inventory Adjustment Import

- Inventory Cost Revaluation Import
- Inventory Transfer Import
- Invoice Import
- Item Demand Plan Import
- Item Supply Plan Import
- Journal Entry Import and Intercompany Journal Entry Import (Use this record type to import multiple journal entries at a time. To import a single journal entry, see [Single Journal Entry Import](#).)
- Opportunity Import
- Order Reservation Import
- Paycheck Import
- Period End Journal Entry Import
- Purchase Order Import
- Return Authorization Import
- Sales Order Import
- Statistical Journal Entry Import
- Transfer Order Import
- Vendor Bill Import
- Vendor Credit Import
- Vendor Payment Import
- Vendor Prepayment Import
- Vendor Return Authorization Import
- Website Import Type
 - Site Category Import
 - CMS Page Import
 - Commerce Category Import

Specialized two-step Import Assistants are available for the following import tasks:

- Single Journal Entry Import
- Budget Import
- Single Inventory Worksheet Import
- Project Tasks Import
- Web Site Redirects Import

Accounting Import Type

For information about accounting imports, see the following:

- Budget Exchange Rates Import
- Chart of Accounts Import
- Consolidated Exchange Rates Import
- Currency Exchange Rates Import

- Expense Categories Import
- Fair Value Price CSV Import
- Global Account Mapping Import
- Item Account Mapping Import
- Item Collection Import
- Item Collection Item Map Import

Budget Exchange Rates Import

You can import budget exchange rates using CSV import if your organization.

The Budget Exchange Rates table is available at Lists > Accounting > Budget Exchange Rates. In this table you can maintain exchange rates between the child and parent subsidiaries for use in the budgeting process.



Note: To access this table, the Multiple Currencies and Multiple Budgets features must be enabled.

The Budget Exchange Rates table is similar to the Consolidated Exchange Rates table. In NetSuite OneWorld, NetSuite uses the Consolidated Exchange Rates table to initially populate the Budget Exchange Rates table. Then, you can update and maintain the Budget Exchange Rates table as necessary.

This table shows the exchange rates for each subsidiary's base currency in relation to the currencies used by its parent subsidiaries, for each period. Table columns include: accounting period, accounting book, whether the period is closed, the From (child) subsidiary, the To (parent) subsidiary, and exchange rates.

Rates in this table are either direct or indirect (derived). Direct rates are rates set between a child and parent subsidiary. Direct rates are set by a user and may be edited. Indirect rates are rates set between a grandchild and grandparent subsidiary. Indirect rates are always calculated by the system and cannot be edited. Budget exchange rates include three different rate types per period, subsidiary, and accounting book: Average, Current, and Historical.

To import updated budget exchange rate data, in the Import Assistant, set the Import Type to Accounting and the Record Type to Budget Exchange Rate. Only the Update data handling option can be selected for the import.

The fields that you can map and update are:

- Average Exchange Rate
- Current Exchange Rate
- Historical Exchange Rate

The import also requires an external ID or internal ID. For information about using external and internal IDs, see [Select Reference Types](#). The import updates successfully if the period is not closed, is not derived, and does not include an elimination subsidiary.

For more details about how budget exchange rates are handled in NetSuite, you can review the Lists > Accounting > Budget Exchange Rates page, and see the help topic [Budget Exchange Rates](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Chart of Accounts Import

The Chart of Accounts import adds ledger accounts to the Account list record. Because the Chart of Accounts is the basis for all company data, you should complete this import first when you are setting up a new NetSuite account.

Please note the following before importing or updating account records with the Import Assistant:

- This import is not available in the NetCRM product.
- You cannot create a new account or update an existing account with an account number that already exists. You receive an error that the account number is already used.
- To update account numbers on the import, the Use Account Numbers option must be enabled in Setup > Accounting > Accounting Preferences > General.
- If your account is using NetSuite OneWorld, the Subsidiaries field is a required field for Chart of Accounts imports. You must map the NetSuite Subsidiaries field to a field in your CSV file, or the import will fail.
- For information about setting up parent/child relationships for imported account records, see [Referencing Child Accounts by Name and Number](#).

For details about fields that can be mapped in the Account record, see the SOAP Schema Browser's [account](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Account Localization Sublist

In OneWorld accounts that have multiple languages enabled, Account Localization sublist information can be included in the chart of accounts import. The Account Localization sublist does not have a key. The records in the sublist can be language, name, accounting context, and number.

Chart of Accounts Import Example

The following tables illustrate sample data in a Chart of Accounts import.

External Id	Account Number	Account Name	Account Type	Description	Date	Currency	Restrict to Class	Subaccount of
CA-ACCT-01	515652	Direct Labor	Expense	Expense account for labor	01/01/2016	YEN	Recurring Business	Project Cost
CA-ACCT-02	987546	Sales Tax Payable	Other Current Liability	Sales tax liability	01/16/2016	USD	Recurring Business	Tax Liability

Referencing Child Accounts by Name and Number

For reference types in the CSV file, data values must be written exactly as they appear in the list in the NetSuite record form.

For example, if the Income Account dropdown list has an option entitled 40500 Sales, you must specify the full name "40500 Sales" in the CSV file for the reference type to be imported correctly after it is mapped on the Import Assistant's Field Mapping page.

- You cannot provide only the value "40500".

- You cannot provide only the value "Sales".
- The account number and name must be separated by a single space, not a colon or other separator.

For more information about reference types, see [Select Reference Types](#).



Note: Account references are different for budget imports; they require only names and not numbers. For more information, see [Budget Template File Tips](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Consolidated Exchange Rates Import

You can import consolidated exchange rate updates using CSV import if your organization:

- Uses NetSuite OneWorld.
- Has multiple subsidiaries with different base currencies.
- Maintains a table of consolidated exchange rates. The Consolidated Exchange Rates table is available at Lists > Accounting > Consolidated Exchange Rates. For more information, see the help topic [Consolidated Exchange Rates](#).

To import updated consolidated exchange rate data, in the Import Assistant, set the Import Type to Accounting and the Record Type to Consolidated Exchange Rate. Only the Update data handling option can be selected for the import.

The fields that you can map and update are:

- Average exchange rate
- Current exchange rate
- Historical exchange rate

The import also requires an external ID or internal ID. For information about using external and internal IDs, see [Select Reference Types](#). The import updates successfully if the period is not closed, is not derived, and does not include an elimination subsidiary.

For more details about how consolidated exchange rates are handled in NetSuite, you can review the Lists > Accounting > Consolidated Exchange Rates page, and see the help topic [Consolidated Exchange Rates](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Currency Exchange Rates Import

When the Multiple Currencies feature is enabled, you can use the Import Assistant to import currency exchange rates into NetSuite. Exchange rates are stored as a list in NetSuite, with each line in the list representing an exchange rate between a base currency and a foreign currency. For more information, see the help topic [Currency Management](#).

NetSuite OneWorld accounts may have multiple base currencies, with different base currencies set for different subsidiaries. Accounts that are not OneWorld have a single base currency only. Note that

exchange rates defined for a base currency in a OneWorld account apply to all subsidiaries using that base currency.

The Currency Exchange Rates import requires the following values for each rate to be imported:

- **Currency** - the foreign currency to which the rate is applied
 - **Exchange Rate** - the number of base currency units that equal one foreign currency unit
 - **Effective Date** - the first date that the rate should be used
 - **Base Currency** - (OneWorld only) the base currency to which the rate is applied
- For accounts that are not OneWorld, you do not have to define a base currency per rate, because the base currency is always the same.
- **Exchange Rate Type** - (only when the Currency Exchange Rate Types feature is enabled) the currency exchange rate type associated with the exchange rate
- You can select the value in your Field Mapping if the import file does not include a value. The Import Assistant automatically selects the default currency exchange rate type. For information about the feature, see the help topic [Currency Exchange Rate Types](#).

Update data handling is not supported for this import, to be consistent with currency exchange rates functionality in the user interface. To update a rate between two currencies, add a record with the same base currency and foreign currency, the new exchange rate, and a new effective date. For example:

- If NetSuite has the following exchange rate stored:

Base Currency	Foreign Currency	Exchange Rate	Effective Date
US Dollar	Euro	1.2287	7/1/2012

- To change the rate, you include a line like the following in your CSV import file, with a new exchange rate and a new effective date. When the import is completed, this new rate will be used from the new date going forward.

Base Currency	Foreign Currency	Exchange Rate	Effective Date
US Dollar	Euro	1.2298	8/1/2012

For more details about how currency exchange rates are handled in NetSuite, you can review the Lists > Accounting > Currency Exchange Rates page, and see the help topic [Currency Exchange Rates](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, in this case Accounting, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Expense Categories Import

An expense category record represents a type of expense that can be referenced on an employee's expense report. For example, you might have expense categories named "Meals," "Transportation," and "Lodging." Every expense listed on an expense report must belong to an expense category. You can create and update expense category records using the CSV Import Assistant.

The expense category record is available only when the Expense Reports feature is enabled, at Setup > Company > Enable Features, on the Employees subtab. When the feature is enabled, "Expense Categories" appears as an option in the Record Type dropdown list when you set Import Type to Accounting.

In the UI, you access the expense category record by choosing Setup > Accounting > Expense Categories > New. For details on the process of manually creating an expense category, see the help topic [Creating an Expense Category](#).

Understanding the Rate is Required Field

Before you begin working with expense categories, you need to understand the Rate is Required field. The purpose of this field is to determine the behavior of expenses that use this category. That is, when Rate is Required is set to Yes, an expense report line item using this category must have values in the Rate and Quantity fields. These values are then used to determine the amount of the expense. Note that you can also set default rates for your expense categories. You set default rates by using either the Default Rate body field (in accounts that are not OneWorld) or the Rates sublist (in OneWorld accounts).

Related to your ability to create defaults, be aware of the following: If your account is **not** a OneWorld account, the Rate is Required value affects the availability of the Default Rate field. That is, when the value of Rate is Required is Yes for any particular expense category, you can import a value for Default Rate for that category. Otherwise, the field is not available. The Default Rate field determines the default rate for the category throughout your organization.

If your account **is** a OneWorld account, you use the Rates sublist, which stores a default rate for the category for each subsidiary. Unlike the Default Rate body field, an expense category's Rates sublist is available even when you set the Rate is Required value to No.

The default value of Rate is Required is No.

Expense Category Fields

This section summarizes the body fields supported for mapping.

Field	Notes	Required?
Default Rate	Available only for expense category records on which Rate is Required is set to a value of Yes. Further, available only when the account is not a OneWorld account. (In OneWorld accounts, this field is replaced by the Rates sublist.)	No
Description	The description displays on the Expense Categories list view and on the expense category record. The description is not visible to employees using the standard expense report form.	No
Expense Account	The account to which all expenses of this category will post. If you use NetSuite OneWorld, the account determines for whom the new expense category is available. Specifically, a category is available only to employees within the subsidiaries associated with this account.	Yes
ExternalId	Can be used as a unique identifier for the record.	No
Inactive	Possible values are: <ul style="list-style-type: none"> ■ No — Makes the category active and therefore available to employees to choose when working on their expense reports. ■ Yes — Makes the category inactive and unavailable to employees. Do not use an abbreviation such as "Y" or "N." If you do, the Import Assistant ignores your input.	No, but if you do not map a recognizable value for this field, the system uses the default value, which is No.

Field	Notes	Required?
Internal ID	A read-only field that is a unique identifier of the record. Internal ID is available for mapping only when the Data Handling option on page 2 of the Import Assistant is set to 'Update.'	No
Name	A label for the category. If the category is active, the Name text displays as a choice in the Category list on the standard expense report form.	Yes
Rate is Required	When Rate is Required is set to a value of Yes, an expense report line item using this category must have values in the Rate and Quantity fields. These values are then used to determine the amount of that expense.	Yes, but if you do not map a value, the system uses the default value, which is No.
Subsidiaries	<p>Enter the subsidiaries you want this expense category to be available to.</p> <p>The list of available subsidiaries is filtered based on the subsidiaries available to use the selected expense item or expense account.</p>	Yes

For details about the Rates sublist fields, and for other details on the expense category record, see the SOAP Schema Browser's [expense category](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with this tool, see the help topic [SOAP Schema Browser](#).

Expense Category CSV Examples

The following table shows how you might structure a file for importing expense categories.

External ID	Name	Expense Account	Description	Inactive	Rate is Required
101	Meals	1000 Meals & Entertainment	Should be available year-round.		
102	Lodging	2000 Lodging	Should be available year-round.		
103	Annual Conference	9500 Conferences	Should be made available on Sep. 1.	Yes	Yes

In this example, the first two records are automatically active and available to employees following the import (because the Inactive field defaults to No when left blank). If all the items in your CSV file are meant to be active, you could simply omit this column.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Fair Value Price CSV Import

The fair value price import is available only when the Advanced Revenue Recognition feature is enabled at Setup > Company > Enable Features, the Accounting subtab. For details, see the help topic [Enabling the Advanced Revenue Management \(Essentials\) Feature](#).

When this feature is enabled, you must add a formula for calculating a Fair Value Price before you can perform this import. To create such a formula, go to Setup > Accounting > Fair Value Formulas > New,

enter the formula name and formula expression, and click Save. For details, see the help topic [Adding Fair Value Formulas](#).

After you have enabled this feature and added a fair value formula, you can import fair value price CSV data.

Fair Value Price Fields

To prepare fair value price CSV data for import, make sure that your CSV file includes the following fields. They are required for a successful CSV import.

- **External ID** – Used as a unique identifier for the record. You can specify any value that has not been used as the External ID in previous CSV imports.
- **Item** – The item this fair value price is related to.
- **Base Fair Value** – Item's base price that is used for range checking.
- **Fair Value Formula** – The formula used to calculate the prices range.

To learn about other supported fields, see the help topic [Creating the Fair Value Price List](#).

In addition to standard fields, the CSV data you import may also contain Fair Value Dimensions fields. To learn more about Fair Value Dimensions, see the help topic [Adding Fair Value Dimensions](#).

Fair Value Price CSV File Example

The following table shows how you might structure a file for importing a fair value price list.

External ID	Item	Base Fair Value	Fair Value Formula
FV-PRICE-01	Cable - IDE	12.49	FV Formula - NGO
FV-PRICE-02	Cable - Parallel	9.99	FV Formula - NGO
FV-PRICE-03	Cable - SCSI	17.49	FV Formula - NGO
FV-PRICE-04	Cable - USB	8.69	FV Formula - NGO

Importing a Fair Value Price CSV File

To import the data, use the Import Assistant, which you can find at Setup > Import/Export > Import Tasks > Import CSV Records if you have the Import CSV File permission. Set the Import Type to Accounting and the Record Type to Fair Value Price.

For more information about using the Import Assistant and importing CSV records, see [Importing CSV Files with the Import Assistant](#).

Global Account Mapping Import

For accounts using Multi-Book Accounting, the global account mapping record enables you to configure secondary accounting books to post to accounts different from the primary book. These mappings are used by transactions where the user can manually select the account to which the transaction posts.

This import is available when you enable the Chart of Accounts Mapping option at Setup > Company > Enable Features, on the Accounting subtab. Note that this choice is part of the overall setup required for Multi-Book Accounting.

NetSuite Professional Services handles the setup and implementation of the Multi-Book Accounting feature.

For details, see the help topic [Multi-Book Accounting Overview](#).

In the user interface, you access this record at Setup > Accounting > Global Account Mappings > New.

Global Account Mapping Fields

The Import Assistant supports all the fields that are available in the user interface. It also supports external ID — that is, you can give each global account mapping record an external ID of your choosing, which you can later use as a unique identifier when updating the record.

For details about fields that can be mapped in this record, see the SOAP Schema Browser's [global account mapping](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

For help working with this record in the user interface, see the help topic [Global Account Mapping](#).

Note: The field labeled Custom Dimension is available only if you have configured the field at Setup > Accounting > Accounting Preferences, on the Accounting Books tab. (For details on this process, see the help topic [Custom Mapping Dimensions](#).)

Global Account Mapping CSV File Example

The following table shows how you might format your CSV file when importing global account mapping records. In this example, the custom dimension field has been configured to reference the customer record. Note that because this record has no sublist, you always use a single CSV file for the import.

External Id	Effective Date	Accounting Book	Subsidiary	Source Account	Destination Account	Custom Dimension
101A	1/31/2014	Canadian Accounting Book	Parent Company : CA Subsidiary	1100 Accounts Receivable	1130 AR CA	Customer A
102A	1/31/2014	Canadian Accounting Book	Parent Company : CA Subsidiary	1100 Accounts Receivable	1182 AR CA	Customer B
101A	1/31/2014	Czech Accounting Book	Parent Company : CZ Subsidiary	1100 Accounts Receivable	1125 AR CZ	—

Note: Exercise care with the formatting of your date and subsidiary values. With the date field, the value must match the NetSuite formatting preference for the person doing the import. With the subsidiary field, the value must be hierarchical; for example: "Parent Company : UK Subsidiary." If the formatting of either the date or subsidiary value is incorrect, the import fails.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Item Account Mapping Import

For accounts using Multi-Book Accounting, the item account mapping record enables you to configure secondary accounting books to post to accounts different from the primary book. These mappings are used by transactions where the item determines the account to which the transaction posts.

This import is available when you enable the Chart of Accounts Mapping option at Setup > Company > Enable Features, on the Accounting subtab. Note that this choice is part of the overall setup required for Multi-Book Accounting.

NetSuite Professional Services handles the setup and implementation of the Multi-Book Accounting feature in Version 2014 Release 2.

For details, see the help topic [Multi-Book Accounting Overview](#).

In the user interface, you access this record at Setup > Accounting > Item Account Mappings > New.

Item Account Mapping Fields

The Import Assistant supports all the fields that are available in the user interface. It also supports external ID — that is, you can give each item account mapping record an external ID of your choosing, which you can later use as a unique identifier when updating the record.

For details about fields that can be mapped in this record, see the SOAP Schema Browser's [item account mapping](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

For help working with this record in the user interface, see the help topic [Item Account Mapping](#).

Note: The field labeled Custom Dimension is available only if you have configured the field at Setup > Accounting > Accounting Preferences, on the Accounting Books tab. (For details on this process, see the help topic [Custom Mapping Dimensions](#).)

Item Account Mapping CSV File Example

The following table shows how you might format your CSV file when importing item account mapping records. In this example, the custom dimension field has been configured to reference costing method. Note that because this record has no sublist, you always use a single CSV file for the import.

External Id	Effective Date	Accounting Book	Subsidiary	Item Account Type	Source Account	Destination Account	Custom Dimension
111A	1/31/2014	Philippine Accounting Book	Parent Company : PH Subsidiary	Expense	6012 Advertising	6160 Outside Services	Average
112A	1/31/2014	Philippine Accounting Book	Parent Company : PH Subsidiary	Expense	6012 Advertising	6180 Professional Fees	LIFO
111A	1/31/2014	Czech Accounting Book	Parent Company : CZ Subsidiary	Asset	1200 Inventory	1221 AT CZ	—

Note: Exercise care with the formatting of your date and subsidiary values. With the date field, the value must match the NetSuite formatting preference for the person doing the import. With the subsidiary field, the value must be hierarchical; for example: "Parent Company : UK Subsidiary." If the formatting of either the date or subsidiary value is incorrect, the import fails.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Item Collection Import

The Item Collection record is a way of grouping catalog items. Item collections can be static or dynamic. You can create and update static item collections using the CSV Import Assistant.

To create a static item collection using CSV Import, you must complete the following steps:

- Import item collections and create Item Collection records
- Import item collection members for each item collection to the Item Collection-Item Map record.

The Item Collection record and the Item Collection-Item Map record work together to define the items in an item collection.



Note: The Item Collection-Item Map record is a standalone record. It is not a sub-list of the Item Collection record.

For more information about the Item Collection-Item Map record, see [Item Collection Item Map Import](#).

For more information about item collections, see the help topic [Item Collections](#).

In the user interface, you create the Item Collection record at Lists > Accounting > Item Collections > New.

Item Collection Fields

The Import Assistant supports all the fields that are available in the user interface for static collections. It also supports External ID, which can be used to link the Item Collection record with all the related items in the Item Collection—Item Map record. You should give each Item Collection record an External ID of your choosing, and then use the External ID in the Item Collection–Item Map record to specify which items should be included in which item collection.

For details about fields that can be mapped in this record, see the SOAP Schema Browser's [item collection](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

For help working with this record in the user interface, see the help topic [Item Collections](#).

Item Collection CSV File Example

The following table shows how you might format your CSV file when importing item collection mapping records. Note that because this record has no sublist, you always use a single CSV file for the import.

Name	Description	External ID	Inactive
VIP Items	Exclusive items for VIP Customers	VIP001	No
North America Exclusive	Items to be sold only in NA	NA001	No
Secure Products	Items to be sold only to registered customers	SECURE001	No

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Item Collection Item Map Import

The Item Collection Item Map record captures which items are part of which static item collection. You can create Item Collection Item Map records using the CSV Import Assistant.

To create a static item collection using CSV Import, you must complete the following steps:

- Import item collections and create Item Collection records
- Import item collection members for each item collection to the Item Collection-Item Map record.



Note: You cannot update an Item Collection Item Map record. To change the relationship between item collections and items, you must add new Item Collection Item Map records for the new relationships and then delete the existing, outdated records.

The Item Collection record and the Item Collection-Item Map record work together to define the items in an item collection.



Note: The Item Collection-Item Map record is a standalone record. It is not a sub-list of the Item Collection record.

For more information about the Item Collection record, see [Item Collection Import](#).

For more information about item collections, see the help topic [Item Collections](#).

In the user interface, you add items to the Item Collection record at Lists > Accounting > Item Collections > New.

Item Collection Item Map Fields

The Import Assistant supports the fields External ID, Item and Item Collection. The value in the Item Collection field links the items in the Item Collection—Item Map record with the related Item Collection record. You can use either the name, External ID, or Internal ID of the item collection in the Item Collection field. If you use External ID or Internal ID, you must select it as the reference type in the Field Mapping step of the Import Assistant. For details on how to do this, see [Select Reference Types](#).

For details about fields that can be mapped in this record, see the SOAP Schema Browser's [item account mapping](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

For help working with this record in the user interface, see the help topic [Item Collections](#).

Item Collection Item Map CSV File Example

The following table shows how you might format your CSV file when importing Item Collection—Item Map mapping records. In this example, the External ID of the item collection is used to identify it. Note that because this record has no sublist, you always use a single CSV file for the import.

External ID	Item	Item Collection
1	Ergonomic Keyboard	VIP001

External ID	Item	Item Collection
2	Upright Mouse	VIP001
3	RSA Key Fob	SECURE001

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Activities Import Type

For information about activities imports, see the following:

- [Events Import](#)
- [Phone Calls Import](#)
- [Resource Allocations Import](#)
- [Tasks Import](#)

Events Import

An event record stores details about an activity such as an appointment or meeting. You can create and update event records using the CSV Import Assistant.

On page 1 of the Import Assistant, "Events" appears as an option in the Record Type dropdown list when you set Import Type to Activities.

In the UI, you can view the event record by choosing Activities > Scheduling > Events > New. For details on how to manually create an event record, see the help topic [Creating a New Event Record](#).

For more on Events import, see the following:

- [Event Date and Time Fields](#)
- [Event Body Fields](#)
- [Event Sublists](#)
- [Event CSV File Examples](#)
- [Common Errors When Importing Events](#)

Event Date and Time Fields

Before using the CSV Import Assistant to work with event records, you need to understand the Reserve Time, Date, and End Date fields. These fields are closely related to one another.

Reserve Time

The Reserve Time field indicates whether the system blocks off time on attendees' calendars for the event.

Possible values are:

- **Yes** — Indicates that the event shows up on attendees' calendars. A value of Yes also means that the event must have a start time and an end time. You set the start time using the Date field. You set the end time using the End Date field.
- **No** — Indicates that the event does **not** show up on attendees' calendars, and that it does not have start and end times. In this case, the event has only a date, which you set using the Date field.

The Reserve Time field is required, but if you do not include a mapping for this value, the system uses the default, which is Yes. This default does not show up on the Import Assistant mapping page.

Date

The Date field indicates the day an event takes place and, in some cases, the exact time it begins. The behavior of this field varies depending on the value of the Reserve Time field, as follows:

- When Reserve Time is set to Yes, the Date field must include a date with a time. For example: 08/12/2013 09:00 AM. Together these values indicate when the event begins. This value also determines the start of the time reserved on attendees' calendars.
- When Reserve Time is No, the Date field includes only a date. For example: 08/12/2013. In these cases, if a time is included, it is ignored.

End Date

The End Date field is used to indicate the date and time that the event ends. It also marks the end of the time that is reserved on attendees' calendars for the event.

The End Date field is used only if Reserve Time is set to Yes, and in these cases the field is required. However, you can omit an End Date column from your CSV file and the system will automatically create end dates and times.

If you do map values for End Date, the date you choose for any event must be the same as the date used in the Date field. The reason is that an event cannot span two days. Further, the End Date column must include both a date and a time. For example: 08/12/2013 10:00 AM.



Important: The values in both the Date and End Date fields must match the NetSuite formatting preference for the person doing the import. For additional tips, see [Avoiding Event Date/Time Formatting Errors](#).



Note: The values for dates and times are not labeled the same way in the Import Assistant as they are in the standard event form in the UI. For a comparison, see [How Mapped Event Date Values Display in the UI](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

How Mapped Event Date Values Display in the UI

An event's date and time values are represented slightly differently in the CSV Import Assistant compared with the standard Event form in the UI (at Activities > Scheduling > Events > New).

The standard Event form, as shown in the following screenshot, includes fields labeled Date (1) and Start Time (2). Together, these two values map to one field in the Import Assistant — **Date**.

Similarly, the standard Event form, shown in the following screenshot, includes a field labeled End Time. Together, the Date (1) and End Time (3) fields map to one field in the Import Assistant — [End Date](#).

The screenshot shows the 'Date and Time' section of a NetSuite form. It includes a 'Date' field (1) with the value '7/15/2014', an 'All Day' checkbox, a 'Reserve Time' checkbox (which is checked), a 'Start Time' field (2) set to '2:00 pm', and an 'End Time' field (3) set to '3:00 pm'. The 'Reserve Time' checkbox is highlighted with a green circle and the number '1'. The 'Start Time' and 'End Time' fields are highlighted with green circles and the numbers '2' and '3' respectively.

Whether you are working in the UI or importing records using the Import Assistant, you can specify start and end only times if the Reserve Time option is selected. For more details on how to successfully map these three fields during your CSV import, see [Event Date and Time Fields](#).

Avoiding Event Date/Time Formatting Errors

When using the CSV Import Assistant to work with event records, you must format the dates and time values correctly.

For both the Date and End Date fields, the values you enter should match the NetSuite formatting preferences of the person doing the import, as set at Home > Set Preferences, under the Formatting heading. The two relevant fields are Date Format and Time Format.

For example, suppose you want to enter a date and time in the Date field, and your NetSuite preferences are as follows:

- Date Format is MM/DD/YYYY.
- Time Format is hh:mm:ss AM/PM.

In your CSV file, any date and time values you include should use these formats. The date and time values should be separated by one space. For example: 12/16/2013 12:00:00 PM.

If you are using Microsoft® Excel to create your CSV file, you should right-click the column and choose Format Cells to explicitly select a format that matches the Date Format (and if applicable, the Time Format) specified in NetSuite. Do not apply date formatting to any empty cells.

For more details on how to successfully map the Date and End Date fields for a CSV import, see [Event Date and Time Fields](#).

Event Body Fields

This topic describes some of the important body fields on the event record and how they are handled during the import process. You may want to review these details before you begin importing event records using the CSV Import Assistant.



Important: Three of the most important fields on the event record — Reserve Time, Date, and End Date — are unusual in that their behavior can vary. They are described in a different topic: [Event Date and Time Fields](#). Exercise care when mapping to these fields.

Event Access

Valid choices for Event Access are Private, Public, and Show as Busy. (For details on what these choices mean, see the help topic [Creating a New Event Record](#).)

If you choose a data handling option of Add on page 2 of the Import Assistant and your CSV file does not include a column for Event Access, the system creates a default mapping setting the value to Show as Busy. If you do map to a column in your CSV file, be aware that every row in your file must have a value in this column. Otherwise, the Import Assistant does not allow you to proceed past the mapping page. Instead, it displays an error reading in part Mandatory Field Missing.

Your Fields	NetSuite Fields
Show as Busy	Event Access (Req)
ExternalID	ExternalID
Title	Title
Location	Location
Date	Date
End Date	End Date
Reminder Type	Reminder Type
Reminder	Reminder
Reserve Time	Reserve Time
Status (Req)	Status (Req)

Organizer

In general, the organizer of an event is the only person who can make changes to the event record. The organizer must be an active employee.

If you choose a data handling option of Add on page 2 of the Import Assistant and your CSV file does not include a column for Organizer, the Import Assistant creates a default mapping that sets the value to the name of the person doing the import. If you do map to a column in your CSV file, be aware that every row in your file must have a value in this column. Otherwise, the Import Assistant does not allow you to proceed past the mapping page. Instead, it displays an error reading in part "Mandatory Field Missing."

Note that the organizer is not the same as the owner. The owner of an event is always the person who created the record (in this case, the person who completed the import).

Status

The Status field indicates whether the event is expected to take place. Valid choices for Status are Confirmed, Tentative, and Canceled.

If you choose a data handling option of Add on page 2 of the Import Assistant and your CSV file does not include a column for Status, the Import Assistant creates a default mapping that sets Status to Confirmed. If you do map to a column in your CSV file, be aware that every row in your file must have a value in this column. Otherwise, the Import Assistant does not allow you to proceed past the mapping page. Instead, it displays an error reading in part "Mandatory Field Missing."

Title

You use the Title field to name your event. This field is required. Note that this value does not have to be unique.

For More Information

For details on other fields available for mapping, see the following:

- For details on the event date and time fields, see [Event Date and Time Fields](#).

- For details on the events sublists available for import, see [Event Sublists](#).
- For help with additional body and sublist fields available for import, see the SOAP Schema Browser's [calendar event](#) reference page. For help working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Event Sublists

When using the CSV Import Assistant to work with events records, you can interact with three sublists:

- [Attendees](#)
- [Resources](#)
- [Time Tracking](#)

Attendees

You use the Attendees sublist to invite people to the meeting. Each sublist record represents a single attendee. Important fields in this sublist are:

- Attendance Status — Indicates whether the invitee is required to attend. Possible values are Optional and Required. If you do not map a value for this field, the Import Assistant sets a value of Required.
- Attendee — Identifies the person invited. This field is required. Valid values are active Employee IDs, Customer IDs, and so on. Note that each attendee of a single event record must be unique. If you mistakenly include the same person twice, the import of the record fails. Note that the owner of the record (the person doing the import) is always listed as an attendee.
- Response Status — Indicates whether the invitee is planning to attend. Possible values are Accepted, Declined, No Response, and Tentative. If you do not map a value for this field, the system creates a default mapping of No Response.

This sublist is selectively updatable based on the Attendee field.

Resources

You use the Resources sublist to reserve things needed for the event, such as a conference room or projector. This sublist has only one field (Resource). This field must reference a record listed at Activities > Setup > Resources. For details on resource records, see the help topic [Using Resource Records on Events](#).

This sublist is selectively updatable based on the Resource field.

Time Tracking

You use the Time Tracking sublist to charge employee time for the meeting. Required values include:

- Duration — The amount of time for which to charge, in hours and minutes, separated by a colon. For example, to specify four and a half hours, use the following value: 4:30.
- Employee — The ID of the employee for whom time is being charged. The employee does not have to be an attendee.

- Location — Must identify a location listed at Setup > Company > Locations.
- Date — If you do not map a value for this field, the system sets the value to today's date.

The Time Tracking sublist is not keyed, which means that you cannot selectively update individual records in this sublist. For more details on non-keyed sublists, see [Sublist Data Import](#).

For More Information

For details on other fields available for mapping, see the following:

- For details on the event date and time fields, see [Event Date and Time Fields](#).
- For details on other required body fields, see [Event Body Fields](#).
- For help with additional body and sublist fields available for import, see the SOAP Schema Browser's [calendar event](#) reference page. For help working with this tool, see the help topic [SOAP Schema Browser](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Event CSV File Examples

When importing events, you can use multiple-file or single-file upload techniques.

Multiple Files Import

With the multiple-file approach, you use a separate file to import values for each of the following:

- The [Event Body Fields](#)
- The [Attendees](#) sublist
- The [Resources](#) sublist
- The [Time Tracking](#) sublist

The first file should include a unique identifier for the event, the event's title, and any other needed body field values, as shown below.

You should create an additional file for each sublist you want to import. Each file should include a unique identifier that can link each sublist record to the appropriate body field values.

For example, the file representing the Attendees sublist might include columns for External ID, Attendee, Attendance Status, and Response Status.

The Resources sublist has only one field (Resource). Therefore, this file requires only two columns — one for the Resource field, and one for the unique identifier linking the sublist records to the relevant body field values.

External ID	Resource
101A	Board Room
101A	Projector #9

Single File Import

With a single-file import, all data for a single event record must exist on a single row. For this reason, if the sublist data for any event must include more than one record, you must create a discrete set of columns for mapping each sublist record. For example, the following sample would create two event records. The first has four attendees (four records in the Attendees sublist), and the second has three.

Formatting restrictions make the table unreadable in the PDF output.

If you name your columns as shown in this example, the mapping should happen automatically. If you choose column headings that do not match what the system expects, you must map the fields manually.

Common Errors When Importing Events

This topic describes typical problems you might experience when using the CSV Import Assistant to create or update event records.

Date Field Not in Preferred Format

Sometimes when you click Next on the field mapping page, the system stops you from progressing and displays a dialog stating "Date field not in your preferred date format for field 'Date.'" This error indicates that at least one cell in the Start or End Date column of the CSV file is not formatted consistently with the NetSuite date format preference of the person doing the import. This preference is viewable at Home > Set Preferences, under the Formatting heading.

For additional guidance, see [Avoiding Event Date/Time Formatting Errors](#).

Mandatory Field Missing for Field Date

Sometimes when you click Next on the field mapping page, the system displays a dialog stating "Mandatory Field Missing for field 'Date'" or "Mandatory Field Missing for field 'End Date'."

Review the column in your CSV file for Date (or End Date), and make sure that all rows have values.

If all records in your CSV file do contain a value for the field, the problem may be that date formatting was inadvertently applied to an empty cell. If you are using Microsoft® Excel, the solution is to highlight the rows below your records, right-click and select **Delete > Entire Row**. Save your file, and then try the import again.

Parse of Date/Time Failed

Sometimes the Import Assistant lets you complete all the steps of the import process, but the import fails with a reason of "Parse of date/time date time failed with date format format."

This error can be caused by different problems, including:

- At least one cell in your Date or End Date column is not formatted consistently with the NetSuite date/time format preference of the person doing the import. These preferences are viewable at Home > Set Preferences, under the Formatting heading. For further help, refer to [Avoiding Event Date/Time Formatting Errors](#).
- For one of your records, your CSV file does not include a date in the End Date column, and the system automatically generated an invalid date. To resolve this problem, review your CSV file and make sure every value in the End Date column has a valid date.

Start Time Must Be Earlier Than the End Time

Sometimes the Import Assistant lets you complete all the steps of the import process, but the import fails with a reason of "Start time must be earlier than the end time." This error can indicate one of the following problems:

- You mistakenly included an End Date value that is earlier than the Date value.
- Your End Date value includes a date later than the one indicated by the Date value, but the End Date time is earlier in the day than the Date time. For example, you would see this error if your Date value was 11/13/13 5:00 PM and your End Date value was 11/14/13 12:00 PM. Note that an event cannot span two days, so the solution is change both the date and time of the End Date value.

Phone Calls Import

A phone call record stores details about a business call, such as its organizer, its subject, and its date and time. A phone call can be linked to another record type such as customer or contact. After a phone call is linked to another record type, the phone call appears on the Activities subtab of that record.

The phone call data that you can import depend on the fields available on either your preferred Phone Call form, or the custom phone call form selected on the Import Assistant Import Options page. For details about specifying a custom form, see [Set Advanced CSV Import Options](#).

For details about fields that can be mapped in the Phone Call record, see the SOAP Schema Browser's [phone call](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with this tool, see the help topic [SOAP Schema Browser](#).

Be aware of the following:

- Required phone call fields for import are: Organizer, Status, Subject, and Date.
- You need to understand the use of the Date and End Date fields on phone call records, and to exercise care when you format values for them in your CSV files. To avoid errors, review and follow the guidelines in [Setting Date Field Values for Phone Calls Imports](#).
- Unlike in the user interface, the Organizer field does not default to be the logged in user. You need to include values for this field in your CSV file or set up a default on the Import Assistant Field Mapping page. See [Assign Default Values during Field Mapping](#).
- The Phone Calls import supports the import of the following sublist data:

Sublist	Notes
Contacts	Selectively updatable based on Participant(Entity) or Contact key field. Maps to Companies and Contacts subtab on Related Records subtab of Phone Call record, can include other records, such as customers and contacts, that are related to each phone call.
Time Tracking	When Time Tracking feature is enabled.

For more information, see [Sublist Data Import](#).

- If you are doing a phone calls import for the addition of new phone calls, select the **Add** data handling option, rather than **Add or Update**.
- If you need to use an import to update existing phone call records, you must map either the Internal ID or External ID field to uniquely identify records. This requirement is enforced when you select the **Update** data handling option and when you select the **Add or Update** data handling option.

Setting Date Field Values for Phone Calls Imports

Before you set up a CSV file for a phone calls import, you need to understand how Date and End Date fields are used, and you need to be aware of formatting requirements for their values.

Understanding Date and End Date Fields

You can review the standard Phone Call form to understand the use of the Date and End Date fields in phone call records, to properly specify their values in your CSV files.

- Reserve Time - Indicates whether to schedule a time for the phone call on the organizer's calendar. How the Start Date and End Date fields are used depends upon whether Reserve Time is enabled (set to True). By default, Reserve Time is not enabled (set to False).
- Date - The date when a phone call is started, in the field labeled **Date** on the standard Phone Call form, number 1 in the following screenshot. If Reserve Time is enabled, the Date value should also include a time that is the beginning of reserved time on the organizer's calendar, as shown in the field labeled **Start Time**, number 2 in the following screenshot.
- End Date - If Reserve Time is enabled, the time that is the end of reserved time on the organizer's calendar, as shown in the field labeled **End Time** on the standard Phone Call form, number 3 in the following screenshot. The date is not shown, and is assumed to be the same as the date in the Date field.

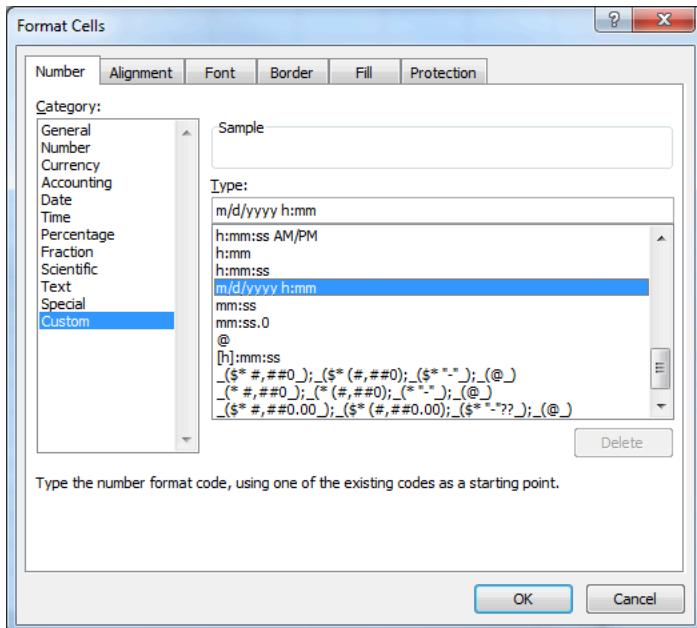
Primary Information		
Subject Raising Credit Limits	Status Scheduled	Organizer S Wolfe
Phone Number 123-456-7899	<input type="checkbox"/> Private Phone Call	
Date and Time		
1 Date Tuesday July 15, 2014	2 Start Time 4:00 pm	Reminder Type None
Date Completed	3 End Time 5:00 pm	Reminder None
<input checked="" type="checkbox"/> Reserve Time		

Formatting Guidelines for Phone Call Date Field Values

Follow these guidelines when you enter values for date fields in CSV files used for phone calls imports.

- For Date fields:
 - If Reserve Time is set to False, a Date value requires only a date, for example: **04/12/2010**. If a time is included, it is ignored.
 - If Reserve Time is set to True, Date requires both a date and a time, for example: **04/12/2010 09:00 AM**.
- For End Date fields:
 - If Reserve Time is set to False, no End Date value is required.
 - If Reserve Time is set to True, End Date requires both a date, that should be the same as the date set for Date, and a time, for example: **04/12/2010 11:00 AM**.

- For both Date and End Date fields, values should be specified according to the NetSuite Date Format, and if applicable, Time Format, set at Home > Set Preferences for the user doing the import. The following are example formats:
 - Date Format is **MM/DD/YYYY**.
 - Time Format is **hh:mm AM/PM**.
 - For a Date field that includes both date and time, a space should be included between them, for example: **04/12/2010 10:00 AM**.
- To avoid Excel formatting errors for Date and End Date values, you should right-click the column and choose Format Cells to explicitly select a format that matches the Date Format (and if applicable, Time Format) set up in NetSuite.



The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Resource Allocations Import

A resource allocation record stores details about project resource time allocated to a specific project. After a resource allocation record has been created and approved, the allocated time is shown on the project record. Resource allocation records are available for import in accounts where the Project Management and Resource Allocation features are enabled.

The resource allocation data that you can import depend on the fields available on either your preferred resource allocation form, or the custom form selected on the Import Assistant Import Options page. For details about specifying a custom form, see [Set Advanced CSV Import Options](#).

For details about fields that can be mapped in the resource allocation record, see the SOAP Schema Browser's [resource allocation](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

For information about working with resource allocations in the user interface, see the help topic [Resource Allocations](#).

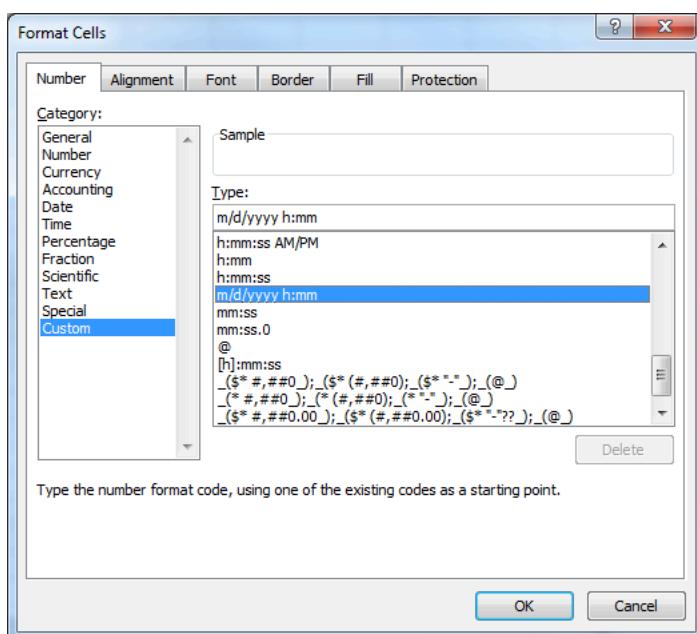
Be aware of the following:

- Required resource allocation fields for import are: Resource, Customer:Project, Allocate, Allocation Type, Start Date, and End Date.
- Allocations imported with CSV are automatically allocated by hours. If you would like to allocate by percentage, you must include an Allocation Unit column with the value of Percent of Time.
- You need to exercise care when you format values for the Start Date and End Date fields in your CSV files. To avoid errors, review and follow the guidelines in [Formatting Guidelines for Resource Allocation Date Field Values](#).
- The Requested By field is automatically populated with your name. You can add Requested By to your CSV file to populate this field with a different user name.
- If you are doing a resource allocation import for the addition of new allocations, select the **Add** data handling option, rather than **Add or Update**.
- If you need to use an import to update existing allocation records, you must map either the Internal ID or External ID field to uniquely identify records. This requirement is enforced when you select the **Update** data handling option and when you select the **Add or Update** data handling option.

Formatting Guidelines for Resource Allocation Date Field Values

Follow these guidelines when you enter values for date fields in CSV files used for resource allocation imports.

- For Start Date and End Date fields, values should be specified according to the NetSuite Date Format set at Home > Set Preferences for the user doing the import.
- Important:** If your resource allocation import returns date-related errors such as "You have entered an Invalid Field Value" or "End Date occurs before Start Date", try removing leading zeros from date values in your CSV file, for example changing **08/01/2010** to **8/1/2010**.
- To avoid Excel formatting errors for Start Date and End Date values, you should right-click the column and choose Format Cells to explicitly select a format that matches the Date Format set up in NetSuite.



The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Tasks Import

A task record stores details about a unit of work to be completed. NetSuite supports the creation of two different types of tasks: CRM Tasks and Project Tasks. The Tasks import supports the import of CRM tasks, not project tasks. CRM tasks, usually labeled Tasks in the NetSuite user interface, do not have to be associated with projects.

Note: Project tasks are available in accounts where the Project Management feature is enabled, and are used only in association with project records. A different import process for project tasks is available at Activities > Scheduling > Project Tasks > Import. See [Project Tasks Import](#).

The CRM tasks data that you can import depend on the fields available on either your preferred Task form, or the custom task form selected on the Import Assistant Import Options page. For details about specifying a custom form, see [Set Advanced CSV Import Options](#).

For details about fields that can be mapped in the Task record, see the SOAP Schema Browser's [task](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Be aware of the following:

- Required task fields for import are: Assigned To, Due Date, Priority, Start Date, Status, and Title.
- You need to understand the use of the Start Date and End Date fields on task records, and to exercise care when you format values for the Start Date, End Date, and Due Date fields in your CSV files. To avoid errors, review and follow the guidelines in [Setting Date Field Values for Tasks Imports](#).
- Unlike in the user interface, the Assigned To field does not default to be the logged in user. You need to include values for this field in your CSV file or set up a default on the Import Assistant Field Mapping page. See [Assign Default Values during Field Mapping](#).
- The Send Email field is not available for import mapping. Imports cannot send email to task assignees.
- The Tasks import supports the import of the following sublist data:

Sublist	Notes
Contacts	Selectively updatable based on Company/Project(Entity) or Contact key field. Maps to Companies and Contacts subtab on Related Records subtab of Task record, can include other records, such as customers and contacts, that are related to each task.
Time Tracking	When Time Tracking feature is enabled.

For more information, see [Sublist Data Import](#).

- If you are doing a tasks import for the addition of new tasks, select the **Add** data handling option, rather than **Add or Update**.
- If you need to use an import to update existing task records, you must map either the Internal ID or External ID field to uniquely identify records. This requirement is enforced when you select the **Update** data handling option and when you select the **Add or Update** data handling option. The Title field is not a key field and does not have to be unique.

Setting Date Field Values for Tasks Imports

Before you set up a CSV file for a tasks import, you need to understand how Start Date and End Date fields are used, and you need to be aware of formatting requirements for Start Date, End Date, and Due Date field values.

Understanding Start Date and End Date Fields

You can review the standard Task form to understand the use of the Start Date and End Date fields in task records, to properly specify their values in your CSV files.

- Reserve Time - Indicates whether to schedule time for the task on the assignee's calendar. How the Start Date and End Date fields are used depends upon whether Reserve Time is enabled (set to True). By default, Reserve Time is not enabled (set to False).
- Start Date - The date when a task is started, as shown in the field labeled **Start Date** on the standard Task form, number 1 in the following screenshot. If Reserve Time is enabled, the Start Date value should also include a time that is the beginning of reserved time on the assignee's calendar, as shown in the field labeled **Start Time**, number 2 in the following screenshot.
- End Date - If Reserve Time is enabled, the time that is the end of reserved time on the assignee's calendar, as shown in the field labeled **End Time** on the standard Task form, number 3 in the following screenshot. The date is not shown, and is assumed to be the same as the date in the Start Date field.

Primary Information		
Title Approve Purchase Orders	Parent Task	Status Not Started
Assigned To Mike G	Priority Medium	<input type="checkbox"/> Private Task
<input type="checkbox"/> Notify Assignee by Email	Insert Before	
Date and Time		
Start Date 1 Friday July 18, 2014	<input checked="" type="checkbox"/> Reserve Time	Reminder Type None
Due Date Friday July 18, 2014	Start Time 10:00 am	Reminder None
Date Completed	End Time 11:00 am	

Formatting Guidelines for Task Date Field Values

Follow these guidelines when you enter values for date fields in CSV files used for tasks imports.

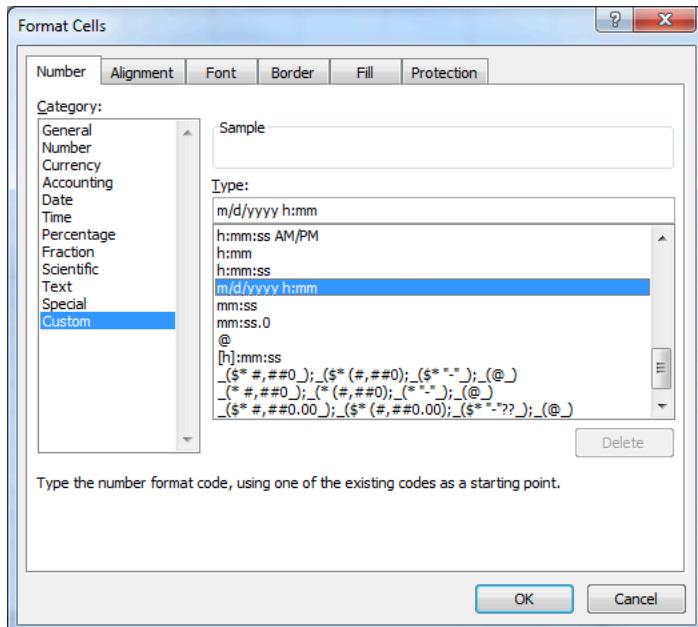
- For Start Date fields:
 - If Reserve Time is set to False, a Start Date value requires only a date, for example: **04/12/2010**. If a time is included, it is ignored.
 - If Reserve Time is set to True, Start Date requires both a date and a time, for example: **04/12/2010 09:00 AM**.
- For End Date fields:
 - If Reserve Time is set to False, no End Date value is required.

- If Reserve Time is set to True, End Date requires both a date, that should be the same as the date set for Start Date, and a time, for example: **04/12/2010 11:00 AM**.
- For Start Date, End Date, and Due Date fields, values should be specified according to the NetSuite Date Format, and if applicable, Time Format, set at Home > Set Preferences for the user doing the import. The following are example formats:
 - Date Format is **MM/DD/YYYY**.
 - Time Format is **hh:mm AM/PM**.
 - For a Start Date or End Date field that includes both date and time, a space should be included between them, for example: **04/12/2010 10:00 AM**.



Important: If your tasks import returns date-related errors such as "You have entered an Invalid Field Value" or "Due Date occurs before Start Date", try removing leading zeros from date values in your CSV file, for example changing **08/01/2010** to **8/1/2010**.

- To avoid Excel formatting errors for Start Date, End Date, and Due Date values, you should right-click the column and choose Format Cells to explicitly select a format that matches the Date Format (and if applicable, Time Format) set up in NetSuite.



The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Classification Import Type

Departments, Locations, and Classes are classifications you can use to identify and group many areas of your NetSuite account to keep your data organized and accurate. Departments usually indicate groupings of records according to management responsibility. Locations usually indicate groupings according to geographic areas. Classes can indicate a wide variety of categorizations.

To use each classification, you need to enable the feature and then set up records for each. One technique to set up these records is to use the Import Assistant to import them. After you set up

classification records, you can use them to group records in your NetSuite account, and to sort account data in report and search results.

For information about classification imports, see the following:

- [Class Import](#)
- [Custom Segment Value Import](#)
- [Department Import](#)
- [Location Import](#)
- [Merchandise Hierarchy Node Import](#)

Class Import

Classes are type definitions that can be used to categorize records such as financials, transactions, and employees. Classes can provide more generalized categories than departments or locations. For more information, see the help topic [Creating Classes](#).

You can use the Import Assistant to set up and update class records in your NetSuite account.

Before you can import classes, an administrator, or another user with permission to enable features, must go to Setup > Company > Enable Features, and on the Company subtab, check the Classes box and click Save.

Class fields for which data can be imported include Name, External ID, Subclass of (the parent class, if any), and whether the class is inactive. If you are using NetSuite OneWorld, these additional fields also are available: Subsidiaries (the subsidiaries associated with a class), and Include Children (a Boolean indicating whether to associate a class with all child subsidiaries of those specified in the Subsidiaries field).

For details about fields that can be mapped in the Class record, see the SOAP Schema Browser's [class](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

After you have imported class records successfully, you can review them at Setup > Company > Classes.



Note: If you plan to import other record types that include fields referencing class values, complete the import of classes first.

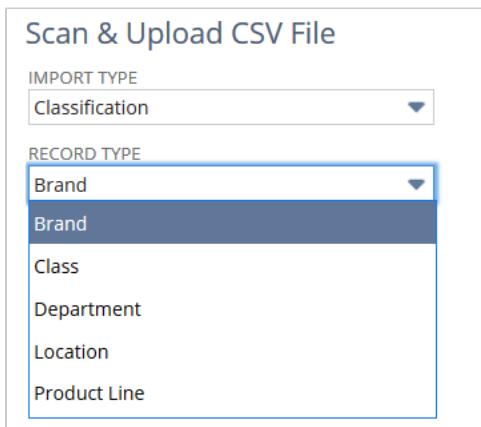
The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Custom Segment Value Import

Custom segments are classification fields similar to class, department, and location. When the Custom Segments feature is enabled, you can use the NetSuite UI to create as many custom segments as necessary for your organization. For example, you might create a custom segment called Sales Channel that has values such as Brick-and-Mortar Store, Call Center, and Web Store. For general details about creating and managing custom segments, see the help topic [Custom Segments](#).

After custom segments have been created in your NetSuite account, you can use the Import Assistant to add and update values for each segment. For example, with the segment called Sales Channel, you could use the Import Assistant to import new values such as Catalog and Partner Outlet.

To import values, set the Import Type to Classification. In the Record Type dropdown 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 display alongside Class, Department, and Location, if those features are enabled.



Before you begin importing custom segments, it might be useful to view the form you would use to manually create these records, at Customization > Lists, Records, & Fields > Custom Segments > New.

See the following for more information about custom segment value imports:

- [Custom Segment Value Body Fields](#)
- [Custom Segment Value Translations](#)

Custom Segment Value Body Fields

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

- **ExternalId** – When adding values, you can optionally use this field to import a unique identifier for the value. This identifier may be useful if you want to update the value later.
- **Inactive** – If you want the segment value to be available to users, you can omit a mapping for this field. In this case, the system uses the default choice of false. If you want to hide the new value from users, set Inactive to true.
- **InternalId** – InternalId is available only during updates. You can use this read-only field to reference the value that you want to change.
- **Name** – The name of the value. This field is required. Note that the name can denote a parent. For example, suppose the segment already includes a value called Americas. You may want to add a new value, Brazil, which uses Americas as its parent. To do so, use the following format: [Parent value] : [Child value].

Custom Segment Value Translations

If your account uses the Multi-Language feature, you can import translations of a segment value's name. To import translations, you use a sublist. The sublist uses the same name as the segment. For example, a segment called Sales Channel would have a sublist called Sales Channel. You can create a new sublist entry for each language. Within each sublist entry, there are two fields:

- **Name** – The translation of the segment value name.
- **Language** – The language for which you are providing this translation.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Department Import

Departments can be used to categorize records, such as accounts, employees, and items. Departments usually indicate groupings of records according to management responsibility. For more information, see the help topic [Creating Departments](#).

You can use the Import Assistant to set up and update department records in your NetSuite account. To import department records, select Classification as the import type, and Department as the record type.

Before you can import departments, an administrator, or another user with permission to enable features, must go to Setup > Company > Enable Features, and on the Company subtab, check the Departments box and click Save.

Department fields for which data can be imported include Name, External ID, Subdepartment of (the parent department, if any), and whether the department is inactive. If you are using NetSuite OneWorld, these additional fields also are available: Subsidiaries (the subsidiaries associated with a department), and Include Children (a Boolean indicating whether to associate a department with all child subsidiaries of those specified in the Subsidiaries field).

For details about fields that can be mapped in the Department record, see the SOAP Schema Browser's [department](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

After you have imported department records successfully, you can review them at Setup > Company > Departments.

Note: If you plan to import other record types that include fields referencing department values, complete the import of departments first.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you [Select a Record Type for Import](#), [Choose Import Character Encoding](#).

Location Import

Locations can be used to categorize records according to geographic area. You can use the Import Assistant to set up and update location records in your NetSuite account.

Before you can import locations, an administrator, or another user with permission to enable features, must go to Setup > Company > Enable Features, and on the Company subtab, check the Locations box and click Save.

After you have imported location records successfully, you can review them at Setup > Company > Locations.

Note: If you plan to import other record types that include fields referencing location values, complete the import of locations first.

Location body fields for which data can be imported include Name, External ID, Sublocation of (the parent location if any), whether the location is inactive, and a transaction prefix field you can use to make auto-

generated transaction numbers independent per location. (Transaction prefix values can be up to 8 alphanumeric characters.) If you are using NetSuite OneWorld, the Subsidiary field is also available.



Important: The location import supports the import of multiline sublists. When importing a file where the sublist data contains multiple lines for each sublist item, you should include an external ID for each location record to uniquely identify the record the sublist data belongs to. For more information, see [Multiline Sublists for CSV Import](#) and Import Format and Mapping Considerations in [Importing Sublist Data in a Single File](#).

As of Version 2015 Release 2, fields formerly in the Address sublist for Location are mapped as body fields, and fields formerly in the Return Address sublist are structured as a subrecord. By default, the Address body field is read-only, and data from other related body fields is copied into it. If you map the Override body field and set it to Yes (meaning true), you can import data for the Address body field. Similarly, the Address field in the Return Address subrecord is read-only, and data from other related subrecord fields is copied into it. If you map the Override subrecord field and set it to Yes (meaning true), you can import data for the Address subrecord field.

Supported Location Sublist Imports

The Location import supports the import of the following sublist data:

Sublist	Notes
Translation	<p>When the Multi-Language feature is enabled.</p> <p>You can map multiple instances of this sublist to import translations for multiple languages.</p> <p>Selectively updatable based on the Language key field.</p>
Business Hours	You can map multiple instances of this sublist to import more than one set of business hours. For information about setting up business hours, see the help topic Defining Store Business Hours .

Every sublist on each record can optionally have a separate file. For imports that update existing Location records, handling of sublist data updates depends on the setting for the [Overwrite Sublists](#) advanced option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).

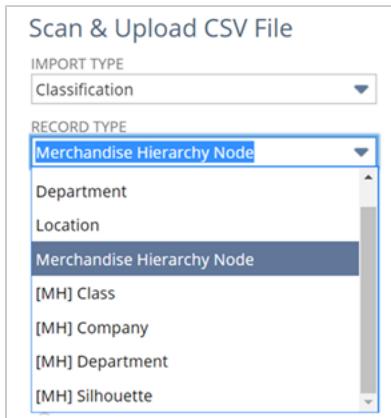
For more details about fields that can be mapped in the Location record, see the SOAP Schema Browser's [location](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Merchandise Hierarchy Node Import

NetSuite merchandise hierarchy nodes provide a way to group items in your merchandise hierarchy. You can use the Merchandise Hierarchy Nodes import to import new nodes to an existing merchandise hierarchy version. Before you can import hierarchy nodes, you must first create a hierarchy version and the required hierarchy levels. For more information regarding creating a merchandise hierarchy, see the help topic [Creating a Merchandise Hierarchy](#).

To import merchandise hierarchy nodes, set the Import Type to Classification. In the Record Type list, select Merchandise Hierarchy Node.



For details about fields that can be mapped in the merchandise hierarchy node record, see the Records Browser's [merchandise hierarchy node](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the Records Browser, see the help topic [Working with the SuiteScript Records Browser](#).

Review the following guidelines for Merchandise Hierarchy Node imports:

- [Supported Merchandise Hierarchy Node Sublist Data Imports](#)
- [Using Import Assistant for Merchandise Hierarchy Node Mass Update](#)
- [Merchandise Hierarchy Node Import Example](#)

Supported Merchandise Hierarchy Node Sublist Data Imports

The Merchandise Hierarchy Node import supports the import of the following sublist data:

Sublist	Notes
Hierarchy Versions	The Included in Version box on the Hierarchy Versions subtab indicates if the hierarchy node is assigned to a hierarchy version. You can assign a node to multiple versions.

Using Import Assistant for Merchandise Hierarchy Node Mass Update

The following are typical use cases for importing merchandise hierarchy nodes:

- Initial merchandise hierarchy setup
- Adding new nodes to a merchandise hierarchy
- Re-parenting existing nodes in a merchandise hierarchy

Merchandise Hierarchy Node Import Example

The following example shows how you might structure a file for importing merchandise hierarchy node data.

Name	Description	ExternalID	VersionID	LevelID	parentnodeID	IsIncluded
NORSO	Company name	100	1	1		T

Name	Description	ExternalID	VersionID	LevelID	parentnodeID	IsIncluded
Women's Wear	Women's apparel department	101	1	2	100	T
Tops	Women's upper body apparel	102	1	3	101	T
Bottoms	Women's lower body apparel	103	1	3	101	T
Shoes	Women's footwear	104	1	3	101	T
Jackets	Women's jackets	105	1	4	102	T
Shirts	Women's shirts	106	1	4	102	T
Pants	Women's pants	107	1	4	103	T
Skirts	Women's skirts	108	1	4	103	T
Boots	Women's boots	109	1	4	104	T
Sandals	Women's sandals	110	1	4	104	T



Note: To establish the parent node of a node, enter the External ID for the parent node in the parentnodeID column. In the above example, the parent node for Women's Wear is Norsø. The External ID for NORSO is 100, so this is the value entered in the parentnodeID column for Women's Wear.

Communications Import Type

For information about communications imports, see the following:

- [Messages Import](#)
- [Notes Import](#)

Messages Import

The Messages import adds message records to NetSuite. Messages are used to attach email messages to NetSuite entities and transactions.

The fields available for messages imports correspond to those on the Recipients and Messages subtabs of the Attach Message dialog. This dialog appears when a user clicks Attach on the Messages subtab of one an entity or transaction record.

For details about fields that can be mapped in the Message record, see the SOAP Schema Browser's [message](#) reference page. You can use the field definitions as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Be aware of the following:

- Because messages are not editable in the UI, they are not editable through CSV import. You can use CSV import to add new message records only, not to edit existing message records. For messages

imports, the **Update** and **Add or Update** data handling options are grayed out on the Step 2 Import Options page of the Import Assistant.

- Required messages fields for import are: From (the sender of the message), Attach to (the recipient of the message and the record to which the message is attached in NetSuite), and Subject (which also serves as a title). Entities provided as From and Attach to field values must already exist in NetSuite. If the From and Attach to entity records do not have email addresses, then the From Email Address and To (Email) fields are required.
- Unlike in the user interface, the Attach to field does not default to be the logged in user. You need to include values for this field in your CSV file or set up a default on the Import Assistant Field Mapping page. See [Assign Default Values during Field Mapping](#).
- To attach messages to transactions, map the Transaction field, and either set a default value or include transaction values in the CSV file.
- The Emailed field is a Boolean that indicates whether or not an email message was sent. Messages imports do not send any email messages.
- Import of file attachments is not supported, although files can be attached to messages in the NetSuite user interface.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Notes Import

The Notes import adds or updates Note records in NetSuite. Notes are used to attach information to other NetSuite records.

CSV file note records should include references to the NetSuite record to which they are attached. These reference values can be in one of the following fields (as shown on the Import Assistant Field Mapping page):

- CRM/Support Record
- Entity (for Customer or Contact records)
- Item
- Transaction (for Opportunity records)

The Date field on note records is a Date/Time type. CSV file values for this field can be include dates only or both dates and times. If a value is date-only, the time defaults to the current time (time of the import).

If you are doing a notes import for the addition of new notes, select the **Add** data handling option, rather than **Add or Update**.

If you need to import updates to existing note records, you should use an identifier of internal ID or external ID, to prevent duplication of records.

- If you select the **Update** data handling option, you can use the Title as an identifier to match records and perform updates.
- If you select the **Add or Update** data handling options, no Title lookups are performed, so in the absence of internal ID or external ID, multiple notes with the same title may be added.

For details about fields that can be mapped in the note record, see the SOAP Schema Browser's [note](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Custom Records Import

A custom record type is an entry form you can create to collect information specific to the needs of your business, when the Custom Records feature is enabled. To enable the Custom Record feature, go to Setup > Company > Enable Features, on the SuiteCloud subtab.

For more details, see: [Custom Records](#)

For already existing custom record types, you can use the CSV Import Assistant to:

- Add new custom record instances
- Update the data in existing custom record instances and sublists
- Delete data from existing custom record instances and sublists

When adding a new custom record instance, the Name field is a mandatory field, that can also be used as a reference type when updating or deleting data in existing custom record instances, but it is not a Unique Key. Therefore it is more susceptible to errors because of matching failures. Unique Keys are the External ID (if enabled) and the Internal ID.

For more information on Reference Types, see: [Select Reference Types](#)

For more details about fields that can be mapped in custom records, see the SOAP Schema Browser's [custom record](#) reference page. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).



Note: When you create new custom record instance through CSV Import, it is possible to import values for the Translations sublist, if the Enable Name Translation field is enabled for the corresponding custom record type. For more details on configuring a custom record type to allow for translations, see the help topic [Translating Custom Record Instance Names](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. For more information on the Import Assistant, see: [Importing CSV Files with the Import Assistant](#)

Customization Import Type

For information about customization imports, see the following:

- [Custom List Import](#)

Custom List Import



Important: CSV import is not supported for custom lists with more than 25,000 values.

A custom list is a list of values that can be used to populate dropdown lists on NetSuite forms. With the custom list import, you can import several custom lists together. You can use the Import Assistant to create new custom lists and update existing custom lists.

After you import a custom list, you can add it to a form by completing a few other steps: creating a custom field of type List/Record or Multiple Select, choosing the imported list as the List/Record value for the field, and adding the field to the form. You can add the custom field to multiple forms as needed. For more information, see the help topics [Custom Lists](#) and [Creating a Custom Field](#).

To import custom lists, select Customization as the import type, and Custom List as the record type.

Review the following guidelines for more details about custom list imports:

- [Custom List Body Fields](#)
- [Custom List Sublist Data](#)
- [Custom List CSV Multiple File Examples](#)
- [Custom List CSV Single File Examples](#)
- [Common Errors When Importing Custom Lists](#)

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

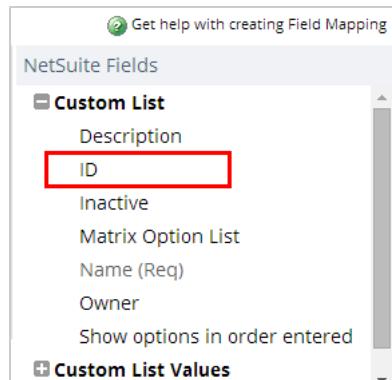
Custom List Body Fields

The following custom list body fields are available for mapping:

- [ID](#)
- [Inactive](#)
- [Internal ID](#)
- [Matrix Option List](#)
- [Name](#)
- [Owner](#)
- [Show options in order entered](#)

ID

The field labeled "ID" on the Import Assistant mapping page corresponds to thescriptId element in customization.xsd. It is neither the Internal ID nor an External ID.



The ID field is available only if Client SuiteScript and Server SuiteScript have been enabled at Setup > Company > Enable Features, on the SuiteCloud tab.

The value entered for the ID field must be unique.



Note: The system adds the prefix customlist to whatever value you enter. For example, if you enter _listColors, the system saves the ID as customlist_listColors. This value can be used as an identifier for the record.

Inactive

A value of Yes makes the list unavailable to be selected as the List/Record of a new custom field. The default is No.

Internal ID

This field is available for mapping only if the import has a data handling option of Update, or Add or Update.

Matrix Option List

This field is available only if the Accounting Matrix Items feature has been enabled at Setup > Company > Enable Features, on the Items & Inventory tab. When the value is Yes, the system can display abbreviations for each value in the list. The default is No.

Name

The value for Name shows up in the form you use to create a new custom field, as a choice in the List/Record dropdown list (unless you have chosen a value of Yes for the custom list's Inactive field, which hides the list name from this view). The Name is **not** the user-facing label that ultimately appears on the custom form next to the list. (That label is the value you enter for the Label field on the custom field record.)

The illustration below shows where the name of the custom list appears when you create a new custom field, in this example, "List of days" in the List/Record dropdown list.

The screenshot shows the 'Custom Entity Field' dialog box. At the top, there are buttons for Save, Cancel, Reset, and Apply to Forms. Below these are fields for Label (containing 'Day'), Description (empty), Package (empty), ID (empty), Owner (set to 'Jane McQuay'), and Type (set to 'List/Record'). A dropdown menu for 'Type' is open, showing a list of options: VSOE Discount Type, VSOE Deferral Type, VSOE SOP Group Type, Win/Loss Reason, Work Calendar, Workplace, and List of days. The 'List of days' option is highlighted with a red border. At the bottom of the dialog, there are tabs for Applies To, Display, Validation & Defaulting, and a section for selecting Customer and Job.

The Name field is required, and its value must be unique.

Owner

If you do not create a mapping for Owner, the system identifies you as the owner. The mapping page does not indicate you are mapped as owner, but the import sets you as the owner for all imported records. If you do not want to be set as owner, create a mapping that sets the Owner field to another user or to null.

Show options in order entered

A value of Yes places your custom list's values (which are defined by the [Custom List Values](#) sublist) in the order they are listed in the CSV import file. A value of No places the values in alphabetical order.

If you do not create a mapping for this field, the import sets the value to Yes. The mapping page does not indicate that this default is being chosen, but you can see it on the resulting record after the import.

For more details

For further details about fields that can be mapped, see the SOAP Schema Browser's [custom list](#) reference page. However, note that the Convert to Custom Record field is not currently supported in the Import Assistant. With that exception, you can use the field definitions in the SOAP Schema Browser as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Custom List Sublist Data

You can import data for two sublists — [Custom List Values](#) and [Custom List Translation](#).

This topic describes these sublists in more detail. See also [Custom List CSV Multiple File Examples](#) for tips on organizing CSV files that include sublist data.

Custom List Values

The Custom List Values sublist specifies the options, or values, to be displayed in the custom list. For example, in a custom list named "Sizes," sublist values might be "small," "medium," and "large." The sublist fields are described in the following table.

This sublist is selectively updatable based on the ID field.

Field	Notes	Required?
Abbreviation	<p>Available only if the Matrix Items feature is enabled for your account (at Setup > Company > Enable Features > Items & Inventory).</p> <p>You can use this field to add an abbreviation for each Custom List Values in your list. If, after the import, you review the newly imported record in the UI, note that the Abbreviation field shows up only if Matrix Option List is set to Yes for this particular custom list. However, even if you import abbreviations when setting Matrix</p>	No

Field	Notes	Required?
ID	<p>Option List to No, the system saves your abbreviations, and they can be displayed later.</p> <p>This field — which is the key for the sublist — is automatically generated and read only.</p> <p>Do not attempt to populate this field with a value of your own choosing. Attempts to do so are generally ignored and in some cases (if you use illegal characters) result in errors that halt your import. You should use this field only when attempting to selectively update a record in the sublist using the automatically generated value for the field.</p> <p>This field is not related to the ID field that is available to be mapped as a body field when SuiteScript is enabled.</p>	No, but if you are trying to selectively update the sublist, you must include a mapping for the ID of those records you want to modify.
Inactive	A value of No means that the value displays as an option in your custom list. A value of Yes means the value is hidden.	No, but if you do not include a mapping for this field, the system uses the default value, which is No.
Translation: (Language)	<p>Available when both of the following are true:</p> <ul style="list-style-type: none"> ■ The Multi-Language feature is enabled for your account (at Setup > Company > Enable Features). ■ You have added one or more languages to the Languages subtab at Setup > Company > General Preferences. <p>For each language listed on the Languages subtab, the Import Assistant mapping page offers a corresponding Translation: (Language) field. For each sublist record, you can use these fields to add translations for the corresponding entry in the Custom List Values column for this sublist record.</p>	No
Value	The value, or option, to be shown in the custom list. For example, for Yes a list of colors, values might be "red," "blue," and "green."	

Custom List Translation

The Custom List Translation sublist lets you add translations for the name of the sublist. In order for you to use this sublist, both of the following must be true:

- The Multi-Language feature has been enabled (at Setup > Company > Enable Features).
- You have added one or more languages to the Languages subtab at Setup > Company > General Preferences.

This sublist is selectively updatable based on the Language field.

Field	Notes	Required?
Language	Use this field to identify the language of the translation. This field is also the key for the sublist.	Yes. This field is not marked as required on the mapping page, but if you try to import data to this sublist and fail to map a value for Language, the import fails.
Name	The translation of the Name body field that corresponds with the locale you entered for this sublist record.	No

For general information on translations for custom lists, see the help topic [Adding Translations for Custom Lists](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Custom List CSV Multiple File Examples

With the multiple-file approach, you can organize your data into two or three files. You can use a separate file to import values for each of the following:

- The [Custom List Body Fields](#)
- The [Custom List Values](#) sublist
- The [Custom List Translation](#) sublist

The first file, or main file, should include a unique identifier for the custom list, the custom list's name, and any other needed body field values, as shown in the following example of the main file. In this example, row 2 in the file is the first custom list (_listSizes) and row 3 is the second custom list (_listColors).

A	B	C	D	E
1	ID	Name	Description	Matrix Option List
2	_listSizes	Size	This is a list of sizes	Yes
3	_listColors	Colors	This is a list of colors	Yes
4				

The second file should include one row for each value in each custom list, along with that value's abbreviation and translations, if needed. Each row must also include a unique identifier to match the sublist record with the appropriate row from the main file.

For example, the illustration below uses the value from the body field ID to link the body data with each sublist record. However, note that in the second file, the body ID value is referred to as "List ID." The second file should not refer to the body field ID using the column heading "ID," because this file maps to the Values sublist, and the Values sublist has its own ID field that is unrelated to the body field of the same name. (You map to the sublist's ID field only when selectively updating the sublist, and only using the ID value that was generated by the system when the list was created. Other attempts to map to the sublist's ID field can cause your import to fail.)

In the following example of the second file, the first three sublist records (rows 2, 3, and 4) belong to the first custom list (_listSizes) defined in the main file. The last three sublist records (rows 5, 6, and 7) belong to the second custom list (_listColors) defined in the main file.

A	B	C	D	E	
1	List ID	Value	Abbreviation	Translation: Czech	Transalation: Spanish
2	_listSizes	small	S	malé	pequeño
3	_listSizes	medium	M	střední	mediano
4	_listSizes	large	L	velký	grande
5	_listColors	red	R	červený	rojo
6	_listColors	green	G	zelený	verde
7	_listColors	blue	B	modrý	azul
8					

The third file should include one row for each translation of each custom list name. No more than one translation should exist in any row. Further, each row must include a unique identifier matching the translation with the appropriate body data from the main file. The following example uses the ID value, which is again referred to using the column heading "List ID."

In the following example of the third file, the first two sublist records (rows 2 and 3) belong to the first custom list (_listSizes) defined in the main file. The last two sublist records (rows 4 and 5) belong to the second custom list (_listColors) defined in the main file.

A	B	C
1	List ID	Language
2	_listSizes	Czech
3	_listSizes	Spanish
4	_listColors	Czech
5	_listColors	Spanish
6		

With this approach, each CSV file corresponds to one of the groups shown on the right side of the mapping page under "NetSuite Fields."

The screenshot shows the 'NetSuite Fields' mapping page. It displays three main sections with numbered callouts:

- 1 Custom List**: Includes fields like Description, ID, Inactive, Matrix Option List, Name (Req), Owner, and Show options in order entered.
- 2 Custom List Values**: Includes fields like Abbreviation, ID, Inactive, Translation:Croatian, Translation:Czech, Translation:Hebrew, Translation:Spanish, Translation:Ukrainian, and Value (Req).
- 3 Custom List Translation**: Includes fields like Language and Name.

1	The first file, Custom List, includes body data, such as name of the list, description, and ID.
2	The second file, Custom List Values, includes values for the list, and optionally translations, and abbreviations.
3	The third file, Custom List Translation, includes translations for the list's name.
Note: You need only one instance of these mappings, but your file can include translations for many locales.	

Custom List CSV Single File Examples

With the single-file approach, be aware of a few rules that affect the way you format data intended for the two sublists, [Custom List Values](#) and [Custom List Translation](#).

If you want to import multiple values into the Custom List Values sublist (for any custom list represented in your file), the file must include multiple rows for that particular custom list. For example, if you want

the custom list to have five options for users to choose from, you must create five rows for it in your CSV file. Each row must include one of the values to be mapped to the [Custom List Values](#) field of the sublist, and any other sublist data needed for that value, such as an abbreviation or a translation. However, the second through fifth rows do not need to contain any body data except for the name of the custom list record.

For example, the following illustration shows how you would format a CSV file to import one custom list record that has five values. Note that the ID, Description, and Owner values do not have to be repeated. The Name value does have to be repeated.

	A	B	C	D	1	E	2
1	Name	ID	Description	Owner		Value	
2	Furniture	listFurniture	This is a list of furniture	John Smith	sofa		
3	Furniture				chair		
4	Furniture				coffee table		
5	Furniture				end table		
6	Furniture				ottoman		
7							

- | | |
|---|--|
| 1 | Columns A, B, C, and D contain body data. |
| 2 | Column E contains data for the Custom List Values sublist. |
| 3 | Name value must be repeated on every line. |

The single-file approach also lets you import multiple records into the Custom List Translation sublist. In these cases, your CSV file must include a language column and a name column for **each** needed translation. For example, suppose you want to import Czech and Spanish translations for the name of your custom list. Your file must include four columns for the Custom List Translation sublist: two columns to map to the Language field and two columns to map to the Name field.

When naming your columns, use the same naming conventions found in the Import Assistant (for example: Custom List Translation 1: Language, Custom List Translation 1: Name, Custom List Translation 2: Language, and so on) to automatically map your columns. The following example shows how you might use one file to include data for two translations.

	A	B	C	D	E	F
1	ID	Name	Custom List Translation 1: Language	Custom List Translation 1: Name	Custom List Translation 2: Language	Custom List Translation 2: Name
2	_listClothes	Clothes	Czech	oblečení	Spanish	ropa
3						

The following example shows how you populate both sublists using one file. This file creates two custom lists, each with two translations for its name, and each with three values in its list. In this example, you are creating two translations for each value in each custom list.

	A	B	C	D	E	F	G	H	I
1	ID	Name	Custom List Translation 1: Language	Custom List Translation 1: Name	Custom List Translation 2: Language	Custom List Translation 2: Name	Value	Translation: Czech	Translation: Spanish
2	Sz	Sizes	Czech	Velikosti	Spanish	Tamaños	Sm	Ma	Pe
3		Sizes					Me	St	Me
4		Sizes					Lg	Ve	Gr
5	Cl	Colors	Czech	Barvy	Spanish	Colores	red	červený	rojo
6		Colors					blue	modrý	azul
7		Colors					green	zelený	verde
8									

When you import a single file, be aware that if your file includes more than one record for the Custom List Translation sublist, the mapping page must include multiple instances of the sublist fields. If you name the columns in your CSV file using the same naming conventions as shown in the preceding screenshot (with the name of the sublist as a prefix), these instances are created for you automatically.

If you used different column names, you must manually create the additional instances. You can add an extra instance by clicking the plus sign next to the Custom List Translation label.



You create multiple instances because the system must know how to pair the language-name combinations in your file. The following illustration shows how you might complete your mapping in this situation:

1	Body data
2	Custom List Translation data Since two languages are used in the CSV file, a second instance of the Netsuite fields is needed on this page. Click the plus sign next to the Custom List Translation to add another instance.
3	Custom List Values data The mapping in Your Fields is same as in the multiple-file import.

Common Errors When Importing Custom Lists

The “Results” file for a failed custom list import might include any of the following messages.

‘Adding new line to sublist translations is not allowed’

This error might indicate that you tried to map data to the Custom List Translation sublist when the Multi-Language feature was not properly set up. For imports to this sublist to work, the Multi-Language feature must be enabled, and at least one language must be listed on the Languages subtab at Setup > Company > Enable Features. For more details, see [Custom List Translation](#).

‘Unable to find a matching line for sublist translations’

This error might indicate that you created a static mapping for the Language field (using the edit icon on the mapping page) when your CSV file included translations for more than one language. You can use the static mapping successfully only if the CSV file includes translations for **one** language and no others.

'One of the columns [id, name] must be mapped in the CUSTOMLIST import'

This error might indicate that neither a name, nor an internal or external ID was mapped on the field mapping page of the Import Assistant. For the import to succeed, you must select a reference type, either a name or an ID, and map it to your CSV file content, using the edit icon on the mapping page. For more information about using reference types, see [Select Reference Types](#).

Employees Import Type

For information about employee imports, see the following:

- [Bonus Import](#)
- [Employees Import](#)
- [Expense Report Import](#)
- [Imported Employee Expense Import](#)
- [Job Import](#)
- [Time-Off Change CSV Import](#)
- [Track Time Import](#)

Bonus Import

You can import bonus CSV data when the Compensation Tracking features is enabled. For more information about bonuses, see the help topic [Awarding a Bonus to an Employee](#).

Usage Notes

Consider these usage notes when you map the following fields.

- **Employee** — A record for the employee must exist in your account. The employee and bonus type must have the same subsidiary.
- **Bonus Type** — A record for the bonus type must already exist in your account. The employee and bonus type must have the same subsidiary.
- **Percentage** — If you include both percentage and amount, only amount is used. If the employee's base wage is hourly, you must use amount.
- **Amount** — If you include both percentage and amount, only amount is used. The currency used for amount is taken from the **Compensation Currency** field on the **Compensation Tracking** tab of the employee record. For more information, see the help topic [Recording Base Pay Compensation for an Employee](#).

CSV File Example

The following table shows how you might structure a file for importing bonus data in a CSV file.



Note: You cannot include symbols for percentage or amount. For a 3% bonus, use 3. For a \$400 bonus, use 400.

Employee	External ID	Bonus Type	Percentage	Amount	Award Date
Julie Bauer	659	Holiday	—	400	12/21/2020
Jennifer Sanders	640	Annual	3		12/10/2020
John Smith	671	Holiday	—	400	12/21/2020

Importing a Bonus CSV Table

To import bonus CSV data:

1. Go to Setup > Import/Export > Import Tasks > Import CSV Records
2. In the Import Assistant, choose Employees as the Import Type, and Bonus as the Record type.
3. Click **Select** and specify the CSV file you want to import. Click **Next**.
4. Select the appropriate data handling for your import. Click **Next**.
5. Review the field mappings to make sure that your CSV data fields map into NetSuite fields.
6. Click **Next** and follow the assistant's instructions.

For more information about using the import assistant and importing CSV records, see the help topics [Importing CSV Files with the Import Assistant](#) and [Guidelines for CSV Import Files](#).

Employees Import

The Employees import adds employees to the Employee list.

- Starting from version 2017.1, you can only import employee records if you are logged in with a role that has the Employees permission assigned to it.
- When you import employee records, you can flag employees as sales representatives. This flagging is important if you plan to use CSV import to assign sales representatives to customer records.
- If your account is using NetSuite OneWorld, and if the subsidiary is not set as a default value on the employee record, the Subsidiary field is required for Employees imports when you are creating new records. You must map the NetSuite Subsidiary field to a field in your CSV file, or the import will fail. The CSV file value for subsidiaries should be the name of the subsidiary.
- The Employees import supports the import of the following sublist data:

Sublist	Notes
Payroll Accrued Time	Selectively updatable based on Payroll Item key field. When Payroll feature enabled.
Address	Selectively updatable based on Internal ID or Label key field. By default, the sublist Address field is read-only, and data from other sublist fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.

Sublist	Notes
Payroll Contributions	Selectively updatable based on Payroll Item key field. When Payroll feature enabled.
Payroll Deductions	Selectively updatable based on Payroll Item key field. When Payroll feature enabled.
Payroll Earnings	Selectively updatable based on Payroll Item key field. When Payroll feature enabled.
Direct Deposit	Selectively updatable based on Internal ID key field. When Direct Deposit feature enabled.
Education	—
Emergency Contacts	—
Roles	—
Subscriptions	Selectively updatable based on Subscription key field.
HCM Position	Available when the HRIS module is enabled. By default, the fields on this list are read-only. The following fields are writable: Position, Primary Position, and Position Allocation. You must map a value for the workAssignment field to distinguish between a job and a position. By default, the workAssignment field is set to job. This sublist does not support the import of multiline sublist data. For more information, see Importing Sublist Data in a Single File .

For imports that update existing Employee records, handling of sublist data updates depends upon the setting for the [Overwrite Sublists](#) advanced option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).

For details about fields that can be mapped in the Employee record, see the SOAP Schema Browser's [employee](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Import of Employee Record Changes with Effective Dating

The Effective Dating feature enables you to make changes to the employee record that are back-dated or future-dated to a specific date. To import an employee record change with effective dating, you must be logged into NetSuite using a role that has the Employee Effective Dating permission and the Import CSV File permission. By default, the Employee Effective Dating permission is automatically assigned to the Chief People Officer (CPO) and HR Generalist roles.

For details about the permission requirements for effective dating, see the help topic [Effective Dating Permission Requirements](#).

Usage Notes

When you make an effective-dated change, you must specify a change reason to document why the change was made. When you enable the Effective Dating feature, several default change reasons become available, but you can create new ones that match your company's policies.

The value in the Change Reason field, when importing an employee record change, must be one of the Employee Change Reason records. Change reason is a required field when importing an effective dated change. If you leave the field empty, it will automatically take a default value for the import.

If you want to capture additional notes for the change, you must add a column to your CSV file and map it to the Change Reason Details field.

If you leave the Effective Date field empty in your CSV file or fail to map it correctly, the change will be imported as of the current date.

The Set By field, which is used as part of the 'Effective Date Log', is automatically set to the logged in user importing the change.

In case of any Effective Dating conflicts, the system will keep all changes to avoid loss of any changes. For example, you import a department change for an employee to Department A as of January 2020. A previous department change to Department B as of March 2020 had been imported before for the same employee record. The employee will be in Department A from January 2020 to March 2020 and then their department will change to Department B from March 2020.

For more information about the effective dating feature for employee information, see the help topic [Effective Dating for Employee Information](#).

CSV File Example

Name	Internal ID	Supervisor	Job	Base Wage	Base Wage Type	Compensation	Effective From	Change Reason	Change Reason Details
John Doe	008	Jane Smith	SW Engineer	79850	Annual Salary	USD	8/5/18	Base Pay Change	The base salary for this employee has been updated
Jane Doe	010	John Smith	SR SW Engineer	105700	Annual Salary	USD	3/1/20	Pay Change - Promotion	This employee is being promoted to senior software engineer

Expense Report Import

The expense report record is used to document an employee's expenses for reimbursement. You can create and update expense report records using the CSV Import Assistant.

This record is available for import when the Expense Reports feature is enabled at Setup > Company > Enable Features, on the Employees subtab. When the feature is enabled, the Expense Report option is available in the Record Type list when you set Import Type to Employees.

In the UI, you can view the expense report record by choosing Transactions > Employees > Enter Expense Reports. For details on the process of manually creating an expense report, see the help topic [Enter an Expense Report](#).

For more details on importing expense reports, see the following:

- [Expense Report Body Fields](#)
- [Expense Report Sublist Fields](#)
- [Expense Report CSV Examples](#)
- [Common Errors When Importing Expense Reports](#)

For more information about employees and expense reports, see the help topics [Employee Information Management](#) and [Expense Reporting](#).

Expense Report Body Fields

Key expense report body fields include the following.

Accounting Approval

The Accounting Approval field can have either of the following values:

- Yes — Use this value if you want to give the expense report accounting approval, indicating it is ready to be paid. A value of Yes also makes two other fields, Account and [Posting Period](#), modifiable.
- No — Use this value if you do **not** want to give the expense report accounting approval. A value of No also means that the Account field and the Posting Period field are automatically populated by the system and cannot be modified by the user. In this case, if you try to populate the Account or the Posting Period fields, your mappings are ignored.

Do not use an abbreviation such as "Y" or "N." If you do, the Import Assistant ignores your input and uses the default value, which is No.

For more on the significance of accounting approval, see the help topic [Giving Accounting Approval for Expense Reports](#).

Date

The Date field represents the date that the expense was incurred. Make sure that the format of the date in your CSV file matches your NetSuite date format preference, which is viewable at Home > Set Preferences, under the Formatting heading.

Every expense report record must have a date. Therefore, if you choose the Add data handling option on page 2 of the Import Assistant, and if your CSV file does not include a column named "Date," the system creates a static mapping that uses today's date. If you are creating new records and you **do** map the Date field to a column in your CSV file, make sure that every row has a value in this column. Otherwise, the Import Assistant does not allow you to proceed past the mapping page. Instead, it displays an error reading in part 'Mandatory Field Missing for field "Date."

If you choose the "Update" operation on page 2 of the Import Assistant, you do not have to include a date value for every record, even if you map to a date column.

Employee

This field must identify an active employee listed at Lists > Employees > Employees. The Employee field is required.

External ID

If appropriate, you can create a unique external ID for this record.

Posting Period

Your ability to map a value for the Posting Period field depends on the value of the [Accounting Approval](#) field. That is, if Accounting Approval is set to Yes, you can map a value for Posting Period. When you map a value for posting period, be careful of the formatting in your CSV file. If the field is formatted incorrectly, the operation for that record will fail. If you are using Microsoft® Excel, you may want to set the formatting of the Posting Period column to "Text." Further, you should make sure that the text of these entries exactly matches the name of the appropriate posting period.

Use Multiple Currencies

The Use Multiple Currencies field is available only if the Multiple Currencies feature is enabled (at Setup > Company > Enable Features, on the Company subtab). For more information, see the help topic [Currency Management](#).

Possible values for the Use Multiple Currencies field are:

- Yes — Choosing this value adds three additional fields to the Expenses sublist: [Foreign Amount](#), [Currency](#), and Exchange Rate. In this case, the Currency field is required. You must also enter a value for either Foreign Amount or Amount, as well as the other required sublist field, [Category](#).
- No — Choosing this value means that the same currency is applied to all amounts entered. (The currency used is the base currency of the subsidiary the [Employee](#) is associated with.) In this case, for every record in the Expenses sublist, there are only two required fields: [Amount](#) and [Category](#).

Do not use an abbreviation such as "Y" or "N." If you do, the Import Assistant ignores your input and uses the default value, which is No.

For More Information

The SOAP Schema Browser includes definitions for all body fields, sublist fields, search filters, and search joins available to this record. For details, see the SOAP Schema Browser's [employee](#) reference page.

 **Note:** For information on using the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Expense Report Sublist Fields

You use the Expenses sublist to add or update individual expenses on an expense report record. This sublist can be selectively updated by either the [Line ID](#) or [Ref No.](#) field.

Accounting Book Detail

The Accounting Book Detail sublist is available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. This sublist is selectively updateable based on the Accounting Book key field.

Amount

The behavior of the Amount field varies depending on the value you choose for the [Category](#) field.

In some cases, you might use the Category field to select an expense category record **not** configured to use the Rate is Required option. In these cases, the handling of the Amount value is fairly straightforward — you must specify an amount either in the Amount field or in the [Foreign Amount](#) field. (Note that Foreign Amount is available only if the [Use Multiple Currencies](#) body field is set to Yes.)

If the expense category record you choose **does** have the Rate is Required option selected, then you generally do not populate the Amount field manually. Instead, the Amount value is calculated by the system using the values that you specify for [Quantity](#) (which in this case is a required field) and [Rate](#) (also

required in this case, although the field may populate automatically with a default value, which you can override).

If you are using a Tax Code, you need to enter the amount without the tax. The tax amount will be calculated automatically, based on the tax rate, and the sum of the two amounts will appear under Gross Amount.

Category

You use the Category field to identify an existing expense category record. Expense category records are listed at Setup > Accounting > Expense Categories. Each category represents a general type of expense (for example, lodging or meals), and a corresponding expense account. A category might also be configured to use the Rate is Required option, which means that any expense that falls into this category is charged according to a flat rate (entered on the expense report) times a quantity.

The Category field is required. For more on expense categories, see the help topic [Expense Categories](#).

Currency

The Currency field is available only if the [Use Multiple Currencies](#) body field is mapped to a value of Yes. In these cases, Currency is required.

Date

The Date field represents the date that the expense was incurred. Make sure that the format of the date in your CSV file matches your NetSuite date format preference, which is viewable at Home > Set Preferences, under the Formatting heading.

Every sublist record must have a date. Therefore, if you choose a data handling option of Add on page 2 of the Import Assistant, and if your CSV file does not include a sublist column named "Date," the system creates a static mapping that uses today's date. If you are creating new records and you **do** map the Date field to a column in your CSV file, make sure that every row has a value in this column. Otherwise, the Import Assistant does not allow you to proceed past the mapping page. Instead, it displays an error reading in part 'Mandatory Field Missing for field "Date."

If you choose a data handling option of Update on page 2 of the Import Assistant, you do not have to include a date value for every sublist record, even if you map to a column in your CSV file.

Foreign Amount

The Foreign Amount field is available only if the [Use Multiple Currencies](#) body field is mapped to a value of Yes.

The behavior of the Foreign Amount field varies depending on the value you choose for the [Category](#) field.

In some cases, you might use the Category field to select an expense category record that does **not** have the Rate is Required option selected. In these cases, you are required to enter an amount either in the [Amount](#) field or in the Foreign Amount field.

If the expense category record you choose **does** have the Rate is Required option selected, then you cannot populate the Foreign Amount field manually. Instead, the amount value is calculated by the system using the values that you specify for Quantity (which in this case is a required field) and Rate (also required in this case, although the Rate field may populate automatically with a default value, which you can override).

Line ID

Line ID is one of the key fields for the Expenses sublist. Line ID is a read-only field. It is not viewable in the UI. However, you can obtain this value using SOAP web services. Alternatively, you can use the [Ref No.](#) value to update your expense line. (Ref No. is viewable in the UI.)

Quantity

The Quantity field is available only if you choose an expense category for which the Rate is Required option is selected. In this case, the Quantity field is required. The system uses the product of the Quantity value and the Rate value to populate the Amount field.

Rate

The Rate field is available only if you the [Category](#) field points to an expense category for which the Rate is Required option is selected. In this case, you specify a rate, which is used to determine the cost of the item. Note that the expense category may be configured to insert a default rate, which you can change if needed. If the Rate field is available, a value for it is required.

Ref No.

Ref No. is one of the key fields for the Expenses sublist. You can create a value for Ref No. when you create the expense report record. If you do not create a value, the system creates one.

If you create a value, note that it must be unique, and it must be an integer. If you attempt to populate the Ref No. field with an illegal value (such as an alphabetic value), the Import Assistant does not allow you to proceed past the mapping page.

Tax Amount, Tax Code

The availability of the Tax Amount and Tax Code fields varies depending on the nexus that the [Employee](#) is associated with. For example, for an employee associated with a US nexus, these fields are not available. For an employee associated with a UK account, these fields are available. If you submit values for these fields when they are not available, the values you submit are ignored.

Tax Code can be country specific taxes, like the Value Added Tax (VAT), Goods and Services Tax (GST), Harmonized Sales Tax (HST) and so on. For more information on Tax Codes, see the help topic [Tax Codes Overview](#)

For More Information

The SOAP Schema Browser includes definitions for all body fields, sublist fields, search filters, and search joins available to this record. For details, see the SOAP Schema Browser's [expense report](#) reference page.



Note: For information on using the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Expense Report CSV Examples

When importing expense reports, you can use multiple-file or single-file upload techniques.

Multiple Files CSV Example

With a multiple-file import, you use one file for the expense report body fields and another file for the Expenses sublist fields. The file holding the body data must include, at a minimum, a value in the [Employee](#) field. An External ID is also recommended. For example:

External ID	Employee
101	Smith, John
102	Brown, Jane
103	Martin, Ann

Each row in the second file must include values for the [Category](#) field and, typically, for the [Amount](#) field. (If the body data for the record has Use Multiple Currencies set to No, which is the default, then Amount is required.)

Each sublist record must also include a unique identifier that links the sublist record to an entry in the main file. The following example uses the External ID field for this purpose.

External ID	Amount	Category
101	25	Meals
101	756	Transportation
102	12.50	Meals
102	389	Lodging
103	488.50	Training

Multi-Files Example Using Multiple Currencies

In the following example, two import files are used to import expense reports that contain expenses in multiple currencies. In this case, your main import file might look as follows.

External ID	Date	Employee	Use Multiple Currencies
321	8/14/2017	Agneta Simpson	Yes

The linked file for the Expenses sublist might look as follows. When you map these fields to the fields of the expenses sublist, map the external ID to the Line ID field, and map Line Reference Number to Ref No.

External ID	Line Reference Number	Category	Amount	Currency	Date	Tax Code
321	1	Entertainment	450	CA CAD	8/14/2017	CA-Zero
321	2	Travel	300	US USD	8/14/2017	CA-Zero

Single File CSV Example

With a single-file import, all data for each expense report record must exist on a single row. For this reason, if the sublist data for any expense report record includes more than one expense, you must

create a discrete set of columns for each expense. For example, the following sample would create three expense report records. The first two records would each have two expenses and the third would have only one.



Note: This file is an example. If you try to import a file just like this one, the import fails. There are mandatory fields missing and some fields, although not mandatory for the import assistant, are required for the expense report, based on the value of other fields. For more details, see [Expense Report Body Fields](#) and [Expense Report Sublist Fields](#).

External ID	Employee	Expense Report Expenses 1: Amount	Expense Report Expenses 1: Category	Expense Report Expenses 2: Amount	Expense Report Expenses 2: Category
101	Smith, John	25	Meals	756	Transportation
102	Brown, Jane	12.50	Meals	389	Lodging
103	Martin, Ann	488.50	Training	—	—

When naming your columns, you should use the same naming conventions used by the Import Assistant, so that your columns automatically map. For this to happen, each sublist column should have prefixes that begin with "Expense List Expenses" — for example "Expense List Expenses 1:", "Expense List Expenses 2:", and so on).

Common Errors When Importing Expense Reports

The "Results" file for a failed expense report import might include any of the following messages.

'Please enter value(s) for: Amount'

This error can indicate that you failed to provide a value for one of the following sublist fields:

- Amount
- Rate
- Quantity

Problems with any of these fields are referred to as problems with "Amount" because, depending on the exact details of the record, all of these fields can be critical for determining the amount of the expense.

'You must enter at least one line item for this transaction'

This error indicates that you failed to include sublist data for every expense report record. Each expense report record must have at least one sublist record. If you are doing a multiple-file import, this error might point to a problem with the key column you are using to link the files. For example, one of the files might include a typo in this column, preventing proper linking of the expense report's body data to its sublist data.

'Invalid postingperiod reference key for subsidiary 1'

This error indicates a problem with the Posting Period value. Double-check that you entered the name of an existing posting period. After you have done that, make sure that your CSV files formatting is not set up to add any punctuation or special handling to the text in this column.



Note: If you are using Microsoft® Excel, set the formatting of the Posting Period column to "Text."

Imported Employee Expense Import



Important: This topic describes the import of a record that is currently available only in some customer accounts. For information on the availability of this record type import for your account, please contact your NetSuite account manager.

The Imported Employee Expense record is available when the Expense Report feature is enabled on the Setup > Company > Enable Features, on the Employees subtab.

In the user interface, you can access the Imported Employee Expense record at Transaction > Employees > Imported Employee Expenses. For information about working with this record in the user interface, see the help topic [Expense Reporting](#).

To import employee expense records, set the Import Type to Employee and the Record Type to Imported Employee Expense in the first step of the Import Assistant.

The employee expense import supports sublist fields.

For details about fields that can be mapped in the Employee Expense record, see the SOAP Schema Browser's [expense report](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Imported Employee Expense Example

The following example shows an employee expense import where two new billed amounts are added.

External ID	Billed Amount	Billed Currency	Card Currency	Charge Date	Source Type	Status	Transaction ID	Field Name	Field Value
csv1	1	USA	Euro	03-09-2021	Visa	Pending	sTransactionId111	FLDname1	firstline
csv2	2	USA	Euro	03-09-2021	Visa	Pending	sTransactionId222	FLDname1	secondline

Job Import



Important: This topic describes a feature that is currently available only in some customer accounts. For information on the availability of this feature for your account, please contact your NetSuite account manager.

The job record is available when the Job Management feature is enabled on the Setup > Company > Setup Tasks > Enable Features.

In the user interface, you can access the job record at Setup > HR Information System > Jobs. For information about working with this record in the user interface, see the help topic [Managing Jobs](#).

To import job records, set the Import Type to Employee and the Record Type to Job in the first step of the Import Assistant.

The job import does not contain any sublist fields.

For details about fields that can be mapped in the job record, see the SOAP Schema Browser's [HCM job](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

After the import is complete, you can assign employees to the newly created or updated jobs. For more information, see the help topic [Assigning Employees to Jobs](#).

Job Import Example

The following example shows a job import where two new jobs are added.

External ID	Job Title	Employment Category	Inactive	Description
6542	Senior Sales Engineer	Full-time	F	Sales engineer with 5+ years of experience
6543	QA Intern — Summer	Part-time	T	Summer intern — active from July 1

For updating job records, you must map an external ID, an internal ID, or the job title in the field mapping page of the import assistant.

External ID	Job Title	Employment Category	Inactive	Description
6542	Senior Sales Engineer	Full-time	F	Sales engineer with 10+ years of experience
6543	QA Intern — Fall	Part-time	F	Fall intern — active from September 1

Time-Off Change CSV Import



Important: This topic describes a feature that is currently available only in some customer accounts. For information on the availability of this feature for your account, please contact your NetSuite account manager.

You can import time-off change CSV data when the Time-Off Management feature is enabled at Setup > Company > Setup Tasks > Enable Features. Under the Employees subtab, check the **Time-Off Management** box. For more information about time-off changes, see the help topic [Viewing Time-Off Changes](#).

Time-Off Change Fields

To prepare time-off change CSV data for import, make sure that your CSV file includes the following fields.

- External ID — Used as a unique identifier for the record. You can specify any value that has not been used as the External ID in previous CSV imports. This field is recommended, but not required.
- Employee — Name of the employee. A record for the employee must exist in the account.
- Time-Off Type — The time-off type must already exist in the account.
- Amount — The number of days or hours for this time-off.

- Time-Off Time Unit — Use Days or Hours. After the record is saved, the time-off unit is automatically changed to hours. For any amount entered in days, the time-off unit type is changed to hours and the Amount value is converted to hours. For example, seven days, is converted to 56 hours when saved.
- Date Applied — Date when the time-off change was applied.

CSV File Example

The following table shows how you might structure a file for importing time-off change data in a CSV file.

External ID	Employee	Time-Off Type	Amount	Time-Off Time Unit	Date Applied	Time-Off Request	Description
TOC-EMP-398	Jennifer Sanders	Vacation	7	Days	07/01/2015	53	—
TOC-EMP-400	Julie Bauer	Vacation	4	Days	09/01/2015	22	—
TOC-EMP-402	Daniel White	Vacation	5	Days	08/15/2015	43	Summer Vacation

Importing a Time-Off Change CSV Table

To import time-off change CSV data:

1. Go to Setup > Import/Export > Import Tasks > Import CSV Records.
2. In the Import Assistant, choose **Employees** as the Import Type, and **Time-Off Change** as the Record Type.
3. Click **Select** and specify the CSV file you want to import. Click **Next**.
4. Select the appropriate data handling for your import. In most cases you will add new time-off change records. Click **Next**.
5. Review the field mappings to make sure that your CSV data fields map into NetSuite fields.
6. Click **Next** and follow the assistant's instructions.

For more information about using the import assistant and importing CSV records, see the help topics [Importing CSV Files with the Import Assistant](#) and [Guidelines for CSV Import Files](#).

Track Time Import

The track time record is used to keep track of hours worked by an employee. You can create and update track time records using the CSV Import Assistant.

This record is available for import when the Time Tracking feature is enabled at Setup > Company > Enable Features, on the Employees subtab.

In the UI, you access the track time record by choosing Transactions > Employees > Track Time. For details on how to manually create a record, see the help topic [Entering a Time Transaction](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

To import track time records, set the import type to Employees, and the record type to Track Time.

For more on importing track time records, see the following:

- [Track Time Body Fields](#)
- [Track Time CSV Example](#)

Track Time Body Fields

The following table describes some of the body fields available for mapping when you create a new track time record using the CSV Import Assistant.

Field	Notes	Required?
Date	The posting date of the transaction. Note that the date value should be specified according to the NetSuite formatting preferences of the person doing the import. You can view this preference at Home > Set Preferences.	Yes, but if you do not include a date, the system creates a default mapping to today's date.
Duration	The number of hours the employee worked.	Yes
Employee	The employee ID of the person whose time is being logged. This value must point to an active employee listed at Lists > Employees > Employees.	Yes
External ID	A unique identifier that can be used to update the record.	No
Location (if the Locations feature has been enabled)	A location specified at Setup > Company > Locations.	Yes

Additional fields are also available. For details, see the SOAP Schema Browser's [time bill](#) reference page. For information on using the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Track Time CSV Example

The following table shows how you might format your CSV file when importing track time records.

External ID	Employee	Duration	Date	Location
111A	Smith, John	8.0	8/16/13	East Coast
112A	Carter, Susan	8.0	8/16/13	East Coast
113A	Doe, Jane	8.0	8/16/13	East Coast
114A	Miller, James	4	8/16/13	East Coast

Items Import

Item records allow you to track and manage the goods and services your company buys and sells in the course of doing business.

For a list of the types of items that you can add or update with the Import Assistant, see [Item Record Types that Can Be Imported](#).

For a table of item sublist data that can be imported, see [Item Sublists Available for Import](#).

To review issues you may encounter when you import Items data, see [Notes about Items Imports](#) and [Selecting General Ledger Accounts for Item Imports](#).

If the Demand Planning feature is enabled in your account, review [Importing Demand Planning Data for Items](#) for information about importing related data.

If the Web Site feature is enabled in your account, review [Importing Related Items Groups](#).

If the Warehouse Management feature is enabled, you can import data for the following fields: Rotation Type, Item Process Group, and Item Process Family. For more information about working with these fields, see the help topic [Creating Items for NetSuite WMS](#).

For information about using the Import Assistant to set up matrix options for items, see [Importing Matrix Options for Items](#).

For tips about importing price levels for items, see [Importing Pricing Data for Items](#).

For an example of replacing the contents of a sublist with the content from the CSV import, see [Replacing the Bill of Materials Sublist with the CSV File](#).



Important: Because the Quantity on Hand field is not available for entry on NetSuite user interface Item forms, CSV imports can add Quantity on Hand values for new item records being imported, but cannot update Quantity on Hand values for existing NetSuite item records. The Quantity on Hand field should only be available on the Field Mapping page for Adds, but currently may appear for Updates as well. If you map this field for an update, currently no error occurs, but Quantity on Hand field values are not updated.

For details about fields that can be mapped in Item records, refer to the [SOAP Schema Browser](#), which has a reference page for each supported item type. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Item Record Types that Can Be Imported

The Items import type provides the ability to import the following NetSuite items record types, as shown in the Record Type dropdown list on the first page of the Import Assistant.

- Assembly/BOM Item
 - Lot Numbered Assembly/BOM Item
 - Serialized Assembly/BOM Item
- Description Item
- Discount Item
- Inventory Item (Not supported in NetCRM), including:
 - Lot Numbered Inventory Item
 - Serialized Inventory Item



Important: For OneWorld accounts, the import of inventory item historical data dated prior to the date of the OneWorld upgrade in your account is not supported. To maintain accurate inventory information, you should import only data that is dated later than the OneWorld upgrade and initial Multi-Location Inventory distribution.

- Item Group

- Kit/Package Item
- Markup Item
- Non-Inventory Item, including:
 - for Purchase
 - for Resale
 - for Sale
- Other Charge Item, including:
 - for Purchase
 - for Resale
 - for Sale
- Payment Item
- Service Item, including:
 - for Purchase
 - for Resale
 - for Sale
- Subtotal Item



Note: You can use the Import Assistant to import matrix options for Inventory Item, Non-Inventory Item, and Service Item imports, but you need to use the NetSuite user interface to set up possible matrix options as custom lists and custom item fields before you can complete an import of matrix item options. For information about importing matrix options for items, see [Importing Matrix Options for Items](#). For general information about matrix items in NetSuite, see the help topic [Matrix Items](#).

For details about fields that can be mapped in item records, refer to the [SOAP Schema Browser](#), which includes a reference page for supported item types. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Item Sublists Available for Import

Item sublist data supported for import varies according to the type of item data to be imported, and the related features enabled. The following table indicates these limitations:

Sublist	Notes
Bills of Materials	<p>Available for the following import types:</p> <ul style="list-style-type: none"> ■ Assembly Item ■ Serialized Assembly Item ■ Lot Numbered Assembly Item <p>Available if the Advanced Bill of Materials feature is enabled at Setup > Company > Setup Tasks > Enable Features (Administrator), on the Items & Inventory subtab.</p>
Bin Numbers	When Bin Management feature or Advanced Bin/Numbered Inventory Management enabled.

Sublist	Notes
	<p>Selectively updatable based on Bin Number key field.</p> <p>For Assembly/BOM Item and Inventory Item imports.</p> <p>Note: If you are importing bin records, you should complete this import before you import items with associated bin numbers. See Bin Import.</p>
Locations	<p>When Multi-Location Inventory feature enabled.</p> <p>Selectively updatable based on Internal ID, External ID, or Location. (See Updating Locations on Items.)</p> <p>For Assembly/BOM Item and Inventory Item imports.</p>
Members	For Assembly/BOM Item, Item Group, and Kit/Package Item imports.
Merchandise Hierarchy	<p>Available for the following item types:</p> <ul style="list-style-type: none"> ■ Inventory Item ■ Lot Numbered Inventory Item ■ Serialized Inventory Item <p>Available if the Merchandise Hierarchy feature is enabled at Setup > Company > Setup Tasks > Enable Features, on the Items & Inventory subtab.</p>
Pricing	<p>When any of Multiple Prices, Quantity Pricing, or Multiple Currencies feature enabled.</p> <p>Selectively updatable based on fields of Currency, Quantity, and Level, depending on enabled features (See Keys for Item Pricing Sublist.)</p>
Related Items	<p>When Web Site feature enabled.</p> <p>Not available for Non-Inventory Item for Purchase, Service Item for Purchase, Other Charge Item imports.</p> <p>For more information, see Importing Related Items Groups.</p>
Site Category	<p>When Web Site feature enabled.</p> <p>Not available for Non-Inventory Item for Purchase, Service Item for Purchase, Other Charge Item imports.</p>
Task Templates	<p>When Project Management feature enabled.</p> <p>For Service Item for Sale imports.</p>
Translation	<p>When Multi-Language feature enabled.</p> <p>Selectively updatable based on Language key field.</p>
Vendors	<p>When Multiple Vendors feature enabled.</p> <p>Selectively updatable based on Vendor key field.</p> <p>For Inventory Item, Non-Inventory Item for Resale or Purchase, Service Item for Resale or Purchase, and Other Charge Item for Resale or Purchase imports, and Assembly/BOM Item when Allow Purchase of Assembly Items preference is enabled.</p> <p>Note that if multiple vendors are defined as preferred, the last one listed is the only one marked preferred by the import.</p> <p>See Updating Vendors on Items.</p>

Every sublist on each record can optionally have a separate file. For imports that update existing Item records, handling of sublist data updates depends upon the setting for the **Overwrite Sublists** advanced

option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Notes about Items Imports

The following information may apply to your items imports:

- [Import of Inventory Detail Data Currently Not Supported](#)
- [Unique Item Lookups by Internal ID and External ID](#)
- [Updating Inventory with Imported Items Data](#)
- [Updating Vendors on Items](#)
- [Updating Locations on Items](#)

Import of Inventory Detail Data Currently Not Supported

When the Advanced Bin / Numbered Inventory Management feature is enabled, the following types of items include an Inventory Detail subrecord in the user interface: Assembly/BOM Item (when Use Bins is set to True), Lot Numbered Assembly/BOM Item, Serialized Assembly/BOM Item, Inventory Item (when Use Bins is set to True), Lot Numbered Inventory Item, and Serialized Inventory Item.

The Inventory Detail subrecord includes quantity on hand and quantity available values per bin number and/or per serial/lot number. Import of this subrecord's data is not currently supported. If you enable the Advanced Bin / Numbered Inventory Management feature, CSV import of the types of items listed above may result in incomplete data. For details about this feature, see the help topic [Advanced Bin / Numbered Inventory Management](#).

Unique Item Lookups by Internal ID and External ID

To help eliminate ambiguous or missed lookups, the Import Assistant lets you reference an Item's Internal ID or External ID.

- The Internal ID can be obtained by performing an Item saved search and exporting the results to CSV.
- The External ID is similar to handle, and can be set to any string during add, but must be unique across all items.

For more information, see [Select Reference Types](#).

Updating Inventory with Imported Items Data

After you have completed an import of items, you can use the Adjust Inventory Worksheet to update inventory levels. For more information, see the help topic [Inventory Adjustments](#).

Updating Vendors on Items

You can use the Import Assistant to update Vendor sublist information for items. For these updates, depending upon your setting for the [Overwrite Sublists](#) option, you can overwrite items' existing vendors sublists, or you can selectively update based on a key of Vendor name.

You also can use an alternate method to set preferred vendors for items through a CSV import. The Import Assistant supports the addition of a Preferred Vendor column to an Items CSV file. If the vendor specified in this field currently is on the vendor list, the import marks it as preferred; if it is not on the list, the import adds it. This method is available whether or not the Multiple Vendors feature is enabled.



Important: If your CSV file defines more than one vendor as preferred for an item, the last vendor listed is the one that is marked as preferred by the import.

Updating Locations on Items

You can use the Import Assistant to update location sublist information for items, when the Multi-Location Inventory feature is enabled. The fields that are updatable per location are Preferred Stock Level, Quantity on Hand, and Reorder Point. Also, if the Demand Planning feature is enabled, additional demand planning fields are available for items where the Time Phased replenishment method is used. See [Selecting General Ledger Accounts for Item Imports](#).

After you have completed an import of items for multiple locations, you can use the Transfer Inventory form or Transfer Orders to move inventory among locations as necessary. For information, see the help topic [Transferring Inventory](#).

The Location sublist is a keyed sublist, based on Internal ID, External ID, or Location name. Updates of this sublist vary depending upon your setting for the [Overwrite Sublists](#) option.

Importing Default ATP Method Data

As of 2017.1, you can use the Import Assistant to import default available to promise (ATP) methods when you import inventory items, and you have the Available to Promise feature enabled in your account. For information about the Available to Promise feature, see the help topic [Available to Promise](#).

Selecting General Ledger Accounts for Item Imports

Different item types have different accounting requirements and considerations. If you are setting up your account for the first time, you should review this topic and consider creating General Ledger (GL) accounts before you import items.

In regard to their General Ledger (GL) impact, item types fall into two categories:

- Some item types have no accounting component.
- Some item types can optionally be created as posting items that require an account, or as non-posting items that do not.

For items in the second category, note that if you choose to make them non-posting, they cannot be used on transactions and have no direct impact on your General Ledger. However, you might choose to make items non-posting if they are to be used as parent items, or as components of kits and assemblies.

The following table summarizes the primary accounting considerations for each item type that can be imported. Note that, for those item types that can be associated with one or more accounts, the list of valid account types you can choose from varies depending on whether the Expand Account Lists option has been enabled. If enabled (at Setup > Accounting > Accounting Preferences), Expand Account Lists let you choose from a greater number of account types than would otherwise be available. Except where noted, the table below assumes that you do **not** have this preference enabled. Note also that this table summarizes only the minimal accounting components that exist. Some items have additional optional accounting choices. For full details, see the help topic for the relevant item.

Map your account fields with some care. If you map to an account that is not considered valid for the item type, the import fails with an “invalid account reference key” error. Of course, if you already have your accounts set up, you can double-check which accounts are valid by referring to the various Account lists on the forms where you manually create items.

Item Type/Subtype	Accounting Component?	Valid Account Types to Choose when Adding	Valid Account Changes when Updating
Assembly/Bill of Materials	Yes, but you can make the item non-posting by mapping the Cost of Goods Sold (COGS), Asset, and Income account fields to values of “null” (all lowercase) in your CSV file, or creating default values of null on the mapping page.	Cost of Goods Sold (COGS), Asset, and Income	
Description	No	—	
Discount	Yes, but you can avoid entering an account by mapping the Non-Posting field to Yes. You can do this either by mapping to a Non-Posting column in your CSV file or creating a default value on the mapping page.	Expense or Income	You can update only to the same type of account selected when the record was created. For example, if you chose an expense account originally, the update can be only to another expense account. With Expand Account Lists enabled, the Account field can be updated to a different account type other than the one chosen when the item record was created.
Inventory	Yes, but you can make the item non-posting by mapping the Cost of Goods Sold (COGS), Asset, and Income account fields to values of “null” (all lowercase) in your CSV file, or creating default values of null on the mapping page.	Cost of Goods Sold (COGS), Asset, and Income	
Item Group	No	—	
Kit/Package	Yes, but you can make the item non-posting by mapping the Income account field to a value of “null” (all lowercase) in your CSV file, or creating a default value of null on the mapping page.	Income	
Markup	Yes, but you can avoid entering an account by mapping the Non-Posting field to Yes. You can do this either by mapping to a Non-Posting column in your CSV file or creating a default value on the mapping page.	Expense or Income	You can update only to the same type of account selected when the record was created. For example, if you chose an income account originally, the update can be only to another income account. With Expand Account Lists enabled, the Account field can be updated to a different

Item Type/Subtype	Accounting Component?	Valid Account Types to Choose when Adding	Valid Account Changes when Updating
Non-inventory, Other Charge, and Service for Purchase	Yes, but you can make the item non-posting by mapping the Expense account field to a value of "null" (all lowercase) in your CSV file, or creating a default value of null on the mapping page.	Expense	account type other than the one chosen when the item record was created.
Non-inventory, Other Charge, and Service for Resale	Yes, but you can make the item non-posting by mapping the Income and Expense account fields to values of "null" (all lowercase) in your CSV file, or creating default values of null on the mapping page.	Income and Expense	
Non-inventory, Other Charge, and Service for Sale	Yes, but you can make the item non-posting by mapping the Income account field to a value of "null" (all lowercase) in your CSV file, or creating a default value of null on the mapping page.	Income	
Payment	Yes. You can select an account by including an Account mapping and by setting Group With Undeposited Funds to Yes. If you fail to do the latter, your account mapping is ignored.	Bank or Other Current Asset	
Subtotal	No	—	

Importing Demand Planning Data for Items

The Demand Planning feature supports the use of demand plan and supply plan records to track anticipated supply and demand for inventory and assembly/BOM items. When this feature is enabled, you can include demand planning data in inventory items imports. If the Work Orders feature is also enabled, you can include demand planning data in assembly/BOM items imports.



Note: You also can import data from Item Demand Plan transactions. See [Item Demand Plan Import](#).

The Import Assistant supports the import of values for the following fields related to demand planning. Review the notes in the following table before setting up your CSV files and mapping these fields on the Import Assistant Field Mapping page. It is also recommended that you read the help topics [Demand Planning](#) and that you review details about other items record fields in the SOAP Schema Browser.

Field	Notes
Replenishment Method	<p>Reorder Point is the default value for this field. You must set a value of Time Phased for each item you want to use with Demand Planning. When this value is set:</p> <ul style="list-style-type: none"> ■ Orders are created based on item demand plans instead of the Advanced Inventory Management settings.

Field	Notes
	<ul style="list-style-type: none"> ■ The Alternate Source Item, Demand Source, Fixed Lot Size, and Lot Size Method fields are available for writing if this value is used. ■ Other fields on the record that are used by Advanced Inventory Management to calculate demand are not writable. These unavailable fields are: Seasonal Demand, Build Point/Reorder Point, Preferred Stock Level Days, Safety Stock Level Days. ■ The Auto-Calculate settings are set to False and cannot be changed for Build Point/Reorder Point, Preferred Stock Level.
Alternate Source Item	<p>An alternate item to be used as the source of historical sales data used for demand planning. When this field is left blank, the source for historical data is the original item.</p> <p>Note: You can select only an item that is of the same item type to be an alternate source. For example, if the original item is an inventory item, the alternate source item must also be an inventory item.</p>
Lead Time	<p>The average number of days between ordering this item from the vendor and receiving it. If no value is set, the default value from the Inventory Management Preferences page is used.</p> <p>Note: To set a value for this field, you must set Auto-Calculate Lead Time to False.</p>
Auto-Calculate Lead Time	<p>Boolean indicating whether lead time is auto-calculated or based on a value set in the Lead Time field.</p> <p>By default set to True.</p>
Safety Stock Level	<p>The amount of an item that should be kept in stock at all times. When the Replenish Method field is set to Time Phased, this value can only be defined as a quantity of items, not as a number of days supply. If no value is set, the default value from the Set Up Inventory Management page is used.</p>
Expected Demand Change	<p>Used when an item's demand plan forecast method is set to Seasonal Change. The percentage used to augment the forecasted amount according to seasonal variations in demand. Format is numeric; you do not need to include the % sign, for example: 32.5.</p>
Lot Sizing Method	<p>Possible values are:</p> <ul style="list-style-type: none"> ■ Lot For Lot – Orders are suggested for procurement based on the exact projections for that day. The suggested order quantity may vary from day to day depending on demand calculations. ■ Fixed Lot Size – Orders are suggested for procurement based on a fixed amount or a multiple of the fixed amount. ■ Periods of Supply – Select this option to generate aggregated purchase orders or work orders based on the overall demand requirements extended over a designated period, such as weekly or monthly. <p>Note: If the Multi-Location Inventory feature is enabled, this field is in the Locations sublist on the Field Mapping page, and can have different values per location.</p>
Fixed Lot Size	Used when Lot Sizing Method is set to Fixed Lot Size .

Field	Notes
	<p>The quantity that procurement of this item is always based on, regardless of demand projections.</p> <p>Note: If the Multi-Location Inventory feature is enabled, this field is in the Locations sublist on the Field Mapping page, and can have different values per location.</p>
Periodic Lot Size Type	<p>If you selected Periods of Supply as the lot sizing method, then make a selection in the Periodic Lot Size Type field:</p> <ul style="list-style-type: none"> ■ Interval – Order aggregation starts when a requirement is established and continues for a fixed period defined in the Interval field. ■ Monthly – Order aggregation starts at the beginning of each month. The requirement date is always the first day of each month. ■ Weekly – Order aggregation starts at the beginning of each week. The requirement date is always the first day of the week as defined under Company Settings.
Periodic Lot Size Increment	<p>In the Periodic Lot Size Increment field, enter a number from 1 to 90. The increment starts on the first day an order is required. From the first day, NetSuite aggregates all orders in the increment. Orders are placed on the first day of the period.</p>
Supply Type	<p>This field's value can only be set for assembly items when the Allow Purchase of Assembly Items preference is enabled at Setup > Accounting > Accounting Preferences. In this case, the value can be either Build or Purchase.</p> <p>Note: If the Multi-Location Inventory feature is enabled, this field is in the Locations sublist on the Field Mapping page, and can have different values per location.</p> <p>In the following cases, this field is not available for import mapping:</p> <ul style="list-style-type: none"> ■ When this preference is not enabled, the value for assembly items is always Build. ■ The value for inventory items is always Purchase.
Demand Source	<p>Determines where demand data is sourced for an item. Possible values are:</p> <ul style="list-style-type: none"> ■ Forecast from Demand Plan – Demand is sourced only from the item's demand plan record. ■ Select Entered and Planned Orders – Demand is sourced from open orders and the expected ship date is used as the demand date. (If the item is a member of an assembly, demand for the assembly is included in demand calculations for the item.) <p>Note: If the Multi-Location Inventory feature is enabled, this field is in the Locations sublist on the Field Mapping page, and can have different values per location.</p>
Preferred Stock Level	<p>The Demand Source field determines where demand data is sourced for an item.</p> <p>Possible values are:</p> <p>Forecast from Demand Plan – Source only the item's demand plan record.</p> <p>Entered and Planned Orders – Source open orders and use the expected ship date as the demand date. If the item is a member of an assembly, demand for the assembly is included in demand calculations for the item.</p>

Field	Notes
	<p>Order and Forecast – Calculates demand for an item by including both the forecast amount and the amount on orders that have been entered.</p> <ul style="list-style-type: none"> ■ Forecast demand for an item is calculated by combining the following: (Quantity forecast over time) + (quantity on sales orders and invoices entered) ■ The total forecast includes the forecast demand and the actual demand order quantities from transfer orders, work orders, and sales orders. <p>Forecast Consumption – Calculates demand for an item by subtracting from the forecast quantity any item quantities on orders entered. This removes duplication if an order is already included as part of a forecast.</p> <ul style="list-style-type: none"> ■ Demand for an item is calculated as follows: (Quantity forecast over time) - (Quantity on sales orders and invoices entered)
	<p>Note: If the Multi-Location Inventory feature is enabled, this field is in the Locations sublist on the Field Mapping page, and can have different values per location.</p>

Importing Related Items Groups

Related items groups are defined for items in Web stores to cross-sell items that complement each other. The Import Assistant supports the import of related item sublist data for item records when the Web Site feature is enabled.

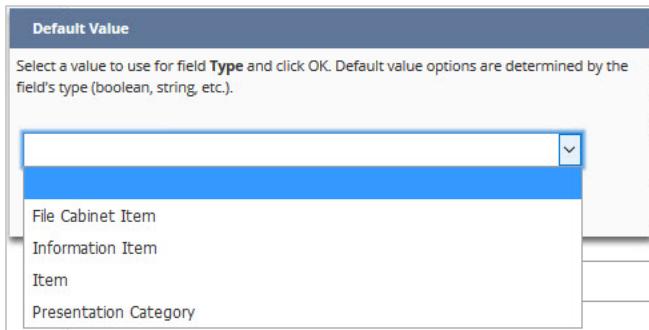
On the Import Assistant Field Mapping page, you must map two fields for the Related Items sublist: Item and Type.

The Item field represents the item name that appears in the browser, whereas the Type field indicates the NetSuite type of relation, for example File Cabinet Item, Information Item, Item, Presentation Category Item.

- To see available values for the Type field, create a new item in the browser, go to the Related Items subtab, and click the List button for the Item field. The top of the popup displays a dropdown list of available values for the Type field.
- You can include Type values in your CSV files, and/or select a default value for Type on the Field Mapping page by clicking the edit icon.



In the Default Value popup, select a default Type value (File Cabinet Item, Information Item, Item, or Presentation Category) from the dropdown list next to the Provide Default Value option.



Note the following:

- For an import job that includes large numbers of related item records, you should upload multiple CSV files.
- Import of related items is not supported for Non-Inventory Item for Purchase, Service Item for Purchase, or any Other Charge Item imports.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Importing Matrix Options for Items

You can use the Import Assistant to add matrix options for some types of item records. You can do this import instead of using the Matrix Item Assistant or creating matrix items manually.

An item matrix, which enables tracking your items by options such as size and color, consists of a parent item and subitems, or children. Each individual combination of matrix options is stored as a separate item record. For example, a parent item record for a sweater could have a list of subitems, with each subitem record representing a different size and color combination.

You can import parent and child item records together in a single CSV file. A limit of 2000 child matrix items is permitted for each parent matrix item.

- [Item Types that Support Matrix Options Import](#)
- [Prerequisites for Importing Matrix Items](#)
- [Setting Up Custom Lists and Item Fields for Matrix Options](#)
- [Setting Up Your CSV File for Matrix Items Import](#)
- [Mapping Fields for Matrix Items Import](#)
- [Tips for Matrix Items Import](#)

i Note: For general information about matrix items in NetSuite, see the help topic [Matrix Items..](#)

Item Types that Support Matrix Options Import

You can import matrix options for the following types of items:

- Assembly/Bill of Materials
- Lot Numbered Assembly
- Serialized Assembly
- Inventory Item
- Lot Numbered Inventory Item
- Serialized Inventory Item

- Non-Inventory Item for Sale
- Non-Inventory Item for Resale
- Non-Inventory Item for Purchase
- Service Item for Sale
- Service Item for Resale
- Service Item for Purchase
- Other Charge Item for Sale
- Other Charge Item for Resale
- Other Charge Item for Purchase

Prerequisites for Importing Matrix Items

Before you can import matrix items, you must do the following:

- Ensure that the Matrix Items feature is enabled, at Setup > Company > Setup Tasks > Enable Features, on the Items & Inventory subtab.
- Set up a custom list and a custom item field for each matrix option, at Customization > Lists, Records, & Fields > Lists > New and . (See detailed instructions below.)

Setting Up Custom Lists and Item Fields for Matrix Options

Before you import matrix items, you need to set up a custom list and a custom item field for each matrix option. Each custom list represents a matrix option such as size or color, and includes the set of possible values for that option. Each custom item field provides an interface for display and selection of that matrix option on item forms. The matrix options that you have set up in this manner are displayed on the Import Assistant's Field Mapping page as fields to be mapped.

To set up a custom list for a matrix option:

1. Go to Setup > Customization > Lists > New.
2. Enter a name for the option, choose the display order for option values, check the **Matrix Option List** box, add the values that you want to be available for that option, and click **Save**.

VALUE*	TRANSLATION	ABBREVIATION*
Basic Brown	BRN	BRN
Brilliant Burgundy	BUR	BUR
Racing Red	RR	RR
Relaxing Lilac	LIL	LIL
Sea Green	SGRN	SGRN

For more information, see the help topic [Setting up Custom Lists](#).

To set up a custom item field for a matrix option:

1. Go to Setup > Customization > Item Fields > New.
2. On this page, do the following:
 - a. Enter the name of a custom list in the **Label** field.
 - b. Check the **Matrix Option** box.
 - c. Select the custom list from the **List/Record** list.
 - d. On the **Applies To** subtab check the boxes for the types of items that can have this matrix option.
 - e. Click **Save**.

Setting Up Your CSV File for Matrix Items Import

The CSV file containing your matrix items data should include columns that map to the following fields. For best results, set the column headers to match these field names.

- External ID: Recommended for all CSV imports, to serve as a unique identifier for each record.
- Item Name/Number: Name for each matrix item.
- Matrix Type: Possible values for this column are Parent Matrix Item, Child Matrix Item.
- Subitem of: For each child matrix item, this column's value is the name of the parent matrix item. For each parent matrix item, this column is blank.
- Columns that map to custom lists, such as Color, Size. Values for these columns should match those in the custom lists you set up.

Your CSV file also can include columns that map to other Item record fields.

Important: In CSV import, updating parent item values for the Asset Account, Cost of Goods Sold (COGS) account, or Income Account fields does not automatically update child item field values. You need to set these values for each child item row. The system does not enforce that child item values match the parent item values for these fields, so you need to ensure that they match yourself.

The following table shows the contents of a sample matrix items CSV file. Notice that the parent matrix item is an individual record, and each child matrix item also is an individual record.

External ID	Item Name/ Number	Display Name/ Code	Color	Size	Matrix Type	Subitem of
12000	CottCrewSweat	Cotton Crewneck Sweater	—	—	Parent Matrix	—

External ID	Item Name/ Number	Display Name/ Code	Color	Size	Matrix Type	Subitem of
12011	CottCrewSweat-ES	Cotton Crewneck Sweater	Ecru	S	Child Matrix Item	CottCrewSweat
12012	CottCrewSweat-EM	Cotton Crewneck Sweater	Ecru	M	Child Matrix Item	CottCrewSweat
12021	CottCrewSweat-RS	Cotton Crewneck Sweater	Rose	S	Child Matrix Item	CottCrewSweat
12022	CottCrewSweat-RM	Cotton Crewneck Sweater	Rose	M	Child Matrix Item	CottCrewSweat
12031	CottCrewSweat-SS	Cotton Crewneck Sweater	SkyBlue	S	Child Matrix Item	CottCrewSweat
12032	CottCrewSweat-SM	Cotton Crewneck Sweater	SkyBlue	M	Child Matrix Item	CottCrewSweat

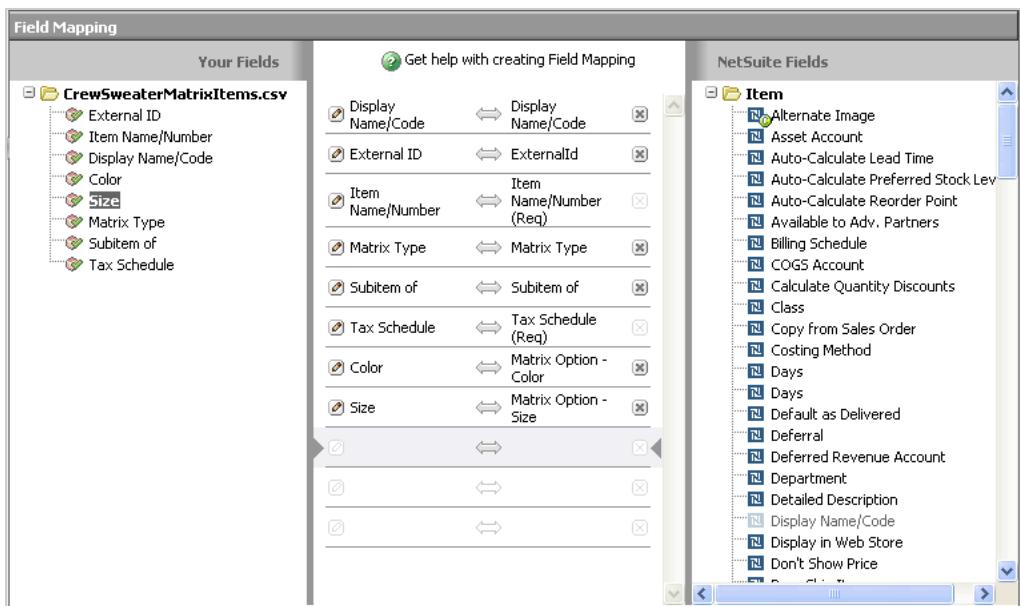
Mapping Fields for Matrix Items Import

On the Import Assistant Field Mapping page, you need to map CSV file columns to NetSuite fields, so that data is imported into records correctly. For a matrix items import, the key fields that you need to map are:

- Item Name/Number
- Matrix Type
- Subitem of
- Each matrix option field

Depending on your CSV file column names, the first three fields may be mapped automatically. You must manually map each matrix option field. Notice that in the NetSuite Fields pane, matrix option fields have names with the format **Matrix Option - <Custom_List_Name>**.

The following screenshot shows a sample mapping for a matrix items import:



Tips for Matrix Items Import

- When you select matrix options for a parent in the NetSuite user interface, child matrix items are created automatically. The CSV import process is different. Each parent matrix item and each child matrix item must be added or updated individually, and the CSV file should include a separate line for each parent matrix item and child matrix item. Otherwise, the rules for creation of matrix items in the NetSuite user interface generally also apply to matrix items imports.
- Each child matrix item can have separate pricing data.
- A limit of 2000 child matrix items are permitted for each parent matrix item.
- You can use the Import Assistant to add child matrix items to existing parent matrix items. Use the Subitem of field to store the value of the parent matrix item for each child.
- The following limitations apply to updates of matrix items with the Import Assistant:
 - You cannot change matrix option values for existing child matrix items.
 - You cannot change the parent matrix item (Subitem of value) for existing child matrix items.
 - You cannot change the matrix type value for existing matrix items.
 - Unlike in the user interface, matrix items imports cannot update child matrix items as a group in the parent item record. Each child matrix item record must be updated individually.
- You cannot use the Import Assistant to delete matrix options.
- In the user interface, child matrix items inherit Units Type field values from parent matrix items. However, items imports set Units Type field values separately on parent and child matrix items. You should map this field for both parent and child items and include values for both in CSV import files. Also note that Stock Units, Purchase Units, and Sale Units values are dependent on Units Type values.
- When you are using a CSV import for populating the facet field values, ensure that the facet field values are the same for the child matrix items. If the facet field values are not the same or they are missing for the child matrix items, the facet filter might not work as expected. This issue is observed only when you use non-matrix options as facet fields.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Importing Pricing Data for Items

The way you import prices varies depending on the features enabled in your account. If your account uses Multiple Prices, Quantity Pricing, and/or Multiple Currencies, you use the Item Pricing sublist. Otherwise, your pricing data is fairly simple, and you map prices using the Purchase Price body field. This topic deals primarily with the Item Pricing sublist.

When using the sublist, be aware of the following:

- The recommended column headers for item pricing in CSV files vary, depending on whether you plan to upload a single file or multiple files. For more information, see [Formatting for Item Pricing CSV Files](#).
- The Item Pricing sublist can be selectively updated based on key field values. The key fields vary depending on the pricing-related features that are enabled. For more information, see [Keys for Item Pricing Sublist](#).
- For multiple pricing levels, if the CSV file data includes a base price for an item, all discount or markup price levels are always calculated during import. You do not need to supply discount or markup price values, because the import process overrides any values specified in the CSV files.
- If you are using both multiple price levels and quantity-based pricing, every quantity must have a price defined at every price level. For more details, including examples of how to set up your CSV files to accommodate these fields, see [Imports Using Multiple Price Levels and Quantities Example](#).

- For any items that have quantity pricing schedules applied to them, you need to specify only a price for quantity zero for the price levels that you are using. The import process calculates other quantity prices. If you try to specify a price for any quantity besides zero for an item with a pricing schedule, the import fails. For more details, including examples of how to set up your CSV files, see [Imports Using Quantity Pricing Schedules Example](#).
- For CSV updates to items with quantity-based pricing, base price updates do not result in updates to other price levels, unless import data specifies a quantity pricing schedule or schedules.
- For multiple currencies, the Import Assistant calculates price levels for the base currency specified. The Currency field is required to be mapped for item pricing imports in accounts where the Multiple Currencies feature is enabled.
- You shouldn't enable the Overwrite Sublists option for imports that include item pricing data. Enabling this option may result in errors when imported sublist data overwrites existing sublist values driven by body field values such as pricing schedule.
- When multiple item-pricing fields (price level, currency, quantity, and price) are mapped for an import job, and a row has values for some of these fields but not for others, none of the values for pricing fields are imported for the row. The assumption is that the populated values for pricing fields are defaults, and the empty values in other pricing fields indicate that complete pricing data is not available and so pricing field values should not be imported at all.

Keys for Item Pricing Sublist

The import of pricing sublist data for items is supported when one or more of the following features are enabled: Multiple Currencies, Multiple Prices, and/or Quantity Pricing.

The Import Assistant can selectively update existing NetSuite records that match CSV file key field values. The key for this sublist's records is based on a unique field value or a unique combination of field values, depending on the enabled features. The following table describes possible key combinations.

Enabled Features	Key Fields
Multiple Currencies only	Currency
Multiple Currencies, Multiple Prices	combination of Currency, Level
Multiple Currencies, Quantity Pricing	combination of Currency, Quantity
Multiple Currencies, Multiple Prices, Quantity Pricing	combination of Currency, Level, Quantity
Multiple Prices only	Level
Multiple Prices, Quantity Pricing	combination of Level, Quantity
Quantity Pricing Only	Quantity

Formatting for Item Pricing CSV Files

The formatting of CSV import files differs for multiple file and single file uploads of item pricing data. It may also vary depending on the features enabled in your account. To see how you might set up your files, refer to [Imports Using Multiple Price Levels and Quantities Example](#) and [Imports Using Quantity Pricing Schedules Example](#).

Imports Using Multiple Price Levels and Quantities Example

If both Multiple Prices and Quantity Pricing are enabled, the sublist area of the item record form includes a row for each price level, and a column for each quantity. You can view this form at Lists > Accounting

> Items > New > Inventory Item (or any item type that uses pricing), and looking at the Sales / Pricing subtab.

Whenever you try to save a record of this type, the system enforces the following rule: A price level row that contains **any** values must include values for **all** defined quantity columns (all columns that have a number in the Qty field). Similarly, if a quantity column contains any values, it must include values for **all** price level rows that contain any other values.

For example, the following data could not be saved because two prices are missing in one row.

PRICE LEVEL	DEFAULT DISCOUNT %	QTY 0	QTY 12	QTY 24
Default Discount %				
Base Price		160.00	135.00	110.00
Alpha price level				
Alternate Price 1		180.00		
Alternate Price 2		200.00	180.00	170.00

Similarly, the following data could not be saved because two prices are missing in one column.

PRICE LEVEL	DEFAULT DISCOUNT %	QTY 0	QTY 12	QTY 24
Default Discount %				
Base Price			135.00	110.00
Alpha price level				
Alternate Price 1			155.00	140.00
Alternate Price 2	200.00		180.00	170.00
Alternate Price 3				

By contrast, the following record has fully populated pricing data and could be saved. Note that it is acceptable for the Alternate Price 3 row to be empty. A row can be empty, but if it contains any data, it must be fully populated.

PRICE LEVEL	DEFAULT DISCOUNT %	QTY 0	QTY 12	QTY 24
Default Discount %				
Base Price		160.00	135.00	110.00
Alpha price level				
Alternate Price 1		180.00	155.00	140.00
Alternate Price 2	200.00		180.00	170.00
Alternate Price 3				

This rule also applies to your CSV import. If the Import Assistant cannot create fully populated pricing rows and columns as shown in the third of the preceding screenshots, an error like the following occurs: "Please enter missing price(s)." If you see this error and you believe that all required prices exist in your CSV file, the problem is likely that the file and/or the mapping were not set up correctly.

The "enter missing price(s)" error can occur in the following situations:

- During an import with update data handling that does either of the following:
 - Adds a new quantity threshold for an item
 - Adds a price to a previously unused pricing level
- During an import that creates a new item that uses multiple quantities and price levels

To avoid problems, make sure that your CSV data is formatted and mapped correctly. Two approaches are supported — multiple-file and single-file. For the purposes of the following examples, assume you are trying to create the pricing data pictured in the preceding figure.

Multiple Files Import

If you are using multiple CSV files, you should include one file for the body data and a second file for the pricing data.

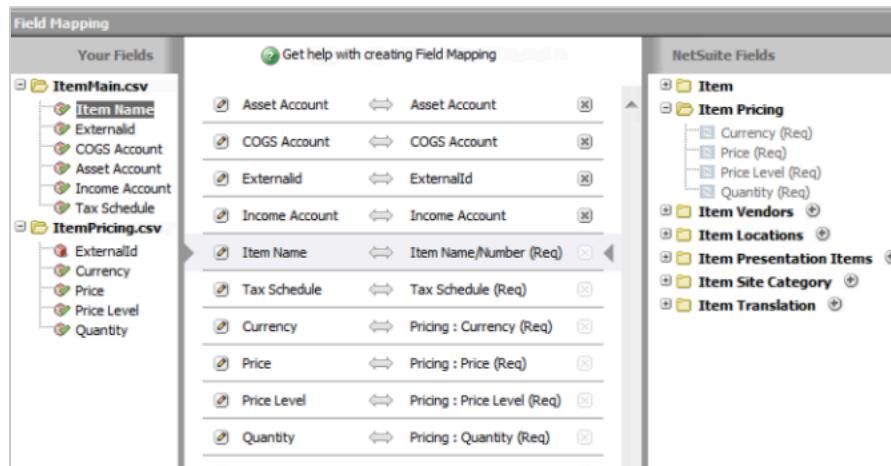
The primary file should include required body fields such as the item's name and the tax schedule, plus any account data you want to include, as shown here:

ExternalId	Item Name/ Number	Cost of Goods Sold (COGS) Account	Asset Account	Income Account	Tax Schedule
item100	Widget	1000 COGS	1000 Asset	1000 Income	S1

The secondary file containing pricing data must repeat one row for **each** required quantity/price-level/price combination. Further, each of these rows must include a unique identifier for the item record, such as the repeating ExternalId values shown here:

ExternalId	Currency	Price	Price Level	Quantity
item100	USA	160	Base Price	0
item100	USA	180	Alternate Price 1	0
item100	USA	200	Alternate Price 2	0
item100	USA	135	Base Price	12
item100	USA	155	Alternate Price 1	12
item100	USA	180	Alternate Price 2	12
item100	USA	110	Base Price	24
item100	USA	140	Alternate Price 1	24
item100	USA	170	Alternate Price 2	24

When you do your mapping, you match the price columns to a single instance of the Item Pricing sublist fields.



Single File Import

If you are using a single CSV file for item body data and pricing data, all pricing fields for each item must be included in a single row. Each of the pricing groups should be represented by quantity, price level,

price, and currency columns (unless you prefer to create a default value for some of these, such as currency, on the mapping page). The following example illustrates the first several columns for an item that includes nine pricing groups. Note that the columns for Item Pricing 4 through Item Pricing 9 are not pictured here.

Item ID	Item Pricing 1: Quantity	Item Pricing 1: Price Level	Item Pricing 1: Price	Item Pricing 2: Quantity	Item Pricing 2: Price Level	Item Pricing 2: Price	Item Pricing 3: Quantity	Item Pricing 3: Price Level	Item Pricing 3: Price
item111	0	Base Price	160	12	Base Price	135	24	Base Price	110

On the Import Assistant Field Mapping page, each of these groups maps to a separate instance of the Item Pricing sublist. The following illustration shows how the first part of this mapping would look. (Not pictured are the Item Pricing instances 5 through 9.)

The screenshot shows the 'Get help with creating Field Mapping' interface. On the left, under 'Your Fields', there are four sections of mappings:

- These fields identify the Base Price value for Quantity 0.** Mappings: USA → Pricing 1 : Currency (Req), Item Pricing 1: Price → Pricing 1 : Price (Req), Item Pricing 1: Price level → Pricing 1 : Price Level (Req), Item Pricing 1: Quantity → Pricing 1 : Quantity (Req).
- These fields identify the Base Price value for Quantity 12.** Mappings: USA → Pricing 2 : Currency (Req), Item Pricing 2: Price → Pricing 2 : Price (Req), Item Pricing 2: Price level → Pricing 2 : Price Level (Req), Item Pricing 2: Quantity → Pricing 2 : Quantity (Req).
- These fields identify the Base Price value for Quantity 24.** Mappings: USA → Pricing 3 : Currency (Req), Item Pricing 3: Price → Pricing 3 : Price (Req), Item Pricing 3: Price level → Pricing 3 : Price Level (Req), Item Pricing 3: Quantity → Pricing 3 : Quantity (Req).
- These fields identify the "Alternate" Price 1 value for Quantity 0.** Mappings: USA → Pricing 4 : Currency (Req), Item Pricing 4: Price → Pricing 4 : Price (Req), Item Pricing 4: Price level → Pricing 4 : Price Level (Req), Item Pricing 4: Quantity → Pricing 4 : Quantity (Req).

On the right, under 'NetSuite Fields', the 'Item' category is expanded, showing 'Item Pricing' and its sub-items: Item Pricing 1 through Item Pricing 9, followed by Item Vendors, Item Locations, Item Presentation Items, Item Site Category, and Item Translation.

Considerations when Data Handling is Set to Update

When you are setting Data Handling to Update, be aware of the following:

- If you want to update a single price on an item record, you must identify both the price level and the quantity associated with that price.
- Remember that if you are doing an update that adds a new quantity to the record, you must identify a price for that quantity at every price level. Otherwise, the system generates an error about missing prices.
- If you are doing an update that adds a price for a new or previously unused price level, you must identify prices for that price level for every quantity that's already used by the item record. Otherwise, the system generates an error about missing prices.

Imports Using Quantity Pricing Schedules Example

Quantity pricing schedules are templates that allow you to automatically apply quantity discounts to an item. For example, a schedule defined as Schedule 1 might automatically create a 10 percent discount

when a customer buys 15 of your items. For more on quantity price schedules, including how to create them, see the help topic [Quantity Pricing Schedules](#).

When an item to be imported uses a quantity pricing schedule, note that your CSV file should define a price only for a quantity of zero for that item. The pricing schedule creates the additional quantities. If you try to define a price for any quantity besides 0 for an item associated with a schedule, your import fails.

Multiple Files Import

If you are using multiple CSV files, you should create one file for the body data and a second file for the pricing data.

The primary file should include body fields such as the item's name, the tax schedule, any account data you want to use, and the quantity pricing schedule for any items that should use a schedule, as shown here:

ExternalId	Item Name/ Number	Quantity Pricing Schedule	Cost of Goods Sold (COGS) Account	Asset Account	Income Account	Tax Schedule
item101	Widget 1	Schedule 1	1000 COGS	1000 Asset	1000 Income	S1
item102	Widget 2	Schedule 2	1000 COGS	1000 Asset	1000 Income	S1
item103	Widget 3	—	1000 COGS	1000 Asset	1000 Income	S1

The pricing file must include a separate row for each price level being created for each item. Two price levels cannot be represented on the same row. For example, if you are importing two items and you want to define two price levels for each for Quantity 0, your file must include four rows.

Again, you do not define any quantities besides zero because you are relying on your pricing schedule to create them. If you try to define other quantities for an item associated with a schedule, the import fails. However, note that it is permissible to define different quantities in the file for item records that are **not** associated with a pricing schedule, as is the case with item103, below.

ExternalId	Currency	Price	Price Level	Quantity
item101	USA	125	Base Price	0
item101	USA	100	Alternate Price 1	0
item102	USA	1999	Base Price	0
item102	USA	1699	Alternate Price 1	0
item103	USA	550	Base Price	0
item103	USA	525	Alternate Price 1	0
item103	USA	475	Base Price	5
item103	USA	400	Alternate Price 1	5

Single File Import

To import similar data using one file only, you should include one row for each item. All of that item's data must be on the same row. (Note that the example below omits the item's name, which would be required if the Add data handling option was selected.)

Formatting restrictions make the table unreadable in the PDF output.

Replacing the Bill of Materials Sublist with the CSV File

You can replace the contents of a sublist with the contents from the CSV file. This example describes how to replace the Bill of Materials (BOM) with the contents of the CSV file, which has multiple rows (rather than columns) for each line in the BOM.

Note: You can only replace values in a sublist. You cannot delete sublist items.

To replace the values in a sublist:

1. Prepare two CSV files:
 - a. File #1 has the internal IDs of the assembly items whose BOMs you want to overwrite. This file has one column, and one row for each internal ID.
 - b. File #2 contains the BOM members. The file has one row for each member of the BOM, for each assembly item. There are multiple rows for the same assembly item. The first column must be the internal ID of the assembly item, and it must match the internal ID in column one of file #1. The second column contains the internal ID of the BOM member, and the third column contains the quantity.
2. Begin the CSV import, selecting an import type of **Items** and a record type of **Assembly/BOM Item**.
3. Click **Multiple Files to Upload**.
4. For **Primary File – Items**, select the first file you prepared.
5. For **Linked File (Optional) – Item Members**, select the second file you prepared.
6. In the **Data Handling** field, click **Update**.
7. On the Advanced Options menu, check the **Overwrite Sublists** box.
8. Map the internal ID of the assembly item (column 1) in file #1 to Internal ID on the right-hand side of the Mapping page in the first section that has the Item header.
9. At the bottom of the mapping list, expand Item Members 1.
10. Map Item Members 1:Item to BOM component, which is column two in your second file, and map Item Members 2:Quantity to Qty, which is column three in your second file.
11. Click **Save & Run**.

The existing Bill of Materials is replaced with the new Bill of Materials that you provided in your second CSV file.

File Examples

This is an example of File#1.

Internal ID
6001
6002
6003

Internal ID
6004

This is an example of File #2.

Internal ID Assembly Item	Internal ID BOM Member	Quantity
6001	9001	1
6001	9002	2
6001	9003	3
6002	9003	6
6002	9004	5
6002	9002	2
6003	9005	4
6003	9006	3
6003	9002	1
6004	9001	5
6004	9004	6
6004	9003	2

Payment Instruments Import Type

A payment instrument is a set of fields that can be used to charge a shopper without any action on the shopper's side.

Note: The Payment Instruments import type is not available unless the Payment Instruments feature is enabled in your account. To enable the Payment Instruments feature, the Credit Cards Payments feature must already be enabled.

To enable the Payment Instruments feature, go to Setup > Company > Setup Tasks > Enable Features, and on the **Transactions** subtab, check the **Payment Instruments** box. Then, click **Save**.

The Payment Instruments feature makes using various payment methods more straightforward and, in the case of payment cards, more secure. The Payment Instruments feature uses tokenization to substitute sensitive data with tokens. Using tokens removes the need of Payment Card Industry (PCI) compliance considerations. Typically, tokens are created automatically by gateway integrations.

You can use CSV imports to import the following kinds of payment instruments:

- **Payment Card** - contains payment card details.
- **Payment Card Token** - represents a payment card without the need to save the payment card number (PAN).
- **General Token** - represents all types of credentials that are retained from processing alternative payment methods apart from payment cards.

For the CSV import to be successful, the payment method specified in the CSV file must already exist in NetSuite.

Payment Card Example

Entity	Card Number	Card Brand	Expiration Date
Widget Works	4111111111111111	VISA	12/2022

Payment Card Token Example

Entity	Payment Method	Token	Token Family
American Computers	CSV_IMPORT_PAYMENT_CARD_TOKEN	swrwsfsfhskh54sf4577s	CyberSource

General Token Example

Entity	Payment Method	Token	Token Family
Widget Works	CSV_IMPORT_GENERAL_TOKEN	ccydewa678d554dyy4142	CyberSource

Relationships Import Type

For information about relationships imports, see the following:

- [Billing Account Import](#)
- [Contacts Only Import](#)
- [Customer-Subsidiary Relationship Import](#)
- [Customers Only Import](#)
- [Group Import](#)
- [Projects \(Jobs\) Import](#)
- [Leads Only Import](#)
- [Partners Import](#)
- [Prospects Only Import](#)
- [Sales Channel Import](#)
- [Vendor-Subsidiary Relationship Import](#)
- [Vendors Import](#)
- [Importing Entities and Contacts Together](#)
- [Understanding Leads, Prospects, and Customers](#)

Billing Account Import

You can import billing account CSV data for a customer. For more information about billing accounts, see the help topic [Creating Billing Accounts](#).

You must set up a billing schedule before you can import billing account data. To set up a billing schedule, go to Lists > Accounting > Billing Schedules > New, type a schedule name, provide the initial amount, recurrence frequency, and recurrence count, and click Save. For more details, see the help topic [Billing Schedules](#).

Billing Account Fields

To prepare billing account CSV data for import, make sure that your CSV file includes the following fields. They are required for a successful CSV import.

- **External ID** – Used as a unique identifier for the record. You can specify any value that has not been used as the External ID in previous CSV imports. This field is recommended but not required.
- **Customer** – Customer that will use this billing account.
- **Name** – Account name.
- **Billing Schedule** – Billing schedule name.
- **Start Date** – Date when the billing account will start to be used.

To learn about other supported fields, see [billing account](#).

CSV File Example

The following table provides an example structure for a file to import billing account data.

External ID	Customer	Name	Billing Schedule	Start Date
BACCT001	Nelson Muntz	Nelson Muntz - Billing	Monthly Billing	11/10/2015
BACCT002	Oliver Equipment	Oliver Equipment - Billing	Monthly Billing	11/11/2015
BACCT003	Travis Gilbert	Travis Gilbert - Billing	Monthly Billing	11/12/2015
BACCT004	Eckler Leasing	Eckler Leasing - Billing	Monthly Billing	11/13/2015

For more information about using the Import Assistant and importing CSV records, see [Importing CSV Files with the Import Assistant](#) and [Guidelines for CSV Import Files](#).

Contacts Only Import

The Contacts Only import is used to attach individual names to existing entries in the customer, vendor, partner, or other name list. Contacts also can be imported without reference to an entity. These names can later be linked to one or more businesses in these lists.

For details about fields that can be mapped in the contact record, see the SOAP Schema Browser's [contact](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with this tool, see the help topic [SOAP Schema Browser](#).

Review the following guidelines for Contacts imports:

- [Supported Contact Sublist Imports](#)
- [Importing Contacts for Existing Entity Data](#)
- [Importing Contacts and New Entities Data](#)
- [Setting the Global Subscription Status Field for Contacts](#)
- [Contacts Subsidiary Field Required for NetSuite OneWorld](#)



Note: If you want to update the Company field for a contact record, you need to use a key of internal ID or external ID, rather than name. To set up this key, click the edit icon for the Company field on the Import Assistant Field Mapping page, and select from the Choose Reference Type list. Otherwise the import job creates a new contact record with the same name and the Company field populated, instead of updating the existing contact record.

Supported Contact Sublist Imports

The Contacts import supports the import of the following sublist data:

Sublist	Notes
Address	Selectively updatable based on Internal ID or Label key field. By default, the sublist Address field is read-only, and data from other sublist fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.
Subscriptions	Selectively updatable based on Subscription key field.

For imports that update existing Contact records, handling of sublist data updates depends upon the setting for the [Overwrite Sublists](#) advanced option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).

Importing Contacts for Existing Entity Data

If you want to import contacts for entities (Customers, Leads, Prospects, or Vendors) that already exist in NetSuite, include entity names in the Company column of Contacts CSV file data.

Importing Contacts and New Entities Data

You can import Contacts with their related Customers, Leads, or Prospects in a single Import Assistant job. For more information, see [Importing Entities and Contacts Together](#).

The Import Assistant also supports a two-step import of Contacts and entities.

- You should import Contacts data first, use External ID as a reference type, and do not import values for the Contacts' Company field.
- After the Contacts data exists in your account, then import the entities data.
 - You should use External ID as a reference type.
 - Make sure the entities CSV file includes contact names in the Primary Contact column. When the entities data is imported with the Primary Contact field completed, the system links the Contact record with the entity record.
 - Note that you cannot set a role relationship in a two-step import; contacts can be set as primary or with no role.

Setting the Global Subscription Status Field for Contacts

The Global Subscription Status field on contact records determines whether or not a contact can receive email sent through campaigns and email merge operations.

- Four values are possible: Confirmed Opt-In, Soft Opt-In, Soft Opt-Out, and Confirmed Opt-Out, but only the soft values are available to be set by import.

- If you want to send campaign email to a contact, set this field's value to Soft Opt-In, because you cannot send campaign email to users with Soft Opt-Out status; you can only send opt-in email.

Note: Certain jurisdictions, such as the European Union (EU), have regulations regarding whether or not you can contact entities if you do not have their explicit permission to do so. You should check that your global subscription status adheres to the regulations in the recipient's jurisdiction.

- If you do not include this field in an import, its value is defaulted, based on the Unsubscribed to Marketing By Default option at Setup > Marketing > Marketing Preferences. By default, this option is disabled, and the Global Subscription Status field defaults to Soft Opt-Out. When this option is enabled, the field defaults to Soft Opt-In.
- After an import, you can change the value of the Global Subscription Status between Soft Opt-In and Soft Opt-Out manually in the user interface and through mass updates. Only recipients themselves can change the value to Confirmed Opt-In or Confirmed Opt-Out.

For more information on global subscription statuses, see the help topic [Subscription Management](#).

Contacts Subsidiary Field Required for NetSuite OneWorld

If your account is using NetSuite OneWorld, the Subsidiary field is a required field for Contacts Only imports. You must map the NetSuite Subsidiary field to a field in your CSV file, or the import will fail. CSV file values for subsidiaries should be hierarchical names, in the format grandparent : parent : child, for example, Consolidated Parent Company : UK Subsidiary : Euro Subsidiary.

Contacts Only CSV File Example

The following example uses three files to import contacts only information: main contact file, address sublist, and contact subscriptions sublist.

Contact

External ID	First Name	Last Name	Subsidiary	Job Title	Main Phone	Email	Category
SSE_CON_14	Sandra	Johnson	ACME Corp : U.K. Subsidiary	Regional Manager	1 958 555 0100	sandraj@acmecarpet.com	Tradeshow
SSE_CON_18	Andrew	Wilson	ACME Corp : German sub	CEO	1 958 555 0199	ajw@aaalawn.com	Website
SSE_CON_20	Angela	Wolfe	ACME Corp : Canada subsidiary	Regional Sales Manager	1 958 555 0121	awolfe@breatherite.com	Phone

We are importing contacts to associate with entities later, so there is no Company column in the file. If you want to associate the contact with an existing entity by the import, add a Company column to the file. The Subsidiary column is required for OneWorld accounts. Use the format parent : child.

Categories must exist in NetSuite or an error will occur.

Contact Address

Contact Address: External ID	Contact Address: ID	Contact Address: Country	Contact Address: Address	Contact Address: City	Contact Address: State	Contact Address: Zip	Contact Address: Default Billing	Contact Address: Default Shipping
SSE_CON_14	83923	United States	123 Elm Street	Chicago	Illinois	60604	Yes	Yes

Contact Address: External ID	Contact Address: ID	Contact Address: Country	Contact Address: Address	Contact Address: City	Contact Address: State	Contact Address: Zip	Contact Address: Default Billing	Contact Address: Default Shipping
SSE_CON_18	38733	Czech Republic	Trnitá 123/45	Prague	—	602 00	Yes	No
SSE_CON_20	36366	Australia	Level 2, 15 King Street	Sydney	NSW	3048	No	Yes

Contact Subscriptions

Contact Subscriptions: External ID	Contact Subscriptions: Subscription	Contact Subscriptions: Subscribed
SSE_CON_14	Newsletters	Yes
SSE_CON_14	Marketing	Yes
SSE_CON_18	Surveys	Yes
SSE_CON_20	Newsletters	No
SSE_CON_20	Marketing	Yes

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type, you choose the import character encoding. For information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Customer-Subsidiary Relationship Import

If you use NetSuite OneWorld and the Multi-Subsidiary Customer feature is enabled, the customer-subsidiary relationship import adds or updates multi-subsidiary customer records with subsidiary information. These multi-subsidiary customer records appear on the Customers list.

The customer-subsidiary relationship record is not visible in the user interface. The fields available for mapping appear in the header of the customer record, and on the Subsidiaries subtab.

Following are the **required** fields that are available for CSV mapping:

- Customer
- External ID
- Internal ID
- Subsidiary

Following is a sample of a newly created multi-subsidiary customer record.

Customer (company name)	External ID (company name)	Subsidiary (primary and any secondary subsidiaries)
Simply Fresh	Simply Fresh	Fresh Foods Parent Fresh Foods Canada Fresh Foods Mexico

For details about fields that can be mapped in the customer-subsidiary relationship record, see the SOAP Schema Browser's [customer-subsidiary relationship](#) page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

For information about multi-subsidiary customers, see the help topic [Assigning Subsidiaries to a Customer](#).

Customers Only Import

The Customers Only import adds or updates data in the Customer record. Note that Leads Only imports and Prospects Only imports also affect Customer record data. The Stage field on a Customer record defines whether the entity is a Lead, Customer, or Prospect. To be defined as a Customer, rather than a Lead or a Prospect, an entity must have one or more associated sales transactions or closed opportunities.

For details about fields that can be mapped in the customer record, see the SOAP Schema Browser's [customer](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with this tool, see the help topic [SOAP Schema Browser](#).

Review the following guidelines for Customers imports:

- [Supported Customer Sublist Imports](#)
- [Default Values for Customers' Primary Sales Rep](#)
- [Including Primary Contact in Customers Import](#)
- [Customers as Individuals or Companies](#)
- [Setting Sales Teams for Child Customers](#)
- [Importing NetSuite Access Details for Customer Contacts](#)
- [Setting Multiple Transaction Currencies for Customers](#)
- [Setting the Global Subscription Status Field for Customers](#)
- [Customers Subsidiary Field Required for NetSuite OneWorld](#)

Supported Customer Sublist Imports

The Customers import supports the import of the following sublist data:

Sublist	Notes
Address	Selectively updatable based on Internal ID or Label key field. By default, the sublist Address field is read-only, and data from other sublist fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.
Contact Access	Available for updates of existing customers only, to add or update NetSuite access information for existing customer contacts. See Importing NetSuite Access Details for Customer Contacts . Selectively updatable based on Contact key field.
Credit Cards	Addition of new records is supported. Update of existing lines is not supported.
Currencies	When Multiple Currencies feature enabled. See the help topics Currency Management and Setting Multiple Transaction Currencies for Customers .
Downloads	When Sell Downloadable Files feature enabled.
Group Pricing	When Multiple Prices feature enabled.
Item Pricing	When Multiple Prices feature enabled.

Sublist	Notes
Partners	When Multi-Partner Management feature enabled. Selectively updatable based on Internal ID, External ID, or Partner.
Sales Team	When Team Selling feature enabled. See Setting Sales Teams for Child Customers .
Subscriptions	Selectively updatable based on Subscription key field.
Tax Registrations	Available when the SuiteTax feature is enabled at Setup > Company > Setup Tasks > Enable Features, on the Tax subtab. Whenever you change the Tax Registration Number value on a sublist line, it triggers the regeneration of the value of a hidden ID field, and the values of ID fields are regenerated on all sublist lines. The ID field is hidden in the UI, but it is visible through SOAP web services. The ID field is searchable, so you can access the updated values through SOAP web services. For information about working with the tax registrations sublist through SOAP web services, see the help topic Working with Customer Sublists . For information about working with tax registration in the UI, see the help topic Assigning Tax Registrations to an Entity in SuiteTax .

Every sublist on each record can optionally have a separate file. For imports that update existing Customer records, handling of sublist data updates depends upon the setting for the [Overwrite Sublists](#) advanced option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).

Default Values for Customers' Primary Sales Rep

For Customer records added through CSV import, values for Primary Sales Rep do not default to be the user performing the import. This behavior differs from the NetSuite user interface, where the user entering data on the Customer form is the default for Primary Sales Rep. If a CSV file does not include values for Primary Sales Rep, you can specify a default value on the Import Assistant's Field Mapping page. For information, see [Assign Default Values during Field Mapping](#).

Including Primary Contact in Customers Import

If you plan to import a Customers CSV file that includes data for Primary Contact, the Contacts data must first exist in NetSuite.

- If this data is not yet in NetSuite, you need to complete a CSV import of Contacts data before you import the Customers CSV file. Leave the Company field blank in the Contacts CSV file that you import.
- After the Contacts data exists in your account, you can import the Customers data. Make sure the CSV file includes contact names in the Primary Contact column. When the entities data is imported with the Primary Contact field completed, the system links the Contact record with the entity record.



Note: It is possible to import Customers and Contacts in a single import job. See [Importing Entities and Contacts Together](#).

Customers as Individuals or Companies

NetSuite lets you define each customer as either an individual (a person) or a company. The NetSuite Fields pane of the Import Assistant's Field Mapping page includes an Individual field for Customers. This field is required.

- The Individual field is a Boolean indicating whether the customer is a company or a person. It corresponds to the Type option buttons on the Customer form.
- Unlike most radio button fields, an import of this field's data accepts all forms of True or False. For example, the following values are acceptable as a "True" value: True, true, TRUE, T, yes, Yes, YES.
 - A True value indicates a customer is an individual; a False value indicates a customer is a company.
 - The Company Name field is required for records with a False value, but not for records with a True value.
- You can set a default value for the Individual field by clicking its edit icon on the Field Mapping page. In the Default Value popup: choose Yes to default customer type to individual, choose No to default customer type to company.



Note: Your account's setting for the Default Customer Type field, at Setup > Company > General Preferences, may affect the value of the Individual field for Customers imports.

Setting Sales Teams for Child Customers

Note that if a customer is set up as a child of another customer, by default the child customer inherits the sales team of the parent customer. If you want to set up a different sales team for a child customer, enable the [Overwrite Sublists](#) option and include sales team values in the CSV file.

Importing NetSuite Access Details for Customer Contacts

For Customers Only imports that update existing records, the Field Mapping page includes a Contact Access sublist. You can map this sublist's fields to provide Customer Center access to contacts.

Sublist fields include:

- Access - Boolean indicating whether to grant NetSuite access to the contact
- Contact - Contact name used the key for the sublist
- Email - Email address used as the NetSuite username for the contact
- Notify - Boolean indicating whether to send notification email to contact
- Password - NetSuite password for the contact
- Role - NetSuite role assigned to the contact (Customer Center)

You can import this data during updates of preexisting customer records that have preexisting contact records already attached. You cannot add new customer records, add new contact records, or attach new contacts to customers at the same time that you import contact access data. You must complete these other tasks first, either in the user interface or through an import, before you can import contact access data. Here is the workflow: 1) Add customers. 2) Add contacts. 3) Attach contacts to customers. 4) Update customers to give access to attached contacts.

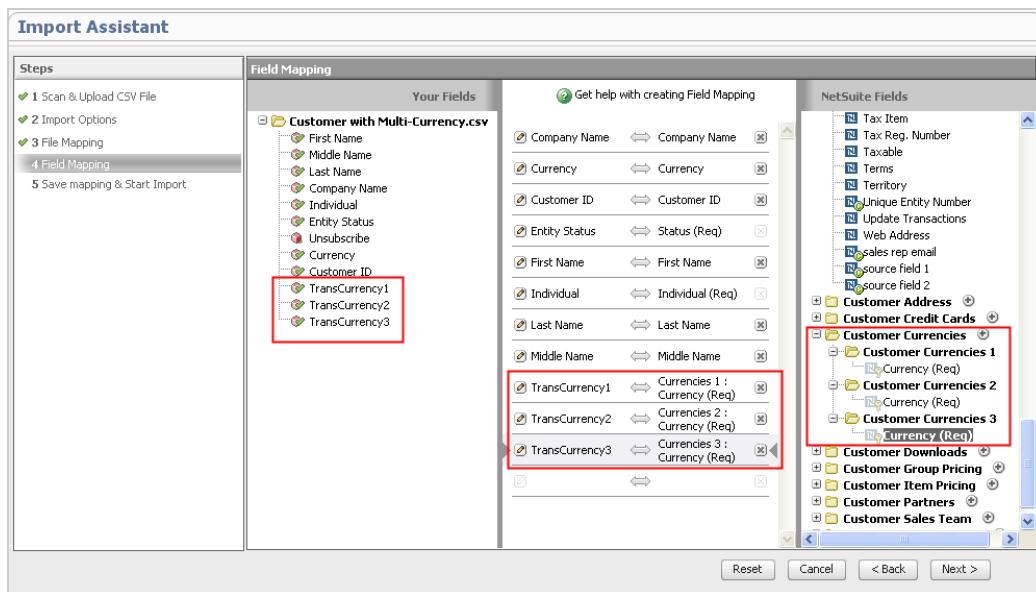
Setting Multiple Transaction Currencies for Customers

The Multiple Currencies feature enables you to enter sales transactions in multiple currencies for individual customers. For details about using this feature, see the help topic [Currency Management](#).

When this feature is enabled, you can define a primary currency for customers by including the Currency body field in your CSV file and mapping it in the Import Assistant, exactly as you would without the feature enabled. However, you can also define additional currencies that can be used in this customer's transactions, called transaction currencies, by mapping a Currencies sublist Currency field to an additional Currency field in your CSV file, for each additional currency to be supported.

To import transaction currencies for a customer:

1. In your Customers CSV file, add a column for each additional currency that you want to support, with a different name for each column, for example: TransCurrency1, TransCurrency2, TransCurrency3.
2. Start a Customers import.
3. On the Field Mapping page, after you have mapped other customer fields as necessary, map the Customer Currencies 1 sublist's Currency field to an additional currency column in your CSV file.
4. Click the + sign next to the Customer Currencies folder to create another Customer Currencies sublist, and map that Currency field to another currency column in your CSV file.
5. Repeat step 4 until all currency columns in your CSV file are mapped.



6. Complete the import as you normally would.

Note: The currencies defined for the Customer Currencies sublist can be imported as values for the Currency field in Cash Sale, Estimate, Invoice, and Sales Order imports.

Setting the Global Subscription Status Field for Customers

The Global Subscription Status field on customer records determines whether or not a customer can receive email sent through campaigns and email merge operations.

- Four values are possible: Confirmed Opt-In, Soft Opt-In, Soft Opt-Out, and Confirmed Opt-Out, but only the soft values are available to be set by import.
- If you want to send campaign email to a customer, set this field's value to Soft Opt-In, because you cannot send campaign email to users with Soft Opt-Out status, you can only send opt-in email.

Note: Certain jurisdictions, such as the European Union (EU), have regulations regarding whether or not you can contact entities if you do not have their explicit permission to do so. You should check that your global subscription status adheres to the regulations in the recipient's jurisdiction.

- If you do not include this field in an import, its value is defaulted, based on the Unsubscribed to Marketing By Default option at Setup > Marketing > Marketing Preferences. By default, this option is

disabled, and the Global Subscription Status field defaults to Soft Opt-In. When this option is enabled, the field defaults to Soft Opt-Out.

- After an import, you can change the value of the Global Subscription Status between Soft Opt-In and Soft Opt-Out manually in the user interface and through mass updates. Only recipients themselves can change the value to Confirmed Opt-In or Confirmed Opt-Out.

For more information on global subscription statuses, see the help topic [Subscription Management](#).

Customers Subsidiary Field Required for NetSuite OneWorld

If your account is using NetSuite OneWorld, the Subsidiary field is a required field for Customers Only imports. You must map the NetSuite Subsidiary field to a field in your CSV file, or the import will fail. CSV file values for subsidiaries should be hierarchical names, in the format grandparent : parent : child, for example, Consolidated Parent Company : UK Subsidiary : Euro Subsidiary.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Group Import

The group record is a way of grouping entities. The supported types of entity groups are:

- Contact Group
- Customer Group
- Employee Group
- Project Group
- Partner Group
- Vendor Group

Members can be added to a group record depending on the type of group record. For example, a customer group record can have one or more customers as members.

Groups can be static or dynamic. You can create and update static groups using the CSV Import Assistant.



Note: Be aware that you cannot create a static group with more than 10,000 members. For groups larger than 10,000, you must create a dynamic group.

For more information about groups, see the help topic [Working with Groups](#).

In the user interface, you create Groups records at Lists > Relationships > Groups > New.

For details about fields that can be mapped in this record, see the SOAP Schema Browser's [Entity Group](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Group Fields

When importing groups, it is important to use the correct value in the Group Type field. The values are:

Record Type	Group Type CSV Field Value
Contact	Contact
Customer	CustJob
Employee	Employee
Partner	Partner
Project	Job
Vendor	Vendor

The best practice for importing groups is to import the groups record first and then update it with the group member sublist.

Supported Group Sublist Imports

The Groups import supports the import of the following sublist data:

Sublist	Notes
Group Members	Can be updated using Internal ID, External ID or Names key field for the group member.

Group Collection CSV File Example

The following table shows how you might format your CSV file when importing group records.

Group File

Name	Group Type	Owner	External ID	Billing Group	Comments	Email	Inactive	Private	Restrict To
VIP Customers	CustJob	Admin Name	VIP001	T	Group of VIP customers	—	F	F	—

Group Members File

External ID	Entity Group Group Members : Name
VIP001	J Doe
VIP001	M Smith
VIP001	K Wolfe

Note: The External ID column in both tables refers to the External ID of the group. If you use External IDs for the group members, they should be populated in the Entity Group Group Members column of the Group Members file.

Projects (Jobs) Import

You use the project record to manage company initiatives.

To use the project record, you must have the Projects feature enabled at Setup > Company > Enable Features, on the Company subtab. If you plan to do advanced project tracking, you must also enable

Project Management. If you do not see the Project Management check box, your company must first purchase the Project Management add-on from NetSuite.

To access the project record in the UI, choose Lists > Relationships > Projects (or Jobs). For help working with projects manually, see .

The import of project tasks from a CSV export of Microsoft Project plan data is supported through a specialized Project Tasks Import Assistant, available at Activities > Scheduling > Project Tasks > Import.

 **Note:** As of Version 2008, Release 2, the Jobs feature and the Advanced Job Tracking feature have been renamed to Projects and Project Management, and Job records may be labeled Project records, depending upon your account's settings at Setup > Company > Rename Records/Transactions.

Project Body Fields

This section describes some of the important body fields on the project record.

Subsidiary

If your account is using NetSuite OneWorld, the Subsidiary field is required for project imports. CSV file values for subsidiaries should be hierarchical names, in the following format — grandparent : parent : child, for example, Consolidated Parent Company : UK Subsidiary : Euro Subsidiary.

Customer

Imported projects can be standalone or associated with an entity such as customer. You may want to use project imports to associate externally maintained project information with NetSuite customer records on an ongoing basis. However, note that you cannot use the Import Assistant to update the Customer field on a project record. This restriction is consistent with user interface business rules. If the customer for a project changes, you need to create a new project record rather than update an existing one.

Project Sublist Fields

The following sublist data is supported for import:

- Address — Available when Project Management is **disabled**.
- Resource — Available when Project Management is **enabled**.

See the following sections for more detail.

Working with Addresses

By default, the sublist Address field is read-only, and data from other sublist fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.

This sublist is selectively updatable based on Internal ID or Label key field.

Working with Resources

When using the Import Assistant, the behavior of the Resources sublist differs slightly from the behavior in the UI. Specifically, in the UI, each line must have a unique value in the Name field. Further, in the UI, you can select more than one role for each resource.

Schedule	Resources	Financial	P&L	Budget	Relationships	Communication	Related Records
Resource Allocations • Resource Details • Time Tracking •							
NAME	EMAIL	ROLE					
Kelly, Taylor	ktaylor@wolfe.com	Assistant Manager Designer Installer					
Leaf, Vicky	vleaf@wolfe.com	Designer					
North, Shelly	snorth@wolfe.com	Designer					
Sikes, Brenda	bsikes@wolfe.com	Project Manager					
Smith, Julie	jsmith@wolfe.com	Assistant Manager					

With the Import Assistant, if you want to add a resource that has two different roles, you set up your CSV file as if you are adding two sublist records for that resource — one for each role. The Name values are not required to be unique, as shown in the table below. This example shows how to add two unique resources to the sublist. But because one resource has two roles, the file is set up as if adding three sublist records.

External Id	CompanyName	Job 1: Name	Job 1: Role	Job 2: Name	Job 2: Role	Job 3: Name	Job 3: Role
101A	Launch	John Smith	Installer	John Smith	Designer	Jane Johnson	Staff

Note that after you complete the add operation, the Resources sublist in the UI looks the same as it would if you had manually added one line for the resource, with multiple roles specified on that line, as shown in the illustration above.

For More Information

For details about additional body and sublist fields that can be mapped in the project record, refer to the SOAP Schema Browser's [job](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Leads Only Import

The Leads Only import adds or updates data in the Customer record. Note that Customers Only imports and Prospects Only imports also affect Customer record data. The Stage field on a Customer record defines whether the entity is a Lead, Customer, or Prospect.

To be defined as a Lead, rather than a Customer or a Prospect, an entity must have no associated estimates, opportunities, or transactions. If an estimate or opportunity is created for a lead, the lead becomes a prospect. If a sales transaction is created for a lead, the lead becomes a customer.

For details about fields that can be mapped in the customer record, see the SOAP Schema Browser's [customer](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Review the following guidelines for Leads imports:

- [Supported Lead Sublist Imports](#)

- [Default Values for Leads' Primary Sales Rep](#)
- [Including Primary Contact in Leads Import](#)
- [Leads as Individuals or Companies](#)
- [Sales Rules and Lead Imports](#)
- [Setting the Global Subscription Status Field for Leads](#)
- [Leads Subsidiary Field Required for NetSuite OneWorld](#)

Supported Lead Sublist Imports

The Leads import supports the import of the following sublist data:

Sublist	Notes
Address	Selectively updatable based on Internal ID or Label key field. By default, the sublist Address field is read-only, and data from other sublist fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.
Credit Cards	Addition of new records is supported; update of existing lines is not supported.
Downloads	When Sell Downloadable Files feature enabled.
Group Pricing	When Multiple Prices feature enabled.
Item Pricing	When Multiple Prices feature enabled.
Partners	When Multi-Partner Management feature enabled. Selectively updatable based on Internal ID, External ID, or Partner.
Sales Team	When Team Selling feature enabled.

Every sublist on each record can optionally have a separate file. For imports that update existing Lead records, handling of sublist data updates depends upon the setting for the [Overwrite Sublists](#) advanced option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).

Default Values for Leads' Primary Sales Rep

For Lead records added through CSV import, values for Primary Sales Rep do not default to be the user performing the import. This behavior differs from the NetSuite user interface, where the user entering data on the form is the default for Primary Sales Rep. If a CSV file does not include values for Primary Sales Rep, you can specify a default value on the Import Assistant's Field Mapping page. For information, see [Assign Default Values during Field Mapping](#).

Including Primary Contact in Leads Import

If you plan to import a Leads CSV file that includes data for Primary Contact, the Contacts data must first exist in NetSuite.

- If this data is not yet in NetSuite, you need to complete a CSV import of Contacts data before you import the Leads CSV file. Leave the Company field blank in the Contacts CSV file that you import.
- After the Contacts data exists in your account, you can import the Leads data. Make sure the CSV file includes contact names in the Primary Contact column. When the entities data is imported with the Primary Contact field completed, the system links the Contact record with the entity record.



Note: It is now possible to import Leads and Contacts in a single Import Assistant job. See [Importing Entities and Contacts Together](#).

Leads as Individuals or Companies

NetSuite lets you define each lead as either an individual (a person) or a company. The NetSuite Fields pane of the Import Assistant's Field Mapping page includes an Individual field for Leads. This field is required.

- The Individual field is a Boolean indicating whether the lead is a company or a person. It corresponds to the Type option buttons on the Lead form.
- Unlike most radio button fields, an import of this field's data accepts all forms of True or False. For example, the following values are acceptable as a "True" value: True, true, TRUE, T, yes, Yes, YES.
 - A True value indicates a lead is an individual; a False value indicates a lead is a company.
 - The Company Name field is required for records with a False value, but not for records with a True value.



Note: Your account's setting for the Default Customer Type field, at Setup > Company > General Preferences, may affect the value of the Individual field for Leads imports.

Sales Rules and Lead Imports

If you want automatic sales territory assignment rules to apply to imported lead records, be aware of the following:

- In Lead imports, sales rules are not applied to records that have values set for Sales Rep (when Team Selling is not enabled), or for Sales Role (when Team Selling is enabled). These values can be set either in CSV files or as defaults on the Field Mapping page. For records that do not have values set for Sales Rep or Sales Role, sales rules are applied when other field values trigger them, exactly as in the user interface.
- If territory assignments are not made during import, you can do a mass update after import, at Lists > Mass Update > Mass Updates. Under Sales Force Automation, select one of the following updates: Change Sales Rep Assignment, Change Territory Assignment, or Reassign Customers by Sales Territory Rules. Note that billing address data is required for these mass updates to work properly.

Setting the Global Subscription Status Field for Leads

The Global Subscription Status field on lead records determines whether or not a lead can receive email sent through campaigns and email merge operations.

- Four values are possible: Confirmed Opt-In, Soft Opt-In, Soft Opt-Out, and Confirmed Opt-Out, but only the soft values are available to be set by import.
- If you want to send campaign email to a lead, set this field's value to Soft Opt-In, because you cannot send campaign email to users with Soft Opt-Out status; you can only send opt-in email.



Note: Certain jurisdictions, such as the European Union (EU), have regulations regarding whether or not you can contact entities if you do not have their explicit permission to do so. You should check that your global subscription status adheres to the regulations in the recipient's jurisdiction.

- If you do not include this field in an import, its value is defaulted, based on the Unsubscribed to Marketing By Default option at Setup > Marketing > Marketing Preferences. By default, this option is

disabled, and the Global Subscription Status field defaults to Soft Opt-In. When this option is enabled, the field defaults to Soft Opt-Out.

- After an import, you can change the value of the Global Subscription Status between Soft Opt-In and Soft Opt-Out manually in the user interface and through mass updates. Only recipients themselves can change the value to Confirmed Opt-In or Confirmed Opt-Out.

For more information on global subscription statuses, see the help topic [Subscription Management](#).

Leads Subsidiary Field Required for NetSuite OneWorld

If your account is using NetSuite OneWorld, the Subsidiary field is a required field for Leads Only imports. You must map the NetSuite Subsidiary field to a field in your CSV file, or the import will fail. CSV file values for subsidiaries should be hierarchical names, in the format grandparent : parent : child, for example, Consolidated Parent Company : UK Subsidiary : Euro Subsidiary.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type, you choose the import character encoding. For information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Partners Import

The Partners import adds partners to the Partner list.

Note: Partners imports are not available unless partner records are enabled in your account. To enable this feature, go to Setup > Company > Enable Features and on the CRM tab, check Partner Relationship Management.

For details about fields that can be mapped in the partner record, see the SOAP Schema Browser's [partner](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Review the following guidelines for Partners imports:

- [Supported Partner Sublist Imports](#)
- [Importing Partners Primary and Alternate Contact Data](#)
- [Setting the Global Subscription Status Field for Partners](#)
- [Partners as Individuals or Companies](#)
- [Partners Subsidiary Field Required for NetSuite OneWorld](#)

Supported Partner Sublist Imports

The Partners import supports the import of the following sublist data:

Sublist	Notes
Address	Selectively updatable based on Internal ID or Label key field. By default, the sublist Address field is read-only, and data from other sublist fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.
Contact Access	Available for updates of existing partners only, to add or update NetSuite access information for existing partner contacts. See Importing NetSuite Access Details for Partner Contacts .

Sublist	Notes
	selectively updatable based on Contact key field
Promotion Codes	—
Subscriptions	Selectively updatable based on Subscription key field.
Tax Registrations	<p>Available when the SuiteTax feature is enabled at Setup > Company > Setup Tasks > Enable Features, on the Tax subtab.</p> <p>Whenever you change the Tax Registration Number value on a sublist line, it triggers the regeneration of the value of a hidden ID field, and the values of ID fields are regenerated on all sublist lines. The ID field is hidden in the UI, but it is visible through SOAP web services. The ID field is searchable, so you can access the updated values through SOAP web services. For information about working with the tax registrations sublist through SOAP web services, see the help topic Partner.</p> <p>For information about working with tax registration in the UI, see the help topic Assigning Tax Registrations to an Entity in SuiteTax.</p>

For imports that update existing Partner records, handling of sublist data updates depends upon the setting for the [Overwrite Sublists](#) advanced option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).

Importing Partners Primary and Alternate Contact Data

If you plan to import a Partners CSV file that includes data for Primary Contact or Alternate Contact, the Contacts data must first exist in NetSuite.

- If this data is not yet in NetSuite, you need to complete a CSV import of Contacts data before you import the Partners CSV file. Leave the Company field blank in the Contacts CSV file that you import.
- After the Contacts data exists in your account, you can import the Partners data. Make sure the CSV file includes contact names in the Primary Contact column. When the partners data is imported with the Primary Contact field completed, the system links the Contact record with the partner record.

Importing NetSuite Access Details for Partner Contacts

For Partners imports that update existing records, the Field Mapping page includes a Contact Access sublist. You can map this sublist's fields to provide Partner Center access to contacts.

Sublist fields include:

- Access - Boolean indicating whether to grant NetSuite access to the contact
- Contact - Contact name used the key for the sublist
- Email - Email address used as the NetSuite username for the contact
- Notify - Boolean indicating whether to send notification email to contact
- Password - NetSuite password for the contact
- Role - NetSuite role assigned to the contact (Partner Center or Advanced Partner Center)

You can import this data during updates of preexisting partner records that have preexisting contact records already attached. You cannot add new partner records, add new contact records, or attach new contacts to partners at the same time that you import contact access data. You must complete these other tasks first, either in the user interface or through an import, before you can import contact access data. Here is the workflow: 1) Add partners. 2) Add contacts. 3) Attach contacts to partners. 4) Update partners to give access to attached contacts.

Setting the Global Subscription Status Field for Partners

The Global Subscription Status field on partner records determines whether or not a partner can receive email sent through campaigns and email merge operations.

- Four values are possible: Confirmed Opt-In, Soft Opt-In, Soft Opt-Out, and Confirmed Opt-Out, but only the soft values are available to be set by import.
- If you want to send campaign email to a partner, set this field's value to Soft Opt-In, because you cannot send campaign email to users with Soft Opt-Out status; you can only send opt-in email.

Note: Certain jurisdictions, such as the European Union (EU), have regulations regarding whether or not you can contact entities if you do not have their explicit permission to do so. You should check that your global subscription status adheres to the regulations in the recipient's jurisdiction.

- If you do not include this field in an import, its value is defaulted, based on the Unsubscribed to Marketing By Default option at Setup > Marketing > Marketing Preferences. By default, this option is disabled, and the Global Subscription Status field defaults to Soft Opt-In. When this option is enabled, the field defaults to Soft Opt-Out.
- After an import, you can change the value of the Global Subscription Status between Soft Opt-In and Soft Opt-Out manually in the user interface and through mass updates. Only recipients themselves can change the value to Confirmed Opt-In or Confirmed Opt-Out.

For more information on global subscription statuses, see the help topic [Subscription Management](#).

Partners as Individuals or Companies

NetSuite lets you define each partner as either an individual (a person) or a company. The NetSuite Fields pane of the Import Assistant's Field Mapping page includes an Individual field for Partners. This field is required.

- The Individual field is a Boolean indicating whether the partner is a company or a person. It corresponds to the Type option buttons on the Partner form.
- Unlike most radio button fields, an import of this field's data accepts all forms of True or False. For example, the following values are acceptable as a "True" value: True, true, TRUE, T, yes, Yes, YES.
 - A True value indicates a partner is an individual; a False value indicates a partner is a company.
 - The Company Name field is required for records with a False value, but not for records with a True value.
- You can set a default value for the Individual field by clicking its edit icon on the Field Mapping page. In the Default Value popup: choose Yes to default partner type to individual, choose No to default partner type to company.

Note: Your account's setting for the Default Partner Type field, at Setup > Company > General Preferences, may affect the value of the Individual field for Partners imports.

Partners Subsidiary Field Required for NetSuite OneWorld

If your account is using NetSuite OneWorld, the Subsidiary field is a required field for Partners imports. You must map the NetSuite Subsidiary field to a field in your CSV file, or the import will fail. CSV file values for subsidiaries should be hierarchical names, in the format grandparent : parent : child, for example, Consolidated Parent Company : UK Subsidiary : Euro Subsidiary.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Prospects Only Import

The Prospects Only import adds or updates data in the Customer record. Note that Customers Only imports and Leads Only imports also affect Customer record data. The Stage field on a Customer record defines whether the entity is a Lead, Customer, or Prospect.

Prospects have no associated sales orders, invoices, cash sales, or other sales transactions, but do have associated opportunities and/or estimates. If a sales transaction is created for a prospect, or an opportunity is closed for a prospect, the prospect becomes a customer.

For details about fields that can be mapped in the customer record, see the SOAP Schema Browser's [customer](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Review the following guidelines for Prospects imports:

- [Supported Prospect Sublist Imports](#)
- [Default Values for Prospects' Primary Sales Rep](#)
- [Including Primary Contact in Prospects Import](#)
- [Prospects as Individuals or Companies](#)
- [Setting the Global Subscription Status Field for Prospects](#)
- [Prospects Subsidiary Field Required for NetSuite OneWorld](#)

Supported Prospect Sublist Imports

The Prospects import supports the import of the following sublist data:

Sublist	Notes
Address	Selectively updatable based on Internal ID or Label key field. By default, the sublist Address field is read-only, and data from other sublist fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.
Credit Cards	Addition of new records is supported; update of existing lines is not supported.
Downloads	When Sell Downloadable Files feature enabled.
Group Pricing	When Multiple Prices feature enabled.
Item Pricing	When Multiple Prices feature enabled.
Partners	When Multi-Partner Management feature enabled. Selectively updatable based on Internal ID, External ID, or Partner.
Sales Team	When Team Selling feature enabled.

Every sublist on each record can optionally have a separate file. For imports that update existing Prospect records, handling of sublist data updates depends upon the setting for the [Overwrite Sublists](#) advanced

option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).

Default Values for Prospects' Primary Sales Rep

For Prospect records added through CSV import, values for Primary Sales Rep do not default to be the user performing the import. This behavior differs from the NetSuite user interface, where the user entering data on the form is the default for Primary Sales Rep. If a CSV file does not include values for Primary Sales Rep, you can specify a default value on the Import Assistant's Field Mapping page. For information, see [Assign Default Values during Field Mapping](#).

Including Primary Contact in Prospects Import

If you plan to import a Prospects CSV file that includes data for Primary Contact, the Contacts data must first exist in NetSuite.

- If this data is not yet in NetSuite, you need to complete a CSV import of Contacts data before you import the Prospects CSV file. Leave the Company field blank in the Contacts CSV file that you import.
- After the Contacts data exists in your account, you can import the Prospects data. Make sure the CSV file includes contact names in the Primary Contact column. When the entities data is imported with the Primary Contact field completed, the system links the Contact record with the entity record.



Note: It is now possible to import Prospects and Contacts in a single Import Assistant job. See [Importing Entities and Contacts Together](#).

Prospects as Individuals or Companies

NetSuite lets you define each prospect as either an individual (a person) or a company. The NetSuite Fields pane of the Import Assistant's Field Mapping page includes an Individual field for Prospects. This field is required.

- The Individual field is a Boolean indicating whether the prospect is a company or a person. It corresponds to the Type option buttons on the Prospect form.
- Unlike most radio button fields, an import of this field's data accepts all forms of True or False. For example, the following values are acceptable as a "True" value: True, true, TRUE, T, yes, Yes, YES.
 - A True value indicates a prospect is an individual; a False value indicates a prospect is a company.
 - The Company Name field is required for records with a False value, but not for records with a True value.



Note: Your account's setting for the Default Customer Type field, at Setup > Company > General Preferences, may affect the value of the Individual field for Prospects imports.

Setting the Global Subscription Status Field for Prospects

The Global Subscription Status field on prospect records determines whether or not a prospect can receive email sent through campaigns and email merge operations.

- Four values are possible: Confirmed Opt-In, Soft Opt-In, Soft Opt-Out, and Confirmed Opt-Out, but only the soft values are available to be set by import.
- If you want to send campaign email to a prospect, set this field's value to Soft Opt-In, because you cannot send campaign email to users with Soft Opt-Out status; you can only send opt-in email.



Note: Certain jurisdictions, such as the European Union (EU), have regulations regarding whether or not you can contact entities if you do not have their explicit permission to do so. You should check that your global subscription status adheres to the regulations in the recipient's jurisdiction.

- If you do not include this field in an import, its value is defaulted, based on the Unsubscribed to Marketing By Default option at Setup > Marketing > Marketing Preferences. By default, this option is disabled, and the Global Subscription Status field defaults to Soft Opt-In. When this option is enabled, the field defaults to Soft Opt-Out.
- After an import, you can change the value of the Global Subscription Status between Soft Opt-In and Soft Opt-Out manually in the user interface and through mass updates. Only recipients themselves can change the value to Confirmed Opt-In or Confirmed Opt-Out.

For more information on global subscription statuses, see the help topic [Subscription Management](#).

Prospects Subsidiary Field Required for NetSuite OneWorld

If your account is using NetSuite OneWorld, the Subsidiary field is a required field for Prospects Only imports. You must map the NetSuite Subsidiary field to a field in your CSV file, or the import will fail. CSV file values for subsidiaries should be hierarchical names, in the format grandparent : parent : child, for example, Consolidated Parent Company : UK Subsidiary : Euro Subsidiary.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Sales Channel Import

NetSuite enables you to manage order to cash transactions by channel. You can save a specified amount of inventory and future supplies and allocate them to sales orders in these channels. A sales channel is a category of sales transaction that you can differentiate by customer type and distribution channel, such as web-shop or retail outlet.

To import CSV records for Sales Channel, use the CSV import Assistant. For more information, see [CSV Imports Overview](#).

To use the CSV Import Assistant to import this record, you must enable the [Enabling Sales Channels](#) feature and have the Import CSV File permission. For more information, see the help topic [NetSuite Permissions Overview](#).

You can still manually update individual items and location attributes, if needed. For more information, see [Importing CSV Files with the Import Assistant](#).

The Sales Channel Import supports the following sublist data:

Sublist	Notes
Internal ID	Automatically added by the system.
External ID	Use this as a unique identifier for each order reservation.
Name	The sales channel name.
Description	A description of the sales channel.

Sublist	Notes
Order Priority	Designates the sales channel priority.
Can Only use Dedicated Order Reservation as Supply	Only uses supplies reserved for this channel.

Vendor-Subsidiary Relationship Import

If you use NetSuite OneWorld, the vendor-subsidiary relationship import adds or updates multi-subsidiary vendor records with subsidiary, credit limit, and tax code information. These multi-subsidiary vendor records appear on the Vendors list.

The vendor-subsidiary relationship record is not visible in the user interface. The fields available for mapping appear in the header of the vendor record, and on the Subsidiaries subtab.

Most of the fields are optional in the CSV file.

Following are the fields that are available for CSV mapping:

- Credit Limit
- External ID (required)
- Internal ID
- Subsidiary
- Tax Code
- Vendor (required)

Following is a sample of a newly created multi-subsidiary vendor record.

Credit Limit (currency)	External ID (vendor name)	Subsidiary (primary and secondary subsidiaries)	Vendor (company name)
CAD	More Toys	More Toys Parent More Toys Australia	More Toys

 **Note:** If you want to use Internal ID, follow the sample above and replace the External ID column with Internal ID.

For details about fields that can be mapped in the vendor-subsidiary relationship record, see the SOAP Schema Browser's [vendor-subsidiary relationship](#) page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

For information about working with multi-select fields in a CSV file, see the help topic [Delimiters for Hierarchical and Multi-Select Fields](#).

For information about multi-subsidiary vendors, see the help topic [Assigning Subsidiaries to a Vendor](#).

Vendors Import

The vendors import adds vendors to the Vendors list.

For details about fields that can be mapped in the vendor record, see the SOAP Schema Browser's [vendor](#) reference page. You can use the field definitions here as a basis for creating your own CSV import

template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).



Important: You must create payment terms prior to referencing them during the Import Assistant's Vendor import. In the previously supported CSV import process for vendors, new Payment Terms referenced during a Vendor import would cause a new payment term to be created in the account.

Review the following guidelines for Vendors imports:

- [Supported Vendor Sublist Imports](#)
- [Setting the Global Subscription Status Field for Vendors](#)
- [Vendors as Individuals or Companies](#)
- [Vendors Primary Subsidiary Field Required for NetSuite OneWorld](#)

Supported Vendor Sublist Imports

The Vendors import supports the import of the following sublist data:

Sublist	Notes
Address	Selectively updatable based on Internal ID or Label key field. By default, the sublist Address field is read-only, and data from other sublist fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.
Roles	—
Subscriptions	Selectively updatable based on Subscription key field.
Tax Registrations	Available when the SuiteTax feature is enabled at Setup > Company > Setup Tasks > Enable Features, on the Tax subtab. Whenever you change the Tax Registration Number value on a sublist line, it triggers the regeneration of the value of a hidden ID field, and the values of ID fields are regenerated on all sublist lines. The ID field is hidden in the UI, but it is visible through SOAP web services. The ID field is searchable, so you can access the updated values through SOAP web services. For information about working with the tax registrations sublist through SOAP web services, see the help topic Vendor . For information about working with tax registration in the UI, see the help topic Assigning Tax Registrations to an Entity in SuiteTax .

For imports that update existing Vendor records, handling of sublist data updates depends upon the setting for the [Overwrite Sublists](#) advanced option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).

Setting the Global Subscription Status Field for Vendors

The Global Subscription Status field on vendor records determines whether or not a vendor can receive email sent through campaigns and email merge operations.

- Four values are possible: Confirmed Opt-In, Soft Opt-In, Soft Opt-Out, and Confirmed Opt-Out, but only the soft values are available to be set by import.
- If you want to send campaign email to a vendor, set this field's value to Soft Opt-In, because you cannot send campaign email to users with Soft Opt-Out status; you can only send opt-in email.



Note: Certain jurisdictions, such as the European Union (EU), have regulations regarding whether or not you can contact entities if you do not have their explicit permission to do so. You should check that your global subscription status adheres to the regulations in the recipient's jurisdiction.

- If you do not include this field in an import, its value is defaulted, based on the Unsubscribed to Marketing By Default option at Setup > Marketing > Marketing Preferences. By default, this option is disabled, and the Global Subscription Status field defaults to Soft Opt-In. When this option is enabled, the field defaults to Soft Opt-Out.
- After an import, you can change the value of the Global Subscription Status between Soft Opt-In and Soft Opt-Out manually in the user interface and through mass updates. Only recipients themselves can change the value to Confirmed Opt-In or Confirmed Opt-Out.

For more information on global subscription statuses, see the help topic [Subscription Management](#).

Vendors as Individuals or Companies

NetSuite lets you define each vendor as either an individual (a person) or a company. The NetSuite Fields pane of the Import Assistant's Field Mapping page includes an Individual field for Vendors. This field is required.

- The Individual field is a Boolean indicating whether the vendor is a company or a person. It corresponds to the Type option buttons on the Vendor form.
- Unlike most radio button fields, an import of this field's data accepts all forms of True or False. For example, the following values are acceptable as a "True" value: True, true, TRUE, T, yes, Yes, YES.
 - A True value indicates a vendor is an individual; a False value indicates a prospect is a company.
 - The Company Name field is required for records with a False value, but not for records with a True value.



Note: Your account setting for the Default Vendor Type field, at Setup > Company > General Preferences, may affect the value of the Individual field for Vendors imports.

Vendors Primary Subsidiary Field Required for NetSuite OneWorld

If your account is using NetSuite OneWorld, the Primary Subsidiary field is required for Vendors imports. You must map the NetSuite Primary Subsidiary field to a field in your CSV file, or the import will fail. CSV file values for subsidiaries should be hierarchical names, in the format grandparent : parent : child, for example, Consolidated Parent Company : UK Subsidiary : Euro Subsidiary.



Note: You cannot import a vendor with multiple subsidiaries using CSV Import.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Importing Entities and Contacts Together

It is now possible to import data for Contacts and some entities together, meaning you can import the following types of records with a single Import Assistant job:

- Customers and Contacts
- Leads and Contacts
- Prospects and Contacts

Review the following guidelines for importing entities and contacts together:

- Requirements for Importing Entities and Contacts in a Single Job
- Benefits of Importing Related Records Together
- Importing Address Sublist Data for Contacts
- Setting the Global Subscription Status Field for Entities and Contacts
- Subsidiary Field Not Required for Entities and Contacts in OneWorld
- Steps for Importing Entities and Contacts Together
- Import Job Processing for Entities and Contacts Imports

Requirements for Importing Entities and Contacts in a Single Job

- You can use one CSV file that contains both entity and contact data, or you can use two separate files, one containing entity data and one containing contact data.
 - If you use one file, contact field values are stored by column, and you are limited to importing five contacts per entity in each import.
 - If you use two files, contact field values are stored by row, and this limitation on imported contacts per entity does not apply.
- If you use two files, you need to complete the File Mapping page of the Import Assistant to define a column in the contact data file that maps to the primary key column in the entity data file, such as Customer ID. (So if the Contacts CSV file does not include this column, you should add it before the import.)
- You must ensure that the [Ignore Read Only Fields](#) advanced option is enabled.
- Whether you use one or two files, you can map required fields for both entities and Contacts in one step on the Import Assistant's Field Mapping page.
 - You have the option of mapping the Attached Role field for Contacts. This field describes how the Contact is attached to the entity. Standard role values include Alternate Contact, Primary Contact, Consultant, and Decision Maker.



Important: The Customers and Contacts single job import does not support the import of contact access data, such as password, login, and role. You can import this data in a separate Customers Only import after your Customers and Contacts import has completed successfully. See [Importing NetSuite Access Details for Customer Contacts](#).

When you import entities and contacts together with the **Update** or the **Add or Update** options, all fields in the contact records that have a default value in the UI will take the default value. This happens even if you have given a different value to these fields in your CSV file. If you want to update the value of such fields for contacts, you must use the **Contacts Only** import.

Benefits of Importing Related Records Together

This approach of combining related records has the following advantages:

- The process is quicker and easier, as you can import both record types during the same import, rather than requiring two distinct imports.
- You are no longer forced to rely on name matching to link contacts and entities together, which can be prone to inaccuracy.

Importing Address Sublist Data for Contacts

When you import entities and contacts together, the Address sublist for contacts is not available for mapping. However, the address sublist values imported for each entity (customer, lead, or prospect) record are copied to all of the entity's contacts. If a contact already has one or more addresses, the newly imported address data is added; it does not overwrite existing address data.

When you map the fields in the entity's Address sublist, their values are imported to the Address subrecords on entity records and copied to the Address subrecords on all related contact records.

By default, the entity Address field is read-only, and data from other address sublist fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.

Setting the Global Subscription Status Field for Entities and Contacts

The Global Subscription Status field on lead, prospect, customer, and contact records determines whether or not these entities can receive email sent through campaigns and email merge operations.

- Four values are possible: Confirmed Opt-In, Soft Opt-In, Soft Opt-Out, and Confirmed Opt-Out, but only the soft values are available to be set by import.
- If you want to send campaign email, set this field's value to Soft Opt-In, because you cannot send campaign email to users with Soft Opt-Out status; you can only send opt-in email.



Note: Certain jurisdictions, such as the European Union (EU), have regulations regarding whether or not you can contact entities if you do not have their explicit permission to do so. You should check that your global subscription status adheres to the regulations in the recipient's jurisdiction.

- If you do not include this field in an import, its value is defaulted, based on the Unsubscribed to Marketing By Default option at Setup > Marketing > Marketing Preferences. By default, this option is disabled, and the Global Subscription Status field defaults to Soft Opt-In. When this option is enabled, the field defaults to Soft Opt-Out.
- After an import, you can change the value of the Global Subscription Status between Soft Opt-In and Soft Opt-Out manually in the user interface and through mass updates. Only recipients themselves can change the value to Confirmed Opt-In or Confirmed Opt-Out.

For more information on global subscription statuses, see the help topic [Subscription Management](#).

Subsidiary Field Not Required for Entities and Contacts in OneWorld

If your account is using NetSuite OneWorld, the Subsidiary field is a required field for importing entities and contacts together.

The Subsidiary field is not required for importing entities and contacts together only in an account that is not a OneWorld account.

Steps for Importing Entities and Contacts Together

1. Before you start the Import Assistant, review one of the following topics to get some background information about entity imports: [Customers Only Import](#), [Leads Only Import](#), or [Prospects Only Import](#).
2. Ensure that each CSV file includes required columns.
If you are using two files for the import, the file containing Contacts data should include a column with values that map to the entities' primary key field values. You will need to map the two files' key columns on the Import Assistant's File Mapping page.
3. Start the Import Assistant by going to Setup > Import/Export > Import CSV Records.
4. On the Scan & Upload CSV File page:
 - a. Choose the import's record type:
 - Customers and Contacts Together
 - Leads and Contacts Together
 - Prospects and Contacts Together
 - b. If needed, change the default character encoding. For information, see [Choose Import Character Encoding](#).
 - c. Choose the number of files to upload:
 - One file to upload
 - Multiple files to upload
 - d. Click the Select buttons and browse to the CSV files for entities and contacts data.
If you also are importing sublist data, you can select files for sublist data as well. For information, see [Sublist Data Import](#).
 - e. After you have selected one or more files to upload, click Next.
5. On the Import Options page:
 - a. Select a Data Handling option.
 - b. If needed, expand the Advanced Options and make changes. For information, see [Set Advanced CSV Import Options](#). Note that the Ignore Read-Only Fields advanced option must be enabled.
 - c. Click Next.
6. (If you are uploading multiple files only) On the File Mapping page:
 - a. Select a key column for the CSV file containing entity data. (The Import Assistant refers to this file as the Primary File.)
 - b. Select the Contacts column containing values to be mapped to entity key values.
 - c. Click Next.
7. On the Field Mapping page, review the Import Assistant's auto mappings shown in the center pane.
 - a. Note that Contact fields may be mapped multiple times so that multiple linked contacts can be imported for each entity.
 - b. Make sure that required fields (fields marked Req. in the center pane) are mapped. You can set default values by clicking the edit icon.
 - c. Click Next.
 - d. If necessary, correct any mapping errors.
8. On the Save Mapping and Start Import page, provide a mapping name and, optionally, a description, then click Save and Run.

Import Job Processing for Entities and Contacts Imports

The following table illustrates the actions taken during job processing for imports of Customers, Leads, or Prospects together with Contacts. This processing varies based on the following:

- Data handling option (Add, Update, Add or Update)
- Reference type (Name, Internal ID, External ID)
- Whether auto-generated numbering is enabled

Matching Conditions	Add	Update	Add or Update
Name Matching			
No Matching Entity, No Matching Contact	Add Both	Fail Both	Add Both
No Matching Entity, 1 Matching Contact	Fail Both	Fail Both	Add Entity, Update Contact
No Matching Entity, 2 Matching Contacts	Fail Both	Fail Both	Fail Both
1 Matching Entity, No Matching Contact	Add Both if Auto-Generated Numbering Else Fail Both	Fail Both	Update Entity, Add Contact
1 Matching Entity, 1 Matching Contact	Fail Both	Update Both	Update Both
1 Matching Entity, 2 Matching Contacts	Fail Both	Fail Both	Fail Both
2 Matching Entities, No Matching Contact	Add Both if Auto-Generated Numbering Else Fail Both	Fail Both	Fail Both
2 Matching Entities, 1 Matching Contact	Fail Both	Fail Both	Fail Both
2 Matching Entities, 2 Matching Contacts	Fail Both	Fail Both	Fail Both
Internal ID or External ID Matching			
No Matching Entity, No Matching Contact	Add Both	Fail Both	Add Both
No Matching Entity, 1 Matching Contact	Fail Both	Fail Both	Add Entity, Update Contact
1 Matching Entity, No Matching Contact	Add Both if Auto-Generated Numbering	Fail Both	Update Entity, Add Contact

Matching Conditions	Add	Update	Add or Update
	Else Fail Both		
1 Matching Entity, 1 Matching Contact	Fail Both	Update Both	Update Both

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Understanding Leads, Prospects, and Customers

When you import Lead, Prospect, or Customer data into NetSuite, you import into the Customer record. The Stage field on the Customer record defines the stage of "Customer" that is currently in the system - a Customer can be a Lead, Prospect or Customer. Leads automatically can become Prospects, and Prospects can become Customers.

Following are specific definitions of the three record types:

- **Lead** : lets you track all the information you need to convert a lead into a customer. Leads have no estimates, opportunities or transactions associated with them. If an estimate or opportunity is created for a lead, the lead becomes a prospect. If you create a sales transaction for a lead, the lead becomes a customer.
- **Prospect** : lets you track all the information you need to convert a prospect into a customer. Prospects have no sales orders, invoices, cash sales or other sales transactions associated with them. They can have opportunities and estimates associated with them, however. If a sales transaction is created for a prospect, or an opportunity is closed for a prospect, the prospect becomes a customer.
- **Customer** : lets you track all the information on your current customers.

For details about fields that can be mapped in the customer record, see the SOAP Schema Browser's [customer](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with this tool, see the help topic [SOAP Schema Browser](#).

Rules Setup Import Type

For information about Rules Setup imports, see the following:

- [Foreign Currency Variance Posting Rule Import](#)

Foreign Currency Variance Posting Rule Import

Each foreign currency variance posting rule specifies the account into which NetSuite posts gains or losses resulting from foreign currency variances. This account is the destination account. The rules consist of a set of source or revaluation transaction criteria that determine the posting account. You must create the posting accounts you want to set as destination accounts before you import rules. A destination accounts must be an account of the type Other Income or Other Expense.

If your NetSuite account has no variance posting rules, NetSuite posts the gains and losses from fluctuations in foreign exchange rates to default system-generated accounts. The default system-generated accounts are also used if no rules match the transaction. For information about the default accounts, see the help topic [Foreign Currency Revaluation](#).

Each variance posting rule must have a unique set of criteria. NetSuite compares each transaction to the foreign currency variance posting rules in the order of rule priority. When a rule matches, that rule is used and evaluation ends. Key fields, custom segments, and custom fields that apply to Purchase, Sale, Journal, Customer Payment, Vendor Payment, or Deposit are available as criteria. Custom fields are limited to the following types:

- Check Box
- Currency
- Date
- Decimal Number
- Email Address
- Free-Form Text
- Integer Number

For more information about foreign currency variance posting rules and instructions to create the rules in the UI, see the help topics [Foreign Currency Variance Mapping](#) and its subtopics.

Use the Import Assistant to import foreign currency variance posting rules. The Import Type is Rules Setup, and the Record Type is Foreign Currency Variance Posting Rule. For help with the Import Assistant, see [Importing CSV Files with the Import Assistant](#). For general information, see [Tips for Successful CSV Imports](#).

Features and Permissions Required for Import

The Foreign Currency Variance Posting Rule record type is available for import only when the Foreign Currency Variance Mapping feature is enabled.

In addition to the Import CSV File permission, the Foreign Currency Variance Mapping setup permission is required at the Full level to import rules.

Field Reference for Foreign Currency Variance Posting Rule Import

Change the Reference Type as needed. See [Select Reference Types](#).

Rule Header Fields

Field	Description
Rule Name	Required. The rule name must be unique. Include enough information to identify the rule in a list if you change the priority of your rules. The rule name can include symbols in addition to letters and numbers.
Destination Account	Required. Use the internal ID or the exact account name, including the account number if the accounting preference box Use Account Numbers is checked. Include the reference type in your field mapping. The account must be of the account type Other Income or Other Expense and must exist prior to import. Foreign currency variances post to this destination account when the source or revaluation transaction matches the rule. Multiple rules can have the same destination account.
Description	Include a short description of the rule if wanted.
Inactive	This field is a check box in the UI. For acceptable inputs, see Boolean Values in CSV Files .

Field	Description
	Inactive rules appear on the Foreign Currency Variance Posting Rules page, but they are ignored during revaluation processing.

Rule Criteria Fields

Each variance posting rule must have a unique set of criteria. These fields are in the Criteria subtab in the UI. In the Import Assistant, they are a sublist.

Field	Description																																							
Criteria Field	<p>You can import the standard criteria fields for foreign currency variance posting rules, plus custom fields and segments. You cannot set a default value in the Import Assistant. Be sure to create any custom fields and segments prior to import.</p> <p>For a description of the standard criteria fields in the UI, see the help topic Defining Foreign Currency Variance Posting Rules.</p>																																							
Criteria ID	Use this field to update existing rules. To determine the criteria ID, look at the rule in the UI and assign numbers to the criteria fields beginning with 1. You cannot set a default value in the Import Assistant.																																							
Criteria Values	<p>The criteria values depend on the criteria field. The Gain/Loss criteria field is Boolean. Use T or TRUE to indicate gain. Use F or FALSE to indicate loss.</p> <p>For fields that do not support external IDs (Account Type, Country, Posting Period, Variance Type, and custom segment), the default reference type is Name. (For more information about countries, see Country Names for CSV Import.) Be sure to select the reference type during field mapping. Do not mix name and internal ID reference types in the same CSV file.</p> <p>You cannot set a default value in the Import Assistant.</p>																																							
Operator	<p>The following table lists the supported operators for the field types and number of inputs shown. You cannot set a default value in the Import Assistant.</p> <p>Number is used for Currency, Integer Number, and Decimal Number field types. Boolean includes Check Box. Text includes Email Address. Operators are not case sensitive.</p> <table border="1"> <thead> <tr> <th>Operator</th> <th>Field Type</th> <th>Input Count</th> </tr> </thead> <tbody> <tr> <td>AFTER</td> <td>Date</td> <td>1</td> </tr> <tr> <td>ANYOF</td> <td>List/Record</td> <td>1...N</td> </tr> <tr> <td>BEFORE</td> <td>Date</td> <td>1</td> </tr> <tr> <td>BETWEEN</td> <td>Number</td> <td>2</td> </tr> <tr> <td>EMPTY</td> <td>Number</td> <td>1</td> </tr> <tr> <td>EQUALTO</td> <td>Number</td> <td>1</td> </tr> <tr> <td>GREATERTHAN</td> <td>Number</td> <td>1</td> </tr> <tr> <td>GREATERTHANOREQUALTO</td> <td>Number</td> <td>1</td> </tr> <tr> <td>IS</td> <td>Boolean and Text</td> <td>1</td> </tr> <tr> <td>ISEMPTY</td> <td>Date and Text</td> <td>0</td> </tr> <tr> <td>ISNOT</td> <td>Text</td> <td>1</td> </tr> <tr> <td>ISNOTEMPTY</td> <td>Number, Date, and Text</td> <td>0</td> </tr> </tbody> </table>	Operator	Field Type	Input Count	AFTER	Date	1	ANYOF	List/Record	1...N	BEFORE	Date	1	BETWEEN	Number	2	EMPTY	Number	1	EQUALTO	Number	1	GREATERTHAN	Number	1	GREATERTHANOREQUALTO	Number	1	IS	Boolean and Text	1	ISEMPTY	Date and Text	0	ISNOT	Text	1	ISNOTEMPTY	Number, Date, and Text	0
Operator	Field Type	Input Count																																						
AFTER	Date	1																																						
ANYOF	List/Record	1...N																																						
BEFORE	Date	1																																						
BETWEEN	Number	2																																						
EMPTY	Number	1																																						
EQUALTO	Number	1																																						
GREATERTHAN	Number	1																																						
GREATERTHANOREQUALTO	Number	1																																						
IS	Boolean and Text	1																																						
ISEMPTY	Date and Text	0																																						
ISNOT	Text	1																																						
ISNOTEMPTY	Number, Date, and Text	0																																						

Field	Description		
	LESSTHAN	Number	1
	LESSTHANOREQUALTO	Number	1
	NONEOF	List/Record	1...N
	ON	Date	1
	ONORAFTER	Date	1
	ONORBEFORE	Date	1
	WITHIN	Date	2

Foreign Currency Variance Posting Rule Import Example

The following table shows the structure of a file to import Foreign Currency Variance Posting Rules with the rule header fields and the rule criteria fields in the same file.

Rule Name	Destination Account	Description	Inactive	Criteria Field	Operator	Criteria Values
Germany Realized Losses	612 Realized Losses	German subsidiary realized losses	N	varianctype	anyof	Realized
Germany Realized Losses	612 Realized Losses	German subsidiary realized losses	N	isgain	is	F
Germany Realized Losses	612 Realized Losses	German subsidiary realized losses	N	subsidiary	anyof	Germany
Germany Realized Gain	611 Realized Gains	German subsidiary realized gains	N	varianctype	anyof	Realized
Germany Realized Gain	611 Realized Gains	German subsidiary realized gains	N	isgain	is	T
Germany Realized Gain	611 Realized Gains	German subsidiary realized gains	N	subsidiary	anyof	Germany
Other Realized Gains/Losses	613 Other Realized Gains/Losses	All other subsidiaries' realized gains and losses	N	varianctype	anyof	Realized

Subscription Billing Import Type

Some of the records related to subscription billing can be imported as CSV data.

To import subscription billing records, verify the following settings:

- Check the **Consolidate Projects on Sales Transactions** box on the Items/Transactions subtab at Setup > Accounting > Accounting Preferences
- Enable the following features on the Transaction subtab at Setup > Company > Enable Features:

- Advanced Billing
- Charge-Based Billing
- Billing Accounts
- Billing Operations
- SuiteBilling

For more information about setting up SuiteBilling and billing records, see the help topics [SuiteBilling Overview](#) and [Viewing Records Related to the Billing Account](#).

To import subscription billing data, perform the CSV imports in the following order:

	Record Type	Import Type	Requirements	More Information
1	Subscription Plan	Items	—	Subscription Plan Import
2	Price Plan	Accounting	<p>Price plans are only used one time, and the CSV import can only be used to modify existing price plans.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> Note: Price plan information is not available from the UI, so ensure that you record all information from this import for later use. </div>	Price Plan Import
3	Price Book	Accounting	A saved associated subscription plan and a price plan are mandatory for the price book import. Refer to the price plan using the external ID.	Price Book Import
4	Subscription	Transactions	<p>Subscriptions reference existing subscription plans. The following fields are required:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Customer <input type="checkbox"/> Billing account <input type="checkbox"/> Subscription plan <input type="checkbox"/> Price book in the same currency that is used in the billing account. 	Subscription Import
5	Subscription Line	Transactions	This import can only be used to update existing lines in a subscription, usually to change the status from Draft to Pending Activation. New lines cannot be added using CSV import because all subscription lines are created with the subscription record and they reflect lines of the subscription plan.	Subscription Line Import
6	Subscription Change Order	Transactions	<p>Use this import as needed. The information imported varies, depending on the action specified, that is, activation, termination, reactivation, suspension, modify pricing, and renewal.</p> <p>A subscription with at least one activated subscription line is required. To add a subscription change order, the subscription, billing account, and customer are required. The internal ID or external ID is required to update a subscription change order.</p>	Subscription Change Order Import
7	Usage	Transactions	Use this import as needed. To import subscription usage data, a subscription must exist for the	Usage Import

Record Type	Import Type	Requirements	More Information
		<p>customer. For more information, see the help topic Creating Subscription Plans.</p> <p>View the video: Setting Up a Subscription Plan and Price Plan.</p>	

The Billing Account record type is also used for subscription billing. For more information, see [Billing Account Import](#).

Price Book Import

You can import price book CSV data for a customer only when SuiteBilling and the related features are enabled on your account. For more information, see the help topics [SuiteBilling Overview](#) and [Creating Price Books](#).



[Setting Up a Subscription Plan and Price Plan](#)

A saved associated subscription plan and a price plan are mandatory for the price book import. Refer to the price plan using the external ID.

Price Book Body and Sublist Fields

To prepare price book CSV data for import, make sure that your CSV file includes the following fields. They are required for a successful CSV import.

- **Currency** – Currency used for the price book values.
- **Name** – Name of the price book.
- **Subscription Plan** – Name of the subscription plan.

To learn about other supported fields, see the help topic [Creating Price Books](#).

Price book records include the Price Book Lines sublist. Required values include:

- **Subscription Plan Line** – This is the key field, identifying the subscription plan line that the price book is associated with.
- **Price Plan** – External ID of the price plan.



Note: Field mapping for the price plan is set to Name by default. Ensure that you change it to External ID by clicking the edit icon.

- **Charge Frequency** – Frequency with which to charge the line item.

Price Book CSV File Examples

The following table shows how you might structure a file for importing price book data, when using a single CSV file.

External ID	Currency	Name	Subscription Plan	Price Book Price Book Lines: Subscription Plan Line	Price Book Price Book Lines: Repeat Every	Price Book Price Book Lines: Price Plan	Price Book Price Book Lines: Charge Frequency
RPL001	USD	Price Book 1	Monthly	1	1	Standard01	Annually
RPL002	USD	Price Book 1	Annual	4	1	Discount02	Monthly

External ID	Currency	Name	Subscription Plan	Price Book Lines: Subscription Plan Line	Price Book Lines: Repeat Every	Price Book Lines: Price Plan	Price Book Lines: Charge Frequency
RPL002	EUR	Price Book 2	Maintenance	3	0	Standard02	One Time
RPL003	CAD	Price Book 3	Quarterly	2	3	Discount03	Quarterly

The following example imports the price book lines sublist data in a separate CSV file.

Primary file:

External ID	Currency	Name	Subscription Plan
RPL001	USD	Price Book 1	Monthly
RPL002	USD	Price Book 1	Annual
RPL002	EUR	Price Book 2	Maintenance
RPL003	CAD	Price Book 3	Quarterly

Price Book Lines sublist file:

External ID	Subscription Plan Line	Repeat Every	Price Plan	Charge Frequency
RPL001	7	1	Standard01	Annually
RPL002	8	1	Discount02	Quarterly
RPL002	3	0	Standard02	Monthly
RPL003	9	1	Discount03	One Time

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. Select the Accounting import type and the Price Book record type. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Price Plan Import

You can use the CSV Import assistant to import a new or update an existing price plan for a customer only when SuiteBilling and the related features are enabled on your account. For more information, see the help topic [SuiteBilling Overview](#).

Some price plan fields might be read-only, or not visible, depending on the price plan type (one time, usage, recurring). A price plan can be associated with a price book only when all of the conditions are met.

Price plans can be used only one time. You can only use the Price Plan CSV Import to modify the price plan itself. Although the price plan is included in other imports (for example, subscription or subscription change order), the price plan cannot be modified from other CSV imports.

Price Plan Body and Sublist Fields

To prepare price plan CSV data for import, make sure that your CSV file includes the following fields. They are required for a successful CSV import.

- **External ID** – Used as a unique identifier for the record. You can specify any value that has not been used as the External ID in previous CSV imports. This field is required.
- **Currency** – Currency used for the price book values. The price plan will use the same currency.
- **Type** – Price plan type, for example, Tiered.

To learn about other supported fields, see the help topic [Creating Subscription Plans](#).

Price plan records may include the Pricing sublist. Required values include:

- **Above Quantity** – This is the key field, and is used to identify volume pricing tiers. When adding a price plan, the first line of your CSV file must have Above Quantity = 0.
- **Pricing Options** – Pricing options for the plan, for example, Rate pricing or Fixed Amount pricing.
- **Value** – Enter the pricing value for the option chosen.

Price Plan CSV File Examples

The following table shows how you might structure a single CSV file for adding price plan data.

External ID	Currency	Type	Price Plan Pricing: Above Quantity	Price Plan Pricing: Pricing Option	Price Plan Pricing: Value
RPL001	USD	Tiered	0	Fixed Amount	2
RPL002	USD	Tiered	50	Rate	8
RPL002	EUR	Volume	1	Fixed Amount	100
RPL003	CAD	Volume	99	Variable	4

The following example imports the pricing sublist data in a separate CSV file.

Primary file:

External ID	Currency	Type
RPL001	USD	Tiered
RPL002	USD	Tiered
RPL002	EUR	Volume
RPL003	CAD	Volume

Pricing sublist file:

External ID	Above Quantity	Pricing Option	Value
RPL001	99	Fixed Amount	2
RPL002	50	Rate	8
RPL002	1	Fixed Amount	100
RPL003	99	Variable	4

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. Select the Accounting import type and the Price Plan record type. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Subscription Import

You can import subscription CSV data for a customer only when SuiteBilling and the related features are enabled on your account. For more information, see the help topic [SuiteBilling Overview](#).

Subscriptions reference existing subscription plans. The following are required:

- Billing account
- Subscription plan
- Price book in the same currency that is used in the billing account.

For more information about subscriptions , see the help topic [Subscription Management](#).

Subscription Body and Sublist Fields

To prepare subscription CSV data for import, make sure that your CSV file includes the following fields. They are required for a successful CSV import.

- **Subscription Plan** – Name of the subscription plan.
- **Price Book** – Name of the price book. The price book must use the same currency that is used in the billing account.
- **Customer** – Customer using the subscription.
- **Billing Account** – Customer's billing account for this subscription.

In a single file import, either the internal ID or external ID field is required. Each single file import with repeating rows for a sublist needs a mapped field. The mapped field identifies the record, which is required because it spans multiple rows in the import file.

Subscription records include the Price Book Lines sublist. This is a keyed sublist, and the required value is the **Subscription Plan Line Number**.

Subscription CSV File Example

The following tables show how you might structure files for importing subscription and price book line sublist CSV data.

Primary file:

External ID	Subscription Name	Customer	Billing Account	Subscription Plan	Initial Term	Original Start	Original End	Default Renewal Term	Default Renewal Method
SBSC001	Enterprise Monthly Service	Harriott Construction	Harriott Construction: BA_1001	Enterprise Monthly Solution	12 Months	01/15/2013	01/31/2014	1 Year	Automatic
SBSC002	Company Quarterly Service	B-Sharp Music	B-Sharp Music: BA_1002	Quarterly Service Silver	3 Months	06/06/2015	09/01/2015	3 Months	Manual

Price Book Line sublist:

External ID	Subscription	Repeat Every	Price Plan	Quantity	Included Quantity	Discount	Charge Frequency
SBSC001	1	1	Annual	4	0.5	0.1	12

External ID	Subscription	Repeat Every	Price Plan	Quantity	Included Quantity	Discount	Charge Frequency
SBSC002	3	2	Quarterly	20	0.9	0.2	3
SBSC002	5	0	One Time	1	2	0.05	0

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. Select the Transactions import type and the Subscription record type. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Subscription Change Order Import

You can import subscription change order CSV data for a customer only when SuiteBilling and the related features are enabled on your account. For more information, see the help topic [SuiteBilling Overview](#).

To import subscription change order records, a subscription with at least one activated subscription line is required. When adding a subscription change order, the subscription, billing account, and customer are required. When updating a subscription change order, you must use the internal ID or external ID of the subscription change order.

Subscription Change Order Body and Sublist Fields

To prepare subscription change order CSV data for import, make sure that your CSV file includes the following fields. They are required for a successful CSV import.

i Note: The information imported varies, depending on the action specified. For activation, termination, reactivation, and suspension, the line number and include fields are imported. For modify pricing, it is possible to define a new price plan, new quantity, and new discount for each item line. For renewals, only body fields are modified.

- **Customer** (mandatory) — Name of the customer. A subscription for the customer must exist in the account.
- **Action** (mandatory) — Change order activity. Valid actions are:
 - Activate
 - Modify Pricing
 - Reactivate
 - Renew
 - Suspend
 - Terminate
- **Subscription** (mandatory) – Subscription name.
- **Requester** (mandatory) — Name of the person requesting the subscription change order.

i Note: The import will fail if a billing account is not specified for a customer who has no default billing account.

In a single file import, either the internal ID or external ID field is required. Each single file import with repeating rows for a sublist needs a mapped field. The mapped field identifies the record, which is required because it spans multiple rows in the import file.

The Subscription Change Order import supports the import of Subscription Change Order Items sublist data. **Line Number** is the key field for the sublist, specifying the line number to which the subscription change order is applied.

Subscription Change Order CSV File Example

The following example shows how you might structure CSV files for importing subscription change order data.

Primary File

External ID	Action	Customer	Effective Date	Billing Account	Requester	Renewal Start Date	Renewal End Date	Renewal Method	Subscription	Renewal Subscription Plan
8392-ue87	Renew	Alan Rath	07/01/2016	Billing account 1	J Wolfe	09/01/2016	08/31/2017	Extend Existing Subscription	Subscription 1	Enterprise 12 Months
8323-ir98	Modify Pricing	Alan Rath	07/01/2016	Billing account 1	J Wolfe	09/01/2016	08/31/2017	Extend Existing Subscription	Subscription 1	Customer Service 12 Months
9487-po32	Activate	Sam Thompson	04/15/2016	Billing account 2	J Wolfe	06/30/2016	05/31/2017	Extend Existing Subscription	Subscription 4	Enterprise 12 Months

Subscription Change Order Items Sublist File:

External ID	Subscription Change Order Items: Line Number	Subscription Change Order Items: Include	Subscription Change Order Items: New Discount	Subscription Change Order Items: New Quantity	Subscription Change Order Items: New Rate Plan	Subscription Change Order Items: New Status
8323-ir98	1	No	—	—	—	—
8323-ir98	2	Yes	5	3	Ongoing	Active
9487-po32	1	Yes	—	—	—	—
9487-po32	2	Yes	—	—	—	—

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. Select the Transactions import type and the Subscription Change Order record type. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Subscription Line Import

You can import subscription line CSV data for a customer only when SuiteBilling and the related features are enabled on your account. For more information, see the help topics [SuiteBilling Overview](#) and [Subscription Management](#).

Note: The subscription line CSV import can update only existing lines in a subscription, usually to change the status from Draft to Pending Activation. New lines cannot be added through CSV import because all subscription lines are created with the subscription record and they reflect lines of the subscription plan.

To be able to update the subscription line data, you will need to learn the subscription line ID for each of the lines you update.

To learn the ID of a subscription line:

1. Go to Transactions > Subscriptions > Create Subscriptions > List and click the subscription containing the line.

2. Click **View** beside the subscription line.
3. Check the page's address bar to find the subscription line's ID. The ID usually appears at the end of the address and has the following format: **id=123**. For example, if the page's URL is **www.system.netsuite.com/app/accounting/subscription/subscriptionline.nl?id=103**, the line ID is **103**.

Subscription Line Fields

To prepare subscription line CSV data for import, make sure that your CSV file includes the following fields. They are required for a successful CSV import. The import requires either **Internal ID**, which is the subscription line ID, or **External ID**, which is the unique identifier for the record.

Subscription Line CSV File Example

The following table shows how you might structure a file for updating subscription line data.

External ID	Internal ID	Start Date	End Date	Status	Prorate Start Date	Prorate End Date	Revenue Recognition Option
SubS-3484	103	7/22/2016	7/22/2016	Pending	No	No	OVER_TERM
SubS-3603	109	2/15/2016	2/14/2017	Pending	Yes	Yes	OVER_TERM
SubS-4920	112	11/23/2015	11/22/2016	Pending	Yes	Yes	OVER_TERM

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. Select the Transactions import type and the Subscription Line record type. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Subscription Plan Import

You can import subscription plan CSV data for a customer only when SuiteBilling and the related features are enabled on your account. For more information, see the help topics [SuiteBilling Overview](#) and [Creating Subscription Plans](#).

Subscription Plan Body and Sublist Fields

To prepare subscription plan CSV data for import, make sure that your CSV file includes the following fields. They are required for a successful CSV import.

- **Subscription Plan Name** – Name of the subscription plan.
- **Initial Term** – Initial term for the subscription plan.

Subscription plan records include the Subscription Plan Members sublist. Required values include:

- **Line Number** – Subscription plan line number.
- **Item** – Items included in the subscription plan.
- **Type** – Subscription plan type.

Subscription Plan CSV File Examples

The following example shows how you might structure a single CSV file for importing subscription plan data.

External ID	Subscription Plan Name	Initial Term	Location	Income Account	Subscription Plan Members: Line Number	Subscription Plan Members: Item	Subscription Plan Members: Type
SBSPLN001	Acme Vending Service Gold	12 Month	Chicago	Fees	1	Registration Fee	One Time
SBSPLN001	—	—	—	—	2	Restocking Service	Recurring
SBSPLN001	—	—	—	—	3	Refrigeration Service	Recurring
SBSPLN001	—	—	—	—	4	Sodas	Usage Time
SBSPLN001	—	—	—	—	5	Bottled Water	Usage
SBSPLN001	—	—	—	—	6	Juices	Usage

The following example includes the Members sublist data imported in a separate CSV file.

Primary file:

External ID	Subscription Plan Name	Initial Term	Location	Income Account
SBSPLN001	Acme Vending Service Gold	Evergreen Term	Chicago	Fees

Members sublist file:

External ID	Line Number	Item	Type
SBSPLN001	1	Registration Fee	One Time
SBSPLN001	2	Restocking Service	Recurring
SBSPLN001	3	Refrigeration Service	Recurring
SBSPLN001	4	Sodas	Usage Time
SBSPLN001	5	Bottled Water	Usage
SBSPLN001	6	Juices	Usage

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. Select the Items import type and the Subscription Plan record type. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Usage Import

You can import subscription usage CSV data for a customer only when SuiteBilling and the related features are enabled on your account. For more information, see the help topic [SuiteBilling Overview](#).

Before you can import any subscription usage data for a customer, a subscription must exist for that customer. For more information, see the help topic [Subscription Management](#).

Usage Fields

To prepare usage CSV data for import, make sure that your CSV file includes the following fields. They are required for a successful CSV import.

- **External ID** – A unique identifier for the record. You can specify any value that has not been used as the External ID in previous CSV imports. This field is recommended but not required.
- **Subscription** – Subscription the imported usage data is related to.
- **Quantity** – Item quantity used.
- **Usage Date** – Date on which usage occurred.

To learn about other supported fields, see the help topic [Subscription Management](#).

Usage CSV File Example

The following table shows how you might structure a file for importing subscription usage data.

External ID	Subscription	Subscription Line	Subscription Plan	Item	Quantity	Usage Date
USG001	Vending Services 12 Months	7	Vending Service Gold	One-Time Charge	5	10/23/2015
USG002	Enterprise 12 Month Solution	8	Enterprise Solution	Service Item	1	11/10/2015
USG003	Annual Maintenance	6	Vending Service Gold	Fixed Usage	1	11/11/2015
USG004	Vending Restocking Services	9	Vending Service Gold	Usage	6	11/12/2015

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. Select the Transactions import type and the Usage record type. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Supply Chain Import Type

For information about Supply Chain imports, see the following:

- [Bill of Materials Import](#)
- [Bill of Materials Revision Import](#)
- [Bin Import](#)
- [Item Location Configuration Import](#)
- [Item Process Family Import](#)
- [Item Process Group Import](#)
- [Item Revision Import](#)
- [Manufacturing Cost Template Import](#)
- [Manufacturing Routing Import](#)
- [Order Type Import](#)
- [Pick Strategy Import](#)
- [Planning Item Category Import](#)
- [Planning Item Group Import](#)

- Planning Rule Group Import
- Supply Plan Definition Import
- Zone Import

Bill of Materials Import

A Bill of Materials (BOM) lists the quantities of raw materials, assemblies, sub-components, and parts needed to manufacture a product. A BOM can be used to communicate between manufacturing partners, multiple facilities within the organization, or with a single manufacturing plant.

The BOM import record is available when the Advanced Bill of Materials feature is enabled on the Items & Inventory subtab at Setup > Company > Setup Tasks > Enable Features.

In the user interface, you can access the bills of material record at Lists > Supply Chain > Bills of Materials. To learn more, see the help topic [Advanced Bill of Materials](#).

The member components needed for assembly items are identified in the Bill of Materials (BOM) but required components may change over time. These changing requirements can be documented in Bill of Materials Revision record which is part of the BOM. To learn more, see the help topic [Creating BOM Revisions](#).

Bill of Materials Import Example

The following table provides an example structure for a file to import transfer order data:

Available for Assembly	Available for All Locations	ExternalID	Inactive	Memo	Name	Restrict to Assemblies	Restrict to Locations	Use Component Yield
Yes	Yes	BAR45562	No	—	Bicycle Assembly Red	No	No	Yes
No	No	BAB45563	No	—	Bicycle Assembly Blue	Yes	Yes	Yes

Bill of Materials Revision Import

A Bill of Materials (BOM) revision enables you to update a BOM's details throughout the product lifecycle. A BOM revision also provides an accessible revisions history.

For example, Bicycle Assembly Revision V2 updates the components used in building road bicycles saving the company money because it improves production and assembly methods.

The BOM Revision import record is available when the Advanced Bill of Materials feature is enabled on the Items & Inventory subtab at Setup > Company > Setup Tasks > Enable Features.

In the user interface, you can access the bill of materials revision record at Lists > Supply Chain > Bills of Materials.

The member components needed for assembly items are identified in the Bill of Materials Revision but required components may change over time. These changing requirements can be documented in Bill of Materials Revision record. To learn more, see the help topic [Creating BOM Revisions](#).

For more information, see also [Importing CSV Files with the Import Assistant](#).

Bill of Materials Revision Import Example

The following table provides an example structure for a file to import bill of materials data:

Bill of Materials	Effective End Date	Effective Start Date	ExternalID	Inactive	Memo	Name
Bicycle Assembly BOM Red	05/31/2019	05/16/2019	BAR45562	No	—	Bicycle Assembly Red
Bicycle Assembly BOM Blue	05/15/2019	05/01/2019	BAR45563	No	—	Bicycle Assembly Blue

Bill of Materials Revision Import Sublist Example

The following table provides an example structure for a file to import bill of materials sublist data:

BOM Quantity	Component Yield	Item (Req)	Item Source
1	Yes	Red road Bicycle	Work order
2	Yes	Blue Road Bicycle	Work order

Bin Import

Bin records define bin locations within a warehouse or stock room. Bin record numbers are associated with items and included on receiving and fulfilling transactions to keep track of the on-hand quantity for each bin.

For details about bins in NetSuite, see the help topic [Creating Bin Records](#).

Note: Bin imports are not available unless the Bin Management feature is enabled in your account. To enable this feature, go to Setup > Company > Enable Features and on the Items & Inventory subtab, check Bin Management.

Note the following:

- A Bin Number field value is required to uniquely identify each Bin record.
- If the Multi-Location Inventory (MLI) feature is enabled, the Location field is required. Note that if you use bins with MLI, you must use bins in all locations. After a bin record has been saved for the first time, the location value cannot be changed.
- If the Warehouse Management feature is enabled, you can import data for the following fields: Type, Sequence Number, and Zone. For more information about working with these fields, see the help topic [Creating Bin Locations or Carts](#).
- After bin records have been created, you can associate them with inventory item records. To associate bins with an item record, you need to set the item's Use Bins field value to True, and add bin records to the item's Bin Numbers sublist. You can set the Preferred field value to True for one item bin record per location. You can complete these tasks on the Item page in the user interface, or through an Items import.

For details about fields that can be mapped in the bin record, see the SOAP Schema Browser's [bin](#). You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with this tool, see the help topic [SOAP Schema Browser](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Item Location Configuration Import

When using the Advanced Item Location Configuration feature, item location attributes can be set or updated using the CSV import process.

For example, item location attributes may need to be added when a new location is added. Or, if an item has a new vendor lead time, that update may need to be made across locations. You can make these changes by mass updates using CSV import.

To import CSV records for Item Location Configuration, use the CSV import assistant. For details about CSV Imports, read [CSV Imports Overview](#).

To import CSV records for Item Location Configuration:

1. Save a CSV formatted file with the updates.
2. Go to Setup > Import/ Export > Import CSV Records.
3. Select **Supply Chain** as the Import Type.
4. Select **Item Location Configuration** as the Record Type.
5. In the **CSV File(s)** section, select to upload **One File** or **Multiple Files**.
6. Select the .csv file you want to upload.
7. Click **Next**.
8. In the **Import Options** page, select **Add** and then click **Next**.
9. Click **Submit**.

You can still manually update individual items and location attributes, if needed.

Item Process Family Import

The item process family is an item category that uses properties or attributes to identify and group similar items in your warehouse. For example, you can create a clothing item process family to identify all clothing items.

The item process family record is available when the Warehouse Management feature is enabled at Setup > Company > Enable Features, on the Items & Inventory subtab. For details about working with this record, see the help topic [Creating Item Process Families](#).

After you have imported item process family records successfully, you can review them at Lists > Supply Chain > Item Process Families.

Note: If you plan to import other record types that include fields referencing item process family values, complete your import of item process family records first.

Item Process Group Import

The item process group is an item category that groups similar items in your warehouse using a more refined property or attribute than the item process family. For example, if you have a clothing item process family, you can create item process groups such as pants and jeans. You can further identify and group clothing items into either of these item process groups.

The item process group record is available when the Warehouse Management feature is enabled at Setup > Company > Enable Features, on the Items & Inventory subtab. For details about working with this record, see the help topic [Creating Item Process Groups](#).

After you have imported item process family records successfully, you can review them at Lists > Supply Chain > Item Process Groups.



Note: If you plan to import other record types that include fields referencing item process group values, complete your import of item process group records first.

Item Revision Import

When the Assembly Items feature is enabled, you can use this import to add and update item revision records that define which member items should be included in assembly builds during specific time frames.

The exact member components needed for assembly items are identified in the Bill of Materials (BOM), but required components may change over time. These changing requirements can be documented in item revision records, which are part of BOM member control functionality. An item revision record sets an effective date for a member item to be included in assembly builds. Each item revision record can be assigned to multiple assembly items, because one item can be a member of different assembly items. For more details, see the help topic [Bill of Materials Member Control for Assembly Items](#).

The Item Revision import supports the following fields:

- Effective Date (required) — the date when a member item should begin to be included in assembly items to which this revision record is assigned
- ExternalId — can be used as a unique identifier for each item revision record
- Inactive — Boolean indicating whether the item revision record is inactive
- Item (required) — the member item to which this item revision record applies
- Memo — optional descriptive text
- Name (required) — name of the item revision record

This import cannot add or update values for the Obsolete Date field. When an imported revision record is saved, the system determines its obsolete date, based on its effective date and on the effective dates of other revision records for the member item, to avoid gaps or overlaps in dates covered by revisions.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Manufacturing Cost Template Import

Import of the manufacturing cost template record is possible only if the Manufacturing Routing and Work Center feature has been enabled at Setup > Company > Enable Features, on the Items & Inventory subtab.

The Manufacturing Routing and Work Center feature lets you create routings that specify a sequence of tasks, or operations, required for the building of assembly items. Creating a cost template is one step in this process. A cost template groups together the various costs associated with a particular activity. For example, a cost template representing the cost of metalworking might include a metalworker's wages, the fuel costs associated with running a forge, and wear and tear on the forge. Later, when you create routing records, you use cost templates to represent the rates associated with each task, or operation, included in your routing.

Before you begin importing cost templates, it might be useful to view the form you would use to manually create these records, at Lists > Supply Chain > Manufacturing Cost Templates > New. For details on the

process of manually creating a cost template, see the help topic [Creating Manufacturing Cost Templates](#). For general details about the Manufacturing Routing and Work Center feature, see the help topic [Manufacturing Routing](#).

For more details on importing cost templates, see the following:

- [Prerequisite Records for Cost Template Import](#)
- [Cost Template Body and Sublist Fields](#)
- [Cost Template CSV File Examples](#)
- [Common Errors When Importing Cost Templates](#)

Prerequisite Records for Cost Template Import

When you create a cost template record, you rely on certain prerequisite records that must already exist in NetSuite. Specifically, you need at least one record of each of the following types:

- [Cost Categories](#)
- [Charge Items](#)

Before creating these records, you should also be familiar with the concept of [Cost Types](#), which are classifications predefined by NetSuite.

Cost Types

A cost type is a classification that distinguishes between general types of expenses, such as the cost of paying an employee versus the cost of operating a machine. NetSuite defines the following cost types for use with the manufacturing routing feature:

- | | |
|-----------------|--------------------------|
| ▪ Labor Setup | ▪ Labor Setup Overhead |
| ▪ Labor Run | ▪ Labor Run Overhead |
| ▪ Machine Setup | ▪ Machine Setup Overhead |
| ▪ Machine Run | ▪ Machine Run Overhead |

These cost types become available when you enable the Manufacturing Routing and Work Center feature (at *Setup > Company > Enable Features*, on the *Items & Inventory* subtab). After the feature is enabled, you can view the routing cost types on the page where you create cost category records.

Cost Categories

A cost category is a record you create in NetSuite. It is an expense classification that belongs to a particular cost type. For example, you might create cost categories labeled US Labor Run Standard and Europe Labor Run Standard, each of which belongs to the cost type Labor Run. You create cost categories at *Setup > Accounting > Accounting Lists > Cost Categories*.

To be valid for use on a cost template, a cost category must belong to one of the manufacturing routing cost types (as opposed to one of the other cost types that may be available).

When you select cost categories to use in your cost template, note the following restriction: In some cases, if two cost categories belong to the same cost type, only **one** of the categories may be allowed on the template. Whether or not this restriction applies is determined by the cost type, as described in the following table.

Cost Type	Notes on Using Cost Categories of this Type
Labor Setup	Only one cost category using this cost type can appear on any cost template.
Labor Run	Only one cost category using this cost type can appear on any cost template.
Machine Setup	Only one cost category using this cost type can appear on any cost template.
Machine Run	Only one cost category using this cost type can appear on any cost template.
Labor Setup Overhead	Cost categories using this cost type can occur multiple times on a cost template.
Labor Run Overhead	Cost categories using this cost type can occur multiple times on a cost template.
Machine Setup Overhead	Cost categories using this cost type can occur multiple times on a cost template.
Machine Run Overhead	Cost categories using this cost type can occur multiple times on a cost template.

For more on cost types and cost categories, see the help topic [Defining Cost Categories for Manufacturing Routing and Work Center](#).

Charge Items

Before you can begin importing cost templates, you must create charge items that reference your cost categories. A charge item is an item record that has been flagged as a Manufacturing Charge Item on the Purchasing tab of the item record. Charge items include an exact monetary rate, and they must be associated with a cost category valid for use on a cost template.

You can manually create charge item records, or you can import them. To manually create a charge item, go to Lists > Accounting > Items > New, then choose an appropriate item type, such as Other Charge for Purchase. (Note that only certain item types can be flagged for use as a Manufacturing Charge Item.) When creating your charge items, make sure you select the Manufacturing Charge Item box or, if importing, map the field to a value of Yes.

For more on manually creating item records, see the help topic [Creating Item Records](#). For more on item record import, see [Items Import](#).

Cost Template Body and Sublist Fields

When you import a cost template, you specify several body values, plus at least one record in the template's sublist.

Body Fields

The following body fields are supported for import.

Field	Notes	Required?
ExternalId	Can be used as a unique identifier for the record.	No
Inactive	If set to Yes, the cost template is hidden in lists on records and forms.	No, but if you do not include a mapping for this field, the system uses the default value, which is No.
Memo	Can be used to add a description about the record.	No
Name	Used as a label for the template. This value must be unique.	Yes

Field	Notes	Required?
Subsidiary (OneWorld only)	The subsidiary in which this template is available.	Yes, for OneWorld accounts

Sublist Fields

At least one row is required in this record's sublist. In the Import Assistant, this sublist is referred to as Manufacturing Cost Template Cost Detail. (In the UI, the sublist is labeled simply Costs — to see this, choose Lists > Supply Chain > Manufacturing Cost Templates > New).

Each record in the sublist must consist of a pair of values, as follows. Note that this sublist is not keyed.

Field	Notes	Required?
Cost Category	Must name a cost category record, created in NetSuite, that uses one of the manufacturing cost types. For more details on this entry, including restrictions on duplicate cost type references, see Cost Categories .	Yes
Item	Must refer to a charge item, created in NetSuite, that uses the cost category named for this particular sublist record. If you choose an Item that uses a different cost category, the import fails. For more details on charge item records, refer to Charge Items .	Yes

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Cost Template CSV File Examples

You can import cost template records using multiple files or a single file.

Multiple Files Import

With a multiple-file import, you use one file for the cost template body fields and another file for the Cost Detail sublist.

The file holding the body data must include, at a minimum, the name of the template. An External ID is also recommended. For example:

ExternalId	Name
101	Metalworking Rates
102	Mailroom Rates
103	Warehouse Rates

For full details on body fields supported for import, see [Custom List Body Fields](#).

Each row in the second file must include a cost category and an item that are a matching pair. For example, suppose the charge item value is Metalworker Labor Run and the cost category value is Skilled-Labor Run. If you open the item record for Metalworker Labor Run and review the record's Purchasing tab, you should see the actual cost category for the item. If that category is not Skilled-Labor Run, the import fails.

Further, each row in the file must include a unique identifier to pair the row with the appropriate entry from the main file.

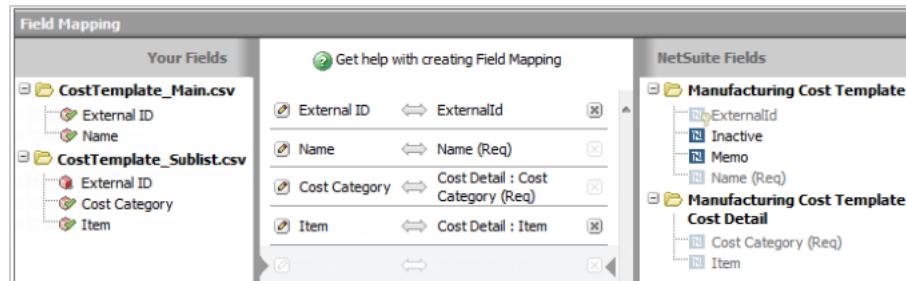
For example, the following data would create one sublist record for each of the three cost templates identified in the sample main file above.

ExternalId	Cost Category	Item
101	Skilled-Labor Run	Metalworker Labor Run
102	Labor Run	Mailroom Labor Run
103	Labor Run	Warehouse Labor Run

If you want to create more than one sublist record for any of your cost template records, add multiple rows for that item to the secondary file. Again, make sure that each row includes a unique identifier to match the sublist data to the appropriate cost template record.

ExternalId	Cost Category	Item
101	Skilled-Labor Run	Metalworker Labor Run
101	Skilled-Labor Setup	Metalworker Labor Setup
101	Skilled-Labor Machine Run	Forge Press Machine Run
102	Labor Run	Mailroom Labor Run
102	Labor Setup	Mailroom Setup Rates
103	Labor Run	Warehouse Labor Run
103	Labor Setup	Warehouse Setup Rates

With a multiple-file import, the fields should be mapped as shown in the following illustration. If you name your columns as shown in the tables above, the mapping should happen automatically.



Single File Import

With a single-file import, all data for a single cost template record must exist on a single row. For this reason, if the sublist data for any cost template must include more than one record, you must create a discrete set of columns for mapping **each** cost category and item pair.

For example, the following sample would create three new cost template records. For each cost template record, the Cost Detail sublist would include two records.

External ID	Name	Manufacturing Cost Template Cost Detail 1: Cost Category	Manufacturing Cost Template Cost Detail 1: Item	Manufacturing Cost Template Cost Detail 2: Cost Category	Manufacturing Cost Template Cost Detail 2: Item
104	Woodworking rates	Skilled-Labor Run	Woodworker Labor Run	Skilled-Labor Overhead	Woodworker-Lab Costs

External ID	Name	Manufacturing Cost Template Cost Detail 1: Cost Category	Manufacturing Cost Template Cost Detail 1: Item	Manufacturing Cost Template Cost Detail 2: Cost Category	Manufacturing Cost Template Cost Detail 2: Item
105	Project management rates	Skilled-Labor Run	Project-Manager Labor Run	Skilled-Labor Overhead	Conference- Room Use
106	Assembly line rates	Labor Run	Assembly-Worker Labor Run	Machine Run	Assembly-Line Machine Cost

On the mapping page, the fields should be mapped as shown in the following illustration. Note that, in the column at the right, under NetSuite Fields, two instances of the sublist fields must be used, because the CSV file includes two sets of cost-category/item pairings.

If you name your columns as shown in this example, the mapping should happen automatically. If you choose column headings that do **not** match what the system expects, you must map the fields manually.

In these cases, if your import requires multiple instances of the sublist fields, you must manually create the additional fields in the right-hand mapping column under "NetSuite Fields." You can create an extra instance by clicking the plus sign next to the Cost Template Cost Detail label.



Common Errors When Importing Cost Templates

The "Results" file for a failed cost template import might include any of the following messages.

You must enter at least one line

This error indicates that you failed to include sublist data for every cost template record. Each cost template record must have at least one sublist record.

If you are doing a multiple-file import, this error might point to a problem with the key column you are using to link the files. For example, one of the files might include a typo in this column, preventing proper linking of the cost template's body data to its sublist data.

Invalid item reference key

Indicates that the item name in one of your sublist records is incorrect. You may have typed it incorrectly, or you may have paired it with a cost category that it does not belong to. Check the item record to see what the correct category is. The category is shown on the Purchasing tab of the item record.

Manufacturing Routing Import

Import of the manufacturing routing record is possible only if the Manufacturing Routing and Work Center feature has been enabled at Setup > Company > Enable Features, on the Items & Inventory subtab.

You use the manufacturing routing record to specify a sequence of tasks, or operations, required for the building of assembly items. For example, suppose your company sells handmade cedar chests. Building a cedar chest might include steps such as sanding the boards, assembling the chest, and cleaning the work space. With the routing record, you can specify the order in which all of these tasks, or operations, must take place. You can also identify the amount of time each operation is expected to take, the employees that must complete each operation, and a cost template that ultimately determines what each operation costs. Further, you can create multiple routings for the same assembly item, then pick the appropriate routing at the time you create the work order.

Before you begin importing routing records, it might be useful to view the form you would use to manually create these records, at Lists > Supply Chain > Manufacturing Routing > New.

For details about the process of manually creating a routing record, see the help topic [Creating a Manufacturing Routing](#). For general details about the Manufacturing Routing and Work Center feature, see the help topic [Manufacturing Routing](#).

For details on importing routing records, see the following:

- [Prerequisite Records for Routing Import](#)
- [Routing Body and Sublist Fields](#)
- [Routing CSV File Examples](#)
- [Common Errors When Importing Routing Records](#)

Prerequisite Records for Routing Import

When you create a routing record, you rely on certain prerequisite records that must already exist in NetSuite. Specifically, you need at least one record of each of the following types:

- [Assembly Item](#)
- [Manufacturing Work Center](#)
- [Default Calendar](#)
- [Manufacturing Cost Template](#)

You cannot import routings until you have created these records.

Assembly Item

An assembly item is an item built from member components — other items that exist in your system. It is not possible to create a routing record without naming a specific assembly item to which the routing can be applied. If necessary, you can import routing records that name one particular assembly item and update the routing records later to name different assembly items.

You can manually create assembly item records using the New Assembly/Bill of Materials form, available at Lists > Accounting > Items > New > Assembly/Bill of Materials. Alternatively, you can import these records. For details on manually creating assembly records, see [Assembly Item](#). For details on the import process, see [Items Import](#).

Manufacturing Work Center

A manufacturing work center is a static group of employees that has been flagged as a manufacturing work center on the group record. For each operation you create on any routing record, you also must identify a value for manufacturing work center. This value identifies the group responsible for completing the operation.

You can create a work center by using the Create Group form, which is available at List > Relationships > Groups > New. The group you create should be a static group made up of employees. Further, on the group record, you must select the box labeled Manufacturing Work Center. If you do not do this, the group is not recognized as a valid entry on a routing record.

For more details, see the help topic [Creating Manufacturing Work Centers or Groups](#).

Default Calendar

NetSuite uses the default work calendar to schedule the operations associated with work centers. The calendar can affect the time required to complete an assembly. If appropriate, you can create a different default calendar, at Lists > Employees > Work Calendars > New. To ensure that your routings use this calendar, select the Default Calendar box on the calendar record. For more details, see the help topic [Setting Up a Work Calendar](#).

Manufacturing Cost Template

A manufacturing cost template defines the rates used to calculate the cost of an operation. For each operation you create on any routing record, you also must identify an existing cost template record.

For details on manually creating cost templates, see the help topic [Creating Manufacturing Cost Templates](#). For details on importing cost templates, see [Manufacturing Cost Template Import](#).

Routing Body and Sublist Fields

When you import a routing record, you specify several body values, plus at least one entry in the record's sublist.

Body Fields

The following body fields are supported for import.

Field	Notes	Required?
Default	If mapped to a value of Yes, this routing is used as the default for the assembly item specified in the Item field.	No, but if you do not include a mapping for this field, the system uses the default value, which is No.
ExternalId	Can be used as a unique identifier for the record.	No
Inactive	If mapped to a value of Yes, this routing is hidden in lists on records and forms.	No, but if you do not include a mapping for this field, the system uses the default value, which is No.
Item	The assembly item to which this routing can be applied.	Yes

Field	Notes	Required?
Location	The locations with which this routing is associated. When entering multiple locations, separate each value with either the pipe symbol () or your custom multi-select value delimiter (which can be specified on either the CSV Import Preferences page or under Advanced Options on the second page of the Import Assistant).	Yes
Memo	Can be used to add a description about the record.	No
Name	A name for this particular routing. This value must be unique.	Yes
Subsidiary (OneWorld only)	The subsidiary with which this routing is associated.	Yes, for OneWorld accounts

Sublist

For each routing record, you must include at least one record in the Manufacturing Routing Steps sublist. Each record in the sublist must include values for the fields listed in the following table.

Note that this sublist is keyed — the key field is Operation Sequence.

Field	Notes	Required?
Operation Sequence	A numeric value that determines the sequence of this operation relative to others. This field is the key for the sublist.	Yes
Operation Name	A name that describes the task to be completed.	Yes
Manufacturing Work Center	The group responsible for completing the operation.	Yes
Manufacturing Cost Template	The rates associated with this work.	Yes
Setup Time (Min)	The number of minutes of setup time required to complete the task.	Yes
Run Rate (Min/Unit)	The number of minutes per unit required to complete this task.	Yes

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Routing CSV File Examples

You can import routing records using multiple files or a single file.

Multiple Files Import

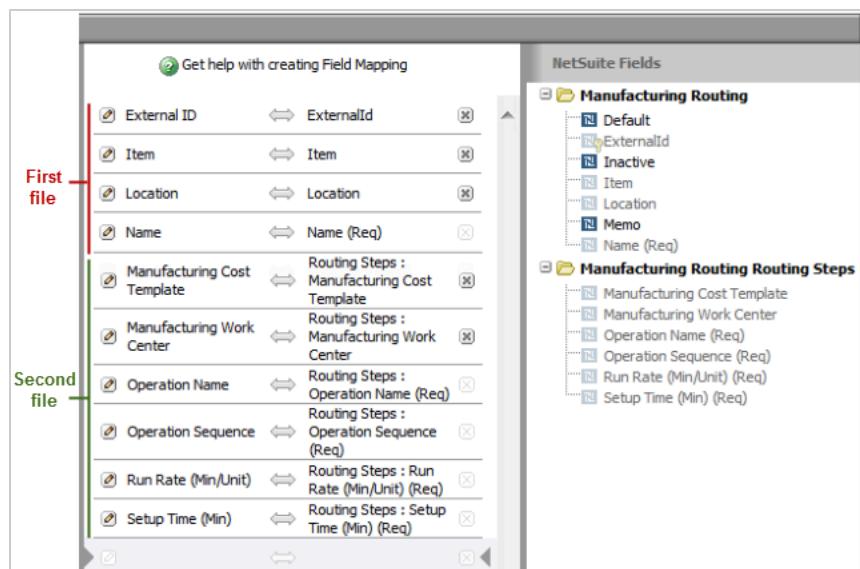
With a multiple-file import, you create a main file for body fields and a secondary file for the Routing Steps sublist. The following example shows how your main file might look when importing one routing record.

ExternalId	Item	Location	Name
101	Cedar Chest	East Coast	Cedar Chest - Standard Routing

The second file should include details of the actual operations required by the assembly process. Each operation belongs on its own row and must include a unique identifier that links it to an entry in the main file, as follows.

ExternalId	Operation Sequence	Operation Name	Manufacturing Work Center	Manufacturing Cost Template	Setup Time (Min)	Run Rate (Min/Unit)
101	10	Retrieve materials	Warehouse Employees	Warehouse Rates	5	20
101	20	Sand boards	Woodworkers	Woodworking Rates	15	40
101	30	Assemble chest	Woodworkers	Woodworking Rates	15	180
101	40	Clean up work space	Shop Workers	Shop-Working Rates	5	25
101	50	Move chest to stock room	Warehouse Employees	Warehouse Rates	5	25

With a multiple-file import, the fields should be mapped as shown in the following illustration. If you name your columns as shown in this example, the mapping should happen automatically.



Single File Import

With a single-file import, all data for a single routing record must exist on the same row. For this reason, if the sublist for any routing record must describe more than one operation, you must create a discrete group of columns for mapping **each** operation. Each group should include all six required sublist fields (Manufacturing Cost Template, Manufacturing Work Center, and so on).

For example, the following table shows an excerpt from a file you could use to create two new manufacturing routing records. For each routing record, two operations are defined for the Routing Steps sublist. (The entire data snippet is not shown; for the import to be successful, both rows would include additional columns representing second instances of the Work Center, Cost Template, Setup Time, and Run Rate fields.)

Formatting restrictions make the table unreadable in the PDF output.

On the mapping page, the fields should be mapped as shown in the following illustration. Note that, in the column at the right, two instances of the sublist fields must be used. Two instances are used because the CSV file includes two sets of columns for the routing steps sublist.

The screenshot shows the 'Field Mapping' section of the NetSuite Importer. On the left, a table lists field mappings between 'Location' and 'Name (Req)'. On the right, a tree view shows the 'Manufacturing Routing' and 'Manufacturing Routing Routing Steps' sections, with various fields like 'Default', 'ExternalId', and 'Run Rate (Min/Unit)' listed under them.

NetSuite Fields	CSV Fields
Default	Location
ExternalId	Name (Req)
Inactive	
Item	
Location	
Memo	
Name (Req)	

If you name your columns as shown in this example, the mapping should happen automatically. If in your CSV file you choose column headings that do **not** match what the system expects, you must map the fields manually.

In these cases, if your import requires multiple instances of the sublist fields, you must manually create the additional fields in the right-hand mapping column under "NetSuite Fields." You can create an extra instance by clicking the plus sign next to the Manufacturing Routing Routing Steps label.



Common Errors When Importing Routing Records

The "Results" file for a failed routing record import might include any of the following messages.

You must enter at least one line

This error indicates that you failed to include sublist data for every routing record. Each routing record must have at least one sublist record.

If you are doing a multiple-file import, this error might point to a problem with the key column you are using to link the files. For example, one of the files might include a typo in this column, preventing proper linking of the routing record body data to its sublist data.

Invalid location reference key

This error could indicate that any of the following occurred:

- You entered an incorrect value for the Location field. For example, you might have included a typo in the location name.
- You entered a location that is not valid for the subsidiary being referenced.
- You entered multiple valid locations but made a formatting error. For example, if you placed spaces around the Multi-Select Value Delimiter (the default is a |), the system generates this error.

This sequence number is already in use on another step

Indicates that you mapped a value to the Operation Sequence field that is not unique for the routing record being referenced. For example, you entered two operations with the sequence "20."

If you are doing a multiple-file import, this error might point to a mistake with the unique identifier used to link the sublist records to the body data. For example, suppose your file defines Routings A and B, each of which includes three operations with sequence values of 10, 20, and 30. If you inadvertently associated one of the Routing B rows with the same unique identifier used for Routing A, then you would get this error.

'Invalid manufacturingworkcenter reference key Value'

Indicates that you mapped an invalid value to the Manufacturing Work Center field. If you are certain you entered the correct name of an employee group, check to make sure that the record for the group has the Manufacturing Work Center box selected.

Order Type Import

The order type is a category that associates attributes to sales and transfer orders. In NetSuite WMS, you can create an accounting list of multiple order types and associate each outbound sales or transfer order with one order type.

The order type record is available when the Warehouse Management feature is enabled at Setup > Company > Enable Features, on the Items & Inventory subtab. For details about working with this record, see the help topic [Creating Order Types](#).

After you have imported order type records successfully, you can review them at Setup > Accounting > Accounting Lists.



Note: If you plan to import other record types that include fields referencing order type values, complete your import of order type records first.

Pick Strategy Import

The pick strategy record contains filters that can be applied to the backend process that determines the recommended bin for items in a pick task. When a wave transaction is saved or released, the backend process uses any available pick strategies to sort bins based on pick strategy filters.

The pick strategy record is available when the Warehouse Management feature is enabled at Setup > Company > Enable Features, on the Items & Inventory subtab. For details about working with this record, see the help topic [Defining Pick Strategies](#).

Usage Notes

Review the following guidelines for pick strategy imports.

- If the Inventory Status feature is enabled, you can import data for the Inventory Status filter. The value that you can set for this filter can be any of the inventory statuses, All available, or All unavailable.
- For each pick strategy, you can import data for the Customer filter only if Sales Order is set in Transaction Type filter.
- For the Location filter, you can set the value only to a location record that has the Use Warehouse Management box checked.

After you have imported pick strategy records successfully, you can review them at Lists > Supply Chain > Pick Strategies.

Planning Item Category Import

Planning item categories help you to organize and display items in a hierarchy. Due to the volume of data involved in supply planning, this hierarchy helps you to aggregate and inspect items.

In the user interface, you can access the planning item category at Lists > Supply Planning > Planning Item Categories. To learn more, see the help topic [Supply Planning Prerequisites](#).

To import CSV records for a Planning item Category, use the CSV import assistant. To learn more, see [Importing CSV Files with the Import Assistant](#).

Usage Notes

Consider these notes when you map the following fields.

- **Description** – a description of the planning item category.
- **External ID** -can be used as a unique identifier for each planning item category.
- **Name (required)** – the planning item category name.

Planning Item Group Import

A planning item group provides a reusable (across different plans) method for specifying a set of items to be planned together. This enables planners to specify which items are in a plan at the item category or item level. To learn more, see the help topic [Supply Planning Prerequisites](#).

To import CSV records for a Planning item Group, use the CSV import assistant. To learn more, see [Importing CSV Files with the Import Assistant](#).

Usage Notes

Consider these notes when you map the following fields for a Planning Item Group import.

- **Description** - a description of the planning item group.
- **External ID** -can be used as a unique identifier for each planning item group.
- **Name (required)** – the planning item category name.

Consider these notes when you map the following fields for a Planning Item Group Planning Items import.

- **Item/Item Category** – Planning item categories help you to organize and display items in a hierarchy.
- **Item Type (required)** – Item types help you track and manage items and services.

Planning Rule Group Import

Planning Rules Groups enable planners to create rules that govern the supply planning process to define how items and item categories are replenished. These rules only apply to transfer orders. For example, you can define where to source supply for an item when it is required at a specified location. To learn more, see the help topic [Supply Planning Prerequisites](#).

To import CSV records for a Planning Rule Group, use the CSV import assistant. To learn more, see [Importing CSV Files with the Import Assistant](#).

Usage Notes

Consider these notes when you map the following fields for a Planning Rule Group import.

- **Description** - a description of the planning rule group.
- **External ID** - use as a unique identifier for each planning rule group.
- **Name (required)** – the planning item category name.

Consider these notes when you map the following fields for a Planning Rule Group Planning Rules import.

- **Item/Item Category** – Planning item categories help you to organize and display items in a hierarchy.
- **Item Type (required)** – Item types help you track and manage items and services.
- **Lead Time (Days) (required)** – Lead-time represents the in-transit lead-time, or how long it takes to ship the item from its source location.
- **Location** – The location associated with the planning rule group.
- **Source Location** – The location you are transferring items from.

Supply Plan Definition Import

Supply Plan Definition enables planners to establish the criteria to be used for supply planning. The plan definition provides the information that drives the supply planning process, such as planning horizon and planning scope. For example: you can run supply planning at multiple facilities at one time. A supply plan definition provides a permanent holding place for your planning criteria and planning results. To learn more, see the help topic [Creating a Supply Planning Definition and Schedule](#).

To import CSV records for a Supply Definition, use the CSV import assistant. To learn more, see [Importing CSV Files with the Import Assistant](#).

Usage Notes

Consider these notes when you map the following fields for a Supply Plan Definition import.

- **Description** - a description of the supply plan definition.
- **External ID** - use as a unique identifier for each supply plan definition.
- **Generate Pegging** – enables supply plan definition pegging. Pegging links demand to incoming supply.
- **Horizon in Days** - how far into the future are you want to plan. For example, 180 days.
- **Name** – the Supply Plan Definition name.
- **Rule Group** - defines how transfer orders work for the plan.
- **Item Group** - a reusable method for specifying a set of items to be planned together.

Consider these notes when you map the following fields for a Supply Plan Definition Scope import.

- **Consume Forecast** – Forecast consumption replaces forecasted demand with actual sales order demand.
- **Demand Source Type** – the demand source type for the location. For example, demand plan or sales order.
- **Location** – the source location.
- [Bill of Materials Import](#)
- [Supply Planning](#)
- [Importing CSV Files with the Import Assistant](#)

Zone Import

Zone records specify areas in your warehouse where you putaway, store, or pick items. In NetSuite WMS, you can create zone records and associate a warehouse location with each zone.

The zone record is available when the Warehouse Management feature is enabled at Setup > Company > Enable Features, on the Items & Inventory subtab. For details about working with this record, see the help topic [Creating Zones](#).

Usage Notes

Review the following guidelines for zone imports.

- The Name field value cannot have a name that already exists for the same location.
- In the Location field of a new zone record, you can set the value only to a location record that has the Use Warehouse Management box checked.
- When updating zone records, you cannot change the value in the Location field.

After you have imported zone records successfully, you can review them at Lists > Supply Chain > Zones.

 **Note:** If you plan to import other record types that include fields referencing zone values, complete your import of zone records first.

Support Import Type

The following imports relate to support management:

- [Issues Import](#)
- [Solutions Import](#)
- [Support Cases Import](#)
- [Topics Import](#)

Issues Import

The Issues import adds issues to the Issue list.

For details about fields that can be mapped in the issue record, see the SOAP Schema Browser's [issue](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).



Note: The Reported By field can be mapped for newly added issue records only. You cannot set the value of this field for an import that updates an issue record.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Solutions Import

NetSuite knowledge bases allow you to organize and deliver information specific to your business. Knowledge bases can increase the efficiency of your support reps and increase communication within your company.

You can create a hierarchy of topics and subtopics to organize your knowledge base solutions. When you create a new topic, you can place this topic under a parent topic by selecting the parent topic in the Subtopic Of field.

Solutions may be attached to topics and subtopics. If you are attaching a solution to a subtopic, you must provide the full topic reference hierarchy, using the field delimiter you define. For more information, see [Name References](#).

The solution data that you can import depend on the fields available on either your preferred Solution form, or the custom solution form selected on the Import Assistant Import Options page. For details about specifying a custom form, see [Set Advanced CSV Import Options](#).

For details about fields that can be mapped in the solution record, see the SOAP Schema Browser's [solution](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Be aware of the following:

- Currently, custom fields cannot be imported into solution records.
- The Solutions import supports the import of Topics and Related Solutions sublist data.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Support Cases Import

A support case, also known as a case, is a record of a customer-reported question, issue, or suggestion, and subsequent actions taken.

The support case data that you can import depend on the fields available on either your preferred Case form, or the custom case form selected on the Import Assistant Import Options page. For details about specifying a custom form, see [Set Advanced CSV Import Options](#).

For details about fields that can be mapped in the support case record, see the SOAP Schema Browser's [support case](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Be aware of the following:

- Required case fields for import are: Company, Subject, Status, and Incident Date.

- The Incident Date field includes both a date and a time. You need to exercise care when you format values for this field in your CSV files. To avoid errors, review and follow the guidelines in [Setting Incident Date Field Values for Cases](#).
- Imports cannot send case-related email.
- Escalations and Solutions sublist data can be imported. Escalation records are selectively updatable based on Escalatee key field.
- If you are doing a cases import for the addition of new cases, select the **Add** data handling option, rather than **Add or Update**.
- If you need to use an import to update existing case records, you must map either the Internal ID or External ID field to uniquely identify records. This requirement is enforced when you select the **Update** data handling option and when you select the **Add or Update** data handling option.

Setting Incident Date Field Values for Cases

The Incident Date mapped field for CSV import represents both the date and the time when a case is reported, as shown in the fields labeled **Incident Date** and **Incident Time** on the standard Case form.

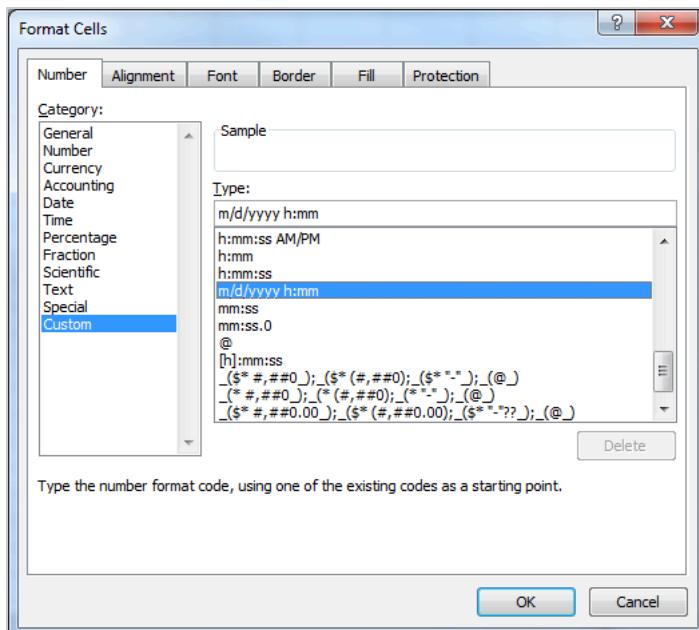
Observe the following guidelines when you enter values for Incident Date fields in CSV files used for case imports:

- Provide both a date and a time, for example: **04/12/2010 09:00 AM**.
- Specify values according to the NetSuite Date Format and Time Format set at Home > Set Preferences for the user doing the import. The following are example formats:
 - Date Format is **MM/DD/YYYY**.
 - Time Format is **hh:mm AM/PM**.
 - A space should be included between the date and time, for example: **04/12/2010 10:00 AM**.



Note: If a date is provided without a time value, **12:00 AM** will be assumed by default.

- To avoid Excel formatting errors for Incident Date values, you should right-click the column and choose Format Cells to explicitly select a format that matches the Date Format (and if applicable, Time Format) set up in NetSuite.



The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Topics Import

NetSuite knowledge bases allow you to organize and deliver information specific to your business. Knowledge bases can increase the efficiency of your support reps and increase communication within your company. To be able to use a NetSuite knowledge base, you should ensure that you have the appropriate features enabled.

You can create topics and subtopics to organize your knowledge base solutions. When you create a new topic, you can place this topic under a parent topic by selecting the parent topic in the Subtopic Of field. When doing this, you must provide the full topic hierarchy, using the field delimiter you define. For more information, see [Name References](#).

Solutions may be attached to topics and subtopics. If you are attaching a solution to a subtopic, you must provide the full topic hierarchy, using the field delimiter you define.

Currently, custom fields cannot be imported into topic records.

For details about fields that can be mapped in the topic record, see the SOAP Schema Browser's [topic](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Transactions Import Type

Transactions imports support the addition or update of data for some transaction subtypes. Processed lines for some transaction types contribute to the Monthly Transaction Lines metric that counts toward maximum limits for your NetSuite service tier. For more information, see the help topic [Transaction Types Included in Monthly Transaction Lines Metric](#).

The Import Assistant supports the following transaction subtype imports:

- [Advanced Intercompany Journal Entry Import](#)
- [Cash Sale Import](#)
- [Check Import](#)
- [Credit Card Charge Import](#)
- [Credit Card Refund Import](#)
- [Credit Memo Import](#)
- [Custom Transactions Import](#)
- [Customer Payment Import](#)
- [Estimate Import](#)
- [Inventory Details on an Inbound Shipment](#)
- [Inventory Adjustment Import](#)
- [Inventory Cost Revaluation Import](#)
- [Inventory Transfer Import](#)

- [Invoice Import](#)
- [Item Demand Plan Import](#)
- [Item Supply Plan Import](#)
- [Journal Entry Import and Intercompany Journal Entry Import](#)
- [Opportunity Import](#)
- [Order Reservation Import](#)
- [Paycheck Import](#)
- [Period End Journal Entry Import](#)
- [Purchase Order Import](#)
- [Return Authorization Import](#)
- [Sales Order Import](#)
- [Statistical Journal Entry Import](#)
- [Transfer Order Import](#)
- [Vendor Bill Import](#)
- [Vendor Credit Import](#)
- [Vendor Payment Import](#)
- [Vendor Prepayment Import](#)
- [Vendor Return Authorization Import](#)

Be aware of the following:

- You can import transaction data in a single CSV file, or in multiple files, for example, with transaction header data in one file and item-level data in other files. For imports of new data, you should include external ID values to uniquely identify transactions. For updates, you can use internal IDs for this purpose. The unique ID should be included in every line of the CSV files. Note that the transaction ID is not unique.
- By default the Field Mapping page for a transactions import includes the NetSuite fields from your preferred form for the selected record type. Fields can be mapped for the import job if they are displayed (not hidden) and not disabled on your preferred form. These default mappable NetSuite fields may not match the fields that you need to import; you may want to include fields available on another record type form.

To ensure that the appropriate fields are available for mapping, you can change the selection for Custom Form, in the Advanced Options area of the Import Assistant's Import Options page. For more information, see [Set Advanced CSV Import Options](#).

- If auto-generated numbering is enabled, transaction numbers can still be set if the Allow Override option is enabled.
- To maintain performance, 5000 lines per transaction is the maximum recommended limit for transactions submitted through CSV import. (For journal entries, this limit is 10,000 lines per transaction.)
- To avoid errors related to imported transaction address data: for state fields, use short names rather than full names, and for country fields, use full names rather than codes. A dropdown list of country names is available from the edit icon on the Field Mapping page, to be set as default country field values. See [State and Province Names for CSV Import](#) and [Country Names for CSV Import](#).
- To import a transaction with multiple line items, use the same transaction number field for each line item.
- You should import entities and items data before you import transactions data.
 - To reference entities such as customers in transaction CSV files, use the number if auto-generated numbering is enabled; otherwise, use the customer name.

- Item references in transaction CSV files must match the spelling and case of the item names in your NetSuite account.
- Account references in transaction CSV files should be account names rather than numbers.
- For sub-customers, sub-items, and sub-accounts, use hierarchical parent : child references. For more information, see [Delimiters for Hierarchical and Multi-Select Fields](#).
- Use entity account names and numbers when importing transactions, not the chart of accounts number.
- For Cash Sale, Estimate, Invoice, Purchase Order, Sales Order, and Vendor Bill imports, Items data is required for imports of new records, but not for imports that update existing records. Items data is not required for Opportunity imports. Items data is not relevant to Customer Payment and Vendor Payment imports. See [Required Items Sublist Fields for Transactions Imports](#).
 - You can import values for custom transaction item options along with Items sublist data. The Item Options feature must be set up in your account, and transaction item options must first be set up at Customization > Lists, Records, & Fields > Transaction Item Options > New. For details, see [Importing Transaction Item Options](#).
 - If you do not map the Price Level field for any imported transaction items, the base price from the item record is used as that line item's price. To use a different price, you must map the Price Level field in your import, and either include a Price Level column with values in the CSV file, or on the Field Mapping page, click the edit icon for the mapped Price Level field and select Custom as the default. (Note that this default is not guaranteed to be a valid level for all items.)
- Be aware of the following when you use the Import Assistant to update transaction records:
 - As of Version 2010 Release 1, the Use Conditional Defaults option is no longer available. Now, imports always populate dependent field values automatically when related field values are set, in the same manner that dependent field values are populated in the user interface. For updates, be sure to include all necessary values in CSV files, to avoid inadvertently changing existing field values to defaults.
 - Some transaction sublists are keyed and some are not. For non-keyed sublists, partial updates are not supported; CSV file sublist data either completely replaces existing sublist data or is appended, depending upon the setting for the [Overwrite Sublists](#) option. Also, for non-keyed sublists, you shouldn't update main transaction fields and sublist fields in the same import job. For a list of keyed and non-keyed transaction sublists supported for import, see [Supported Sublist Imports](#).
 - The Import Assistant lets you update items data for the following types of transactions: Cash Sale, Estimate, Invoice, Opportunity, Purchase Order, Sales Order, and Vendor Bill. You can modify data for existing line items and/or add line items to existing transactions. The Items sublist for transactions uses either Line/Order Line or Item as a key field to determine how to update or add line items. For more information, see [Line Item Updates on Transactions Imports](#).
 - Complete deletion of sublist data currently is not supported. Existing sublist data can only be overwritten with new CSV file sublist data, not with an absence of CSV file sublist data.
 - You can use transaction import capabilities to perform mass updates of supported transaction subtype data. Create a saved search, export saved search results and modify them in an external application, then use the Import Assistant, with an Update data handling option, to reimport modified data. You need to set certain criteria for your saved search to generate an exported file with appropriate data for reimporting. For information, see [Creating Transaction Saved Searches for Reimport](#).

Advanced Intercompany Journal Entry Import

In NetSuite OneWorld, an advanced intercompany journal entry records the impact of transactions between a "from", or originating, subsidiary and multiple "to", or receiving subsidiaries.

You can import multiple advanced intercompany journal entries from another system into NetSuite. Each import job can include data for any combination of classes, department, locations, and subsidiaries.



Important: To import a single advanced intercompany journal entry, you can use a simpler import process available at Transactions > Financial > Make Advanced Intercompany Journal Entries > Import to import a single advanced intercompany journal entry. For more information, see [Single Journal Entry Import](#).

Import is supported for journal entries with up to 10,000 lines. However, poor performance results during import and in the user interface for journal entries with over 1000 lines, and these large journal entries may not be editable in the user interface.

Review the following guidelines for advanced intercompany journal entry imports.

Permissions for Importing Advanced Intercompany Journal Entries with the Import Assistant

To use the Import Assistant to import advanced intercompany journal entries, you need the following permissions:

- Make Journal Entry (Edit or Full)
- Posting Period on Transactions (Full)
- Import CSV File

To set journal entries to approved during import, you also need:

- Journal Approval (Edit or Full)

If you have the Make Journal Entry and Posting Period on Transactions permissions, but not the Import CSV File permission, you can use the Single Advanced Intercompany Journal Entry Import. For more information, see [Single Journal Entry Import](#).

To enable users to use the Import Assistant to import journal entries, an account administrator should do the following:

1. Create a new custom role that includes only the Make Journal Entry (Edit or Full), Posting Period on Transactions (Full), and Import CSV File permissions.
2. Add this new role to all users who require the ability to import journals.
3. Instruct users that they should choose this role when they import journals.

For users who need to set journal entries to approved during import, a custom role can be created with the Make Journal Entry, Posting Period on Transactions, Import CSV File, and Journal Approval permissions.

Users' access to subsidiaries also impacts the journal entries that they can import. For more information, see the help topic [Control Employee Access to Subsidiaries](#).

Advanced Intercompany Journal Entry CSV File Requirements

Review the following requirements for advanced intercompany journal entry files:

- Each imported advanced intercompany journal entry must include at least four lines, with one debit and credit each for the originating and receiving subsidiary. When you use the simple import assistant, only this requirement applies.

- Your CSV files should include both header and line-level data.
- You can import data in a single CSV file, or in multiple files, for example, with header data in one file and line-level data in other files. Each transaction can be uniquely identified by its value for one of the following fields: Entry No., External ID, or (updates only) Internal ID. This value should be included in every row of the CSV files.
- If you include both header-level and line-level data in one file, each row of the CSV file represents a transaction line, and header-level field values must be included in each row, even if it is repetitious.

Advanced Intercompany Journal Entry Supported Fields

The Import Assistant Field Mapping page displays the list of advanced intercompany journal entry fields for which you can import data. Header-level fields are listed under Advanced Intercompany Journal Entry and line-level fields are listed under the Advanced Intercompany Journal Entry Line sublist. These are the fields for which you can include data in your CSV file.

This list is adjusted according to your permissions and to the features enabled in your account. By default, all fields on your preferred entry form, including custom fields, are available. You can specify a custom journal entry form, so that form's fields are available instead. This option is not available for Single Journal Entry Import. See [Custom Form Specification for Journal Entry Imports](#).

For more information about journal entry import fields, see the following topics:

- [Journal Entry and Intercompany Journal Entry Header Fields Table](#)
- [Journal Entry and Intercompany Journal Entry Line-Level Fields Table](#)

For details about fields that can be mapped, see the SOAP Schema Browser's [advanced intercompany journal entry](#) reference pages. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Usage Notes

Creating Book Specific Advanced Intercompany Journal Entries

The advanced intercompany journal entry record contains an Accounting Book and an Is Book Specific field. In accounts that have the Multi-Book Accounting feature enabled, you can use these fields to create book specific advanced intercompany journal entries. For information about Multi-Book Accounting, see the help topics [Multi-Book Accounting Overview](#) and [Using Multi-Book Accounting](#).

Auto-balancing Advanced Intercompany Journal Entries

If you use the Automated Intercompany Management feature, you can use the Auto Balance functionality to automatically add elimination lines and balance the transaction during CSV import. The balancing lines are automatically populated. For more information, see the help topic [Making Advanced Intercompany Journal Entries](#).

Using Advanced Intercompany Journal Entry Import for Updates

For advanced intercompany journal entries that already exist in NetSuite, you can:

- Update transaction body field values
- Add lines to existing transactions
- Update values in existing journal entry lines

If you set the data handling option to Update for an advanced intercompany journal entry import, any CSV file line field values for existing transactions are appended as additional lines per transaction.

Check the Overwrite Sublists box in the advanced options to replace, overwrite, or add journal entry lines in the advanced intercompany journal entry imports.



Important: The lines of the Advanced Intercompany Journal Entry Line sublist are not keyed, therefore you cannot directly update specific lines. To update journal entry lines, ensure you have exported all journal entry lines, make the necessary changes in the sublist lines, check the Overwrite Sublists box in the advanced options, and overwrite the whole sublist.



Warning: Single Journal Entry Import does not support updates.

Custom Form Specification for Advanced Intercompany Journal Entry Import

By default the Field Mapping page for an advanced intercompany journal entry import displays the NetSuite fields from your preferred journal entry form as available for mapping. The default form for your role may not include all the fields you need to import. To ensure that the appropriate fields are available for mapping, you can select any journal entry form that is available to your role, in the Advanced Options area of the Import Assistant's Import Options page. For more information, see [Set Advanced CSV Import Options](#).



Warning: Single Journal Entry Import does not support custom form specification.

Advanced Intercompany Journal Entry Import Example

The following example adds an advanced intercompany journal entry record.

External ID	Subsidiary	Date	Line Subsidiary	Line: Account	Line: Debit	Line: Credit
65432	Parent Company	6/29/2017	Parent Company	Acc: Dep-Building	1000	—
65432	—	—	Parent Company	Acc: Dep-Furnitures	—	1000
65432	—	—	Parent Company: SUB UK	Fees Receivable	—	1000
65432	—	—	Parent Company: SUB UK	Fees Receivable	1000	—

Cash Sale Import

NetSuite Cash Sale transactions are records of sales for which immediate payment is received. You can use the cash sales import to import historical sales data.

For details about fields that can be mapped in the cash sale record, see the SOAP Schema Browser's [cash sale](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Review the following guidelines for Cash Sale imports:

- [Supported Cash Sale Sublist Data Imports](#)
- [Supported Cash Sale Subrecord Data Imports](#)
- [Importing Currency Values for Cash Sale Transactions](#)
- [Charging Customer Credit Cards for Imported Cash Sales](#)
- [Using Import Assistant for Cash Sales Mass Update](#)
- [Cash Sale Import Example](#)

Supported Cash Sale Sublist Data Imports

The Cash Sale import supports the import of the following sublist data:

Sublist	Notes
Auth. Code	When Gift Certificates feature enabled.
Billable Time	Selectively updatable based on related transaction ID (***.doc).
Items	You must import at least one line item for all new cash sale records, and you must map required fields for this sublist on the Field Mapping page. See Required Items Sublist Fields for Transactions Imports . Selectively updatable based on Line/Order Line or Item key field. See Line Item Updates on Transactions Imports .
Partners	When Multi-Partner Management feature enabled. Selectively updatable based on Internal ID, External ID, or Partner.
Sales Team	When Team Selling feature enabled.
Shipment	When Multiple Shipping Routes feature enabled.

If the Item Options feature is enabled in your account, you can import values for custom transaction item options along with Items sublist data. Transaction item options must first be set up at Customization > Lists, Records, & Fields > Transaction Item Options > New, with one of the following Applies To settings: Sale, All Items. For details, see [Importing Transaction Item Options](#).

For imports that update existing Cash Sale records, handling of sublist data updates depends upon the setting for the [Overwrite Sublists](#) advanced option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).



Important: For non-keyed sublists, you shouldn't update main transaction fields and sublist fields during the same import job.

Supported Cash Sale Subrecord Data Imports

The Cash Sale import supports the import of the following subrecord data:

Subrecord	Notes
Billing Address	By default, the subrecord Address field is read-only, and data from other subrecord fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.

Subrecord	Notes
Items — Inventory Detail	When Advanced Bin / Numbered Inventory Management feature enabled.
Shipping Address	By default, the subrecord Address field is read-only, and data from other subrecord fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.

Importing Currency Values for Cash Sale Transactions

When the Multiple Currencies feature is enabled, the import of Currency field values is supported for newly created cash sale transactions. The Currency value for a cash sale must be one of the currencies defined for the transaction's customer, on the Customer Currencies sublist. See the help topics [Currency Management](#) and [Setting Multiple Transaction Currencies for Customers](#).

If the Multiple Currencies feature is not enabled, the Currency field value for a cash sale is not editable.

Charging Customer Credit Cards for Imported Cash Sales

By default, imports of Cash Sale records do not cause charges to customer credit cards. If your NetSuite account has integrated credit card processing set up, you have the option of setting a Cash Sale import to create charges to customer credit cards.

To set up a Cash Sale import to charge customer credit cards:

1. On the Field Mapping page for a Cash Sale import, double-click the Charge Credit Card field to display it in the center pane.
2. Click the edit icon and set the default value for the field to be Yes.

If you do not map the Charge Credit Card field for a Cash Sales import, its value remains No, and no credit card charges occur.

Using Import Assistant for Cash Sales Mass Update

You can perform a mass update of existing Cash Sales data by exporting Cash Sales saved search results, changing data externally, then using the Import Assistant to import modified data, using the Update data handling option. For more information, see [Creating Transaction Saved Searches for Reimport](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Cash Sale Import Example

The following example shows how you might structure a file for importing cash sale data.

External ID	Customer	Date	Item	Quantity	Amount	Tax Code
CS-1234	Amy Johnson	8/17/2017	Model railway set — KHT15	2	1400	VT-855

External ID	Customer	Date	Item	Quantity	Amount	Tax Code
CS-1235	Zachary Hayes	8/17/2017	Model aircraft — BHY54	3	2500	VT-97

Check Import

A check transaction creates and records a check used to pay an expense, records an expense paid in cash and not entered as a bill, or records a non-check debit transaction, such as a debit card transaction, ATM transaction, or EFT (electronic funds transfer) payment. A check transaction records an expense directly to your books by debiting the expense account specified in the transaction detail and crediting the bank account selected for the check.

In the user interface, you can access the check record at Transactions > Bank > Write Checks.

For information about working with this record in the user interface, see the help topic [Writing Checks](#).

Supported Check Sublist Data Imports

The check import supports the import of the following sublist data:

- Accounting Books
- Expenses
- Items

Supported Check Subrecord Data Imports

The check import supports the import of the following subrecord data.

Subrecord	Notes
Items – Landed Cost	Available when the Landed Cost feature is enabled on the Items & Inventory subtab at Setup > Company > Setup Tasks > Enable Features.
Items – Inventory Detail	Available when the Advanced Bin / Numbered Inventory Management Feature is enabled on the Items & Inventory subtab at Setup > Company > Setup Tasks > Enable Features.

Check Import Example

The following table provides an example structure for a file to import check data. You can identify the account either by its name or its internal ID.

External ID	Date	Subsidiary	Payee	Amount	Account
CH-12345	6/3/2018	US – East Coast	Anne Jenkins	1500	Travel Expenses
CH-12345	—	—	—	1200	Automobile Expenses
CH-12345	—	—	—	800	Insurance Expenses
CH-12346	6/4/2018	US – West Coast	Tom Booker	750	Meals & Entertainment

External ID	Date	Subsidiary	Payee	Amount	Account
CH-12346	—	—	—	650	Rent Expense

For details about fields that can be mapped in the check record, see the SOAP Schema Browser's [Check](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Credit Card Charge Import

To be able to import credit card charges data, your company must have a credit card account. To learn how to create a credit card account for your company, see the help topic [Creating Company Credit Card Accounts](#).

After you have added a credit card account, you can import credit card charges and refunds CSV data. For information on importing credit card refunds data, see [Credit Card Refund Import](#).

Credit Card Charge Body and Sublist Fields

When you import a credit card charge, you specify several body values, plus at least one record in the template's sublist.

Body Fields

To prepare credit card charge CSV data for import, make sure that your CSV file includes the following fields. They are required for a successful CSV import.

Field	Notes
Vendor	The vendor related to this credit card transaction.
Date	The date when the charge occurred.

Your file must also include one of internal ID, external ID or transaction ID to be used as a unique identifier for the record. The external ID can be any value that has not been used as the External ID in previous CSV imports.

If you have multiple credit card accounts, you must map the Account field to specify the credit card account for which you are importing the credit card charge.

Sublist Fields

Use the Items, Expenses, and Accounting Books sublists to add or update item and expense information on a credit card charge record.

Sublist	Notes	Required Fields
Expenses	You must map at least one item and expense. If you have more than one credit card accounts, then you must map the Account field in the Expenses sublist, as well as all required fields for the sublist.	Amount

Sublist	Notes	Required Fields
Items	<p>The Items sublist is keyed using either Item or Order Line. Use the items sublist to specify the item that was purchased from the vendor with this credit card charge.</p> <p>The Items sublist is not mapped automatically. You must map at least one item or expense.</p> <p>To learn more about other supported fields, see the help topic Entering Company Credit Card Charges.</p>	Item or Order Line
Accounting Books	The Accounting Books sublist is keyed by Secondary Book. The sublist is available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists.	Secondary Book and Exchange Rate

Credit Card Charge CSV File Examples

The following examples show how you might structure a file for importing credit card charge data.

Single File Import

External ID	Vendor	Date	Posting Date	Credit Card Charge Items: Item	Credit Card Charge Items: Tax Code	Credit Card Charge Expenses: Account	Credit Card Charge Expenses: Amount
CC_CH001	Best Fixture, Inc.	11/11/2015	11/15/2015	Accessories : Cable - SCSI	CA_HST	Office Supplies	10.5
CC_CH002	Best Fixture, Inc.	12/11/2015	12/15/2015	Accessories : Cable - USB 10 ft	CA_HST	Office Supplies	15
CC_CH003	Best Fixture, Inc.	12/11/2015	12/15/2015	Accessories : Cable - SCSI	CA_HST	Office Supplies	12.5
CC_CH004	Best Fixture, Inc.	1/11/2016	1/15/2016	Accessories : Cable - USB 10 ft	CA_HST	Office Supplies	15

The following example shows how you might map your fields to the fields in the import assistant.

<input checked="" type="checkbox"/> Vendor	↔	Credit Card Charge : Vendor (Req)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> External ID	↔	Credit Card Charge : ExternalId	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Date	↔	Credit Card Charge : Date (Req)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Credit Card Charge Expenses: Account	↔	Credit Card Charge Expenses : Account	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Credit Card Charge Expenses: Amount	↔	Credit Card Charge Expenses : Amount (Req)	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Credit Card Charge Items: Item	↔	Credit Card Charge Items : Item	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Credit Card Charge Items: Tax Code	↔	Credit Card Charge Items : Tax Code	<input checked="" type="checkbox"/>

Multiple Files Import

The following example includes the Items sublist data imported in a separate CSV file.

Primary file:

External ID	Vendor	Date
CC_CH001	Best Fixture, Inc.	11/11/2015
CC_CH002	Best Fixture, Inc.	12/11/2015
CC_CH003	Best Fixture, Inc.	1/11/2016

Linked file — Items:

External ID	Credit Card Charge Items: Item	Credit Card Charge Items: Quantity	Credit Card Charge Items: Tax Code	Credit Card Charge Items: Location
CC_CH001	Accessories : Cable - SCSI	2	CA_HST	Canada
CC_CH002	Accessories : Cable - USB 10 ft	4	CA_HST	Canada
CC_CH002	Accessories : Cable - SCSI	3	CA_HST	Canada
CC_CH003	Accessories : Cable - USB 10 ft	6	CA_HST	Canada

Linked file — Expenses:

External ID	Credit Card Charge Expenses: Account	Credit Card Charge Expenses: Amount
CC_CH001	Office Supplies	94.35
CC_CH002	Office Supplies	83.75
CC_CH002	Office Supplies	58
CC_CH003	Office Supplies	93.5

Credit Card Refund Import

To be able to import credit card refund data, your company must have a credit card account. To learn how to create a credit card account for your company, see the help topic [Creating Company Credit Card Accounts](#).

After you have added a credit card account, you can import credit card charges and refunds CSV data. For information on importing credit card charges data, see [Credit Card Charge Import](#).

Credit Card Refund Body and Sublist Fields

When you import a credit card refund, you specify several body values, plus at least one record in the template's sublist.

Body Fields

To prepare credit card refund CSV data for import, make sure that your CSV file includes the following fields. They are required for a successful CSV import.

Field	Notes
Vendor	The vendor related to this credit card transaction.
Date	The date when the refund occurred.

Your file must also include one of internal ID, external ID or transaction ID to be used as a unique identifier for the record. The external ID can be any value that has not been used as the External ID in previous CSV imports.

Sublist Fields

Use the Items, Expenses, and Accounting Books sublists to add or update item and expense information on a credit card refund record.

Sublist	Notes	Required Fields
Expenses	The Expenses sublist uses Line as a key. You must map at least one item or expense.	Line and Amount
Items	The Items sublist is keyed using either Item or Order Line. Use the items sublist to specify the item that was returned to the vendor with this credit card refund. The Items sublist is not mapped automatically. You must map at least one item or expense. To learn more about other supported fields, see the help topic Entering Company Credit Card Charges .	Item or Order Line
Accounting Books	The Accounting Books sublist is keyed by Secondary Book. The sublist is available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists.	Secondary Book and Exchange Rate

Credit Card Refund CSV File Examples

The following examples show how you might structure a file for importing credit card refund data.

Single File Import

External ID	Vendor	Date	Posting Date	Credit Card Refund Items: Item	Credit Card Refund Items: Quantity	Credit Card Refund Items: Tax Code	Credit Card Refund Items: Location
CC_CH001	Best Fixture, Inc.	11/11/2015	11/15/2015	Accessories : Cable - SCSI	4	CA_HST	Canada
CC_CH002	Best Fixture, Inc.	12/11/2015	12/15/2015	Accessories : Cable - USB 10 ft	2	CA_HST	Canada
CC_CH002	Best Fixture, Inc.	12/11/2015	12/15/2015	Accessories : Cable - SCSI	3	CA_HST	Canada
CC_CH003	Best Fixture, Inc.	1/11/2016	1/15/2016	Accessories : Cable - USB 10 ft	4	CA_HST	Canada

Multiple Files Import

The following example includes the Items sublist data imported in a separate CSV file.

Primary file:

External ID	Vendor	Date	Posting Date
CC_CH001	Best Fixture, Inc.	11/11/2015	11/15/2015
CC_CH002	Best Fixture, Inc.	12/11/2015	12/15/2015
CC_CH003	Best Fixture, Inc.	1/11/2016	1/15/2016

Linked file — Items:

External ID	Credit Card Refund Items: Item	Credit Card Refund Items: Quantity	Credit Card Refund Items: Tax Code	Credit Card Refund Items: Location
CC_CH001	Accessories : Cable - SCSI	3	CA_HST	Canada
CC_CH002	Accessories : Cable - USB 10 ft	4	CA_HST	Canada
CC_CH002	Accessories : Cable - SCSI	2	CA_HST	Canada
CC_CH003	Accessories : Cable - USB 10 ft	5	CA_HST	Canada

Linked file — Expenses:

External ID	Credit Card Refund Expenses: Account	Credit Card Refund Expenses: Amount
CC_CH001	Office Supplies	55
CC_CH002	Office Supplies	83.75
CC_CH002	Office Supplies	66.34
CC_CH003	Office Supplies	46

Credit Memo Import

A credit memo is a record of credit due to a customer. Credit memo amounts can be applied toward the charges for specific items and for specific transactions such as invoices. For information about using credit memos in NetSuite, see the help topic [Customer Credit Memos](#).



Note: Credit memo imports are not available unless the A/R (Accounts Receivable) feature is enabled in your account. To enable this feature, go to Setup > Company > Enable Features and on the Accounting tab, check the A/R box.

Review the following guidelines for Credit Memo imports:

- [Supported CSV File Formats for Credit Memo Imports](#)
- [Notes on Credit Memo Import Field Values](#)

- Supported Credit Memo Sublist Data Imports
- Supported Credit Memo Subrecord Data Imports
- Setting the Form for a Credit Memo Import

Supported CSV File Formats for Credit Memo Imports

Credit memo records include Items and Apply sublists:

- Items sublist stores data about the items returned by the customer under this credit memo.
- Apply sublist contains unpaid open invoices to which the credit memo amount can be applied partly or in whole, decreasing the amount due to be paid by the customer. The invoices are referenced by their internal or external IDs.

Credit memo imports may also support the import of data for Partners and Sales Team sublists. See [Supported Credit Memo Sublist Data Imports](#).

 **Note:** To maintain performance, 5000 lines per transaction is the maximum recommended limit for transactions submitted through CSV import.

Multi-File Format

Generally, a multi-file format is recommended for imports of transactions that support multiple sublists. In this format, body data is in a primary CSV file, Items sublist data is in a linked file, Apply sublist data is in another linked file, and data for any other sublists is in other linked files. The following tables illustrate sample data in a multi-file credit memo import.

CreditMemo.csv - primary file with body data:

External ID	Customer	Location	Memo
CM-PT3-042601	ABC Trucking	Biloxi	Returned Carburetors
CM-PT3-042602	Happy Day Motors	Atlanta	Good Customer Credit
CM-PT3-042603	Smithson Auto Body	Atlanta	Returned Alternators

CreditMemoItems.csv - linked file with Items sublist data:

External ID	Item	Quantity	Amount
CM-PT3-042601	Carburetor MK60	10	2500.00
CM-PT3-042601	Carburetor MK65	5	1500.00
CM-PT3-042603	Alternator BS40	2	600.00
CM-PT3-042603	Alternator BS52	3	300.00

CreditMemoApply.csv - linked file with Apply sublist data:

External ID	Apply	Payment
CM-PT3-042601	115602	2500.00

External ID	Apply	Payment
CM-PT3-042601	115603	1500.00
CM-PT3-042601	115604	750.00
CM-PT3-042602	115605	500.00
CM-PT3-042603	115606	300.00
CM-PT3-042603	115607	1200.00

Single-File Format with Multiple Rows per Record

The credit memo import also supports a single-file format where you can include body data and data from multiple sublists in one primary file. This single file can contain multiple rows for each credit memo record; each row only must include the external ID value, so all data can be tied to the record. The following table illustrates a single CSV file that contains body data, Items sublist data, and Apply sublist data.

CreditMemoSingleFile.csv:

External ID	Customer	Item	Quantity	Apply	Payment
CM-PT3-042601	ABC Trucking	Carburetor MK60	10	EXTINV02134	2500.00
CM-PT3-042601	—	Carburetor MK65	3	EXTINV02183	1500.00
CM-PT3-042601	—	—	—	EXTINV02190	750.00
CM-PT3-042602	Happy Day Motors	—	—	EXTSO12456	500.00
CM-PT3-042603	Smithson Auto Body	Alternator BS40	2	—	—
CM-PT3-042603	—	Alternator BS52	3	EXTINV02199	300.00
CM-PT3-042603	—	—	—	EXTINV02210	1200.00

In this sample:

- External ID and Customer fields are body fields. External ID values are repeated in multiple rows to indicate links for sublist data. Other body field values do not need to be repeated in multiple rows.
- Item and Quantity are Items sublist fields. Blank values for these fields indicate there is no data.
- Apply and Payment are Apply sublist fields. Blank values for these fields indicate there is no data.

Notes on Credit Memo Import Field Values

- You must map external ID or internal ID to serve as a unique ID per record. The unique ID should be included in every line of the CSV files. For imports of new data, use external ID. On the Import Assistant's Field Mapping page, you should map the external ID field from your CSV files to the Credit # field, which serves as a transaction ID for credit memo records. This mapping allows external IDs to be displayed on credit memo forms in the NetSuite user interface.
- Each imported credit memo record should include a reference to a NetSuite customer record, mapped to the credit memo's Customer field. This reference must be a unique identifier; you should use internal ID or external ID, rather than a name reference. If you do not map a reference number field, reference number values are generated automatically.

- You do not have to map the required Date field. If you do not map the Date field, it is mapped automatically with default values of the current date.
- If the Multiple Currencies feature is enabled, you should map the Exchange Rate field. If your CSV file does not include values for this field, you can set it to a default value. Currency values are taken from referenced customers. If your customers use currencies other than the currency in which your company manages its financials, you should map the Currency field. For more information, see the help topic [Currency Management](#).
- If the Use Account Numbers preference has been enabled at Setup > Accounting > Accounting Preferences, imported values for the Account field should include both account number and name, for example: 11000 Accounts Payable. If this preference is not enabled, values should be account name only, for example: Accounts Payable.

For more details about fields that can be mapped in the credit memo record, see the SOAP Schema Browser's [credit memo](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Supported Credit Memo Sublist Data Imports

The Credit Memo import supports the import of the following sublist data:

Sublist	Notes
Apply	Selectively updatable based on Apply or Line key field.
Items	Selectively updatable based on Order Line or Item key field. See Line Item Updates on Transactions Imports .
Partners	When Multi-Partner Management feature enabled. Selectively updatable based on Partner key field.
Sales Team	When Team Selling feature enabled. Selectively updatable based on Employee key field.

To apply credit memos to invoices or other transactions, specify invoice numbers as Apply field values, in the Apply sublist. When you import this sublist's data, you can also set Line ID values to uniquely identify each Apply line, and Payment values to set the credit memo amounts to be applied to invoices.

For imports that update existing credit memo records, handling of sublist data updates depends upon the setting for the [Overwrite Sublists](#) advanced option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).

Supported Credit Memo Subrecord Data Imports

The Credit Memo import supports the import of the following subrecord data:

Subrecord	Notes
Billing Address	By default, the subrecord Address field is read-only, and data from other subrecord fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.
Items — Inventory Detail	when Advanced Bin / Numbered Inventory Management feature enabled

Subrecord	Notes
Shipping Address	By default, the subrecord Address field is read-only, and data from other subrecord fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.

Setting the Form for a Credit Memo Import

By default, the Field Mapping page for a credit memo import displays the NetSuite fields from your preferred credit memo form. You can select a different credit memo form in the Advanced Options area of the Import Assistant's Import Options page. See [Custom Form](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Custom Transactions Import

A custom transaction is an instance of a custom transaction type. A custom transaction type lets you adjust your general ledger in ways that differ from the standard transaction types available in NetSuite.

This import is available when both of the following are true:

- The Custom Transactions feature is enabled at Setup > Company > Enable Features, on the SuiteCloud subtab.
- At least one custom transaction type exists in your NetSuite account.

To import a custom transaction instance, set the Import Type dropdown list to Transactions. In the Record Type dropdown list, choose the name of the type you want to import.

For details about working with custom transaction types in the UI, see the help topic [Custom Transactions](#).

For details about working with custom transaction instances by using the CSV Import Assistant, see the following topics:

- [Custom Transaction Body and Sublist Fields](#)
- [How List Styles Affect Your Import](#)
- [Custom Transaction CSV File Examples](#)

Custom Transaction Body and Sublist Fields

When you work with custom transactions, the available fields vary depending on the transaction type, the features enabled in your account, and other factors. As a best practice, view the entry form for the transaction instance in the UI to see which fields are available. Alternatively, you can look at the Import Assistant's mapping screen, or open the transaction type for editing.

The following factors affect field availability:

- Depending on the custom transaction type's configuration, the class, department, and location fields may or may not be available. Similarly, these fields can be configured to appear on either the transaction body or Lines sublist. For details on these configuration choices, see the help topic [Custom Transaction Type Classification Fields](#).

- The transaction type may or may not be configured to use the Status field. You can import a value for Status only if statuses exist, and only if the Show Status Field option has been selected for the custom transaction type. When the field is available, you can set a value for status by referencing the status's text label.
- Different custom transaction types can be configured to use different custom fields. You can view the fields available to a custom transaction type by viewing the Custom Fields subtab. For more details, see the help topic [Custom Fields in Custom Transaction Types](#).
- A custom transaction type can have any of three list styles. The list style has an impact on whether the Lines sublist is available and how you use the sublist. For more details, see [How List Styles Affect Your Import](#).
- The Lines sublist is keyed. When updating the sublist, you can use the Line field as a key. Alternatively, if every line has a unique value in the Account field, you can use Account as the key. (Note that this behavior differs from SOAP web services, where you can use only Line as a key, even when every line has a unique Account value.)
- The Accounting Books sublist is available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. This sublist is selectively updatable based on the Secondary Book key field.
- The Accounting Book Detail sublist is available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. This sublist is selectively updateable based on the Accounting Book key field.
- The subsidiary field is available only for OneWorld accounts.

For details on opening a custom transaction type for editing, see the help topic [Editing a Custom Transaction Type](#).



Note: For full details about fields that can be mapped in the customer payment record, see the SOAP Schema Browser's [custom transaction](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with this tool, see the help topic [SOAP Schema Browser](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

How List Styles Affect Your Import

A custom transaction type can have any of three list styles. The list style dictates which fields are available when you add or update a custom transaction. For more details, see the following sections:

- [Basic](#)
- [Journal](#)
- [Header Only](#)

Basic

When working with an instance of the basic transaction type, be aware of the following:

- Each transaction must have at least one line in the Lines sublist.
- Each line must include a value for the **Account** field and a value for the **Amount** field. The Account field identifies the account that is to be debited or credited by this transaction. (Whether the account

is debited or credit depends on how the transaction type is configured. For details, see the help topic [Account Field Setup for Custom Transaction Types](#).) The Amount field identifies the exact value of the credit or debit.

For more information about the Basic list style, see the help topic [Basic](#).

Journal

When working with an instance of the journal style transaction type, be aware of the following:

- The transaction body does not include a Memo field. However, you can set the Memo field for any line in the Lines sublist.
- Each transaction instance must have at least two lines in the LineList. More lines are permitted, but at least one line must set a value for the **Credit** field and one must set a value for the **Debit** field. The values of all lines must balance.

For more information about the Journal list style, see the help topic [Journal](#).

Header Only

With the Header Only style, it is not possible to interact with the Lines sublist. The only lines associated with these transactions are the lines generated by a custom GL Lines plug-in implementation. For more details, see the help topic [Header Only](#).

Custom Transaction CSV File Examples

When importing a custom transaction, you can use a single CSV file or multiple files.

Multiple Files Import

If you are using multiple CSV files, you should include one file for the body data and an additional file for each sublist that requires data. For example, if you want to include data for the Lines sublist, you include a file for that sublist. If you want to include data for the Accounting Books sublist, include a file for that sublist.

The following table shows how you might format the file that holds the main transaction body data.

External ID	Status	Subsidiary	Class
1015A	A	1	6
1016A	B	1	8

The following table shows how you might format the secondary file. In this example, the transaction type uses the journal style, so each line must include a value for either the Credit or Debit field.

External ID	Fixed Asset Accrual Lines: Account	Fixed Asset Accrual Lines: Credit	Fixed Asset Accrual Lines: Debit
1015A	6	1000	—
1015A	8	—	1000
1016A	6	1952	—

External ID	Fixed Asset Accrual Lines: Account	Fixed Asset Accrual Lines: Credit	Fixed Asset Accrual Lines: Debit
1016A	14	—	952
1016A	18	—	1000

Single File Import

With the single-file approach, all data for all records is included one file. If the transaction is to include more than one line, each line is represented by its own line in the CSV file.

The following example shows how to create two instances of a custom transaction type that uses the **basic** list style. In this case, each record has two lines in the Lines sublist.

External ID	Memo	Status	Subsidiary	Bad Debt Lines: Account	Bad Debt Lines: Amount
101A	Approved by John	B	Parent Company	6	1000
101A	—	—	—	8	1700
102A	Approved by Mary	A	Parent Company	6	2500
102A	—	—	—	10	500

The following example shows how to create two instances of a custom transaction type that uses the **journal** list style. This file is set up in a similar fashion. However, note that the Lines sublist requires values in the Credit and Debit fields. You do not enter a value for Amount.

External ID	Status	Subsidiary	Fixed Asset Depreciation Lines: Account	Fixed Asset Depreciation Lines: Credit	Fixed Asset Depreciation Lines: Debit
105A	Awaiting approval	1	1	1000	—
105A	—	—	2	—	800
105A	—	—	3	—	200

Customer Payment Import

NetSuite Customer Payment transactions are records of payments. You can use the customer payment import to import historical sales data.

Note: To maintain performance, 5000 lines per transaction is the maximum limit for transactions submitted through CSV import. The number of lines a record can contain is specific to the record.

You can import unapplied payment amounts, or apply some or all payment amounts to invoices. If you are importing both customer payments and invoices, and you want to apply imported payments to imported invoices, you need to import invoices first. Include unique IDs, preferably external IDs, for your invoice records. You then can reference invoices in your customer payment import file by including their unique IDs as Invoices sublist field values.



Important: A payment can be associated with an invoice through the internal ID or external ID only. The transaction ID is not unique and cannot be used.

- The customer payment import uses the following logic to apply payments to invoices, based on values for the Payment Amount field, and Invoices Payment sublist fields:
 - If the Payment Amount value is greater than the total of all Invoices Payment values, the remainder is an unapplied payment.
 - If the Payment Amount is equal to the total of all Invoices Payment values, the entire payment is applied.
 - If the Payment Amount is less than the total of all Invoices Payment values, only the Payment Amount is applied, and no error is returned.
- If you import customer payment records with a value of False for the Undep. Funds field, you must supply an account for each of these records. Otherwise an error occurs. If Undep. Funds is set to True, this value overrides Payment Method, and if Undep. Funds is set to False, Account overrides Payment Method.
- If the Use Account Numbers preference has been enabled at Setup > Accounting > Accounting Preferences, imported values for the Account and A/R Account fields should include both account number and name, for example: 11000 Accounts Receivable. If this preference is not enabled, values should be account name only, for example: Accounts Receivable.
- If your Chart of Accounts includes more than one account of the Accounts Receivable type, you should map the A/R Account field in the Import Assistant, and include a column with A/R account values in the CSV file. The A/R account value for each customer payment record should match the account to which related invoices were posted. If you do not import an A/R account value for an imported payment record, the default A/R account is used, and an error occurs if the payment is applied to an invoice that was posted to a different account.

Customer Payment Import Examples

The following example shows a customer payment import where the payment amounts are not applied to invoices.

External ID	Customer	Payment Amount	Date
Cust_Payment_3	John King	6500	4/3/2017
Cust_Payment_4	Marie LaBelle	15000	4/3/2017
Cust_Payment_5	Tim Johnson	8000	4/3/2017

The following example shows a customer payment import where the payment amounts are applied to invoices.

External ID	Customer	Date	Invoice ID	Payment Amount
CP-001	John Woodhouse	5/18/2017	INV-425	10000
CP-002	Tim Johnson	5/16/2017	INV-633	6500
CP-003	Ellen Guest	5/4/2017	INV-732	1800

For details about fields that can be mapped in the customer payment record, see the SOAP Schema Browser's [customer payment](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with this tool, see the help topic [SOAP Schema Browser](#).

Review the following guidelines for Customer Payment imports:

- [Supported Customer Payment Sublist Data Imports](#)
- [Using Import Assistant for Customer Payments Mass Update](#)

Supported Customer Payment Sublist Data Imports

The Customer Payment import supports the import of Invoices sublist data. Each line in this sublist represents an invoice to which the payment is applied. The sum of Payment field values for sublist records represents the total amount of the payment.

In this sublist, the required Invoice key field holds the transaction IDs for invoices to which payments are applied. An additional, optional Line key field holds the line numbers for the invoice lines to which payments are applied, if payments need to be applied to specific lines.



Note: If you use only the Invoice key, the following error may be returned to indicate that a unique reference was not found, "Ambiguous sublist reference; multiple matches exist for key value <>".

An import can add new invoices or invoice lines to which a payment is applied, change the amounts applied to existing invoices or invoice lines, or remove invoices or invoice lines.

When the [Overwrite Sublists](#) advanced option is not enabled (which is the default), CSV file sublist data selectively updates existing invoices data, based on the Invoice key field. When this option is enabled, CSV file sublist data completely replaces existing invoices data. For example:

- If the existing Invoices sublist data is:
Invoice A: \$100
Invoice B: \$200
- And CSV file sublist data is:
Invoice A: \$120
Invoice C: \$180
- When Overwrite Sublists=F, post update sublist data is:
Invoice A: \$120
Invoice B: \$200
Vendor Bill C: \$180
- When Overwrite Sublists=T, post update sublist data is:
Invoice A: \$120
Invoice C: \$180

The Customer Payment import also supports the import of Accounting Book Detail sublist data. The Accounting Book Detail sublist is available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. This sublist is selectively updateable based on the Accounting Book key field.

Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).

Using Import Assistant for Customer Payments Mass Update

You can perform a mass update of existing Customer Payments main fields by exporting Customer Payments saved search results, changing data externally, then using the Import Assistant to import modified data, using the Update data handling option. For more information, see [Creating Transaction Saved Searches for Reimport](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Estimate Import

NetSuite Estimates transactions, also known as Quotes, include items proposed for customer purchase, along with price levels, probabilities of closing, and expiration dates. Estimates can be provided to customers for review, and also can be used for sales forecasting, management, and reporting. Estimates can be attached to Opportunity records, and later can be converted to sales orders.

 **Note:** Estimate imports are not available unless the Estimates feature is enabled in your account. To enable this feature, go to Setup > Company > Enable Features and on the Transactions tab, check the Estimates box.

- You can import Estimate transaction data in a single CSV file, or in multiple files, for example, with transaction header data in one file and item-level data in other files. Estimate transactions can be uniquely identified by internal ID or external ID. The unique ID should be included in every line of the CSV files.
- For imports of new data, use the external ID as a unique identifier. On the Import Assistant's Field Mapping page, you should map the external ID field from your CSV files to the NetSuite Estimate # field, which serves as a transaction ID for Estimate records. This mapping allows external IDs to be displayed on Estimate forms in the NetSuite user interface.
- You can link an Estimate record to an Opportunity record by including the Opportunity record's identifier as the Estimate's "Opportunity" field value. This identifier can be an internal ID, external ID, or transaction ID.
- Each imported Estimate record should include a reference to a NetSuite customer record, mapped to the Estimate's Customer field. This reference must be a unique identifier; you should use the customer record's internal ID or external ID, rather than a name reference.

For details about fields that can be mapped in the estimate record, see the [estimate](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Review the following guidelines for Estimate imports:

- [Supported Estimate Sublist Data Imports](#)
- [Supported Estimate Subrecord Data Imports](#)
- [Importing Currency Values for Estimates](#)
- [Using Import Assistant for Estimates Mass Updates](#)

Supported Estimate Sublist Data Imports

The Estimate import supports the import of the following sublist data:

Sublist	Notes
Items	You must import at least one line item for all new records, and you must map required fields for this sublist on the Field Mapping page. See Required Items Sublist Fields for Transactions Imports . Selectively updatable based on Line/Order Line or Item key field. See Line Item Updates on Transactions Imports .
Partners	when Multi-Partner Management feature enabled

Sublist	Notes
	selectively updatable based on Internal ID, External ID, or Partner
Sales Team	when Team Selling feature enabled

If the Item Options feature is enabled in your account, you can import values for custom transaction item options along with Items sublist data. Transaction item options must first be set up at Customization > Lists, Records, & Fields > Transaction Item Options > New, with one of the following Applies To settings: Sale, All Items. For details, see [Importing Transaction Item Options](#).

For imports that update existing Estimate records, handling of sublist data updates depends upon the setting for the [Overwrite Sublists](#) advanced option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).



Important: For non-keyed sublists, you shouldn't update main transaction fields and sublist fields during the same import job.

Supported Estimate Subrecord Data Imports

The Estimate import supports the import of the following subrecord data:

Subrecord	Notes
Items — Inventory Detail	when Advanced Bin / Numbered Inventory Management feature enabled

Importing Currency Values for Estimates

When the Multiple Currencies feature is enabled, the import of Currency field values is supported for newly created estimates. The Currency value for an estimate must be one of the currencies defined for the transaction's customer, on the Customer Currencies sublist. See the help topics [Currency Management](#) and [Setting Multiple Transaction Currencies for Customers](#).

If the Multiple Currencies feature is not enabled, the Currency field value for an estimate is not editable.

Using Import Assistant for Estimates Mass Updates

You can perform a mass update of existing Estimates data by exporting results for a Transaction saved search with a filter of "Type is Estimate", changing data externally, then using the Import Assistant to import modified data, using the Update data handling option. For more information, see [Creating Transaction Saved Searches for Reimport](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Inventory Details on an Inbound Shipment

An order is identified as an inbound shipment when the vendor physically packs the purchase order items to ship to one of the buyer's receiving destinations. Inbound Shipment Management enables you to track shipments when they leave the supplier, to the receiving destination, and then into the buyer's inventory.

The inbound shipment record tracks such key shipment information as expected delivery dates, items in the shipment, quantity to be received, and links to associated documentation and transactions. You can

assign items from multiple purchase orders to the shipment and then receive, bill, and transfer them from the newly created record.

In the user interface, you can access inventory details on an inbound shipment at Transactions > Purchases > Create Inbound Shipment. To learn more, see the help topic [Using Inbound Shipment Management](#).

Enabling Inventory Details on an Inbound Shipment

To access inventory details on an inbound shipment, contact [NetSuite Support](#).

To enable inventory details on an inbound shipment:

1. Go to Setup > Company > Enable Features.
2. Click the **Items & Inventory** subtab.
3. In the **Inventory** section, check the following boxes:
 - Serialized Inventory
 - Advanced Bin/Numbered Inventory Management
4. Click the **Transactions** subtab.
5. In the **Shipping & Receiving** section check the following boxes:
 - Inbound Shipment Management
 - Inventory Detail on Inbound Shipment

After enabling this feature, you cannot revert to your previous configuration.
6. Click **Save**.

Inbound Shipment Inventory Details Example

External ID	ID	Item	Receipt Inventory Numbers	Quantity	Surrogate Sub-record ID
1	1	LotItem	SBI-001	1	1
1	—	—	SBI-002	1	1
1	2	LotUomItem	LI-001	2	2

Usage Notes

Inbound Shipment

- **Actual Delivery Date** – the date the customer receives the item.
- **Actual Shipping Date** - the date the seller ships the item.
- **Bill of Lading** – a document listing the items in a shipment.
- **Expected Delivery Date** – the date the customer expects to receive a shipment.
- **Expected Shipping Date** – the date the seller expects to release a shipment.
- **External ID** - Used as a unique identifier for the record. You can specify any value that has not been used as the External ID in previous CSV imports.

- **ID** - The item row ID for the machine being modified.
- **Memo** – a field containing additional information describing this shipment.
- **Vessel Number** – the vessel number, IMO, or other identification.
- **Item** - The Item that is being modified.
- **Receipt Inventory Number** - The Serial or Lot number to be set.
- **Surrogate Subrecord ID** – The ID used to group each inventory detail subrecord. This enables the CSV import to determine which inventory detail belongs to which Item.

Inbound Shipment – Items

- **Expected Rate** – the agreed shipment charge.
- **Item (Req)** – the unit being shipped.
- **PO (Req)** - tracks the items transaction and shipment.
- **Quantity Expected** – the number of units the customer expects to receive.
- **Receiving Location** – the location the items will be shipped to.

Inbound Shipment – Landed Cost

- **Allocation Method (Req)** – how items are distributed and shipped.
- **Amount (Req)** – the number of items in the shipment.
- **Associated Item (Req)** – items related to the parent item.
- **Cost Category (Req)** - used to classify different costs associated with your items. They help track costs and variances.
- **Currency (Req)** – the money used for this shipment. For example, dollars, pounds, or euros.
- **Effective Date (Req)** - the date the shipment is expected to take effect.
- **Exchange Rate (Req)** - the amount expected to be charged for the shipment.

Inventory Adjustment Import

The inventory adjustment record is used to change the quantity and value of an inventory item without entering a purchase order. Inventory adjustments are used to account for clerical errors, changes in cost, thefts or miscounts. You can create and update inventory adjustment records using the CSV Import Assistant.

The inventory adjustment record is available for import when the Inventory feature is enabled on the Items & Inventory subtab at Setup > Company > Setup Tasks > Enable Features (Administrator). When Inventory is enabled, Inventory Adjustment is available on the Record Type dropdown list of the Import Assistant when Import Type is set to Transactions.

If the Multi-Book Accounting and Multi-Location Inventory features are enabled, you can also import accounting book file and inventory detail information as part of the import.

In the user interface, you access the inventory adjustment record at Transactions > Inventory > Adjust Inventory. For more information, see the help topic [Inventory Adjustments](#).

For details about fields that can be mapped in the inventory adjustment record, see the SOAP Schema Browser's [inventory adjustment](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Inventory Adjustment Body and Sublist Fields

To prepare inventory adjustment CSV data for import, make sure that your CSV file includes the following fields.

- **Adjustment Account** — The account for the adjustment, for example, an expense account.
- **Date** — Date of the adjustment.

Most imports also require an External ID field, which is used as a unique identifier for the record. You can specify any value that has not been used as the External ID in previous CSV imports.

Supported Inventory Adjustment Sublist Data Imports

The Inventory Adjustment import supports the import of Adjustments sublist data. Each line in this sublist represents an item requiring adjustment and should include the line, item, and quantity adjustment.

If the Multi-Book Accounting and Multi-Location Inventory features are enabled, the Inventory Adjustment import supports the import of Inventory Detail sublist data.

Not all fields of the Inventory Detail sublist available in the field mapping page are visible in the UI. In the following table you can see all fields of the Inventory Detail sublist with their description.

Field	Description
Bin	This field is for the bin number, if you are using Bins.
Expiration Date	This field is for the expiration date of the item added to the inventory.
Inventory Assignment Internal ID	This field is for the internal ID for the Inventory Assignment sublist that appears on the Inventory Details subrecord. Note that the Inventory Assignment has no UI label.
Issue Inventory Number	This is the select field where users pick an issueinventorynumber (Serial/Lot Number) out of inventory.
Quantity	This field is for the quantity of items imported in the inventory.
Receipt Inventory Number	This field is for entering text of serial/lot number when adding new item to the inventory.
Status	This field is for the status of items imported in the inventory. The status can be Damaged, Good, Quarantined, Returned, and Second Grade.
Surrogate Subrecord ID	This field is for the external ID of the Inventory Detail subrecord. The Surrogate Subrecord ID is required only for single file import, not a multi-file. In multi-file imports, subrecords are linked to the parent (sublist line) through file linkage.
To Bins	This field is binary (yes/no) and you can choose if you want to use bins.

Note: When using issue inventory numbers in your import, you should distinguish the records you reference in your CSV file by using unique names. Names are handled case insensitively, therefore you must use names that are different not only in their capitalization.

Alternatively, you can refer to the records by their internal IDs.

Inventory Adjustment CSV File Example

The following examples show how you might structure a file for importing inventory adjustment data.

Single File Example

Formatting restrictions make the table unreadable in the PDF output.

Multiple Files Example

With a multiple-file import, you use one file for the inventory adjustment fields, one file for the inventory detail fields, and one file for the adjustment fields.

The file holding the body data must include the external ID, date and adjustment account.

External ID	Subsidiary	Date	Adjustment Account
CouInvtAdj_3	Parent Company : SUB UK	3/30/2016	Checking(UK)
CouInvtAdj_4	Parent Company : SUB UK	3/30/2016	Checking(UK)

Each row in the inventory detail file includes the item key, serial or lot number, and quantity.

Inventory Adjustment Adjustments - Inventory Detail : Item Key	Inventory Adjustment Adjustments - Inventory Detail: Issue Inventory Number	Inventory Adjustment Adjustments - Inventory Detail: Quantity
ItemKey1	Count1_1	5
ItemKey1	Count1_2	2
ItemKey1	Count1_3	3
ItemKey2	Count2_1	2
ItemKey2	Count2_2	3
ItemKey4	Count4_1	9
ItemKey4	Count4_2	66
ItemKey5	Count5_1	3
ItemKey6	Serial_Count1_1	1
ItemKey6	Serial_Count1_2	1
ItemKey6	Serial_Count1_3	1

The third file contains the Adjustments sublist. The external ID must be included to link the sublist record to the entry in the main file. The adjust quantity by column is also required.

Adjustment: External ID	Adjustment: Item Key	Adjustment: Line	Adjustment: Location	Adjustment: Item	Adjustment: Adjust Qty. By
CouInvtAdj_1	ItemKey1	1	Location UK	LotNumberedItem(UK)	10
CouInvtAdj_1	ItemKey2	2	Location UK	LotNumberedItem(UK)	5
CouInvtAdj_1	ItemKey3	3	Location UK	Inventory Item UK	1
CouInvtAdj_2	ItemKey4	1	Location UK	LotNumberedItem(UK)	675

Adjustment: External ID	Adjustment: Item Key	Adjustment: Line	Adjustment: Location	Adjustment: Item	Adjustment: Adjust Qty. By
CouInvtAdj_2	ItemKey5	2	Location UK	LotNumberedItem(UK)	3
CouInvtAdj_2	ItemKey6	3	Location UK	SerialInventory(UK)	3

When naming your columns, you should use the same naming conventions used by the Import Assistant so that your columns map automatically. For columns to map automatically, each sublist column should have prefixes that begin with Adjustment:

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Inventory Cost Revaluation Import

The inventory cost revaluation record is used to recalculate the value of items configured to use standard costing. You can create and update inventory cost revaluation records using the CSV Import Assistant.

This record is available for import when the Standard Costing feature is enabled at Setup > Company > Enable Features, on the Items & Inventory subtab. When the feature is enabled, "Inventory Cost Revaluation" appears a choice in the Record Type dropdown list on page 1 of the Import Assistant, when you set Import Type to Transactions.

In the user interface, you access the inventory cost revaluation record at Transactions > Inventory > Revalue Inventory Cost. For help working with this record manually, see the help topic [Manually Entering an Inventory Cost Revaluation](#).

For details about fields that can be mapped in the inventory cost revaluation record, see the SOAP Schema Browser's [inventory cost revaluation](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

For more details on importing inventory cost revaluation records, see the following:

- [Prerequisite Records for Inventory Cost Revaluation Import](#)
- [Common Errors When Importing Inventory Cost Revaluation Records](#)

The Inventory Cost Revaluation import supports the import of Accounting Book Detail sublist data. The Accounting Book Detail sublist is available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. This sublist is selectively updateable based on the Accounting Book key field.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Prerequisite Records for Inventory Cost Revaluation Import

When you import a new inventory cost revaluation record, you rely on certain prerequisite records that must already exist in NetSuite. In other words, if you choose a data handling type of Add on page 2 of the Import Assistant, every record you import must reference one of each of the following NetSuite record types:

- Item — You must reference an item that has been configured to use standard costing. You identify this record using the Item body field. For details on how to create items to use standard costing, see the help topic [Setting Up Item Records for Standard Costing](#).

- Cost category — You must reference a cost category defined at Setup > Accounting Lists. You identify this record using the Cost Category field in the Cost Components sublist. For help creating cost categories, see the help topic [Creating Cost Categories](#).

Common Errors When Importing Inventory Cost Revaluation Records

This topic describes typical problems you might experience when using the CSV Import Assistant to create or update inventory cost revaluation records.

Field Mapping Error

When you click Next on the Field Mapping page, you might encounter an error that says "You must map one of the following NetSuite fields to a column in your CSV file, to be a unique identifier: External ID, Internal ID, or a transaction number field, such as Order # or Invoice #." This error occurs when you are trying to add records, and you have not mapped a unique identifier for the records. Specifically, you must map a value for either ExternalId or Ref. No.

Mandatory Field Missing

You may see the "Mandatory Field Missing" error after clicking Next on the mapping page. This error can occur in cases where you have chosen a data handling option of Add on page 2 of the Import Assistant, and one of the following problems occurred:

- You mapped a required field to a column in your CSV file, but one of the rows in your file is missing a value in that column.
- The Import Assistant is trying to process a row in your file that you intended to be empty. If you are using Microsoft® Excel, select the first few empty rows following the last row where you intended to include data. Right-click, and select **Delete > Entire Row**. Save your file, then try the import again.

An Inventory Cost Revaluation Already Exists for this Item, Location, and Date

Each inventory cost revaluation record must use a unique combination of item, location, and date. In other words, if you are trying to create an inventory cost revaluation record for Widget A in your East Coast Warehouse, you can only submit one revaluation for any specified date.

Inventory Transfer Import

The inventory transfer record is used to post details about per-location item inventory level changes when items are transferred between two locations. This basic inventory transfer decreases items in the source location and increases them in the receiving location, all in one step. You can create and update inventory transfer records using the CSV Import Assistant.

This record is available for import when the Multi-Location Inventory (MLI) feature is enabled, at Setup > Company > Enable Features, on the Items & Inventory subtab. When the feature is enabled, "Inventory Transfer" appears as a choice in the Record Type list on page 1 of the Import Assistant, when you set the import type to Transactions.

In the user interface, you access the inventory transfer record at Transactions > Inventory > Transfer Inventory. For help working with this record manually, see the help topic [Transferring Inventory](#).

For details about fields that can be mapped in the inventory transfer record, see the SOAP Schema Browser's [inventory transfer](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

The Inventory Transfer import supports the import of Adjustments sublist data and when the Advanced Bin / Numbered Inventory Management feature is enabled, supports the import of Adjustments – Inventory Detail subrecord data. For more information about working with subrecords, see [Importing Subrecord Data](#). For more information about working with Bin records, see [Bin Import](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Inventory Transfer CSV Import Example

The following example shows how you might structure a file for importing inventory transfer data.

External ID	Date	Location	Transfer Location	Subsidiary	Item	Quantity to Transfer
Tran_001	4/19/2017	San Francisco	Los Angeles	US — West	Suitcase — Medium	500
Tran_002	4/20/2017	San Francisco	Los Angeles	US — West	Suitcase — Large	1000

Invoice Import

NetSuite Invoice transactions are records of sales for which payment is not received at the time of delivery. Invoice records include the items sold, their prices, and payment terms.

You can use the invoice import to import historical sales data. If you also are importing customer payments, and you want to apply imported payments to imported invoices, you need to import invoices first, and include unique IDs, preferably external IDs. You then can reference invoices in your customer payment import file.

If the Use Account Numbers preference has been enabled at Setup > Accounting > Accounting Preferences, imported values for the Account field should include both account number and name, for example: 11000 Accounts Payable. If this preference is not enabled, values should be account name only, for example: Accounts Payable.



Important: A payment can be associated with an invoice through the internal ID or external ID only. The transaction ID is not unique and cannot be used.

For details about fields that can be mapped in the invoice record, see the SOAP Schema Browser's [invoice](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Review the following guidelines for invoice imports:

- [Supported Invoice Sublist Data Imports](#)
- [Supported Invoice Subrecord Data Imports](#)
- [Importing Currency Values for Invoices](#)

- Using Import Assistant for Invoices Mass Update

Supported Invoice Sublist Data Imports

The Invoice import supports the import of the following sublist data:

Sublist	Notes
Accounting Book Detail	Available when Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. Selectively updateable based on Accounting Book key field.
Auth. Code	When Gift Certificates feature enabled.
Billable Expenses	When Projects and Advanced Billing are enabled.
Billable Time	Selectively updatable based on related transaction ID (**doc).
Items	You must import at least one line item for all new records, and you must map required fields for this sublist on the Field Mapping page. See Required Items Sublist Fields for Transactions Imports . Selectively updatable based on Line/Order Line or Item key field. See Line Item Updates on Transactions Imports .
Partners	When Multi-Partner Management feature enabled. Selectively updatable based on Internal ID, External ID, or Partner.
Sales Team	When Team Selling feature enabled.
Shipment	When Multiple Shipping Routes feature enabled.

If the Item Options feature is enabled in your account, you can import values for custom transaction item options along with Items sublist data. Transaction item options must first be set up at Customization > Lists, Records, & Fields > Transaction Item Options > New, with one of the following Applies To settings: Sale, All Items. For details, see [Importing Transaction Item Options](#).

For imports that update existing Invoice records, handling of sublist data updates depends upon the setting for the [Overwrite Sublists](#) advanced option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).



Important: For non-keyed sublists, you shouldn't update main transaction fields and sublist fields during the same import job.

Supported Invoice Subrecord Data Imports

The Invoice import supports the import of the following subrecord data:

Subrecord	Notes
Billing Address	By default, the subrecord Address field is read-only, and data from other subrecord fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.
Items — Inventory Detail	When Advanced Bin/Numbered Inventory Management feature enabled.

Subrecord	Notes
Shipping Address	By default, the subrecord Address field is read-only, and data from other subrecord fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.

Importing Currency Values for Invoices

When the Multiple Currencies feature is enabled, the import of Currency field values is supported for newly created invoices. The Currency value for an invoice must be one of the currencies defined for the transaction's customer, on the Customer Currencies sublist. See the help topics [Currency Management](#) and [Setting Multiple Transaction Currencies for Customers](#).

If the Multiple Currencies feature is not enabled, the Currency field value for an invoice is not editable.

Using Import Assistant for Invoices Mass Update

You can perform a mass update of existing Invoices data by exporting Invoices saved search results, changing data externally, then using the Import Assistant to import modified data, using the Update data handling option. For more information, see [Creating Transaction Saved Searches for Reimport](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Invoice Import Example

The following example shows how you might structure a file for importing cash sale data.

External ID	Customer	Date	Posting Period	Location	Currency	Exchange Rate	Item	Amount
Inv-00001	Tim Mason	5/10/2018	May 2018	Atlantic City	US USD	1.00	Travel Kit — Medium	15
Inv-00002	Anne Woods	5/11/2018	May 2018	San Mateo	US USD	1.00	Travel Kit — Small	10

Item Demand Plan Import

An item demand plan transaction stores the quantity expected to be needed, during specified time periods, for an item. You can import item demand plan data from another system into NetSuite. You need to get the required data into a CSV file, then you can use the Import Assistant to create new demand plans and edit existing demand plans.

The item demand plan data that you can import generally matches the fields available at Transactions > Demand Planning > Item Demand Plans > New. If you are not familiar with this page, you should review it to get an understanding of the fields that you should include in your Item Demand Plan CSV files. Each plan includes two types of fields:

- Body fields used to uniquely identify the record, such as Item, Plan Start Date, Plan End Date, Location (when Multi-Location Inventory is enabled), and Subsidiary (for NetSuite OneWorld). A View body field indicates the time period used in the demand plan: monthly, weekly, or daily. For more information, see [Demand Plan Body Data](#).
- Sublist data that varies according to the demand plan type, as represented by the monthly, weekly, and daily views. The Import Assistant maps one sublist instance per row. For a monthly plan, each row/sublist instance represents a month and can store one monthly quantity. For a weekly plan, each row/sublist instance represents a week and can store one weekly quantity. For a daily plan, each row/

sublist instance represents a week and can store up to seven daily quantities. For more information, see [Demand Plan Sublist Data](#).

You are encouraged to set up your CSV files in accordance with the recommended format for each demand plan type. When a CSV file follows the recommended format, the Import Assistant automatically maps CSV file fields to NetSuite fields, simplifying the import process. For body fields other than the View field, the recommended format is to include a column with a header matching the NetSuite field name. For sublist fields, the recommended format varies per plan type. For more information, see: [Monthly Item Demand Plan Import](#), [Weekly Item Demand Plan Import](#), and [Daily Item Demand Plan Import](#).

Each CSV file used for an import should include data for only one type of time period: either monthly, weekly, or daily. Also, it is strongly encouraged that your CSV file use the recommended format for each type, because these recommended formats support automatic mapping of data in the Import Assistant. For more information, see [Supported Fields for Item Demand Plan Imports](#).

Prerequisites for Importing Item Demand Plans

- Item demand plans are available for inventory items when the Demand Planning feature is enabled in your account.
- Item demand plans are available for assembly/BOM items when both the Demand Planning and Work Orders feature are enabled.
- Demand plans can only be created for items that have a value of Time Phased for the Replenishment Method field.

If the above requirements are met, you can also import data for item record fields related to demand planning. See [Importing Demand Planning Data for Items](#).

Item Demand Plan Import Errors

An import that attempts to add an item demand plan returns an “Invalid item reference Key” error when any of the following occur:

- The item does not exist in NetSuite.
- The demand plan already exists. (Only one demand plan can be created per item and location combination.)
- The Replenishment Method field for the item is not set to Time Phased.



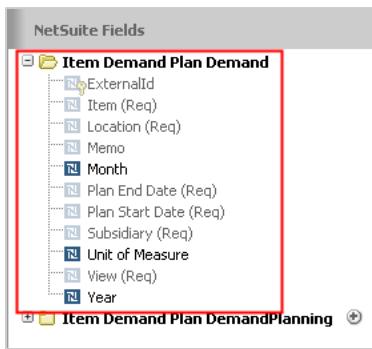
Note: For information about using demand planning and creating item demand plans in the NetSuite user interface, see the help topic [Demand Planning](#).

Demand Plan Body Data

Most body fields are used to uniquely identify the demand plan, such as **Item**, **Plan Start Date**, **Plan End Date**, **Location** (when Multi-Location Inventory is enabled), and **Subsidiary** (for NetSuite OneWorld). Data for each of these body fields should be stored in its own column in the CSV file.

Generally, demand plans are unique per item. In NetSuite OneWorld accounts, demand plans are unique per item/subsidiary combination. When Multi-Location Inventory is enabled, demand plans are unique per item/location combination or per item/subsidiary/location combination.

A **View** body field indicates the time period used in the demand plan: monthly, weekly, or daily. In the recommended format, this field does not need its own CSV file column; its value is inferred from the heading of quantity columns. See [Monthly Item Demand Plan Import](#), [Weekly Item Demand Plan Import](#), and [Daily Item Demand Plan Import](#).



The demand plan body fields that can be imported remain consistent for all types of plans. If you use column headings that match NetSuite field names, these fields are automatically mapped in the Import Assistant.

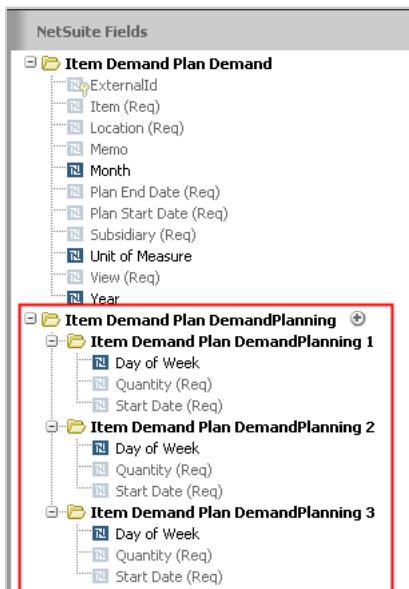
See [Supported Fields for Item Demand Plan Imports](#) for more details on specific fields.

Demand Plan Sublist Data

Demand plan sublist fields vary according to the plan type: monthly, weekly, or daily. A demand plan usually includes multiple start dates and end dates. Each start date-end date pairing represents a time period within the demand plan. Quantity sublist field values store the projected quantity needed for each time period.

- For monthly demand plans, each start date-end date pairing represents a month, for which one quantity can be stored.
- For weekly demand plans, each start date-end date pairing represents a week, for which one quantity can be stored.
- For daily demand plans, each start date-end date pairing represents a day, for which up to seven quantities can be stored. Each quantity is tied to a day of the week.

The Import Assistant Field Mapping page displays Item Demand Plan sublist fields in the Item Demand Plan Demand Planning folder:



To import sublist data for multiple days, weeks, or months, add all your sublist data into one demand plan sublist file. Then map your daily, weekly, or monthly data to separate instances of the Item Demand Plan DemandPlanning sublist, as shown in the previous screenshot. Do not use separate files for the data for each day, week, or month.

Each sublist instance represents a time period within the demand plan, like each row on the Item Demand Plan page in the user interface. For monthly and weekly plans, each sublist instance includes two fields:

Start Date and **Quantity**. For daily plans, each sublist instance also includes the **Day of the Week** field. Note that the **End Date** sublist field is not required for CSV imports.

There is a separate instance of this sublist, represented by a numbered subfolder, for each quantity column included in the CSV file. If your file includes a quantity for each month in a year, there are 12 instances of the sublist. If your file includes a quantity for each week in a year, there are 52 instances of the sublist. It is best to use the recommended file format and rely on automatic mapping of the data, so you do not have to manually map fields for a large number of sublist instances. For details about recommended formats, see [Monthly Item Demand Plan Import](#), [Weekly Item Demand Plan Import](#), and [Daily Item Demand Plan Import](#).

See [Supported Fields for Item Demand Plan Imports](#) for more details on specific fields.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Monthly Item Demand Plan Import

The following screenshot shows a monthly item demand plan in the NetSuite user interface, with sublist fields outlined in red. Each month included in the plan is represented by a row in this screenshot.

Start Date	End Date	Monthly Calculated	Quantity
1/1/2014	1/31/2014		
2/1/2014	2/28/2014		
3/1/2014	3/31/2014		
4/1/2014	4/30/2014		
5/1/2014	5/31/2014		
6/1/2014	6/30/2014		
7/1/2014	7/31/2014		
8/1/2014	8/31/2014		
9/1/2014	9/30/2014		
10/1/2014	10/31/2014		
11/1/2014	11/30/2014		
12/1/2014	12/31/2014		

The recommended format in your CSV file for this sublist data is to include one column for each month, with a heading of **Monthly Quantity:<date of first day of month>** and the quantity value. For example, columns like the following should be included for a 3 month item demand plan:

Monthly Quantity:1/1/2011	Monthly Quantity:2/1/2011	Monthly Quantity:3/1/2011
100	200	200

Each quantity column corresponds to one month, meaning one sublist instance, for a monthly plan.

The following screenshot illustrates how the above columns are mapped in the Import Assistant:

<input type="checkbox"/> Monthly	<input type="button"/> Demand : View	<input type="button"/>
<input type="checkbox"/> enddate	<input type="button"/> Demand : Plan End Date (Req)	<input type="button"/>
<input type="checkbox"/> External ID	<input type="button"/> Demand : ExternalId	<input type="button"/>
<input type="checkbox"/> Item	<input type="button"/> Demand : Item (Req)	<input type="button"/>
<input type="checkbox"/> Location	<input type="button"/> Demand : Location (Req)	<input type="button"/>
<input type="checkbox"/> Memo	<input type="button"/> Demand : Memo	<input type="button"/>
<input type="checkbox"/> startdate	<input type="button"/> Demand : Plan Start Date (Req)	<input type="button"/>
<input type="checkbox"/> Subsidiary	<input type="button"/> Demand : Subsidiary (Req)	<input type="button"/>
<input type="checkbox"/> Monthly Quantity:1/1/2011	<input type="button"/> DemandPlanning 1 : Quantity (Req)	<input type="button"/>
<input type="checkbox"/> 1/1/2011	<input type="button"/> DemandPlanning 1 : Start Date (Req)	<input type="button"/>
<input type="checkbox"/> Monthly Quantity:2/1/2011	<input type="button"/> DemandPlanning 2 : Quantity (Req)	<input type="button"/>
<input type="checkbox"/> 2/1/2011	<input type="button"/> DemandPlanning 2 : Start Date (Req)	<input type="button"/>
<input type="checkbox"/> Monthly Quantity:3/1/2011	<input type="button"/> DemandPlanning 3 : Quantity (Req)	<input type="button"/>
<input type="checkbox"/> 3/1/2011	<input type="button"/> DemandPlanning 3 : Start Date (Req)	<input type="button"/>

- The View body field is automatically mapped to a value of Monthly based on the **Monthly Quantity** keywords in the quantity column headings.
- A Start Date field for each sublist instance is automatically mapped to the date of the first day of the month based on the date in each quantity column heading.
- A Quantity field for each sublist instance is automatically mapped to a Monthly Quantity.
- Sublist End Date fields do not need to be included in CSV files or Import Assistant mappings.

You can also move your sublist data to a separate import file, and upload multiple files. In this case, make sure that your primary file only includes body field data, and all the sublist data for the Demand Planning sublist is moved to the linked file.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Weekly Item Demand Plan Import

The following screenshot shows a weekly item demand plan in the NetSuite user interface, with sublist fields outlined in red. Each week included in the plan is represented by a row in the screenshot.

Manual Item Demand Plan		List Search Customize More	
<input type="button"/> Save	<input type="button"/> Cancel	<input type="button"/> Reset	
Primary Information			
SUBSIDIARY*	UNIT OF MEASURE		
<input type="text"/>	<input type="text"/>		
LOCATION*	MEMO		
<input type="text"/>	<input type="text"/>		
ITEM*			
<input type="text"/>			
YEAR	MONTH	START DATE	END DATE
<input type="text"/>	<input type="text"/>	<input type="text"/> 1/1/2014	<input type="text"/> 3/31/2014
		VIEW	Weekly
START DATE	END DATE	WEEKLY CALCULATED	QUANTITY
12/29/2013	1/4/2014		
1/5/2014	1/11/2014		
1/12/2014	1/18/2014		
1/19/2014	1/25/2014		
1/26/2014	2/1/2014		
2/2/2014	2/8/2014		
2/9/2014	2/15/2014		
2/16/2014	2/22/2014		
2/23/2014	3/1/2014		
3/2/2014	3/8/2014		
3/9/2014	3/15/2014		
3/16/2014	3/22/2014		
3/23/2014	3/29/2014		
3/30/2014	4/5/2014		

The recommended format in your CSV file for this sublist data is to include one column for each week, with a heading of **Weekly Quantity:<date of first day of week>** and the quantity value. For example, columns like the following should be included for the first 3 weeks of a weekly item demand plan:

Weekly Quantity:1/1/2012	Weekly Quantity:1/8/2012	Weekly Quantity:1/15/2012
100	200	200

Each quantity column corresponds to one week, meaning one sublist instance, for a weekly plan.

The following screenshot illustrates how the above columns are mapped in the Import Assistant:

- The View body field is automatically mapped to a value of Weekly based on the **Weekly Quantity** keywords in the quantity column headings.
- A Start Date field for each sublist instance is mapped to the date of the first day of the week based on the date in each quantity column heading.
 - Each sublist Start Date must correspond to the date of the first day of the week based on the company preference set at Setup > Company > General Preferences. The default is Sunday.
 - If the date in a CSV file quantity column does not correspond to the first day of the week, the Import Assistant maps the date of the first day of the week, instead of the date in the CSV file, as Start Date. For example, for a heading of **Weekly Quantity:1/9/2011** where the first day of the week is Sunday, the mapped Start Date value is 1/8/2011, because that is the date of the Sunday of that week.
 - A sublist Start Date may precede the Plan Start Date, if the Plan Start Date is not the first day of the week. For example, if the Plan Start Date is 2/1/2012, which is a Wednesday, and the preference for first day of the week is Sunday, the sublist Start Date is 1/29/2012.
 - The date in the CSV file quantity column must be entered without leading zeros. For example, for January 1, 2017 to be used as the Start Date, enter this date in the CSV file as 1/1/2017, not 01/01/2017.
- A Quantity field for each sublist instance is mapped to a Weekly Quantity.
- Sublist End Date fields do not need to be included in CSV files or Import Assistant mappings.

You can also move your sublist data to a separate import file, and upload multiple files. In this case, make sure that your primary file only includes body field data, and all the sublist data for the Demand Planning sublist is moved to the linked file.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Daily Item Demand Plan Import

The following screenshot shows a daily item demand plan in the NetSuite user interface, with sublist fields outlined in red. Each week included in the plan is represented by a row in this screenshot. Each row includes seven columns, one for each day of the week.

Start Date	End Date	WEEKLY CALCULATED	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
12/29/2013	1/4/2014								
1/6/2014	1/11/2014								
1/12/2014	1/18/2014								
1/19/2014	1/25/2014								
1/26/2014	2/1/2014								
2/2/2014	2/8/2014								
2/9/2014	2/15/2014								
2/16/2014	2/22/2014								
2/23/2014	3/1/2014								
3/2/2014	3/8/2014								
3/9/2014	3/15/2014								
3/16/2014	3/22/2014								
3/23/2014	3/29/2014								
3/30/2014	4/5/2014								

The recommended format in your CSV file for this sublist data is to include one column for each day, with a heading of **Daily Quantity:<date>** and the quantity value. For example, columns like the following should be included for the first week of a daily item demand plan:

Daily Quantity: 1/2/2012	Daily Quantity: 1/3/2012	Daily Quantity: 1/4/2012	Daily Quantity: 1/5/2012	Daily Quantity: 1/6/2012
50	200	100	100	100

Each quantity column corresponds to one day, meaning one sublist instance, for a daily plan.

The following screenshot illustrates how the above columns are automatically mapped in the Import Assistant:

<input checked="" type="checkbox"/> Daily	<input type="button" value="Demand : View (Req)"/>
<input checked="" type="checkbox"/> Plan end date	<input type="button" value="Demand : Plan End Date (Req)"/>
<input checked="" type="checkbox"/> External ID	<input type="button" value="Demand : ExternalId"/>
<input checked="" type="checkbox"/> Item	<input type="button" value="Demand : Item (Req)"/>
<input checked="" type="checkbox"/> Location	<input type="button" value="Demand : Location (Req)"/>
<input checked="" type="checkbox"/> Memo	<input type="button" value="Demand : Memo"/>
<input checked="" type="checkbox"/> Plan start date	<input type="button" value="Demand : Plan Start Date (Req)"/>
<input checked="" type="checkbox"/> Subsidiary	<input type="button" value="Demand : Subsidiary (Req)"/>
<input checked="" type="checkbox"/> Monday	<input type="button" value="DemandPlanning 1 : Day of Week"/>
<input checked="" type="checkbox"/> Daily Quantity:1/2/2012	<input type="button" value="DemandPlanning 1 : Quantity (Req)"/>
<input checked="" type="checkbox"/> 1/1/2012	<input type="button" value="DemandPlanning 1 : Start Date (Req)"/>
<input checked="" type="checkbox"/> Tuesday	<input type="button" value="DemandPlanning 2 : Day of Week"/>
<input checked="" type="checkbox"/> Daily Quantity:1/3/2012	<input type="button" value="DemandPlanning 2 : Quantity (Req)"/>
<input checked="" type="checkbox"/> 1/1/2012	<input type="button" value="DemandPlanning 2 : Start Date (Req)"/>
<input checked="" type="checkbox"/> Wednesday	<input type="button" value="DemandPlanning 3 : Day of Week"/>
<input checked="" type="checkbox"/> Daily Quantity:1/4/2012	<input type="button" value="DemandPlanning 3 : Quantity (Req)"/>
<input checked="" type="checkbox"/> 1/1/2012	<input type="button" value="DemandPlanning 3 : Start Date (Req)"/>
<input checked="" type="checkbox"/> Thursday	<input type="button" value="DemandPlanning 4 : Day of Week"/>
<input checked="" type="checkbox"/> Daily Quantity:1/5/2012	<input type="button" value="DemandPlanning 4 : Quantity (Req)"/>
<input checked="" type="checkbox"/> 1/1/2012	<input type="button" value="DemandPlanning 4 : Start Date (Req)"/>

- The View body field is automatically mapped to a value of Daily based on the **Daily Quantity** keywords in the quantity column headings.
- A Start Date field for each sublist instance is automatically mapped to the date of the first day of the week based on the date in each quantity column heading.
 - Each sublist Start Date must correspond to the date of the first day of the week based on the company preference set at Setup > Company > General Preferences. The default is Sunday.
 - Up to seven columns may have the same Start Date, and belong to the same sublist instance. In the example above, if a first day of week preference of Sunday is assumed, each quantity has a Start Date value of 1/1/2012.
 - A sublist Start Date may precede the Plan Start Date, if the Plan Start Date is not the first day of the week. For example, if the Plan Start Date is 2/1/2012, which is a Wednesday, and the preference for first day of the week is Sunday, the sublist Start Date would be 1/29/2012.
- A Day of the Week field for each sublist instance is automatically mapped to a day of the week, based on the date in each quantity column heading.
 - For example, the quantity column with a date of 1/2/2012 is mapped to Monday, 1/3/2012 is mapped to Tuesday, 1/4/2012 is mapped to Wednesday, 1/5/2012 is mapped to Thursday, and 1/6/2012 is mapped to Friday.
- A Quantity field for each sublist instance is automatically mapped to a Daily Quantity.
- Sublist End Date fields do not need to be included in CSV files or Import Assistant mappings.

Supported Fields for Item Demand Plan Imports

Each CSV file used for an import should include data for only one type of time period, either monthly, weekly, or daily. Also, it is strongly encouraged that your CSV file use the recommended format for each

type, because these recommended formats support automatic mapping of data in the Import Assistant. Other formats are also supported but are more difficult to use.

The following table lists standard fields available for item demand plan imports:

Field	Mapping Required?	Notes
Body Fields		
External ID	No	—
Internal ID	No	Available for updates only
Item	Yes	Item must have a value of Time Phased for the Replenishment Method field to be valid for this field.
Location	Yes, if Multi-Location Inventory enabled	—
Memo	No	—
Month	No	Redundant of Plan Start Date, Plan End Data fields
Plan End Date	Yes	Can set default on Import Assistant mapping page instead of setting value in CSV file
Plan Start Date	Yes	Can set default on Import Assistant mapping page instead of setting value in CSV file
Subsidiary	Yes, if OneWorld account	—
Unit of Measure	No	Available when Multiple Units of Measure is enabled
View	Yes	<p>Default value automatically set based on "Monthly Quantity", "Weekly Quantity", or "Daily Quantity" keywords, when recommended format used</p> <p>If not inferred from keywords in recommended format, valid values are as follows (case-insensitive):</p> <ul style="list-style-type: none"> ■ Monthly ■ Weekly ■ Daily
Year	No	Redundant of Plan Start Date, Plan End Data fields
Sublist Fields		
Day of the Week	Yes, for Daily demand plans only	<p>Day of the week</p> <p>Value automatically set, based on date provided in CSV file, when recommended format used</p> <p>If not inferred from date provided in recommended format, can be name of day, such as Sunday (case-insensitive)</p>
Quantity	Yes	Represents either quantity per month, per week, or per day
Start Date	Yes	<ul style="list-style-type: none"> ■ For monthly demand plans, first day of the month, based on date provided in CSV file ■ For weekly demand plans, first day of the week based on date provided in CSV file ■ For daily demand plans, first day of the day based on date provided in CSV file

Field	Mapping Required?	Notes
		Default value automatically set when recommended format used
Note: You shouldn't enable the Overwrite Sublists option for item demand plan imports. Enabling this option may result in errors when imported sublist data overwrites existing sublist values driven by body field values such as View.		

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Item Supply Plan Import

An item supply plan lists the purchase orders or work orders required to ensure that item quantity meets expected demand. You can import item supply plan data from another system into NetSuite. You need to get the required data into a CSV file, then you can use the Import Assistant to create new supply plans and edit existing supply plans.

Importing item supply plan data is similar to creating a manual item supply plan in the NetSuite user interface. This item supply plan type is not derived from any demand plan in the NetSuite system and can be based on data or projections from external sources.



Important: Only one item supply plan per item is supported.

The item supply plan data that you can import generally matches the fields available at Transactions > Demand Planning > Item Supply Plans > New. If you are not familiar with this page, you should review it to get an understanding of the fields that you should include in your Item Supply Plan CSV files.

Each item supply plan includes two types of fields:

- Body fields used to identify the record, such as ExternalId, Internal ID, Item, Location (when Multi-Location Inventory is enabled), Memo, Subsidiary (for NetSuite OneWorld), and Unit of Measure (when Multiple Units of Measure is enabled).
You must provide ExternalId or Internal ID values to uniquely identify items, because the Item field may have non-unique values.
- Orders sublist fields that define data for the orders needed to replenish the supply of items. These fields include:
 - Order Date (required)
 - Order Line - optionally can be used to identify orders
 - Order Type - the type of order; always purchase order for inventory items, can be purchase order or work order for assembly/BOM items
Although an Order Type value is required for each line item, it is not required to be mapped for imports, because its values may be determined by the selected item.
 - Quantity (required)
 - Receipt Date - (required) the date when the order is expected to be received from the vendor (for a purchase order) or the date when the assembly is expected to be completed (for a work order). This date cannot be earlier than the Order Date.

Prerequisites for Importing Item Supply Plans

- Item supply plans are available for inventory items when the Demand Planning feature is enabled in your account.

- Item supply plans are available for assembly/BOM items when both the Demand Planning and Work Orders feature are enabled.
- Item supply plans can only be created for items that have a value of Time Phased for the Replenishment Method field.



Note: For general information about demand planning in NetSuite, see the help topic [Demand Planning](#). For information about creating item supply plans in the NetSuite user interface, see the help topic [Manually Entering an Item Supply Plan](#).

The following table shows how you might structure a file for importing item supply plans.

Formatting restrictions make the table unreadable in the PDF output.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Journal Entry Import and Intercompany Journal Entry Import

A journal entry records debits and credits to be posted to ledger accounts, adjusting the value of accounts. In NetSuite OneWorld, an intercompany journal entry records the impact of transactions between two subsidiaries. Intercompany journal entries identify both a “from”, or originating, subsidiary and a “to”, or receiving, subsidiary.

You can import multiple journal entries and, for NetSuite OneWorld, multiple intercompany journal entries, from another system into NetSuite. Each import job can include data for any combination of classes, department, locations, and for NetSuite OneWorld, subsidiaries. Journal entry import and intercompany journal entry import are two separate tasks in the Import Assistant. For information about importing advanced intercompany journal entries, see [Advanced Intercompany Journal Entry Import](#).



Note: The Journal Entry and Intercompany Journal Entry record types have been enhanced with two fields: Accounting Book and Is Book Specific. You use these fields only in accounts that have the Multi-Book Accounting feature enabled to create book specific journal entries and book specific intercompany journal entries. If you have questions about Multi-Book Accounting, see the help topics [Multi-Book Accounting Overview](#) and [Using Multi-Book Accounting](#).

After journal entry data is in a CSV file, users with required permissions can start a journal entry import by going to Setup > Import/Export > Import CSV Records, selecting an Import Type of Transactions and a Record Type of Journal Entry (or Intercompany Journal Entry), and completing other Import Assistant pages.



Important: To import a single journal entry, you can use a simpler import process available at Transactions > Financial > Make Journal Entries > Import. If you use NetSuite OneWorld, you can go to Transactions > Financial > Make Intercompany Journal Entries > Import to import a single intercompany journal entry. See [Single Journal Entry Import](#).

Import is supported for journal entries with up to 10,000 lines. However, poor performance results during import and in the user interface for journal entries with over 1000 lines, and these large journal entries may not be editable in the user interface.

See the following for more information about using the Import Assistant to import journal entries or intercompany journal entries.

- [Permissions for Importing Journal Entries with the Import Assistant](#)
- [Journal Entry CSV Files](#)

- Journal Entry Import Supported Fields
- Journal Entry and Intercompany Journal Entry Header Fields Table
- Journal Entry and Intercompany Journal Entry Line-Level Fields Table
- Using Journal Entry Import for Updates
- Custom Form Specification for Journal Entry Imports

Permissions for Importing Journal Entries with the Import Assistant

To use the Import Assistant to import journal entries (or intercompany journal entries), you need the following permissions:

- Make Journal Entry (Edit or Full)
- Posting Period on Transactions (Full)
- Import CSV File

To set journal entries to approved during import, you also need:

- Journal Approval (Edit or Full)

Journal entry imports that occur during the implementation phase usually are completed by users who are account administrators and have all of the above permissions. Other users, such as accountants, who may need to complete journal entry imports at a later point, most likely do not have the Import CSV File permission.



Important: Users who have the Make Journal Entry and Posting Period on Transactions permissions, but not the Import CSV File permission, can use the Single Journal Entry Import (and for NetSuite OneWorld, the Single Intercompany Journal Entry Import). See [Single Journal Entry Import](#).

To enable users to use the Import Assistant to import journal entries, an account administrator should do the following:

1. Create a new custom role that includes only the Make Journal Entry (Edit or Full), Posting Period on Transactions (Full), and Import CSV File permissions.
2. Add this new role to all users who require the ability to import journals.
3. Instruct users that they should choose this role when they import journals.

An alternative is to add the Import CSV File permission to users' existing roles, but this choice allows users to import data for records other than journal entries. The safest route is to create a specialized role used only for journal entry imports.

For users who need to set journal entries to approved during import, a custom role can be created with the Make Journal Entry, Posting Period on Transactions, Import CSV File, and Journal Approval permissions.

If you use NetSuite OneWorld, users' access to subsidiaries also impacts the journal entries that they can import. For more information, see the help topic [Control Employee Access to Subsidiaries](#).

Journal Entry CSV Files

Be aware of the following requirements for journal entry CSV files:

- Each imported journal entry must include at least 2 lines, and have balancing debits and credits.
- Each imported intercompany journal entry must include at 4 lines, with one debit and credit each for the originating and receiving subsidiary.

- If you use NetSuite OneWorld, data for journal entries and intercompany journal entries must be imported from separate files in separate jobs, because journal entry import and intercompany journal entry import are separate record types in the Import Assistant.

Note: For imports with the Single Journal Entry Import Assistant, only the three requirements listed above apply.

- Your journal entry CSV files should include both header and line-level data.
- You can import data in a single CSV file, or in multiple files, for example, with header data in one file and line-level data in other files. Each journal entry transaction can be uniquely identified by its value for one of the following fields: Entry No., External ID, or (updates only) Internal ID. This value should be included in every row of the CSV files.

Note: When creating new records, if the CSV file does not include the entry number or external ID as a unique identifier, then a single import is performed.

- If you include both header-level and line-level data in one file, each row of the CSV file represents a transaction line, and header-level field values must be included in each row, even if it is repetitious.

Note: In 2021.2 the names of the sublists Journal Entry Line and Intercompany Journal Entry Line have changed to Journal Entry – Line and Intercompany Journal Entry – Line. You must use the new names in the headers of your CSV file for the automatic mapping to work properly.

Example Journal Entry CSV File

The following is a sample CSV file containing data for one journal entry transaction with two lines. The first two columns contain header-level data, whereas the other columns contain line-level data.

External ID	Department	Journal Entry – Line: Account	Journal Entry – Line: Debit	Journal Entry – Line: Credit	Journal Entry – Line: Memo
10008	Marketing	1000 Checking	100	—	Put money into petty cash
10008	Marketing	1006 Petty Cash	—	100	Put money into petty cash

Example Intercompany Journal Entry CSV File

The following is a sample CSV file containing data for one intercompany journal entry transaction with four lines. The first three columns contain header-level data, whereas the other columns contain line-level data.

Note: The Subsidiary column indicates the subsidiary the transaction originates from, while the To Subsidiary column indicates the receiving subsidiary.

External ID	Subsidiary	To Subsidiary	Intercompany Journal Entry – Line: Subsidiary	Intercompany Journal Entry – Line: Account	Intercompany Journal Entry – Line: Debit	Intercompany Journal Entry – Line: Credit
12345	Parent Company : AU Subsid	Parent Company : CAN Subsid	Parent Company : AU Subsid	LCT Paid	100	—
12345	Parent Company : AU Subsid	Parent Company : CAN Subsid	Parent Company : AU Subsid	WET Paid	—	100
12345	Parent Company : AU Subsid	Parent Company : CAN Subsid	Parent Company : CAN Subsid	LCT Paid	100	—

External ID	Subsidiary	To Subsidiary	Intercompany Journal Entry -Line: Subsidiary	Intercompany Journal Entry -Line: Account	Intercompany Journal Entry -Line: Debit	Intercompany Journal Entry -Line: Credit
12345	Parent Company : AU Subsid	Parent Company : CAN Subsid	Parent Company : CAN Subsid	VAT on Purchases	—	100

For extensive details about the fields for which data can be included in journal entry and intercompany journal entry CSV files, see:

- [Journal Entry and Intercompany Journal Entry Header Fields Table](#)
- [Journal Entry and Intercompany Journal Entry Line-Level Fields Table](#)

Journal Entry Import Supported Fields

The Import Assistant Field Mapping page displays the list of journal entry (or intercompany journal entry) fields for which you can import data. Header-level fields are listed under Journal Entry; line-level fields are listed under the Journal Entry - Line sublist. These are the fields for which you can include data in your CSV file. The NetSuite Fields for both the Journal Entry and Intercompany Journal Entry are shown side-by-side in the following screenshot.

The screenshot shows two columns of NetSuite Fields. The left column is titled "NetSuite Fields" and contains a list of fields grouped under "Journal Entry" and "Journal Entry - Accounting Books". The right column is also titled "NetSuite Fields" and contains a list of fields grouped under "Intercompany Journal Entry", "Intercompany Journal Entry - Accounting Books", and "Intercompany Journal Entry - Line". Both columns show a mix of required (indicated by a red asterisk) and optional fields, each with a small icon indicating its type (e.g., date, number, dropdown).

NetSuite Fields	NetSuite Fields
Journal Entry <ul style="list-style-type: none"> Accounting Book Accounting Date Approved Class Correction Type Currency Date Defer Entry Department Entry No. Exchange Rate External ID Import Permit No. Internal ID Invoice Date Is Book Specific Memo Nexus Operation Date Original Bill Original Invoice Posting Period Pricing Level Reference No. Reversal Date Subsidiary Subsidiary Tax Reg. Number Tax Details Override Tax Point Date 	Intercompany Journal Entry <ul style="list-style-type: none"> Accounting Book Accounting Date Approved Class Correction Type Currency Date (Req) Defer Entry Department Entry No. Exchange Rate External ID Import Permit No. Invoice Date Is Book Specific Memo Operation Date Original Bill Original Invoice Posting Period Pricing Level Reference No. Reversal Date Subsidiary To Subsidiary
Journal Entry - Accounting Books	Intercompany Journal Entry - Accounting Books
Journal Entry - Line <ul style="list-style-type: none"> ***line Account Apply WH Tax? Credit Credit Tax Debit Debit Tax Eliminate End Date Location Memo Name Pricing Level Residual Schedule Start Date Tax Account Tax Code Tax Details Reference Tax Rate 	Intercompany Journal Entry - Line <ul style="list-style-type: none"> Account Apply WH Tax? Credit Debit Eliminate End Date Location Memo Name Pricing Level Residual Schedule Start Date Subsidiary

This dynamic list adjusts according to your permissions and to the features enabled in your account. By default, all fields on your preferred journal entry form, including custom fields, are available. You have the option of specifying a custom journal entry form, so that form's fields are available instead (not available for Single Journal Entry Import). See [Custom Form Specification for Journal Entry Imports](#).

For more information about journal entry import fields, see the following topics:

- [Journal Entry and Intercompany Journal Entry Header Fields Table](#)
- [Journal Entry and Intercompany Journal Entry Line-Level Fields Table](#)

For details about fields that can be mapped, see the SOAP Schema Browser's [journal entry](#) and [intercompany journal entry](#) reference pages. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Journal Entry and Intercompany Journal Entry Header Fields Table

The following table lists NetSuite standard header fields commonly available for journal entry and intercompany journal entry import mapping. The fields you can map vary according to the fields available on either your preferred journal entry form, or the custom form specified for import.

 **Note:** The Accounting Book and Is Book Specific are available only if the Multi-Book Accounting feature has been enabled. For details about Multi-Book Accounting, see the help topics [Multi-Book Accounting Overview](#) and [Using Multi-Book Accounting](#).

Column Header	Field Size	Notes
Accounting Book	—	<p>Only used in Multi-Book Accounting to specify the accounting book for a book specific Journal Entry or a book specific Intercompany Journal Entry.</p> <p>The Accounting Book field works in conjunction with the Is Book Specific field to accomplish this goal.</p> <p>The list below outlines various combinations that can be specified in the CSV import file for Journal Entries. The same combinations are used for Intercompany Journal Entries.</p> <ul style="list-style-type: none"> ▪ If Is Book Specific is set to True, a book specific journal entry is created. If an Accounting Book is not specified, the book specific journal entry is entered in the primary accounting book. ▪ If Is Book Specific is set to False, a journal entry is created. ▪ If Is Book Specific is not set, and an Accounting Book is specified, a book specific journal entry is created. ▪ If Is Book Specific is not set, and no Accounting Book is specified, a journal entry is created. <p>If you have questions about Multi-Book Accounting, see these help topics: Multi-Book Accounting Overview and Using Multi-Book Accounting.</p>
Accounting Book Detail	—	<p>The Accounting Book Detail sublist is available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists.</p> <p>This sublist is selectively updateable based on the Accounting Book key field.</p>
Approved	Boolean	Users need the Journal Approval permission to set this value to True.
Class	—	Must match the name of an existing class at Setup > Company > Classes.

Column Header	Field Size	Notes
		If the Always Allow Per-line Classifications on Journals preference is enabled at Setup > Accounting > Accounting Preferences, the Class field is at line-level rather than header-level.
Currency	—	<p>Available for accounts with the Multiple Currencies feature enabled. See the help topic Currency Management.</p> <p>Must match the name of an existing currency at Lists > Accounting > Currencies.</p> <p>In accounts that are not OneWorld, defaults to company base currency when CSV file row does not specify a value. In OneWorld accounts, defaults to root parent subsidiary base currency when CSV file row does not specify a value. Click the edit icon to set a different default value for all imported rows.</p> <p>Important: If you set a default in a OneWorld account, you need to ensure that the selected default is valid for all imported subsidiary values. See Using Dependent Field Values as Defaults.</p>
Date	—	<p>Required for new records.</p> <p>For Single Journal Entry Import, default value provided if necessary.</p>
Defer Entry	Boolean	—
Department	—	<p>Must match the name of an existing department at Setup > Company > Departments.</p> <p>If the Always Allow Per-line Classifications on Journals preference is enabled at Setup > Accounting > Accounting Preferences, the Department field is at the line-level rather than header-level.</p>
Entry No.	45	<p>For new records, you should map the external ID field from your CSV files to this field, which serves as a transaction ID for Journal Entry records.</p> <p>For Single Journal Entry Import, default provided if necessary. Note that if you provide a value that is already in use, this value is blank for the newly created journal entry.</p>
Exchange Rate	—	<p>Available for accounts with the Multiple Currencies feature enabled.</p> <p>Defaults to 1.00 when CSV file row does not specify a value.</p>
External ID	—	Unique journal entry identifier in an external system.
Internal ID	—	<p>Available for updates.</p> <p>You can create a transaction saved search to obtain Internal ID values.</p>
Is Book Specific	Boolean	<p>Only used in Multi-Book Accounting. The main function of the book specific journal entry or the book specific Intercompany journal entry is to make accounting adjustments for a specific accounting book.</p> <p>The Is Book Specific field works in conjunction with the Accounting Book field to accomplish this goal.</p> <p>For simplicity, the list below outlines various combinations that can be specified in the CSV import file for Journal Entries. The same combinations are used for Intercompany Journal Entries.</p> <ul style="list-style-type: none"> ■ If Is Book Specific is set to True, a book specific journal entry is created. If an Accounting Book is not specified, the book specific journal entry is entered in the primary accounting book. ■ If Is Book Specific is set to False, a journal entry is created.

Column Header	Field Size	Notes
		<ul style="list-style-type: none"> ▪ If Is Book Specific is not set, and an Accounting Book is specified, a book specific journal entry is created. ▪ If Is Book Specific is not set, and no Accounting Book is specified, a journal entry is created. <p>If you have questions about Multi-Book Accounting, see these help topics: Multi-Book Accounting Overview and Using Multi-Book Accounting.</p>
Memo	999	—
Posting Period	—	An error is returned if a closed period is specified.
Reversal Date	—	—
Subsidiary	—	<p>Required for OneWorld accounts.</p> <p>Must match the name of an existing subsidiary at Setup > Company > Subsidiaries.</p> <p>For intercompany journal entries, this field is the “from”, or originating, subsidiary.</p>
To Subsidiary	—	<p>Required for intercompany journal entries.</p> <p>This field is the “to”, or receiving, subsidiary.</p>

Journal Entry and Intercompany Journal Entry Line-Level Fields Table

The following table lists NetSuite standard line-level fields commonly available for journal entry and intercompany journal entry import mapping.

 **Important:** Each imported journal entry must include at least two lines, and have balancing debits and credits. Each imported intercompany journal entry must include at least four lines, one debit and one credit each for the originating and receiving subsidiary.

Column Header	Field Size	Notes
Account	—	<p>This field is required and should match the name of an existing account at Lists > Accounting > Accounts.</p> <p>If the Use Account Numbers preference has been enabled at Setup > Accounting > Accounting Preferences, values should include both account number and name, such as 11000 Accounts Payable. Number-only values, such as 11000, also are supported. Name-only values, such as Accounts Payable, are not supported when this preference is enabled. If this preference is not enabled, name-only values should be used.</p> <p>Ensure that you exactly match the capitalization, spelling, and spacing of the names as defined in NetSuite with no leading or trailing spaces.</p>
Debit	13	Defines the amount to be debited. Must be a number with a maximum of 10 digits before the decimal and 2 digits after the decimal.
Credit	13	Defines the amount to be credited. Must be a number with a maximum of 10 digits before the decimal and 2 digits after the decimal.
End Date	—	Available if the Revenue Recognition feature is enabled.
Gross Amt	—	Available for if the Advanced Taxes feature is enabled. This feature is required for OneWorld accounts.

Column Header	Field Size	Notes
Location	—	<p>Required if the Multi-Location Inventory feature is enabled.</p> <p>Must match the name of an existing location at Setup > Company > Locations.</p> <div style="border: 1px solid #f0e68c; padding: 10px; margin-top: 10px;">  Important: If you set a default value in a OneWorld account, you need to ensure that the selected default is valid for all imported subsidiary values. See Using Dependent Field Values as Defaults. </div>
Memo	4000	Provides a detailed description displayed in the transaction detail list and other reports.
Name	—	<p>The name of the associated entity, such as customer, vendor or employee.</p> <p>Should match the name of an existing entity.</p> <p>If auto-generated numbering is enabled, Name field values should include both entity ID and name, such as A2255 ABC Company. ID-only values, such as A2255, also are supported.</p> <p>If you include an invalid value that is numeric, an error is returned with the numeric value in quotes.</p> <div style="border: 1px solid #f0e68c; padding: 10px; margin-top: 10px;">  Important: If you set a default value in a OneWorld account, you need to ensure that the selected default is valid for all imported subsidiary values. See Using Dependent Field Values as Defaults. </div>
Residual	—	Available if the Revenue Recognition feature is enabled.
Schedule	—	Available if the Revenue Recognition feature is enabled.
Start Date	—	Available if the Revenue Recognition feature is enabled.
Subsidiary	—	<p>Required for intercompany journal entries.</p> <p>Must match value for either Subsidiary or To Subsidiary.</p> <p>If your CSV file includes a Subsidiary column, it is automatically mapped to the header level Subsidiary field. The column to be mapped to the line-level Subsidiary field should have a different name, such as Line Subsidiary.</p>
Tax Account	—	Available if the Advanced Taxes feature is enabled. This feature is required for OneWorld accounts.
Tax Code	—	<p>Available if the Advanced Taxes feature is enabled. This feature is required for OneWorld accounts.</p> <p>Tax codes should be set up in NetSuite before the import.</p> <div style="border: 1px solid #f0e68c; padding: 10px; margin-top: 10px;">  Important: If you set a default value in a OneWorld account, you need to ensure that the selected default is valid for all imported subsidiary values. See Using Dependent Field Values as Defaults. </div>
VAT Amt	—	Available if the Advanced Taxes feature is enabled. This feature is required for OneWorld accounts.

Using Journal Entry Import for Updates

The Single Journal Entry Import Assistant (see [Single Journal Entry Import](#)) does not support updates.

For existing journal entries and existing intercompany journal entries, you need to use the CSV Import Assistant at Setup > Import/Export > IMPORT TASKS > Import CSV Records, which can:

- Update transaction body field values
- Add lines to existing transactions
- Update values in existing journal entry lines

In the first step of the CSV Import Assistant select the import type (Transactions) and record type (Journal Entry or Intercompany Journal Entry) as well as the CSV file or files you want to upload. In the next steps you will select the data handling options and the field mapping.

If you set the data handling option to Update, any CSV file line field values for existing transactions are appended as additional lines per transaction.

The lines of the Journal Entry – Line sublist are not keyed, so you cannot directly update specific lines. To update specific journal entry lines, export them all, make the necessary changes in the sublist lines, check the Overwrite Sublists box in the advanced options and overwrite the whole sublist.

For more information on updating records with a CSV import see [Choose Data Handling for Import](#).

For CSV file samples see [Journal Entry CSV Files](#).



Warning: If you update any type of journal entry that has been applied as a payment to an invoice or vendor bill, the relationship between the journal entry and payment is removed and the payment is no longer applied.

Custom Form Specification for Journal Entry Imports

By default the Field Mapping page for a journal entry import displays the NetSuite fields from your preferred journal entry form as available for mapping. The default form for your role may not include all the fields you need to import. To ensure that the appropriate fields are available for mapping, you can select any journal entry form that is available to your role, in the Advanced Options area of the Import Assistant's Import Options page. For more information, see [Set Advanced CSV Import Options](#).



Note: Single Journal Entry Import does not support custom form specification.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Opportunity Import

NetSuite Opportunity transactions document negotiations with potential customers (Prospects). Opportunities are created upon customer contact, and are used for record keeping, sales forecasting, sales management, and sales reporting purposes. Each Opportunity record includes items in which the customer is interested, and can have attached estimates or sales orders, and attached activities such as tasks, events, and phone calls.

- You can import Opportunity transaction data in a single CSV file, or in multiple files, for example, with transaction header data in one file and item-level data in other files. Opportunity transactions can be uniquely identified by internal ID or external ID. The unique ID should be included in every line of the CSV files.
- For imports of new data, a key of external ID is recommended. On the Import Assistant's Field Mapping page, you should map the external ID field from your CSV files to the NetSuite Opportunity #

field, which serves as a transaction ID for Opportunity records. This mapping allows external IDs to be displayed on Opportunity forms in the NetSuite user interface.

- Each imported Opportunity record should include a reference to a NetSuite Customer record, mapped to the Opportunity's Company field. This reference must be a unique identifier; you should use the customer record's internal ID or external ID, rather than a name reference.
- The Status field is required for imported Opportunity records. Status field values for customers can be entered at Setup > Sales > Customer Statuses. The Import Assistant Field Mapping page lets you set a default value for Status.
- Other required fields are Probability, Date Created, and Expected Close. The user interface automatically calculates Probability based on Status; the Import Assistant does the same. Formatting for Date Created and Expected should match the Date Format set at Setup > Company > General Preferences.



Note: If you are importing historical data for opportunities that have been previously closed, be sure to set Status field values to "Closed Lost" or "Closed Won". The Close Date field value for all records imported with closed statuses are set to the date that the import job adds or updates the records. You cannot modify Close Date field values to be any other date.

For details about fields that can be mapped in the opportunity record, see the SOAP Schema Browser's [opportunity](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Review the following guidelines for Opportunity imports:

- [Supported Opportunity Sublist Data Imports](#)
- [Using Import Assistant for Opportunities Mass Update](#)
- [Advanced Forecasting and Opportunities' Projected Total Values](#)

Supported Opportunity Sublist Data Imports

The Opportunity import supports the import of the following sublist data:

Sublist	Notes
Items	Selectively updatable based on Line/Order Line or Item key field. See Line Item Updates on Transactions Imports .
Opportunity	(Related Opportunities)
Partners	When Multi-Partner Management feature enabled. Selectively updatable based on Internal ID, External ID, or Partner field.
Sales Team	When Team Selling feature enabled.

If the Item Options feature is enabled in your account, you can import values for custom transaction item options along with Items sublist data. Transaction item options must first be set up at Customization > Lists, Records, & Fields > Transaction Item Options > New, with one of the following Applies To settings: Opportunity, All Items. For details, see [Importing Transaction Item Options](#).

For imports that update existing Opportunity records, handling of sublist data updates depends upon the setting for the [Overwrite Sublists](#) advanced option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).



Important: For non-keyed sublists, you shouldn't update main transaction fields and sublist fields during the same import job.

Using Import Assistant for Opportunities Mass Update

You can perform a mass update of existing Opportunity data by exporting Opportunity saved search results, changing data externally, then using the Import Assistant to import modified data, using the Update data handling option. For more information, see [Creating Transaction Saved Searches for Reimport](#).

Advanced Forecasting and Opportunities' Projected Total Values

You need to be aware of potential issues for imports of Opportunity records' Projected Total field values. When Opportunity transactions are added or updated in the user interface, this field's values are calculated based on Items sublist data and attached Estimates' data, but can be overridden by user entries.

For imports of Opportunity transactions, Projected Total field values are calculated in a variety of manners, depending on whether the imported Opportunities include Items sublist data, on whether your account has the Advanced Forecasting feature enabled and you have enabled the Multiple Sales Projected Amount Preference, and on whether the import is adding or updating NetSuite records.

Review the following scenarios and ensure that Projected Total field values are populated appropriately in your CSV files for Opportunity imports:

When Advanced Forecasting Feature is Disabled

- For Adds:
 - If CSV files do not include Items sublist data, Projected Total field values are required to avoid errors.
 - If CSV files include Items sublist data but no Projected Total field values, these imported records' Projected Total field values are calculated to be the sum of items.
 - If CSV files include both Items sublist data and Projected Total field values, the Projected Total field values are used to set values for imported records.
- For Updates:
 - If CSV files do not include Items sublist data or Projected Total field values, existing NetSuite Projected Total field values are not changed by the import.
 - If CSV files include Items sublist data but no Projected Total field values, existing NetSuite Projected Total field values are updated to be the sum of all items, both preexisting and imported.
 - If CSV files include Projected Total field values, these values replace imported records' preexisting Projected Total field values.

When Advanced Forecasting Feature and Multiple Sales Projected Amount Preference are Enabled

With Advanced Forecasting and Multiple Sales Projected Amount enabled, two additional fields are available relating to the Opportunity Projected Total field: a Range Low and Range High.

- CSV files' Range Low field values must be lower than or equal to Projected Total field values. Range Low values represent Worst Case projected totals.
- CSV files' Range High field values must be greater than or equal to Projected Total field values. Range High values represent Upside projected totals.
- For Adds:
 - If CSV files do not include Items sublist data, Projected Total field values are required to avoid errors.
 - If CSV files do not include Items sublist data, do include Projected Total field values, and one or both of Range Low and Range High fields are missing, then field values for Range Low and Range High are set to Projected Total field value.
 - If CSV files include Items sublist data but are missing Projected Total, Range Low, or Range High field values, any missing values are calculated to be the sum of items.
 - Any values in CSV files for Projected Total, Range Low, and Range High are used to set imported records' field values, whether or not Items sublist data is included.
- For Updates:
 - If any of the values for an import file record's Projected Total, Range Low, or Range High field is the same as the existing record's field value, then all three fields' values are calculated based on the sum of items.
 - If an import file record's Projected Total, Range Low, and Range High fields all have different values than the existing record's fields, then none of the field values are calculated based on the sum of items, and the Projected Total field value is set to the value submitted in the import file.
 - If an import file record does not have a value for Projected Total, Range Low, or Range High, then all three fields' values are calculated based on sum of items, unless there is no change to Items sublist data.

The Advanced Forecasting feature is enabled at Setup > Company > Enable Features, on the CRM subtab's Sales section. For information about this feature, see the help topic [Advanced Forecasting](#).

The Multiple Sales Projected Amount Preference is enabled at Setup > Sales > Sales Preferences, on the Forecasts Subtab. For information about this preference, see the help topic [Forecasting Preferences](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Order Reservation Import

An order reservation enables you to set aside multiple sources of supply for a specific group of future demands. This helps you to ensure that supplies are saved for high priority customers. You can use order reservations to automatically save supplies for anticipated demand by item, location, a time period, and a sales channel. You can further allocate supply on an order reservation to sales orders with the same channel only.

For more information, see the help topic [Order Reservations](#).

To import CSV records for Order Reservation, use the CSV Import Assistant. For more information, see [CSV Imports Overview](#).

To use the CSV Import Assistant to import this record, you must enable the [Enabling Sales Channels](#) feature and have the Import CSV File permission. For more information, see the help topic [NetSuite Permissions Overview](#).

You can still manually update individual items and location attributes, if needed. For more information, see [Importing CSV Files with the Import Assistant](#).

The Order Reservation import supports the following sublist data:

Sublist	Notes
Internal ID	Automatically added by the system.
External ID	Use this as a unique identifier for each order reservation.
Name	The order reservation name.
Subsidiary	The subsidiary associated with this reservation.
Item	The item you want to reserve supplies for.
Location	The order reservation location.
Sales Channel	The sales channel associated with the selected item.
Order Priority	The priority defined in the selected sales channel.
Allocation Strategy	Defines the rules that allocate specified current and/or future inventory.
Commitment Firm	The check box that indicates all allocations to the reservation are firm.
Start Date	The date when the order reservation begins.
End Date	The date when the order reservation is no longer available.
Transaction Date	Displays the current and future inventory allocated to demand through the reservation.
Quantity	The number of items reserved.
Target Quantity	The quantity to reserve.
Units	The Unit of Measure.
Closed	The order reservation is closed without reserving the item.

Paycheck Import

You can use the paycheck import tool for a one-time payroll batch that includes non-regular earnings or deductions for employees. For example, you can use this tool to import annual employee bonuses or group term life insurance payments into NetSuite.

The paycheck import does not create paycheck records in NetSuite. Instead, the import updates existing paycheck records.

Supported Paycheck Sublist Data Import

The Paycheck import supports the import of the following sublist data. The Line field keys each sublist.

- Contributions
- Deductions
- Earnings
- Expenses
- Taxes
- Time



Note: The Line field in a paycheck sublist does not refer to the line number of a particular line in that sublist. The Line field refers to the line number that is saved in a table that contains every line from every paycheck sublist. You can retrieve this line number by using SOAP web services.

Preparing to Import Paycheck Data with CSV

Before you import your paycheck information, you must first assign payroll items to applicable employees and create paychecks for those employees. After you create paychecks, you can import a CSV file to **update** the paychecks. Each paycheck in NetSuite has a unique internal ID. You use the internal ID to map paychecks to the rows in your CSV file.

To prepare to import paycheck data with CSV:

1. Make sure that the employees who have paychecks that you want to import are added to NetSuite and are included in payroll. For more information, see the help topic [Including an Employee in Payroll](#).
2. Add each payroll item that is included in the paycheck import to each applicable employee record. Make sure of the following:
 - The **Rate** field for these payroll items is blank.
 - The **Default** box beside each payroll item is clear.
 For more information about adding payroll items to employee records, see the following topics:
 - [Setting up Earnings for an Employee](#)
 - [Setting up Deductions for an Employee](#)
 - [Setting up Company Contributions for an Employee](#)
 - [Setting up Accrued Time for an Employee](#)
 - [Employee Tax Withholdings and Allowances](#)
3. Update payroll information. For more information, see the help topic [Updating Payroll Information](#).
4. Create a payroll batch. For more information, see the help topic [Creating a Payroll Batch](#). Make sure that you include the employees who are impacted by the paycheck import.
5. Take note of the payroll batch number.
6. To ensure that you can find the internal ID for each paycheck, create a paycheck saved search. Go to Reports > Saved Searches > All Saved Searches > New, and then from the **Search Type** list, click **Paycheck**.
 - In the **Criteria** subtab, set the following filters:
 - **Payroll Batch** – Status is Edited
 - **Batch Number** – The payroll batch number you noted in step 5.
 - In the **Results** subtab, set the following:
 - In the **Sort By** list, select **Internal ID**.
 - In the **Columns** subtab, add the following fields:
 - Internal ID
 - Batch Number
 - Check Date
 - Employee
 - In the **Available Filters** subtab, add the following filters:
 - Batch Number

- Payroll Batch: Status
 - In the **Search Title** field, enter a name for the saved search.
7. Click **Save & Run**.
 8. Using the saved search results as a reference, in the CSV file, make sure that you have an Internal ID column and that each paycheck uses the correct internal ID.

Importing Paycheck Data with CSV

After you complete the steps in Preparing to Import Paychecks with CSV, you can import your CSV file. The import uses the information in the CSV file to update the paychecks that you created earlier.

The following table is an example of how you might set up the CSV file:

Paycheck Internal ID	Employee	Earning Item	Amount
1134	J Wolfe	Quarterly Bonus	8500
1135	M Wolfe	Monthly Incentive	5500
1136	P Wolfe	Monthly Incentive	5000
1137	N Wolfe	Quarterly Bonus	2000

To import paycheck data with CSV:

1. Go to Setup > Import/Export > Import CSV Records.
On the **Import Options** page, click **Next**.
2. From the **Import Type** list, select **Transactions**.
3. From the **Record Type** list, select **Paycheck**.
4. Upload your file:
 - a. If you have one file to upload, choose **One File to Upload**.
 - b. If you have more than one file to upload, choose **Multiple Files to Upload**.
 - c. Click **Select**, and then browse to the CSV file.
5. Click **Next**.
6. On the **Import Options** page, click **Next**.
7. On the **Field Mapping** page, make sure that the paycheck internal IDs, payroll items, and rates are mapped appropriately. You can map any other fields that you require. For more information, see [Step Four Field Mapping](#).



Note: For details about fields that can be mapped in the paycheck record, see the [Schema Browser Paycheck](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For more information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

8. Click **Next**.
9. To save the mapping and import the CSV file, in the **Import Map Name** field, enter a name, and then click **Save and Import**. Saving your mapping lets you use the same mapping to import other CSV files.
10. After the CSV file is imported, go to the payroll batch and check that the paychecks have been updated as expected.

11. Calculate and commit the payroll batch. For more information, see the help topics [Calculating a Payroll Batch](#) and [Committing a Payroll Batch](#).

Period End Journal Entry Import

A Period End Journal is a transaction record that posts subsidiary consolidation and year end closing to the general ledger. Period end journals are generated automatically when you complete the Create Period End Journals task on the Period Close Checklist. For help working with this record in the user interface, see the help topic [Period End Journal Entries](#).

You can use the Import Assistant to update the already generated Period End Journals, but not to add new records. To find the Import Assistant go to Setup > Import/Export > Import Tasks > Import CSV Records.

Permissions and Features required for Importing Period End Journal with the Import Assistant

Features

To use the Import Assistant to import Period End Journals you need to have a NetSuite OneWorld account. Also, you need to enable the Accounting Periods and the Period End Journal Entries features in Setup > Company > Setup Tasks > Enable Features, Accounting subtab.

For more information, see the help topic [Setup for Period End Journal Entries](#)

Permissions

To update period end journals, you must have the permission Period End Journals, Edit level or higher. You must also have access to both the Subsidiary to which the period end journal posts and the Source Subsidiary for the period end journal entry. To review the access level of a specific role, go to Setup > Users/Roles > User Management > Manage Roles and click on the role you want to review. In the Subsidiary Restrictions field group, you can see which subsidiaries this role can access. On the Permissions subtab, under Transactions you can see the level of the Period End Journals permission. For information about assigning permissions to roles, see the help topic [Customizing or Creating NetSuite Roles](#)



Note: The Source Subsidiary is the child subsidiary when posting consolidation, income statement closing and balance sheet closing journals for the child subsidiary in the parent subsidiary. The child subsidiary does not need to have the Period End Journal Entries feature enabled. The Subsidiary is the same as the Source Subsidiary only when posting non-consolidated income statement closing and balance sheet closing journals for each subsidiary's year end.



Important: Editing period end journals in the UI or with a CSV import is permitted when the period is open or when the Allow Non-G/L Changes box is checked on the period record. When Allow Non-G/L Changes is checked, users with the Setup permission Allow Non-G/L Changes can make edits that do not affect the general ledger.

Period End Journal Import Supported Fields

From standard fields on period end journals, you can update only the Memo fields on each journal line and in the header. From custom fields or segments, you can update only those that do not affect the

general ledger. You can't update any other fields and especially those affecting the general ledger. For more information on the header and journal line fields, see the help topics [Period End Journal Header Fields](#) and [Period End Journal Line Fields](#)

Purchase Order Import

NetSuite Purchase Order transactions authorize vendors to provide goods or services to your company, and express a commitment to receive and pay for them. These transactions have no accounting impact until orders are received.

i Note: Purchase Order imports are not available unless the Purchase Orders feature is enabled in your account. To enable this feature, go to Setup > Company > Enable Features and on the Transactions tab, check the Purchase Orders box.

- Purchase order imports can include line-level items and expenses data. For imports with items data, but no expenses data, you can choose either the one file to upload or the multiple files to upload option. For imports with expenses data, you **must** choose the multiple files to upload option. For more information, see [Using Multiple Files for Purchase Order Sublist Data](#).
- By default, the NetSuite fields available for purchase order import mapping are those available on your preferred purchase order form. Fields can be mapped for the import job if they are displayed (not hidden) and not disabled on your preferred form. To make different fields available, you can specify the standard drop ship or another purchase order form on the Import Options page. For information, see [Custom Form Specification for Purchase Order Imports](#).
- You cannot import drop ship purchase orders and other purchase orders at the same time; you must use separate import jobs. To import drop ship purchase orders, you must specify the standard drop ship purchase order form, or a custom drop ship form, as the Custom Form advanced option on the Import Options page, so that the Ship To field is available for mapping.
- You must map either external ID or internal ID to serve as a unique ID per record. The unique ID should be included in every line of the CSV files. For imports of new data, use external ID.
- On the Import Assistant's Field Mapping page, you should map the external ID field from your CSV files to the NetSuite Order # field, which serves as a transaction ID for Purchase Order records. This mapping allows external IDs to be displayed on Purchase Order forms in the NetSuite user interface.
- Each imported Purchase Order record should include a reference to a NetSuite Vendor record, mapped to the Purchase Order's Vendor field. This reference must be a unique identifier; you should use the vendor record's internal ID or external ID, rather than a name reference.
- By default, Billing Address and Shipping Address fields for Purchase Order records are copied from linked Vendor records, but these fields are available for mapping in the Import Assistant so their values can be set by CSV files' field values instead.
- If the Multiple Currencies feature is enabled, you must map the Exchange Rate field. If your CSV file does not include values for this field, you can set it to a default value. Currency values are taken from referenced vendors. See the help topic [Currency Management](#).
- The creation of multiple Purchase Orders, required by a Sales Order containing drop ship or special order items, will fail, if the Sales Order is set to Closed prior to their creation.

For details about fields that can be mapped in the purchase order record, see the SOAP Schema Browser's [purchase order](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Review the following guidelines for Purchase Orders imports:

- Custom Form Specification for Purchase Order Imports
- Supported Purchase Order Sublist Data Imports
- Using Multiple Files for Purchase Order Sublist Data
- Supported Purchase Order Subrecord Data Imports
- Importing Purchase Orders with Billed-Back Items and Expenses
- Importing Purchase Orders with Serial or Lot-Numbered items
- Importing Purchase Orders when Advanced Taxes is Enabled
- Working with Closed Purchase Orders
- Sample Purchase Order Single CSV File Format
- Sample Purchase Order Multiple CSV File Format
- Using Import Assistant for Purchase Orders Mass Update

Custom Form Specification for Purchase Order Imports

By default the Field Mapping page for a purchase order import displays the NetSuite fields from your preferred purchase order form as available for mapping. The default form for your role may not include all the fields you need to import. To ensure that the appropriate fields are available for mapping, you can select any purchase order form that is available to your role, in the Advanced Options area of the Import Assistant's Import Options page. For more information, see [Set Advanced CSV Import Options](#).

 **Warning:** If you specify a drop ship purchase order form, all records in the imported file should be drop ship purchase orders. You cannot import both drop ship purchase orders and other purchase orders at the same time.

Supported Purchase Order Sublist Data Imports

The Purchase Order import supports the import of the following sublist data:

Sublist	Notes
Items	You must import at least one line item for all new records, and you must map required fields for this sublist on the Field Mapping page. See Required Items Sublist Fields for Transactions Imports . Selectively updatable based on Line/Order Line or Item key field. See Line Item Updates on Transactions Imports .
Expenses	When the Allow Expenses on Purchase Orders preference is enabled. Expenses data must be in a separate CSV file.

If you use classes, departments, or locations, you can set these values either for an entire purchase order, or per individual item/expense lines.

If the Item Options feature is enabled in your account, you can import values for custom transaction item options along with Items sublist data. Transaction item options must first be set up at Customization > Lists, Records, & Fields > Transaction Item Options > New, with one of the following Applies To settings: Purchase, All Items. For details, see [Importing Transaction Item Options](#).

For imports that update existing Purchase Order records, handling of sublist data updates depends upon the setting for the [Overwrite Sublists](#) advanced option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).



Important: For non-keyed sublists, you shouldn't update main transaction fields and sublist fields during the same import job.

Using Multiple Files for Purchase Order Sublist Data

For purchase order imports that include items data but no expenses data, you can choose the one file to upload option, and include all data in a single CSV file, or you can choose the multiple files to upload option, and include mainline data in one file and items data in another file.

For imports that include expenses data, you **must** use the multiple files to upload option, with one file for mainline data, and one for expenses data. If you are also importing items data, it should be in a third file.

If you choose the multiple files option, be sure to include the external ID or key field values in the sublist files as well as in the main file.

For a multiple files upload example, see [Sample Purchase Order Multiple CSV File Format](#).

Supported Purchase Order Subrecord Data Imports

The Purchase Order import supports the import of the following subrecord data:

Subrecord	Notes
Billing Address	By default, the subrecord Address field is read-only, and data from other subrecord fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.
Items — Inventory Detail	When Advanced Bin/Numbered Inventory Management feature enabled.
Shipping Address	By default, the subrecord Address field is read-only, and data from other subrecord fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.

Importing Purchase Orders with Billed-Back Items and Expenses

If you are importing purchase orders with items or expenses that need to be billed back to customers, you can set the value of the Billable field to "TRUE" and include a value for the Customer field, for each of these item or expense lines.

Importing Purchase Orders with Serial or Lot-Numbered items

If you are importing purchase orders with serial or lot-numbered items, you need to define serial or lot numbers in the Serial/Lot Numbers field for each item.

- You must enter a number for each serialized item; for example, if the Quantity field has a value of 2, you must enter two numbers.
- You can separate multiple numbers with spaces, commas, or Returns.

Importing Purchase Orders when Advanced Taxes is Enabled

If the Advanced Taxes feature is enabled, you can include values for the Tax Code and Tax Amount fields for purchase order item and expense lines as needed in CSV files. Tax codes should be set up in NetSuite

before the import. Note that other tax-related values for line items and expenses are calculated by the system.

The Advanced Taxes feature is required for NetSuite OneWorld accounts. For information about working with taxes in OneWorld, see the help topic [Nexus and Taxes in OneWorld](#). For general information about setting up tax codes, see the help topic [Managing Tax Codes](#).

Working with Closed Purchase Orders

You can import a purchase order as closed, by setting its Items sublist records' Closed field values to "TRUE".

If these values are not set in the CSV file itself, you can set a default value by adding the Items sublist's Closed field to the field mapping, clicking the edit icon and selecting the Yes option button. For more information, see [Assign Default Values during Field Mapping](#).

You can use an import to update closed purchase orders by setting the Closed field value for one or more items in an order to "FALSE".

Sample Purchase Order Single CSV File Format

The following table illustrates example column headers and data snippets in a single file upload of purchase orders. This file includes data for purchase order header fields and item lines. Note that in this case, the same purchase order number can be repeated in multiple rows.

External ID	Vendor	PO Number	Date	Item
EXT2003	American Computers	2003	7/28/2009	Computer Systems : Desktop : HP Compaq d230
EXT2003	American Computers	2003	7/28/2009	Computer Systems : Laptop : Compaq Evo n800c
EXT2004	American Computers	2004	7/28/2009	Accessories : Standard Keyboard

Sample Purchase Order Multiple CSV File Format

The following tables illustrate example column headers and data snippets in a multiple file upload of purchase orders, including items and expenses data. Note that External ID is the key column that would be specified on the Import Assistant File Mapping page.

Primary File:

Each row of the primary file must include a unique identifier, in this case the external ID.

External ID	Vendor	PO #	Date
EXT2003	American Computers	2003	7/28/09
EXT2004	American Computers	2004	8/3/09

Linked File - Items:

The items file can include multiple rows with the same purchase order external ID.

External ID	Item	Quantity	Amount
EXT2003	Computer Systems : Desktop : HP Compaq d230	1	800

External ID	Item	Quantity	Amount
EXT2003	Computer Systems : Laptop : Compaq Evo n800c	1	1200

Linked File - Expenses:

The expenses file can include multiple rows with the same purchase order external ID.

External ID	Account	Amount	Memo	Customer	Billable
EXT2003	6150 Office Expense	350	laptop repair	107 Fabre Art Gallery	Yes
EXT2003	6150 Office Expense	20	laptop part	107 Fabre Art Gallery	Yes
EXT2004	6150 Office Expense	60	misc.	—	No

Using Import Assistant for Purchase Orders Mass Update

You can perform a mass update of existing Purchase Order data by creating a Transaction saved search with a filter of Type is Purchase Order, changing data externally, then using the Import Assistant to import modified data, using the Update data handling option. For more information, see [Creating Transaction Saved Searches for Reimport](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Return Authorization Import

Return authorization records track information about items returned by customers. These records store data such as quantity and value of returned items, and return status. The return authorization record is updated at each point in the return process, including when the return is initiated, when the returned item is received, and when the refund is issued. The return process can vary based on return management preferences, enabled features, and other account-specific factors. For more information about return authorizations, see the help topic [Customer Return Management](#).

Note: Return Authorization imports are not available unless the Return Authorizations feature is enabled in your account. To enable this feature, go to Setup > Company > Enable Features and on the Transactions tab, check the Return Authorizations box.

This import supports the import of standalone return authorizations, but not linked return authorizations (those created from cash sales or invoices and linked to these original sales transactions).

Review the following guidelines for Return Authorization imports:

- [Setting the Form for a Return Authorization Import](#)
- [Notes on Return Authorization Import Field Values](#)
- [Supported Return Authorization Sublist Data Imports](#)
- [Supported Return Authorization Subrecord Data Imports](#)

Setting the Form for a Return Authorization Import

By default, the Field Mapping page for a return authorization import displays the NetSuite fields from your preferred return authorization form. You can select a different return authorization form in the Advanced Options area of the Import Assistant's Import Options page. See [Custom Form](#).

Two different categories of return authorization forms are usually available:

- “Credit” return authorization forms that authorize the issuing of a credit memo for the returned items. The credit memo can either be applied to an account balance or refunded.
- “Cash” return authorization forms that authorize a direct refund for the returned items. This type of authorization cannot later be processed as a credit memo.

Notes on Return Authorization Import Field Values

- You must map external ID or internal ID to serve as a unique ID per record. The unique ID should be included in every line of the CSV files. For imports of new data, use external ID. On the Import Assistant's Field Mapping page, you should map the external ID field from your CSV files to the Rtn. Auth. # field, which serves as a transaction ID for return authorization records. This mapping allows external IDs to be displayed on return authorization forms in the NetSuite user interface.
- Each imported return authorization record should include a reference to a NetSuite customer record, mapped to the return authorization's Customer field. This reference must be a unique identifier; you should use internal ID or external ID, rather than a name reference. If you do not map a reference number field, reference number values are generated automatically.
- Although the Status field is required, you do not have to map it to a column in your CSV file. If you do not map the Status field, it is automatically mapped with default values of the default return authorization status, as set at Setup > Accounting > Preferences > Accounting Preferences, on the Order Management tab, under Returns. The default is Pending Approval if your company uses the approval process for return authorizations, and Pending Fulfillment if your company does not use this process.
- You also do not have to map the required Date field. If you do not map the Date field, it is automatically mapped with default values of the current date.
- If the Multiple Currencies feature is enabled, you should map the Exchange Rate field. If your CSV file does not include values for this field, you can set it to a default value. Currency values are taken from referenced customers. If your customers use currencies other than the currency in which your company manages its financials, you should map the Currency field. For more information, see the help topic [Currency Management](#).

For more details about fields that can be mapped in the return authorization record, see the SOAP Schema Browser's [return authorization](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Supported Return Authorization Sublist Data Imports

The Return Authorization import supports the import of the following sublist data:

Sublist	Notes
Items	Selectively updatable based on Order Line or Item key field. See Line Item Updates on Transactions Imports .
Partners	When Multi-Partner Management feature enabled. Selectively updatable based on Partner key field.
Sales Team	When Team Selling feature enabled. Selectively updatable based on Employee key field.

For imports that update existing Return Authorization records, handling of sublist data updates depends upon the setting for the [Overwrite Sublists](#) advanced option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).

Supported Return Authorization Subrecord Data Imports

The Return Authorization import supports the import of the following subrecord data:

Subrecord	Notes
Billing Address	By default, the subrecord Address field is read-only, and data from other subrecord fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.
Items — Inventory Detail	When Advanced Bin/Numbered Inventory Management feature enabled.
Shipping Address	By default, the subrecord Address field is read-only, and data from other subrecord fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Sales Order Import

NetSuite Sales Order transactions record a commitment to sell items or services to a customer, including the items to be sold and their prices. Sales orders can be converted from existing estimate transactions, or created as new transactions. Sales orders can be attached to opportunity transactions.

For more details about Sales Orders in NetSuite, see the help topic [Sales Orders](#).

Note: Sales Order imports are not available unless the Sales Orders feature is enabled in your account. To enable this feature, go to Setup > Company > Enable Features and on the Transactions tab, check the Sales Orders box.

- You can import Sales Order transaction data in a single CSV file, or in multiple files, for example, with transaction header data in one file and item-level data in other files.
- By default, the NetSuite fields available for sales orders import mapping are those available on the standard sales order form. Fields can be mapped for the import job if they are displayed (not hidden) and not disabled on your preferred form. To make different fields available, you can specify a custom sales order form on the Import Options page. For information, see [Custom Form Specification for Sales Order Imports](#).
- You must map external ID or internal ID to serve as a unique ID per record. The unique ID should be included in every line of the CSV files.
- For imports of new data, use external ID. On the Import Assistant's Field Mapping page, you should map the external ID field from your CSV files to the NetSuite Order # field, which serves as a transaction ID for Sales Order records. This mapping allows external IDs to be displayed on Sales Order forms in the NetSuite user interface.
- You can link a Sales Order record to an Opportunity record by including the Opportunity record's unique identifier as the Sales Order's "Opportunity" field value. This identifier can be an internal ID, external ID, or transaction ID.

- Each imported Sales Order record should include a reference to a NetSuite Customer record, mapped to the Sales Order's Customer field. This reference must be a unique identifier; you should use the customer record's internal ID or external ID, rather than a name reference.
- By default, Billing Address and Shipping Address fields for Sales Order records are copied from linked Customer records, but these fields are available for mapping in the Import Assistant so their values can be set by CSV files' field values instead.
- The Billing Schedule field available for Sales Orders imports can be set to reference existing NetSuite billing schedules only.
- The Commitment Confirmed field is available only for updating a Sales Order record and not when adding a new one. For the Add operation, the field is not available on the field mapping page. For the Update and the Add or Update operations, the field is available, but its value is ignored when adding a new record.

For details about fields that can be mapped in the sales order record, see the SOAP Schema Browser's [sales order](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Review the following guidelines for sales order imports:

- [Custom Form Specification for Sales Order Imports](#)
- [Supported Sales Order Sublist Data Imports](#)
- [Supported Sales Order Subrecord Data Imports](#)
- [Setting Imported Sales Orders' Status](#)
- [Setting Sales Orders to Closed](#)
- [Importing Currency Values for Sales Orders](#)
- [Charging Custom Credit Cards for Imported Sales Orders](#)
- [Using Import Assistant for Sales Orders Mass Update](#)
- [Sales Order Import Multi-File Example](#)

Custom Form Specification for Sales Order Imports

By default the Field Mapping page for a sales order import displays the NetSuite fields from your preferred sales order form as available for mapping. The default form for your role may not include all the fields you need to import. To ensure that the appropriate fields are available for mapping, you can select any sales order form that is available to your role, in the Advanced Options section of the Import Assistant's Import Options page. For more information, see [Set Advanced CSV Import Options](#).

Supported Sales Order Sublist Data Imports

The Sales Orders import supports the import of the following sublist data:

Sublist	Notes
Accounting Book Detail	Available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. Selectively updateable based on Accounting Book key field.
Auth. Code	When the Gift Certificates feature is enabled.
Items	You must import at least one line item for all new records, and you must map required fields for this sublist on the Field Mapping page. See Required Items Sublist Fields for Transactions Imports .

Sublist	Notes
	Selectively updatable based on Line/Order Line or Item key field. See Line Item Updates on Transactions Imports .
Partners	When the Multi-Partner Management feature is enabled. Selectively updatable based on Internal ID, External ID, or Partner.
Sales Team	When the Team Selling feature is enabled.
Shipment	When the Multiple Shipping Routes feature is enabled.

If the Item Options feature is enabled in your account, you can import values for custom transaction item options along with Items sublist data. Transaction item options must first be set up at Customization > Lists, Records, & Fields > Transaction Item Options > New, with one of the following Applies To settings: Sale, All Items. For details, see [Importing Transaction Item Options](#).

For imports that update existing Sales Order records, handling of sublist data updates depends upon the setting for the [Overwrite Sublists](#) advanced option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).



Important: For non-keyed sublists, you shouldn't update main transaction fields and sublist fields during the same import job.

Supported Sales Order Subrecord Data Imports

The Sales Order import supports the import of the following subrecord data:

Subrecord	Notes
Billing Address	By default, the subrecord Address field is read-only, and data from other subrecord fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.
Items — Inventory Detail	When the Advanced Bin/Numbered Inventory Management feature is enabled.
Shipping Address	By default, the subrecord Address field is read-only, and data from other subrecord fields is copied into it. If you map the Override field and set it to Yes (meaning true), you can import data for the Address field.

Setting Imported Sales Orders' Status

The Status field value for each Sales Order transaction indicates where the order is in terms of the approval, fulfillment, and or billing processes. Possible Status values vary according to the following:

- Whether your company uses the approval process for sales orders:
 - If the approval process is not used, initial Status for sales orders is Pending Fulfillment.
 - If the approval process is used, initial Status for sales orders is Pending Approval, and a Status of Canceled occurs when an order is not approved.
- Whether the Advanced Shipping feature is enabled to provide separate processes for fulfilling and billing sales orders:
 - If Advanced Shipping is off, additional Status values are Partially Fulfilled and Fulfilled, and Fulfilled means the sales order process is complete.
 - If Advanced Shipping is on, additional Status values are Partially Fulfilled, Pending Billing, and Billed, and Billed means the sales order process is complete.

For more explanation of sales order status values, see the help topic [Viewing the Status of Sales Orders](#).

You can set a default value of Pending Approval or Pending Fulfillment for Status by clicking the edit icon on the Field Mapping page. See [Assign Default Values during Field Mapping](#). To set Status to any other values, you have to specify them in the CSV file.



Note: In the UI, you can set the default value of Pending Approval or Pending Fulfillment at Setup > Accounting > Preferences > Accounting Preferences (Administrator), on the Order Management subtab.

Setting Sales Orders to Closed

You cannot use an import to directly set the Status field of sales orders to Closed. Instead, to set a sales order to Closed status, you need to set the Closed field for each line item to TRUE.

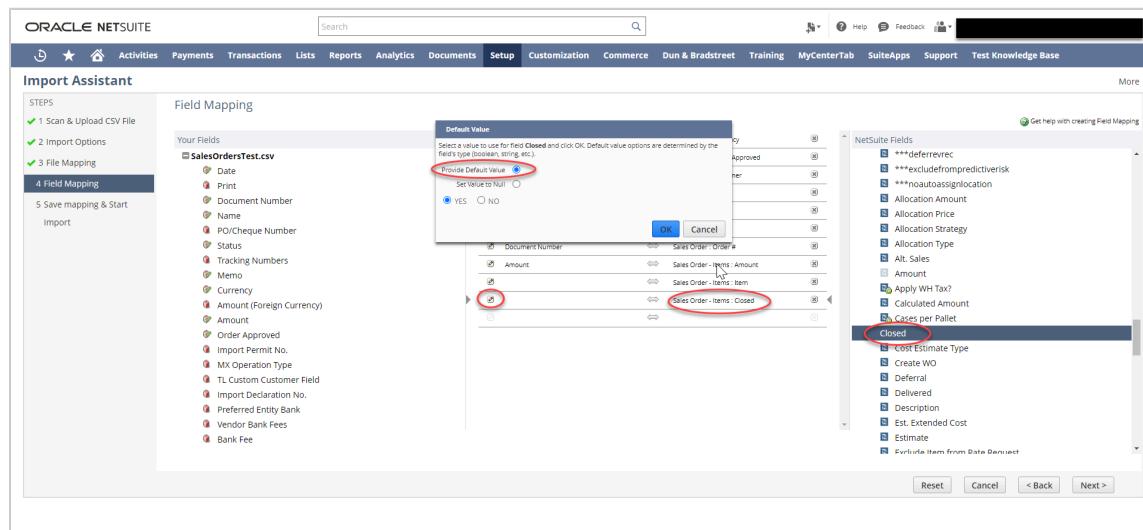
This Closed field is available in the Items sublist on the Import Assistant Field Mapping page. You need to include it in your sales order import mapping. You can either include this field in the CSV file with a value of TRUE, or set a default value for this field on the Field Mapping page. To set this default, after adding the field to the mapping, click its edit icon and select the Yes option button. For more information, see [Assign Default Values during Field Mapping](#).

You should only map the Closed field for sales order line items in imports that are updates. This field is not writable for newly created sales orders. If you attempt to set Closed field values in records being added, the import ignores these values or returns an error. Closed field values are only written successfully for imports that are updates.



Warning: To avoid issues with Sales Orders containing drop ship or special order items that require multiple Purchase Orders, set the Sales Order to Closed, after the creation of the Purchase Orders.

The creation of the Purchase Orders will fail, if you have already set the Sales Order to Closed.



Importing Currency Values for Sales Orders

When the Multiple Currencies feature is enabled, the import of Currency field values is supported for newly created sales orders. The Currency value for a sales order must be one of the currencies

defined for the transaction's customer, on the Customer Currencies sublist. See the help topics [Currency Management](#) and [Setting Multiple Transaction Currencies for Customers](#).

If the Multiple Currencies feature is not enabled, the Currency field value for a sales order is not editable.

Charging Custom Credit Cards for Imported Sales Orders

By default, imports of Sales Orders records do not cause charges to customer credit cards. If your NetSuite account has integrated credit card processing set up, you have the option of setting a Sales Orders import to create charges to customer credit cards.

To set up a Sales Orders import to charge customer credit cards:

1. On the Field Mapping page for a Sales Orders import, double-click the Get Authorization field to display it in the center pane.
2. Click the edit icon and set the default value for the field to Yes.

If you do not map the Get Authorization field for a Cash Sales import, its value remains No, and no credit card charges occur.

Using Import Assistant for Sales Orders Mass Update

You can perform a mass update of existing Sales Order data by creating a Transaction saved search with a filter of type Sales Order. You change data externally, then use the Import Assistant to import modified data. For more information, see [Creating Transaction Saved Searches for Reimport](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type, you choose the import character encoding. For more information, see [Select a Record Type for Import, Choose Import Character Encoding](#).

Sales Order Import Multi-File Example

The sales order template that you choose in the Custom Form field on the Advanced menu determines which fields are available on the Mapping page.

Sales Order

External ID	Customer	Date	Status	Sales Order: Location
SORD-003-10009	Acme Landscaping	02/22/2015	Pending Approval	San Mateo
SORD-003-20384	Jerry's Catering	03/21/2015	Pending Fulfillment	Chicago
SORD-003-20384	Jerry's Catering	03/21/2015	Pending Fulfillment	Chicago

Mandatory fields:

- External ID
- Customer — The customer must exist in the account. Use the internal ID.
- Date
- Status

The location must exist in the account.

Sales Order Items

Sales Order Items: External ID	Sales Order Items: Item	Sales Order Items: Quantity	Sales Order Items: Price Level	Sales Order Items: Amount
SORD-003-20384	Printer	33	Base Price	3300
SORD-003-20384	Scanner	85	Base Price	6375
SORD-003-10009	Keyboard	42	Base Price	2730

Mandatory field: line ID or item. Item must exist in the account.

Sales Order — Shipping Address

Sales Order - Shipping Address: External ID	Sales Order - Shipping Address: Country	Sales Order - Shipping Address: Addressee	Sales Order - Shipping Address: Address 1	Sales Order - Shipping Address: Address 2	Sales Order - Shipping Address: City	Sales Order - Shipping Address: State	Sales Order - Shipping Address: Zip
SORD-003-20384	US	Sandra Windham	123 Elm Street		San Francisco	CA	98765
SORD-003-20384	Canada	Jerry Diner	456 Oak Drive	#829	Toronto	ON	N3V 2I3
SORD-003-10009	Czech Republic	Martin Dravi	932 Barva		Brno		6574

Mandatory field: Country.

Statistical Journal Entry Import

The statistical journal entry record lets you increase or reduce the balance of a statistical account.

This import is available when the Statistical Accounts feature is enabled at Setup > Company > Enable Features, on the Accounting subtab. Also, to successfully import statistical journal entry records, you must have already created at least one statistical account.

In the user interface, you access this record at Transactions > Financial > Make Statistical Journal Entries. For help working with this record in the user interface, see the help topic [Making Statistical Journal Entries](#).

For more details on importing statistical journal entry records, see the following:

- [Statistical Journal Entry Body and Sublist Fields](#)
- [Statistical Journal Entry CSV File Examples](#)

Statistical Journal Entry Body and Sublist Fields

When you create a statistical journal entry, you must define certain body fields, and you must create at least one sublist line.

The required body fields are described in the following table.

Field	Description
Unit of Measure Type	This field must reference an existing field listed at Lists > Accounting > Units of Measure. Later, when you populate the sublist, the account associated with each line must be of this unit type. This field cannot be updated after the statistical journal entry record has been created.
Subsidiary (OneWorld only)	This field must reference an existing subsidiary listed at Company > Setup > Subsidiaries. Later, when you populate the sublist, each account you choose must be a valid account for this subsidiary.

Field	Description
	This field cannot be updated after the statistical journal entry record has been created. However, you can update this field through the user interface. To update the field, delete the lines from the sublist, select a new subsidiary, add new lines, and then save the modified record.

i Note: As of 2015.2, you can also map a Memo field for the body of statistical journal entry. This field is in addition to the Memo field available in the Lines sublist.

Every statistical journal entry record must have at least one sublist line. Each line must include values for the fields described in the following table.

Field	Description
Account	This field must reference an existing statistical account listed at Lists > Accounting > Accounts. The account you choose must be valid for the Subsidiary body field value, and it must use the same unit of measure specified in the Unit of Measure Type body field.
Amount	This field takes a double value that represents the adjustment you want to make to the account. Entering a positive amount increases the value of the account. Entering a negative amount decreases the value.

For more details about fields that can be mapped, refer to the SOAP Schema Browser's [statistical journal entry](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Statistical Journal Entry CSV File Examples

The following table shows how you might structure a file for importing statistical journal entries.

External ID	Subsidiary	Unit of Measure Type	Statistical Journal Entry Line: Account	Statistical Journal Entry Line: Amount	Statistical Journal Entry Line: Memo
101	Parent Company	Floor Space	1002 Conference Room Square Footage	500	New board room
102	Parent Company	Floor Space	1002 Conference Room Square Footage	2000	New meeting rooms
103	Canada	Head Count	1004 Development Staff	4	Additional infrastructure developers

Transfer Order Import

The transfer order transaction is used to move inventory between locations. The transfer order record is available when the Multi-Location Inventory (MLI) feature is enabled on the Items & Inventory subtab at Setup > Company > Setup Tasks > Enable Features.

In the user interface, you can access the transfer order record at Transactions > Inventory > Enter Transfer Orders. For information about working with this record in the user interface, see the help topics [Transferring Inventory](#) and [Inventory Transfer Orders](#).

Usage Notes

Review the following guidelines for transfer order imports.

The following accounting preferences, available at Setup > Accounting > Preferences > Accounting Preferences, on the Order Management subtab, apply to transfer orders:

- Default Transfer Order Status indicates whether transfer orders require approval by default. Pending Approval means that by default the status of someone with permission must approve the order before it is processed. Pending Fulfillment means that by default transfer orders are sent directly to the fulfillment queue without requiring further approval. If you select this status, you must provide a value for From Location in your CSV file.
- Use Item Cost as Transfer Cost affects how the Transfer Price from each transfer order is used on the related item receipt transaction. When this option is enabled, the transfer price is used as a declared shipping value for reference only, such as for insurance or international shipping, and the item cost from the item record is used on the item receipt. Also, when this option is enabled and different items are fulfilled in different item fulfillments, you must receive the items separately. In this case, a separate item receipt is created for each item fulfillment. When this option is disabled, the transfer price on the transfer order is used as the item cost on the item receipt. In this case, both the item fulfillment and the item receipt resulting from the transfer order have G/L impact. Also, when this option is disabled and different items are fulfilled in different item fulfillments, you can receive all items in the same item receipt.

Supported Transfer Order Sublist Data Imports

The transfer order import supports the import of the following sublist data.

Sublist	Notes
Accounting Books	Accounting Books is a multicolumn sublist. For more information, see Importing Sublist Data in a Single File .
Items	—

Supported Transfer Order Subrecord Data Imports

The transfer order import supports the import of the following subrecord data.

Subrecord	Notes
Items – Inventory Detail	Available when the Advanced Bin / Numbered Inventory Management Feature is enabled on the Items & Inventory subtab at Setup > Company > Setup Tasks > Enable Features.
Shipping Address	—

Transfer Order Import Example

The following table provides an example structure for a file to import transfer order data.

External ID	Date	Subsidiary	To Location	Status	Incoterm	Item	Quantity
TO9876	5/31/2018	Parent Company	US – East Coast	Pending Approval	DAP	Travel Kit – Small	1000
TO9876	—	—	—	—	—	Travel Medical Kit	550
TO9876	—	—	—	—	—	Lightweight Sleeping Bag	100
TO9877	5/31/2018	Parent Company	US – West Coast	Pending Fulfillment	DAP	Travel Kit – Large	650
TO9877	—	—	—	—	—	Travel Kit – Medium	150

For details about fields that can be mapped in the transfer order record, see the SOAP Schema Browser's [transfer order](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Vendor Bill Import

Vendor Bill transactions allow you to track paid and unpaid vendor bills, as well as pricing for particular products you buy. You enter bills when they arrive, and then pay them when they are due. NetSuite can remind you when those bill payments are due.

 **Note:** To maintain performance, 5000 lines per transaction is the maximum recommended limit for transactions submitted through CSV import.

For more details about vendor bills in NetSuite, see the help topic [Vendor Bills](#).

- Vendor bill imports can include line-level items and expenses data. For imports with items data, but no expenses data, you can choose either the one file to upload or the multiple files to upload option. For imports with expenses data, it is best to choose the multiple files to upload option. For more information, see [Using Multiple Files for Vendor Bill Sublist Data](#).
- You must map external ID or internal ID to serve as a unique ID per record. The unique ID should be included in every line of the CSV files. For imports of new data, use external ID. On the Import Assistant's Field Mapping page, you should map the external ID field from your CSV files to the NetSuite Reference No. field, which serves as a transaction ID for Vendor Bill records. This mapping allows external IDs to be displayed on Vendor Bill forms in the NetSuite user interface.
- Each imported Vendor Bill record should include a reference to a NetSuite Vendor record, mapped to the Vendor Bill's Vendor field. This reference must be a unique identifier; you should use internal ID or external ID, rather than a name reference. If you do not map a reference number field, reference number values are generated automatically.
- If the Use Account Numbers preference has been enabled at Setup > Accounting > Accounting Preferences, imported values for the Account field should include both account number and name, for example: 11000 Accounts Payable. If this preference is not enabled, values should be account name only, for example: Accounts Payable.
- If the Multiple Currencies feature is enabled, you must map the Exchange Rate field. If your CSV file does not include values for this field, you can set it to a default value. Currency values are taken from referenced vendors. See the help topic [Currency Management](#).
- If the vendor bills you are importing contain values for the Amount, Tax Amount, and Gross Amount fields, Gross Amount must be equal to the sum of the Amount and Tax Amount values.

- If you are using a customized vendor bill form, please note that the Gross Amount field should never precede the Amount field on such a form. Otherwise it may affect the import of vendor bills CSV files.
- Note that vendor bills are typically used to bring in open payables, not to link to open purchase orders.

For details about fields that can be mapped in the vendor bill record, see the SOAP Schema Browser's [vendor bill](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Review the following guidelines for Vendor Bill imports:

- [Supported Vendor Bill Sublist Data Imports](#)
- [Using Multiple Files for Vendor Bill Sublist Data](#)
- [Supported Vendor Bill Subrecord Data Imports](#)
- [Linking Purchase Orders to Vendor Bills](#)
- [Importing Vendor Bills with Billed-Back Items and Expenses](#)
- [Importing Vendor Bills when Advanced Taxes is Enabled](#)
- [Importing Vendor Bills when Amortization is Enabled](#)
- [Sample Vendor Bill Single CSV File Format](#)
- [Sample Vendor Bill Multiple CSV File Format](#)
- [Using Import Assistant for Vendor Bills Mass Update](#)

Supported Vendor Bill Sublist Data Imports

The Vendor Bill import supports the import of the following sublist data:

Sublist	Notes
Items	You must import at least one line item for all new records, and you must map required fields for this sublist on the Field Mapping page. See Required Items Sublist Fields for Transactions Imports . Selectively updatable based on Line/Order Line or Item key field. See Line Item Updates on Transactions Imports .
Expenses	Expenses data must be in a separate CSV file. Selectively updatable based on Line/Order Line key field.
Accounting Book Detail	Available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. Selectively updateable based on Accounting Book key field.

If you use classes, departments, locations, or custom segments, you can set these values either for an entire vendor bill, or per individual item/expense lines.

If the Item Options feature is enabled in your account, you can import values for custom transaction item options along with Items sublist data. Transaction item options must first be set up at Customization > Lists, Records, & Fields > Transaction Item Options > New, with one of the following Applies To settings: Purchase, All Items. For details, see [Importing Transaction Item Options](#).

For imports that update existing Vendor Bill records, handling of sublist data updates depends upon the setting for the [Overwrite Sublists](#) advanced option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).



Important: For non-keyed sublists, you shouldn't update main transaction fields and sublist fields during the same import job.

Using Multiple Files for Vendor Bill Sublist Data

For vendor bill imports that include items data but no expenses data, you can choose the one file to upload option, and include all data in a single CSV file, or you can choose the multiple files to upload option, and include mainline data in one file and items data in another file.

For imports that include expenses data, it is best to use the multiple files to upload option, with one file for mainline data, and one for expenses data. If you are also importing items data, it should be in a third file.

For the multiple files option, be sure to include the external ID or key field values in the sublist files as well as in the main file.

Vendor bill CSV file formats are similar to those for purchase order CSV files. For examples, see: [Sample Purchase Order Single CSV File Format](#), [Sample Purchase Order Multiple CSV File Format](#).

Supported Vendor Bill Subrecord Data Imports

The Vendor Bill import supports the import of the following subrecord data:

Subrecord	Notes
Items — Inventory Detail	When Advanced Bin/Numbered Inventory Management feature enabled.
Items — Landed Cost	When Landed Cost feature enabled.

Linking Purchase Orders to Vendor Bills

The 2017.1 endpoint supports linking purchase orders to vendor bills in CSV import. This way you can populate a vendor bill with the items and expenses from one or more purchase orders.

Use the Purchase Order field on the field mapping page of the import assistant to map a purchase order to your vendor bill record. You can refer to purchase orders by name, external ID, or internal ID, and you can specify multiple purchase orders for the same vendor bill.

The Purchase Order field is a multi-select field. To specify multiple values, use multi-select value delimiters. For information about configuring delimiters, see [Custom Multi-Select Value Delimiter](#).



Important: If you map values to the Purchase Order field, you cannot map values for the Expenses and Items sublists. If you try to map values both to the Purchase Order field and the Expenses or Items sublists, the following error message is displayed: "Please specify either purchase order list or item/expense list in the request but not both."



Note: Partial billing of purchase orders is not supported.

Importing Vendor Bills with Billed-Back Items and Expenses

If you are importing vendor bills with items or expenses that need to be billed back to customers, you can set the value of the Billable field to "TRUE" and include a value for the Customer field, for each of these item or expense lines.

Importing Vendor Bills when Advanced Taxes is Enabled

If the Advanced Taxes feature is enabled, you are able to include tax codes and tax amounts in imported vendor bill items and expenses data. Tax codes should be set up in NetSuite before the import. Then you can include values for the Tax Code and Tax Amount fields for purchase order item and expense lines as needed. Note that other tax-related values for line items are calculated by the system.

The Advanced Taxes feature is required for NetSuite OneWorld accounts. For information about working with taxes in OneWorld, see the help topic [Nexus and Taxes in OneWorld](#). For general information about setting up tax codes, see the help topic [Managing Tax Codes](#).

Importing Vendor Bills when Amortization is Enabled

If the Amortization feature is enabled, you are able to include amortization schedule, amortization start date, and amortization end date values in imported vendor bill items and expenses data. These values define how costs are allocated across a range of time and recognized in increments. Amortization schedules should be set up in NetSuite before the import. For information about setting up amortization in NetSuite, see the help topic [Expense Amortization](#).

Sample Vendor Bill Single CSV File Format

The following table illustrates example column headers and data snippets in a single file upload of vendor bills. This file includes data for vendor bill header fields and item lines. Note that in this case, the same vendor bill number can be repeated in multiple rows.

External ID	Vendor	Date	Item	Quantity	Location
VB1003	American Computers	4/21/2015	Printer Accessories: Printer Cables	10	West Coast
VB1003	—	—	Printer Accessories: Printer Ink Starter Pack	15	West Coast
VB1004	Widget Works	4/20/2015	Office Supplies: 12-Pack Ball Point Pens	25	West Coast

Sample Vendor Bill Multiple CSV File Format

The following tables illustrate example column headers and data snippets in a multiple file upload of vendor bills, including items and expenses data. Note that External ID is the key column that would be specified on the Import Assistant File Mapping page.

Primary File:

Each row of the primary file must include a unique identifier, in this case the external ID.

External ID	Vendor	Date
VB1003	American Computers	4/21/2015
VB1004	Widget Works	4/20/2015

Linked File - Items:

The items file can include multiple rows with the same vendor bill external ID.

External ID	Item	Quantity	Location
VB1003	Printer Accessories: Printer Cables	10	West Coast
VB1003	Printer Accessories: Printer Ink Starter Pack	15	West Coast
VB1004	Office Supplies: 12-Pack Ball Point Pens	25	West Coast

Linked File - Expenses:

The expenses file can include multiple rows with the same vendor bill external ID.

External ID	Account	Amount	Memo	Customer	Billable
VB1003	6220 Repairs & Maintenance	35	installation	107 Fabre Art Gallery	Yes
VB1004	6150 Office Expense	5	misc.	—	No

Using Import Assistant for Vendor Bills Mass Update

You can perform a mass update of existing Vendor Bill data by creating a Transaction saved search with a filter of Type is Vendor Bill, changing data externally, then using the Import Assistant to import modified data, using the Update data handling option. For more information, see [Creating Transaction Saved Searches for Reimport](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you [Select a Record Type for Import](#), [Choose Import Character Encoding](#).

Vendor Credit Import

Vendor Credit transactions create credits from vendors that can be applied to payables. For example, a vendor credit transaction may occur when items are returned to a vendor or when a discount is negotiated with a vendor.



Note: To maintain performance, 5000 lines per transaction is the maximum recommended limit for transactions submitted through CSV import.

For details about vendor credits in NetSuite, see the help topic [Vendor Credits](#).

- Vendor credit imports can include line-level items, expenses, and apply data. For imports with items data, but no expenses or apply data, you can choose either the one file to upload or the multiple files to upload option. For imports with expenses or apply data, you **must** choose the multiple files to upload option. For more information, see [Using Multiple Files for Vendor Credit Sublist Data](#).
- You must map external ID or internal ID to serve as a unique ID per record. The unique ID should be included in every line of the CSV files. For imports of new data, use external ID. On the Import Assistant's Field Mapping page, you should map the external ID field from your CSV files to the NetSuite Reference No. field, which serves as a transaction ID for Vendor Credit records. This mapping allows external IDs to be displayed on Vendor Credit forms in the NetSuite user interface.
- Each imported Vendor Credit record should include a reference to a NetSuite Vendor record, mapped to the Vendor Credit's Vendor field. This reference must be a unique identifier; you should use internal

ID or external ID, rather than a name reference. If you do not map a reference number field, reference number values are generated automatically.

- If the Use Account Numbers preference has been enabled at Setup > Accounting > Accounting Preferences, imported values for the Account field should include both account number and name, for example: 11000 Accounts Payable. If this preference is not enabled, values should be account name only, for example: Accounts Payable.
- If the Multiple Currencies feature is enabled, you must map the Exchange Rate field. If your CSV file does not include values for this field, you can set it to a default value. Currency values are taken from referenced vendors. See the help topic [Currency Management](#).

For details about fields that can be mapped in the vendor credit record, see the SOAP Schema Browser's [vendor credit](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Review the following guidelines for vendor credit imports:

- [Supported Vendor Credit Sublist Data Imports](#)
- [Using Multiple Files for Vendor Credit Sublist Data](#)
- [Supported Vendor Credit Subrecord Data Imports](#)
- [Importing Vendor Credits with Billed-Back Items and Expenses](#)
- [Importing Vendor Credits when Amortization is Enabled](#)
- [Using Import Assistant for Vendor Credits Mass Update](#)

Supported Vendor Credit Sublist Data Imports

The Vendor Credit import supports the import of the following sublist data:

Sublist	Notes
Items	You must import at least one line item for all new records, and you must map required fields for this sublist on the Field Mapping page. See Required Items Sublist Fields for Transactions Imports . Selectively updatable based on Line/Order Line or Item key field. See Line Item Updates on Transactions Imports .
Expenses	Expenses data must be in a separate CSV file. Selectively updatable based on Line/Order Line key field.
Apply	Apply data must be in a separate CSV file. Selectively updatable based on Apply or Line key field.
Accounting Book Details	Available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. Selectively updateable based on Accounting Book key field.

If you use classifications, you can set class, department, and/or location values per individual item/expense lines.

If the Item Options feature is enabled in your account, you can import values for custom transaction item options along with Items sublist data. Transaction item options must first be set up at Customization >

Lists, Records, & Fields > Transaction Item Options > New, with one of the following Applies To settings: Purchase, All Items. For details, see [Importing Transaction Item Options](#).

For imports that update existing Vendor Credit records, handling of sublist data updates depends upon the setting for the [Overwrite Sublists](#) advanced option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).

Using Multiple Files for Vendor Credit Sublist Data

For vendor bill imports that include items data but no expenses and/or apply data, you can choose the one file to upload option, and include all data in a single CSV file, or you can choose the multiple files to upload option, and include mainline data in one file and items data in another file.

For imports that include expenses and/or apply data, you **must** use the multiple files to upload option, with one file for mainline data, one for expenses data, and one for apply data, as needed. If you are also importing items data, it should be in its own separate file as well.

For the multiple files option, be sure to include the external ID or key field values in the sublist files as well as in the main file.

Supported Vendor Credit Subrecord Data Imports

The Vendor Credit import supports the import of the following subrecord data:

Subrecord	Notes
Items — Inventory Detail	when Advanced Bin/Numbered Inventory Management feature enabled

Importing Vendor Credits with Billed-Back Items and Expenses

If you are importing vendor credits with items or expenses that need to be billed back to customers, you can set the value of the Billable field to "TRUE" and include a value for the Customer field, for each of these item or expense lines.

Importing Vendor Credits when Amortization is Enabled

If the Amortization feature is enabled, you are able to include amortization schedule, amortization start date, and amortization end date values in imported vendor credit items and expenses data. These values define how costs are allocated across a range of time and recognized in increments. Amortization schedules should be set up in NetSuite before the import. For information about setting up amortization in NetSuite, see the help topic [Expense Amortization](#).

Using Import Assistant for Vendor Credits Mass Update

You can perform a mass update of existing Vendor Credit data by creating a Transaction saved search with a filter of Type is Vendor Credit, changing data externally, then using the Import Assistant to import modified data, using the Update data handling option. For more information, see [Creating Transaction Saved Searches for Reimport](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Vendor Payment Import

NetSuite Vendor Payment transactions record payment of vendor bills when they are due. These transactions post expenses to the general ledger, and affect both accounts payable and the bank account used for the payment.

 **Note:** To maintain performance, 5000 lines per transaction is the maximum recommended limit for transactions submitted through CSV import.

For more details about vendor payments in NetSuite, see the help topic [Vendor Payments](#).

Usage Notes

Consider the following usage notes when importing vendor payment data.

- You can import Vendor Payment transaction data in a single CSV file, or in multiple files.
- You must map external ID or internal ID to serve as a unique ID per record. The unique ID should be included in every line of the CSV files. For imports of new data, use external ID.
- Each imported Vendor Payment record should include a reference to a NetSuite Vendor record, mapped to the Vendor Payment's Payee field. This reference should match exactly the Vendor ID field value in the Vendor Record.
- You must map a CSV file field to the NetSuite Account field to represent the accounts from which payments are made. You have the option of mapping to the A/P Account field to represent the accounts payable accounts impacted by payments. If the Use Account Numbers preference has been enabled at Setup > Accounting > Accounting Preferences, imported values for the Account and A/P Account fields should include both account number and name, for example: 11000 Accounts Payable. If this preference is not enabled, values should be account name only, for example: Accounts Payable.
- All vendor payments must be applied to vendor bills in full. You cannot import unapplied amounts. You cannot import a total amount value for a payment; this amount is calculated by adding all of the values for the Payment field in the Bills sublist data.

If you are importing both vendor payments and vendor bills, and you want to apply imported payments to imported bills, you need to import bills first.

- If the Multiple Currencies feature is enabled, you must map the Exchange Rate field. If your CSV file does not include values for this field, you can set it to a default value. Currency values are taken from referenced vendors. See the help topic [Currency Management](#).
- To import data for the In-Transit, Available Balance, Approval Status, and Next Approver fields, you must enable the following features and set the following preferences:
 - Enable the In-Transit Payments feature at Setup > Company > Setup Tasks > Enable Features, on the Accounting subtab.
 - Check Vendor Bills and Vendor Payments at Setup > Accounting > Preferences > Accounting Preferences, on the Approval Routing Subtab.
 - Select a Vendor In-Transit Payment Account at Setup > Accounting > Preferences > Accounting Preferences, on the General subtab, under Accounts Payable. Also check the Use In-Transit Vendor Payments by Default box.

For details about fields that can be mapped in the vendor payment record, see the SOAP Schema Browser's [vendor payment](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Review the following guidelines for vendor payment imports:

- Supported Vendor Payment Sublist Data Imports
- Using Import Assistant for Vendor Payments Mass Update

Supported Vendor Payment Sublist Data Imports

The Vendor Payment import supports the import of Bills sublist data. Each line in this sublist represents a vendor bill to which the payment is applied. The sum of Payment field values for sublist records represents the total amount of the payment.

In this sublist, the required Bill key field holds the transaction IDs for vendor bills to which payments are applied. An additional, optional Line key field holds the line numbers for the vendor bill lines to which payments are applied.



Note: If you use only the Bill key, the following error may be returned to indicate that a unique reference was not found, "Ambiguous sublist reference; multiple matches exist for key value <>".

An import can add new vendor bills or vendor bill lines to which a payment is applied, change the amounts applied to existing vendor bills or vendor bill lines, or remove vendor bills or vendor bill lines.

When the [Overwrite Sublists](#) advanced option is not enabled (which is the default), CSV file sublist data selectively updates existing vendor bills data. When this option is enabled, CSV file sublist data completely replaces existing vendor bills data. For example:

- If the existing Vendor Payment Bills sublist data is:
Vendor Bill A: \$100
Vendor Bill B: \$200
- And CSV file sublist data is:
Vendor Bill A: \$120
Vendor Bill C: \$180
- When Overwrite Sublists=F, post update sublist data is:
Vendor Bill A: \$120
Vendor Bill B: \$200
Vendor Bill C: \$180
- When Overwrite Sublists=T, post update sublist data is:
Vendor Bill A: \$120
Vendor Bill C: \$180

The Vendor Payment Import also supports the import of Accounting Book Detail sublist data. Accounting Book Detail sublist data is available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. This sublist is selectively updateable based on the Accounting Book key field.

Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).

Using Import Assistant for Vendor Payments Mass Update

You can perform a mass update of existing Vendor Payment main fields by creating a Transaction saved search with a filter of Type is Vendor Payment, changing data externally, then using the Import Assistant to import modified data. For more information, see [Creating Transaction Saved Searches for Reimport](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Vendor Prepayment Import

A Vendor Prepayment is a posting transaction that impacts the general ledger without offsetting the Accounts Payable account. When the vendor prepayment is applied, the Accounts Payable account is offset. The Vendor Prepayments feature records and tracks payments to vendors before they accept a purchase order for a good or service. You can apply these prepayment amounts against open bills for the vendor.

 **Note:** To maintain performance, 5000 lines per transaction is the maximum recommended limit for transactions submitted through CSV import.

For more information on Vendor Prepayments, see the help topic [Vendor Prepayments](#).

Usage Notes

Consider the following usage notes when importing vendor prepayment data.

 **Note:** Vendor Prepayment imports are not available unless you enable the Vendor Prepayments feature in your account. See, [Vendor Prepayments Setup](#).

- You must map one of the following NetSuite fields to a column in your CSV file to serve a unique identifier: External ID, Internal ID, or a document number field such as Order # or Invoice #.
- Each imported Vendor Prepayment record should include a reference to a NetSuite Vendor record, mapped to the Vendor Prepayment: Payee field. This reference should match exactly the Vendor ID field value in the Vendor Record.
- You must map a CSV file field to the NetSuite Account field to represent the accounts from which prepayments are made. You have the option of mapping to the A/P Account field to represent the accounts payable accounts impacted by prepayments. If the Use Account Numbers preference has been enabled at Setup > Accounting > Accounting Preferences, imported values for the Account and A/P Account fields should include both account number and name, for example: 11000 Accounts Payable. If this preference is not enabled, values should contain account names only, for example: Accounts Payable.
- Each imported Vendor Prepayment record should specify payment amount, mapped to the Vendor Prepayment: Payment Amount field.
- The Vendor Prepayment: Date field is required, but is set to the current date if not specified.

For details about fields that can be mapped in the vendor prepayment record, see the SOAP Schema Browser's [vendor prepayment](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Vendor Prepayment Import Example

The following table provides an example showing how you might structure a file for importing vendor prepayment data.

Each row must include a unique identifier in the case of this example an external ID.

External ID	Payee	Account	Payment Amount
VPP007	Acme Medical Supply	10000 Bank of the West-checking	368
VPP012	Welch Allyn Medical Products	27850 Corporate MasterCard	712

Supported Vendor Prepayment Sublist Data Imports

Vendor Prepayment Import supports the import of Accounting Books sublist data. Accounting Books sublist data is available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. This sublist is selectively updateable based on the Secondary Book key field.

Using Import Assistant for Vendor Prepayments Mass Update

You can perform a mass update of existing Vendor Prepayment data by creating a Transaction saved search with a filter of Type is Vendor Prepayment, changing data externally, then using the Import Assistant to import modified data, using the Update data handling option. For more information, see [Creating Transaction Saved Searches for Reimport](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

Vendor Return Authorization Import

A vendor return authorization is a non-posting transaction that tracks a return to a vendor, including the items to be returned, their quantities, the approval status, the shipment status, and the amount refunded or credited from the vendor. The vendor return process includes four steps: creating a vendor return authorization record, approving or canceling the authorization, shipping items authorized to be returned, and crediting an authorized vendor return.

Note: To maintain performance, 5000 lines per transaction is the maximum recommended limit for transactions submitted through CSV import.

For details about vendor return authorizations in NetSuite, see the help topic [Vendor Returns](#).

Note: Vendor Return Authorization imports are not available unless the Vendor Return Authorizations feature is enabled in your account. To enable this feature, go to Setup > Company > Enable Features and on the Transactions tab, check the Vendor Return Authorizations box.

- Vendor return authorization imports can include line-level items and expenses data. For imports with items data, but no expenses data, you can choose either the one file to upload or the multiple files to upload option. For imports with expenses data, you **must** choose the multiple files to upload option. For more information, see [Using Multiple Files for Vendor Return Authorization Sublist Data](#).
- You must map external ID or internal ID to serve as a unique ID per record. The unique ID should be included in every line of the CSV files. For imports of new data, use external ID. On the Import Assistant's Field Mapping page, you should map the external ID field from your CSV files to the NetSuite Reference No. field, which serves as a transaction ID for Vendor Return Authorization records. This mapping allows external IDs to be displayed on Vendor Return Authorization forms in the NetSuite user interface.
- Each imported Vendor Return Authorization record should include a reference to a NetSuite Vendor record, mapped to the Vendor Return Authorization's Vendor field. This reference must be a unique identifier; you should use internal ID or external ID, rather than a name reference. If you do not map a reference number field, reference number values are generated automatically.
- If the Use Account Numbers preference has been enabled at Setup > Accounting > Accounting Preferences, imported values for the Account field should include both account number and name, for example: 11000 Accounts Payable. If this preference is not enabled, values should be account name only, for example: Accounts Payable.

- If the Multiple Currencies feature is enabled, you must map the Exchange Rate field. If your CSV file does not include values for this field, you can set it to a default value. Currency values are taken from referenced vendors. See the help topic [Currency Management](#).

For details about fields that can be mapped in the Vendor Return Authorization record, see the SOAP Schema Browser's [vendor return authorization](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

Review the following guidelines for Vendor Return Authorization imports:

- [Supported Vendor Return Authorization Sublist Data Imports](#)
- [Using Multiple Files for Vendor Return Authorization Sublist Data](#)
- [Supported Vendor Return Authorization Subrecord Data Imports](#)
- [Importing Vendor Return Authorizations with Billed-Back Items and Expenses](#)
- [Importing Vendor Return Authorizations when Amortization is Enabled](#)
- [Using Import Assistant for Vendor Return Authorizations Mass Update](#)

Supported Vendor Return Authorization Sublist Data Imports

The Vendor Bill import supports the import of the following sublist data:

Sublist	Notes
Items	You must import at least one line item for all new records, and you must map required fields for this sublist on the Field Mapping page. See Required Items Sublist Fields for Transactions Imports . Selectively updatable based on Line/Order Line or Item key field. See Line Item Updates on Transactions Imports .
Expenses	Expenses data must be in a separate CSV file. Selectively updatable based on Line/Order Line key field.
Accounting Book Detail	Available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. Selectively updateable based on Accounting Book key field.

If you use classes, departments, or locations, you can set these values either for an entire vendor return authorization, or per individual item/expense lines.

If the Item Options feature is enabled in your account, you can import values for custom transaction item options along with Items sublist data. Transaction item options must first be set up at Customization > Lists, Records, & Fields > Transaction Item Options > New, with one of the following Applies To settings: Purchase, All Items. For details, see [Importing Transaction Item Options](#).

For imports that update existing Vendor Return Authorization records, handling of sublist data updates depends upon the setting for the [Overwrite Sublists](#) advanced option, and on whether the sublist is keyed. Complete deletion of sublist data currently is not supported. For more information, see [Sublist Data Import](#).

Using Multiple Files for Vendor Return Authorization Sublist Data

For vendor return authorization imports that include items data but no expenses data, you can choose the one file to upload option, and include all data in a single CSV file, or you can choose the multiple files to upload option, and include mainline data in one file and items data in another file.

For imports that include expenses data, you **must** use the multiple files to upload option, with one file for mainline data, and one for expenses data. If you are also importing items data, it should be in a third file.

For the multiple files option, be sure to include the external ID or key field values in the sublist files as well as in the main file.

Supported Vendor Return Authorization Subrecord Data Imports

The Vendor Return Authorization import supports the import of the following subrecord data:

Subrecord	Notes
Items — Inventory Detail	When Advanced Bin/Numbered Inventory Management feature enabled

Importing Vendor Return Authorizations with Billed-Back Items and Expenses

If you are importing vendor return authorizations with items or expenses that need to be billed back to customers, you can set the value of the Billable field to “TRUE” and include a value for the Customer field, for each of these item or expense lines.

Importing Vendor Return Authorizations when Amortization is Enabled

If the Amortization feature is enabled, you are able to include amortization schedule, amortization start date, and amortization end date values in imported vendor return authorization items and expenses data. These values define how costs are allocated across a range of time and recognized in increments. Amortization schedules should be set up in NetSuite before the import. For information about setting up amortization in NetSuite, see the help topic [Expense Amortization](#).

Using Import Assistant for Vendor Return Authorizations Mass Update

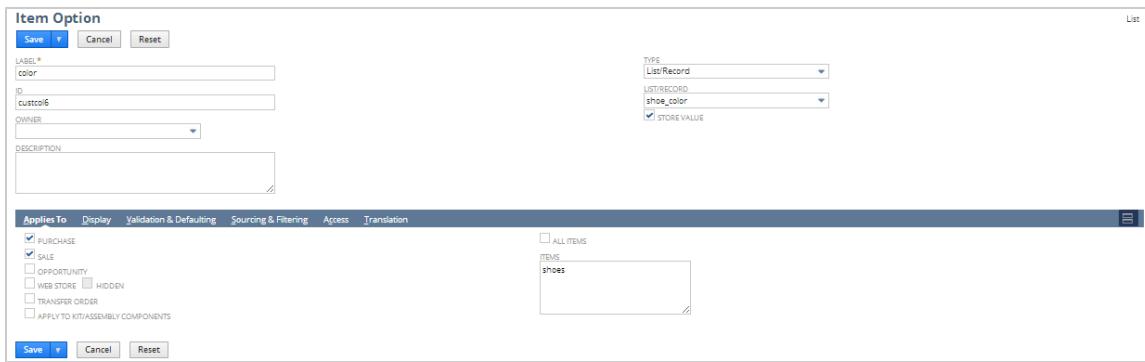
You can perform a mass update of existing Vendor Return Authorization data by creating a Transaction saved search with a filter of Type is Vendor Return Authorization, changing data externally, then using the Import Assistant to import modified data, using the Update data handling option. For more information, see [Creating Transaction Saved Searches for Reimport](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

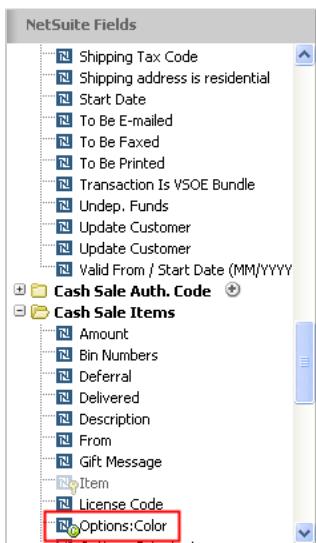
Importing Transaction Item Options

When the Item Options feature is enabled, transaction item options can be created and imported in your account. Transaction item options are custom fields that may be included in transaction line items to represent item-specific choices. When you import transaction records, you can import transaction item options along with Items sublist data.

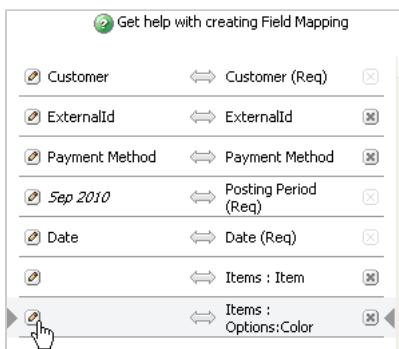
To be available for import, transaction item options must first be set up at Customization > Lists, Records, & Fields > Transaction Item Options > New. The setup of a transaction item option includes selecting the types of transactions to which the item option can be applied. See the help topic [Creating Custom Transaction Item Options](#).



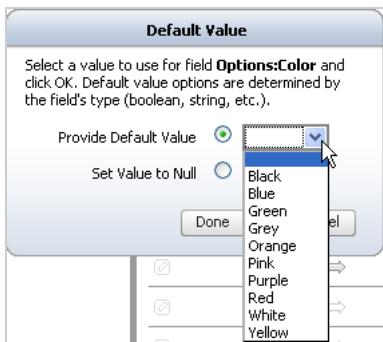
The Import Assistant Field Mapping page includes item options as a flat list under the Items sublist folder. Only the item options that have been set up to apply to the type of transaction being imported are included. Each item option is prefixed with the word "Options" and is marked as a custom field.



To import values for a transaction item option, you must map it to a column in the CSV file.



You can click the edit icon to select a default or null value for an item option.



Creating Transaction Saved Searches for Reimport

This process allows you to mass update transaction record types by exporting data into an external application for updates and then reimporting them into NetSuite with the Import Assistant.

The most straightforward method to make NetSuite data available to other applications is to create a saved search and export the saved search results as a CSV or XLS file.

For general information about NetSuite saved searches, see the help topic [Saved Searches](#).

Because transaction ID values are not unique, you should use internal ID or external ID as the unique identifier when reimporting transactions data. Be sure to include one or both of these fields as results columns for your saved search.

To create a transaction saved search for reimport:

1. Go to Transactions > Management > Saved Searches > New.
2. Select the Transaction search type.
3. On the Saved Search definition page, enter basic search information, such as title.
4. On the Criteria subtab, enter filters for your search data:
 - Specify a filter for the type of transaction. Select Type in the filter list, and set it to be the transaction you want.
 - For transactions that include line items, eliminate data that is not attached to item costs, including main line, taxes, and shipping costs, because this data can result in "Item Not Found" errors when you reimport. Specify filters like the following:
 - Select Main Line in the filter list, and set it to False. For more information about main line data, see the help topic [Main Line in Transaction Search Criteria](#).
 - Select Item in the filter list, and set it to "Type is any of Assembly/Bill of Materials, Description, Discount, Download Item, Gift Certificate, Inventory Item, Item Group, Kit/Package, Markup, Non-inventory Item, Other Charge, Payment, Service, Subtotal."
 - Your list may vary, depending on your available item types.
 - For more information about defining search filters, see the help topic [Advanced Search Criteria Filters](#).
5. On the Results subtab, enter the results fields that you want to include.
 - Make sure you include the field you want to use as a unique identifier, either internal ID or external ID, in the results.
 - Include all fields that you want to modify in the external application. For example, if you want to modify the quantities of line items, include the quantity field.
 - You can include joined item fields if you want to modify them. Scroll down in the Field list to Item Fields..., and select a field from the Item Field list.

- For more information about defining search results fields, see the help topic [Search Results Display Options](#).
6. Define any additional search options that you require.
For information about available options, see the help topic [Defining a Saved Search](#).
 7. Click Save & Run to run your saved search.
 - If the search results do not meet your needs, click the Edit this Search button to modify the definition.
 - If the search results are satisfactory, click Export - CSV or Export - Microsoft Excel.
You can then edit the data in the external application.

After editing the data in the external application, you can reimport the file using the CSV Import Assistant.

Website Import Type

For information about website imports, see the following:

- [Commerce Category Import](#)
- [CMS Page Import](#)
- [Site Category Import](#)

Commerce Category Import

The commerce category import lets you add or update the following information for commerce categories:

- Commerce Categories
- Customer segment assignments
- Subcategories
- Category item assignments
- Category tags
- Category translations

Commerce categories are used to create a hierarchical structure of items in your web store. The fields supported for commerce category CSV import reflect those on the Commerce Category Record at Commerce > Content Management > Catalog & Categories > Commerce Categories. After the import, the categories and items are displayed on your site and are available for management through Site Management Tools and also through the Commerce Category record in NetSuite.

You can use the fields referenced here to create CSV files for import. You can manually create the CSV files or export them from another system, including SiteBuilder Categories.

The import includes categories and related sublists. These include:

- [Commerce Category](#)
- [Commerce Category Customer Segment Assignment](#)
- [Commerce Category Items Sublist](#)
- [Commerce Category Subcategory Sublist](#)
- [Commerce Categories Tags Sublist](#)
- [Commerce Category Translation Sublist](#)

See the help topic [Commerce Categories](#) for more information on categories, subcategories, and item assignments.

External ID Best Practice

Each CSV file includes an External ID column. Use the external ID in your CSV files to link the rows in one file to the relevant row in another file. You should also use the external ID for columns that reference a subcategory. Even though you can use the category names in these columns, category names are not necessarily unique and it is best practice to use the External ID instead.



Note: Any category created with Site Management Tools or through the NetSuite UI are not assigned an external ID in the CSV file. After the export, you must manually enter an external ID for each record.

Updating Items in Commerce Categories

There are multiple ways to update the items or item sequence numbers in your commerce categories. Using a CSV import is normally the most efficient way to update your commerce categories. When using a CSV to update your items or item sequence numbers it is possible to overwrite existing data depending on the options used for the import.

To update items in Commerce Categories

1. Create a saved search of your existing commerce category items. For more information, see the help topic [Saved Searches](#).
2. Export the saved search as a CSV.
3. Update the CSV file with the new items and edit the list sequence numbers as needed.
4. Create a new CSV import.
5. Use the Import Assistant to import your updated CSV file. For more information, see [Importing CSV Files with the Import Assistant](#).

Commerce Category

The following table identifies the fields for Commerce Category record. Fields flagged with an * are required. Use the external ID to link the records in the primary CSV file to records in the subcategory and item sublist files.

Addition to Head	JavaScript, HTML, or other code to include in the <head> area of the commerce category page when it is rendered on the site.
Catalog*	Catalog to which the category is assigned. Specify the catalog name.
Description	Description of the category.
Display in Website	T if the category should display in the website or F if it should not display.
External ID*	The external ID is a required value. This serves as a unique ID key for the record. This can be user defined for a manually generated CSV import file. It can also be the unique key for the record when the data originated as an export from another system. This ID is used to establish the relationship between the CSV import files for subcategories and items.
Heading	The heading to display on the commerce category page.
Inactive	T if the category is Inactive or F if the category is active.
Meta Description	The description to populate the meta description HTML element for the page.
Meta Keywords	The keywords to populate the meta keywords HTML element for the page.

Name*	Name of the category.
Page Banner	Image file in the File Cabinet to use as the banner image for the category page. Specify the file name.
Page Title	The title of the page. This populates the HTML <title> element.
Primary Parent	The primary parent for this category. If the category has no parent, omit this value. If you specify a primary parent, that parent category must already exist or precede the record in the CSV file.
Sequence Number	Sequence number for the category. This is used for ordering the sequence of categories in SMT.
Sitemap Priority	<p>Value between 0.0 and 1.0 used for ranking the importance of pages on the site. If you leave this empty the priority is set to 0.5.</p> <p>The value you enter here populates the <priority></priority> element in an XML sitemap.</p>
Thumbnail Image	The image file in the File Cabinet to use as the thumbnail image for this category. Specify the file name.
URL Fragment*	The URL fragment to use for accessing the category page.

Subcategory assignments with no category attribute overrides can be created with the primary commerce category CSV file by specifying a value in the primary parent field. The following table is a sample of a CSV file that creates a root level category and multiple levels of subcategories.

External ID	Name	Catalog	URL Fragment	Primary Parent	...
10	Men's	default	mens	—	...
11	Men's Shirts	default	mensshirts	Men's	...
12	Men's Short Sleeve Shirts	default	mensshirts-ss	Men's Shirts	...
13	Men's Long Sleeve Shirts	default	mensshirts-ls	Men's Shirts	...

This import results in a root level category of **Men's** with a subcategory of **Men's Shirts**. The Men's Shirts subcategory has two subcategories, **Men's Short Sleeve Shirts** and **Men's Long Sleeve Shirts**.

To create subcategories with override attributes, use the subcategory CSV import file.

Commerce Category Subcategory Sublist

The commerce subcategory CSV import lets you add or update subcategories and override values for those categories. The following table identifies the fields for creating override values for subcategories. Use the External ID field in this file to link to the primary commerce category CSV file.

Addition to <Head> Override	JavaScript, HTML, or other code to include in the <head> area of the subcategory page.
Description Override	Description of the category.
Display in Web Site Override	T if the category should display in the website or F if it should not display.
External ID	Key column to link to records in Primary CSV file.
Heading Override	The heading to display on the commerce category page.
Meta Description Override	The description to populate the meta description HTML element for the page.

Meta Keywords Override	The keywords to populate the meta keywords HTML element for the page.
Name Override	Name of the category.
Page Banner Override	Image file in the File Cabinet to use as the banner image for the category page. Specify the file name.
Sitemap Priority Override	<p>Value between 0.0 and 1.0 used for ranking the importance of pages on the site. If you leave this empty the priority is set to 0.5.</p> <p>The value you enter here populates the <priority></priority> element in an XML sitemap.</p>
Subcategory	Name of the category.
Thumbnail Image Override	The image file in the File Cabinet to use as the thumbnail image for this category. Specify the file name.
Title Override	The title of the page. This populates the HTML <title> element.
URL Fragment Override	The URL fragment to use for accessing the category page.

The following table is a sample CSV file that sets override values for subcategories. The examples used here continue the sample primary category CSV file example.

External ID	Subcategory	Name Override	Title Override	...
11	Men's Shirts	Shirts	Shirts	...
12	Men's Short Sleeve Shirts	Short Sleeve	Short Sleeve	...
13	Men's Long Sleeve Shirts	Long Sleeve	Long Sleeve	...

Commerce Category Items Sublist

The following table identifies the fields for assigning items to Commerce Categories. Use the External ID field in this file to link to the primary category and subcategory files.

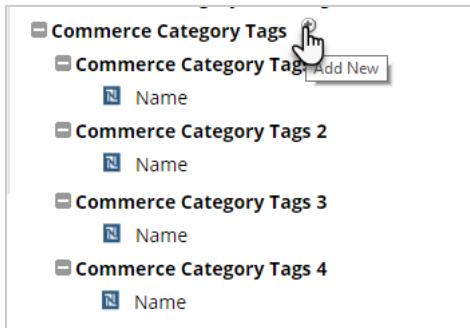
External ID	External ID of the category to which this item should be assigned.
Items	The item name.
Primary Category	T if the category is the primary category for the item or F if it is not the primary category.

Commerce Categories Tags Sublist

When you include tags in the CSV import for Commerce Categories, the CSV file must have a separate tag column for each tag. For example, if each record in the CSV file contains only one tag for each category, then you need only one tag column, but if one or more categories has multiple tags, then the file must include multiple tag columns. In the following sample CSV file you see four separate tag columns. Some records have multiple tags, with four tags being the most, and other records have only one tag

Name	...	Tag1	Tag2	Tag3	Tag4
Men's Pants	...	Men's Trousers	Men's Slacks	—	—
School Supplies	...	Back To School Sale	Teachers	Kids	Office
Backpacks	...	Satchel	—	—	—

By default, the NetSuite Fields mapping for Commerce Categories Tags includes only one column. You can add more tag columns to the import by clicking the Add New tag button. The following example illustrates four tag columns to accommodate four tag columns in the CSV file:



You can then map each tag column in the CSV file to a Commerce Category Tags column in the import.

Commerce Category Translation Sublist

Commerce categories supports the translation locale's supported by NetSuite. The following table lists the fields required for importing commerce category translations by CSV. Enter the values in the language specified by the value you enter in the Locale field.

External ID	The external ID for the category for these translation values.
Addition To	JavaScript, HTML, or other code to include in the <head> area of the commerce category page when it is rendered on the site.
Description	Description of the category.
Heading	The heading to display on the commerce category page for the specified language.
Locale	Specify the locale code for this translation subs sublist. See Locale Code Reference for valid codes.
Name	The name of the category.
Page Banner	Image file in the File Cabinet to use as the banner image for the category page. Specify the file name.
Page Title	The title of the page. This populates the HTML <title> element.
Thumbnail Image	The image file in the File Cabinet to use as the thumbnail image for this category. Specify the file name.

By default, the field mapping for translations includes column sets for only one language. You can click the + button to add another set of columns for additional languages. Your CSV file must include the translation values for different languages in different column sets. To help organize the import, consider prefixing the column names with the locale code as in the following example:

- es_ES_External-ID
- es_ES_Addition-To
- es_ES_Description
- es_ES_Heading
- es_ES_Locale
- es_ES_Name
- es_ES_Page-Banner

- es_ES_Page-Title
- es_ES_Thumbnail-Image
- fr_FR_External-ID
- fr_FR_Addition-To
- fr_FR_Description
- fr_FR_Heading
- fr_FR_Locale
- fr_FR_Name
- fr_FR_Page-Banner
- fr_FR_Page-Title
- es_ES_Thumbnail-Image

Locale Code Reference

When you import translations for commerce category you must specify the locale Code for the translation.

Locale Code	Language
af_ZA	Afrikaans
sq_AL	Albanian
ar	Arabic
hy_AM	Armenian
ms_MY	Bahasa Malai
bn_BD	Bengali
bs_BA	Bosnian
bg_BG	Bulgarian
zh_CN	Chinese (Simplified)
zh_TW	Chinese (Traditional)
hr_HR	Croatian
cs_CZ	Czech
da_DK	Danish
nl_NL	Dutch
en_AU	English (AU)
en_CA	English (CA)
en	English (International)
en_GB	English (UK)
et_EE	Estonian
tl_PH	Filipino

fi_FI	Finnish
fr_CA	French (Canada)
fr_FR	French (France)
de_DE	German
el_GR	Greek
gu_IN	Gujarati
he_IL	Hebrew
hi_IN	Hindi
hu_HU	Hungarian
is_IS	Icelandic
id_ID	Indonesian
it_IT	Italian
ja_JP	Japanese
kn_IN	Kannada
ko_KR	Korean
es_AR	Latin American Spanish
lv_LV	Latvian
lt_LT	Lithuanian
lb LU	Luxembourgish
mr_IN	Marathi
no_NO	Norwegian
fa_IR	Persian (Iran)
pl_PL	Polish
pt_BR	Portuguese (Brazil)
pt_PT	Portuguese (Portugal)
pa_IN	Punjabi
ro_RO	Romanian
ru_RU	Russian
sh_RS	Serbian (Cyrillic)
sr_RS	Serbian (Latin)
sk_SK	Slovak
sl_SI	Slovenian
es_ES	Spanish

sv_SE	Swedish
ta_IN	Tamil
te_IN	Telugu
th_TH	Thai
tr_TR	Turkish
uk_UA	Ukrainian
vi_VN	Vietnamese

CMS Page Import

The CMS Page Import lets you add or update website pages by importing them from a CSV file. This is useful when you have a large number of pages to create or edit. The import is also an important tool when you want to export pages from one account and import them into another account, for example, from your sandbox account to your production account.

Unlike pages that you create or edit with Site Management Tools, pages you create or update by CSV Import are automatically placed in a published state and are visible based on the visibility start and end dates for the page record.

For information about working with this record in the UI, see the help topic [CMS Page Record](#).

 **Tip:** If you are importing pages and do not want them to be immediately visible to site visitors, be sure to give the pages future start date.

For details about fields that can be mapped in the CMS page record, see the SOAP Schema Browser's [CMS page](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

CMS Page Record Fields

The following table lists the fields that are available for import or update for CMS Pages. Required fields are marked with an asterisk.

Addition To	The value specified here populates the addition to head field on the CMS Page record. This is used to add code such as Java Script, HTML, or CSS to the head area of the page.
CMS Page Type*	This value specifies the CMS Page Type and links to the Name field on the CMS Page Type record.
Custom Record Data	If you added custom fields to pages of this type, this field lets you specify the instances of the custom record data assigned to the page type record.
Custom Record External ID	This is a user-defined mapping field that can be used for linking to page types when the import data originated as an export from a different account.
End Date	This value identifies the date and time that the record should expire. If you omit this date from the import file or leave the value blank, no end date is assigned, meaning the page never expires. When including a date and time in the field, use the format specified by the preferences in your NetSuite account.

External ID	The External ID might originate with data that is exported from a third party system or it can be user-defined and added to the CSV file. The external ID must be unique for each record and can be used as a primary key for updating records with CSV Import.
Internal ID	The Internal ID is a primary key assigned to a CMS Page record when it is created in the system. When performing an import that creates new CMS Page records, the Internal ID is not included in the import and is automatically assigned when the records are created. For existing CMS Page records, you can use the Internal ID as the primary key when performing a CSV Import to update existing pages. You can create a saved search to generate a listing of pages and their internal IDs.
Meta Description	The value entered in this field populates the Meta Description field on the CMS Page record and is set as the value of the content attribute for the meta description HTML element for the page.
Meta Keywords	The value entered in this field populates the Meta Keywords field on the CMS page record and is set as the value of the content attribute for the meta keywords HTML element for the page.
Name	This value specifies the page name.
Page Heading	This value populates the Page Heading field on the CMS Page record. If the page template file supports it, the heading is displayed to site visitors.
Page Title	This identifies the page title and populates the HTML <title> element on the page. This is usually the title of the page that is shown in the tab or browser title bar.
Site*	This value identifies the website. You can use the numeric site id or the site name during the import. Be sure to edit the field mapping to specify if the value in your CSV file is the internal ID or the site name. You cannot use both name and site ID in a single import file.
Start Date	This value identifies the date and time the page should begin displaying on the site. If you omit the start date from the file or leave the value blank, no start date is assigned, and the page displays immediately. When including a date and time in the field, use the format specified by the preferences in your NetSuite account.
Template*	Specifies the template for the page. If the page uses the default template, leave the field empty or enter default to use the default template. If the page uses a custom template, enter the template name.
Type*	Specifies the type of page. Valid entries are: <ul style="list-style-type: none">■ Landing Page■ Enhanced Page
URL	This field specifies the page URL.
CMS Page Tags	The tags field lets you specify tags for the CMS Page Record. See CMS Page Tags Sublist .

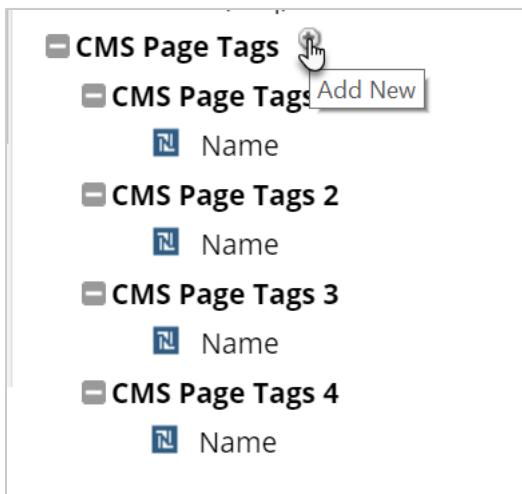
CMS Page Tags Sublist

When you include tags in the CSV import for CMS Pages, the CSV file must have a separate tag column for each tag. For example, if each record in the CSV file contains only one tag for each page, then you need only one tag column, but if one or more pages has multiple tags, then the file must include multiple tag columns. In the following sample CSV file you see four separate tag columns. Some records have multiple tags, with four tags being the most, and other records have only one tag

Name	...	Tag1	Tag2	Tag3	Tag4

About Us	...	About Us	Company Information	—	—
Back To School	...	Sale	School Supplies	Back to School	Fall
Locations	...	Store Locations	—	—	—
Return Policy	...	Return Policy	—	—	—

By default, the NetSuite Fields mapping for CMS Page Tags includes only one column. You can add more tag columns to the import by clicking the Add New tag button. The following example illustrates four tag columns to accommodate four tag columns in the CSV file:



You can then map each tag column in the CSV file to a CMS Page Tags column in the import.

CMS Page Translation Sublist

CMS pages support the translation locale's supported by NetSuite. The following table lists the fields required for importing commerce category translations by CSV. Enter the values in the language specified by the value you enter in the Locale field.

External ID	The external ID for the landing page for these translation values.
Addition To	JavaScript, HTML, or other code to include in the <head> area of the commerce category page when it is rendered on the site.
Locale	Specify the locale code for this translation subsublist. See Locale Code Reference for valid codes.
Meta Description	This is for SEO data you provide to enter for your translations.
Meta Keywords	This is for SEO data you provide to enter for your translations.
Page Heading	The page heading to display on the landing page for the specified language.
Page Title	The title of the page. This populates the HTML <title> element.

By default, the field mapping for translations includes column sets for only one language. You can click the + button to add another set of columns for additional languages. Your CSV file must include the translation values for different languages in different column sets. To help organize the import, consider prefixing the column names with the locale code as in the following example:

- es_ES_External-ID
- es_ES_Addition-To

- es_ES_Locale
- es_ES_Meta Description
- es_ES_Meta Keywords
- es_ES_Page Heading
- es_ES_Page Title
- fr_FR_External-ID
- fr_FR_Addition-To
- fr_FR_Locale
- fr_FR_Meta Description
- fr_FR_Meta Keywords
- fr_FR_Page Heading
- fr_FR_Page Title

Locale Code Reference

When you import translations for commerce category you must specify the locale Code for the translation.

Locale Code	Language
af_ZA	Afrikaans
sq_AL	Albanian
ar	Arabic
hy_AM	Armenian
ms_MY	Bahasa Malai
bn_BD	Bengali
bs_BA	Bosnian
bg_BG	Bulgarian
zh_CN	Chinese (Simplified)
zh_TW	Chinese (Traditional)
hr_HR	Croatian
cs_CZ	Czech
da_DK	Danish
nl_NL	Dutch
en_AU	English (AU)
en_CA	English (CA)
en	English (International)
en_GB	English (UK)
et_EE	Estonian
tl_PH	Filipino

fi_FI	Finnish
fr_CA	French (Canada)
fr_FR	French (France)
de_DE	German
el_GR	Greek
gu_IN	Gujarati
he_IL	Hebrew
hi_IN	Hindi
hu_HU	Hungarian
is_IS	Icelandic
id_ID	Indonesian
it_IT	Italian
ja_JP	Japanese
kn_IN	Kannada
ko_KR	Korean
es_AR	Latin American Spanish
lv_LV	Latvian
lt_LT	Lithuanian
lb LU	Luxembourgish
mr_IN	Marathi
no_NO	Norwegian
fa_IR	Persian (Iran)
pl_PL	Polish
pt_BR	Portuguese (Brazil)
pt_PT	Portuguese (Portugal)
pa_IN	Punjabi
ro_RO	Romanian
ru_RU	Russian
sh_RS	Serbian (Cyrillic)
sr_RS	Serbian (Latin)
sk_SK	Slovak
sl_SI	Slovenian
es_ES	Spanish

sv_SE	Swedish
ta_IN	Tamil
te_IN	Telugu
th_TH	Thai
tr_TR	Turkish
uk_UA	Ukrainian
vi_VN	Vietnamese

Site Category Import

The site category import lets you add or update website categories in NetSuite. These categories are used to organize information and items for sale on your website. Each category must be associated with a presentation tab to be displayed in a website. Presentation tabs are the building blocks, or pages, in a website.

Supported fields for this import mostly match the fields on the Site Category page available at Commerce > Site Builder > Content Management > Categories > New, including the following:

- Category - name of the site category (required)
- Site - the site where the category should be used (required when the Multiple Sites feature is enabled)
- Subcategory of - the tab or category where this category is grouped
- Display in Web Site - Boolean indicating whether the category should be displayed

For details about fields that can be mapped in the site category record, see the SOAP Schema Browser's [site category](#) reference page. You can use the field definitions here as a basis for creating your own CSV import template file. For information about working with the SOAP Schema Browser, see the help topic [SOAP Schema Browser](#).

The Import Assistant is available at Setup > Import/Export > Import Tasks > Import CSV Records. After you select the record type for import, you choose the import character encoding. For more information, see [Select a Record Type for Import](#) and [Choose Import Character Encoding](#).

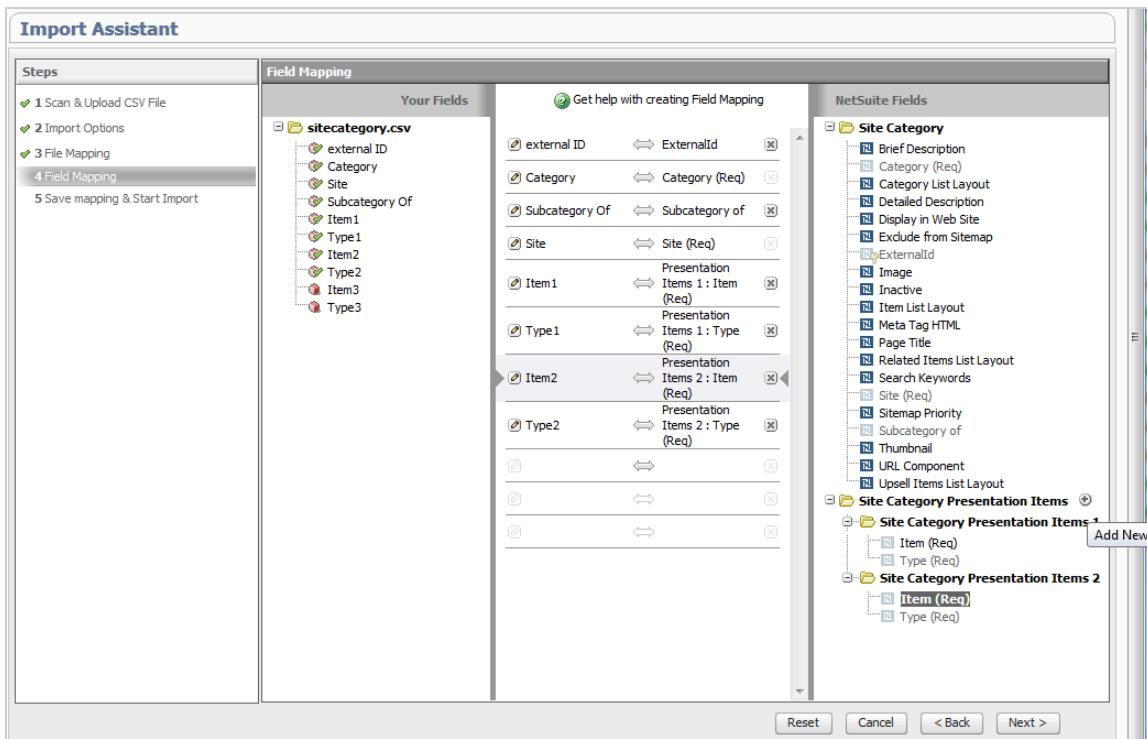
Review the following guidelines for site category imports:

- [Supported Site Category Sublist Data Import](#)
- [Importing Updates to Site Category Records](#)

Supported Site Category Sublist Data Import

The site category import supports the import of information and items to be included in each category, as Presentation Items sublist data. The records in this sublist can be File Cabinet items, information items, actual items to be sold on the website, or subcategories.

To import values for multiple presentation items per category, format your CSV file with repeating columns for the Presentation Items sublist fields (such as Item1, Type1, Item2, Type2, Item3, Type3), and map multiple instances of this sublist on the Import Assistant Field Mapping page. (Click the + sign next to the sublist to add mappable instances.)



Importing Updates to Site Category Records

If you need to import updates to existing site category records, you should use an identifier of internal ID or external ID to prevent duplication of records.

- If you select the **Update** data handling option, you can use Category as an identifier to match records and perform updates.
- If you select the **Add or Update** data handling options, no Category lookups are performed, so in the absence of internal ID or external ID, multiple records with the same category name may be added.



Note: The site category import does not support the definition of an audience for categories to be published internally to an intranet or to specific set of individuals. If necessary, you can define an audience for a category on its record within NetSuite after the import.

Simple Imports

Specialized two-step Import Assistants are available for the following imports:

- Single Journal Entry Import
- Budget Import
- Single Inventory Worksheet Import
- Project Tasks Import
- Web Site Redirects Import



Note: These simple imports do not support the SuiteScript API that is available to automate CSV imports through scripting, because they do not support saved import maps.

Single Journal Entry Import

You can use the Single Journal Entry Import Assistant to import a single journal entry's data from an external system into NetSuite. If you use NetSuite OneWorld, you can use a similar assistant to import data from a single intercompany journal entry.

You need the Make Journal Entry and Posting Period on Transactions permissions to import a single journal entry. You do not need the Import CSV File permission.



Important: The Single Journal Entry Import Assistant preserves the journal entry import process available prior to Version 2010 Release 1, with a modified user interface. More complex journal entry import functions are also available. See [Journal Entry Import and Intercompany Journal Entry Import](#) and [Advanced Intercompany Journal Entry Import](#).

The Single Journal Entry Import Assistant is available at Transactions > Financial > Make Journal Entries > Import. For intercompany journal entries, a similar assistant is available at Transactions > Financial > Make Intercompany Journal Entries > Import. For advanced intercompany journal entries, a similar assistant is available at Transactions > Financial > Make Advanced Intercompany Journal Entries > Import.

If you are using statistical accounts, the Single Journal Entry Import Assistant is available at Transactions > Financial > Make Statistical Journal Entries > Import. For information about statistical accounting, see the help topic [Statistical Accounting Overview](#).

The Assistant includes the following steps:

- The first page of the Single Journal Entry Import Assistant provides a link to a CSV journal entry template file that is identical to the template for the previously available journal import process.
 - Click this link to download the template file and populate it with your data.
Note that you can add columns to your CSV file for journal entry fields that are not included in the template, if you want to import data for these fields.
For more information, see [Supported Values for Journal Entry Import CSV Files](#).
 - After you have a CSV file with data in it, click the Select button in the Import Assistant and select your file, then click Next.
- The Assistant automatically maps fields in your CSV file to NetSuite journal entry fields and lets you view these mappings.
 - You can simply click Run to accept the default mappings and immediately start the import.
 - Or, you can make changes: You can move fields to change or add mappings. Also, you can click the edit icon for a field to open a popup where you can set a default value.
 - Note that if you do not map or set defaults for the Date and Entry No. fields, the import process provides defaults.

After you click Run and the import process completes, the newly created journal record displays. The Entry No. field shows the journal entry number for the transaction.

If errors prevent the process from completing, a status page displays instead. Note that, unlike other imports, email notification is not sent for single journal entry import.

Supported Values for Journal Entry Import CSV Files

For ease of use and compatibility with the previous journal import, the following values are supported in your CSV files:

- For **Account** — If the Use Account Numbers preference is enabled, Account field values should include both numbers and names, such as **11000 Accounts Payable**. Number-only values, such as **11000**, also are supported. Name-only values, such as **Accounts Payable**, are not supported when this preference is enabled. If this preference is not enabled, name-only values should be used.
- For (Entity) **Name** — If auto-generated numbering is enabled, you should make sure that Name field values include both entity ID and name, such as **A2255 ABC Company**. ID-only values, such as **A2255**, also are supported.
- For **Account, Class, Department, Location**, and **Subsidiary** — Most CSV imports require the use of the full hierarchical name, but journal entry import supports the use of the simplified name. For example, for location name, both **California : Los Angeles** and **Los Angeles** are supported.

For more information about supported CSV file fields, see [Journal Entry and Intercompany Journal Entry Header Fields Table](#) and [Journal Entry and Intercompany Journal Entry Line-Level Fields Table](#).



Important: Import is supported for journal entries with up to 10,000 lines. However, poor performance results during import and in the user interface for journal entries with over 1000 lines, and these large journal entries may not be editable in the user interface.

For more information about journal entries, see the following.

- For step-by-step instructions for importing a single journal entry, see the help topic [Importing a Journal Entry](#).
- For more information about working with journal entries, see the help topic [Journal Entries](#).
- To import multiple journal entries, see [Journal Entry Import and Intercompany Journal Entry Import](#).

Budget Import

The Budget Import lets you import your external budget data as NetSuite budget records. The interface and process for budget imports vary from those for other record type imports.

- A simplified version of the Import Assistant is used for budget imports, with two pages to complete instead of five. This Assistant is available from Transactions > Financial > Set Up Budgets > Import instead of the Setup menu.
- NetSuite provides a CSV budget template file that you download and populate with your data before the import. For details, see [Budget Template File](#) and [Budget Template File Tips](#).
- After you populate a file with your budget data and save it, you select this file in the Assistant. The Assistant automatically maps fields in your budget file to NetSuite budget fields and lets you view these mappings, and change them if necessary. Then click Run to import budget data directly into the database.

You can export your NetSuite budget data into an external application, make changes, and then reimport the changed data. To export NetSuite budget data, create a budget search at Transactions > Financial > Set Up Budgets > Search, then click Export for the search.

You need the Set Up Budgets permissions to import budget data. You do not need the Import CSV File permission. For questions about permissions, contact your administrator.

For more instructions for completing a budget import, see the help topic [Importing a Budget](#).



Note: Account field values in budget import CSV files can be names, internal IDs or external IDs, but cannot include account numbers, even if the Use Account Numbers preference is enabled. When using names, values for subaccounts should be hierarchical, with the format parent account name: child account name.

Budget Template File

The budget template file is available for download at Transactions > Financial > Set Up Budgets > Import, when you click **BUDGETS template** in the Import Assistant.

The budget template file includes every field as columns, so that every row of data can store values for fields.

Budget Template File Tips

Review the following tips for populating a budget CSV file from the template:

- The year entered on the budget must match the name of the year at Setup > Accounting > Manage Accounting Periods.
- Note that the CSV file field mapped to the required Account field should contain account names, internal IDs or external IDs, but not account numbers.

When using names, be sure to only use the name that appears in the Name field on the Account record. If you are entering a line item for a subaccount, the Account field must include the parent account name and subaccount name separated by a colon, for example, **Checking : Purchases**. Use this format for the Account field even if the Use Account Numbers preference is enabled.

- If you use the Multiple Budgets feature, Category is a required field. You can create new categories at Setup > Accounting > Accounting Lists > New, by clicking **Budget Category** and entering a budget category name.



Important: If the Budget Category field is not mapped during the import, its value defaults to the first budget category on the list. This list is ordered alphabetically.

In OneWorld accounts, each budget category is classified as global or local to support subsidiary-level budgeting in local currencies. You do not have to modify your budget template file to include this global/local classification, because it is associated automatically with the imported budget category.

Single Inventory Worksheet Import

In the NetSuite user interface, you can use the Inventory Worksheet form to make adjustments to the levels of inventory items in stock. On this form, you need to manually enter general information as well as changes to the quantity and/or value of each inventory item to be adjusted.

The Single Inventory Worksheet Import provides an alternative that you can use to create a new inventory worksheet in NetSuite. With this import, you can submit inventory adjustment data in a CSV file that can be built from a system-provided template. For inventory worksheets with many lines, this import can be significantly faster than data entry in the Inventory Worksheet form.

This type of import can be used for adjustments that are required after physical inventory counts. Another use case for this import is to reset stock quantity and value at the end of the NetSuite implementation phase.

Inventory Worksheet Import Limitations

Review the following limitations to decide whether this import would be useful for you:

- Each import can create one new inventory worksheet. You cannot use the inventory worksheet import to update an existing NetSuite inventory worksheet or to create multiple inventory worksheets at one time.
- Each inventory worksheet import can import data for one combination of class, department, location, and, if applicable, subsidiary values. You must do multiple import jobs to import data for multiple classes, departments, locations, or subsidiaries.
- The inventory worksheet import currently does not support the import of bin information.
- Like the inventory worksheet form in the user interface, this import is best suited if you are using average costing. The import, like the UI form, ignores LIFO and FIFO, so does not preserve that history.
- The inventory worksheet import shares other limitations of the inventory worksheet form, including:
 - New quantity values are exclusive of previous stock totals.
 - Adjustments to lot numbered items, serial numbered items, and inactive items are not supported.
 - A change to the quantity of an assembly item changes the quantity of the assembly only; it does not change the quantity of individual member items.
- Import is supported for inventory worksheets with up to 1,000 lines. However, poor performance results during import and in the user interface for inventory worksheets with over 1,000 lines, and these large inventory worksheets may not be editable in the user interface. Note that 1,000 lines are not always processed by the import. If the timeout limit is reached during the import process, some records are not processed. In this case, try the import with fewer than 1,000 lines.
- You cannot save field mappings for an inventory worksheet import.

Permission for Inventory Worksheet Import

You need the Adjust Inventory Worksheet and Import CSV File permissions to import an inventory worksheet.

By default, only account administrators have the Adjust Inventory Worksheet permission. This permission is not assigned to any standard roles. This permission can be added to a custom role that can be assigned to users who perform this type of import.

How to Do an Inventory Worksheet Import

- For details about the interface for importing an inventory worksheet, see [Using the Inventory Worksheet Import Assistant](#).
- For tips to help you set up your CSV file for an inventory worksheet import, see [Requirements for Inventory Worksheet CSV File Data](#).
- For information about making inventory adjustments, see the help topic [Inventory Adjustments](#).

Using the Inventory Worksheet Import Assistant

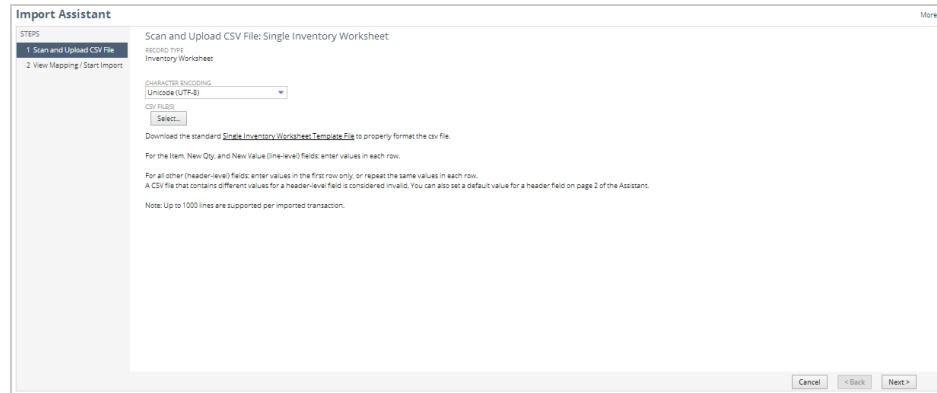
The Single Inventory Worksheet Import Assistant is available at Transactions > Inventory > Adjust Inventory Worksheet > Import, to users who have the required permission. See [Permission for Inventory Worksheet Import](#).

This Import Assistant includes the following steps:

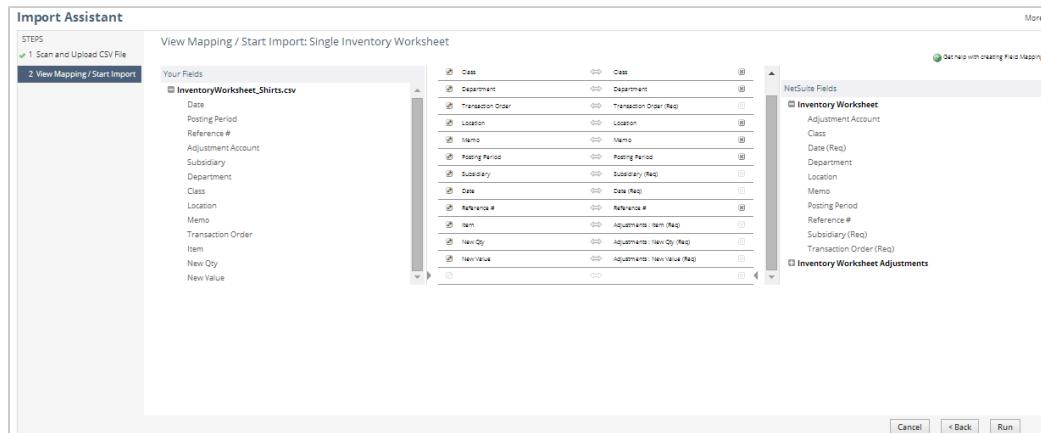
1. Upload the CSV file that contains your inventory worksheet data.
 - The first page of the Assistant provides a link to a CSV template file. Click this link to download the template file and populate it with your data.

Before you populate your CSV file data, review [Requirements for Inventory Worksheet CSV File Data](#).

 - After you have a CSV file with data in it, click the Select button in the Import Assistant, browse to your file, and click Next.

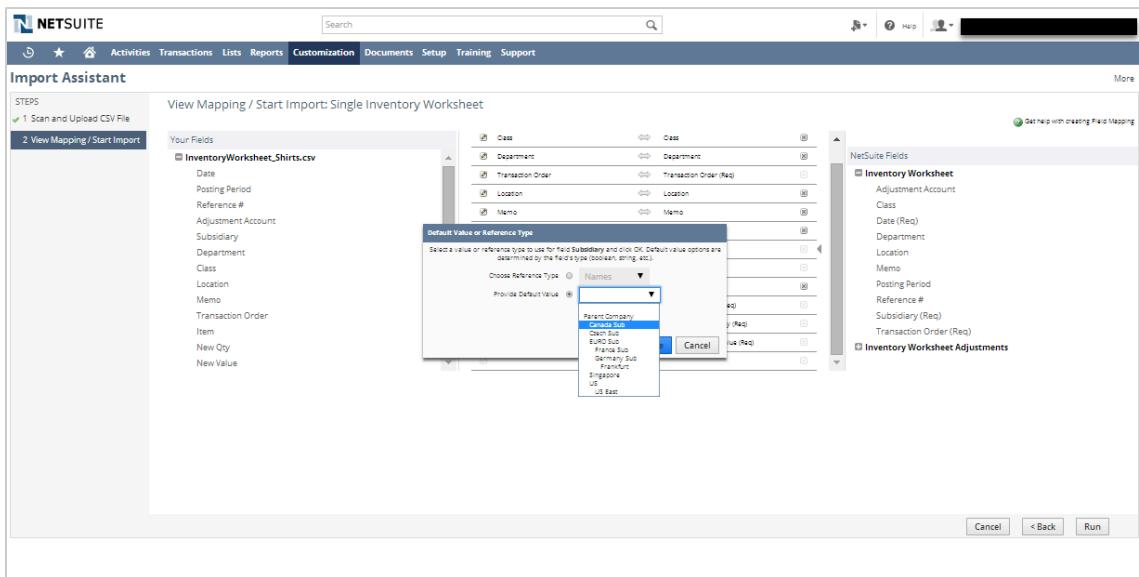


2. Review mappings of CSV fields to NetSuite fields and start the import.



- The Assistant automatically maps fields in your CSV file to NetSuite standard inventory worksheet fields. Header-level fields are listed under Inventory Worksheet; line-level fields are listed under the Inventory Worksheet Adjustments sublist.
- You can click Run to accept the default mappings and immediately start the import.
- You can make changes as necessary by dragging and dropping fields to add or subtract them from the import.
- You can click the edit icon for a field to open a popup where you can set a default value. This option is useful for header-level fields, that need to be the same value for each imported line.

For example, in the following screenshot, the CSV file does not include a Subsidiary field value, so a default value is set in the popup:



When you click Run, the import job is processed.

- If the import was successful, or if there are errors, the Job Status page appears.
- Note that, unlike most other imports, email notification is not sent for single inventory worksheet imports.

For more information about adjusting inventory, see the help topic [Inventory Adjustments](#).

Requirements for Inventory Worksheet CSV File Data

Your inventory worksheet CSV file should include both header and line-level data. Each row of the CSV file represents a transaction line, with repeated header field values, and a different item, new quantity, and new value for each line.

For more information, see:

- [Inventory Worksheet Field Details](#)
- [Using IDs Instead of Names for Items](#)
- [Example Inventory Worksheet CSV File](#)

Inventory Worksheet Field Details

The following tables provide details about the fields supported in a CSV file used for an inventory worksheet import.

⚠ Important: A CSV file that contains different values for a header-level field is considered invalid. The same header-level field values must be included in each row, or all header fields must be blank after the first row. Or, you can omit header fields from the CSV file, and instead set default values for them on the Import Assistant Field Mapping page. See [Assign Default Values during Field Mapping](#).

Header Field	Notes
Adjustment Account	Usually an expense account for inventory adjustments.
	This field is required and should match the name of an existing account at Lists > Accounting > Accounts.

Header Field	Notes
	If the Use Account Numbers preference has been enabled at Setup > Accounting > Accounting Preferences, values should include both account number and name, such as 11000 Accounts Payable . Number-only values, such as 11000 , also are supported. Name-only values, such as Accounts Payable , are not supported when this preference is enabled. If this preference is not enabled, name-only values should be used. Note that account names may be non-hierarchical, even for sub-accounts.
Class	Must match the name of an existing class at Setup > Company > Classes. Most CSV imports require the use of the full hierarchical name, but inventory worksheet import supports the use of the simplified name. For example, both Headquarters : Executive and Executive are supported.
Date	Required. Default value provided if CSV file does not include this field.
Department	Must match the name of an existing department at Setup > Company > Departments. Most CSV imports require the use of the full hierarchical name, but inventory worksheet import supports the use of the simplified name. For example, both Marketing : Marcom and Marcom are supported.
Location	Required if the Multi-Location Inventory feature is enabled. Must match the name of an existing location at Setup > Company > Locations. Most CSV imports require the use of the full hierarchical name, but inventory worksheet import supports the use of the simplified name. For example, for location name, both California : Los Angeles and Los Angeles are supported.
Memo	Provides a detailed description displayed in the transaction detail list and other reports. Maximum length = 4000.
Posting Period	An error is returned if a closed period is specified.
Reference #	Used to track adjustments. This number appears on register and account detail reports. Maximum length = 45. Default value provided if CSV file does not include this field. Note that if you provide a value that is already in use, an error occurs.
Subsidiary	Required for OneWorld accounts. Must match the name of an existing subsidiary at Setup > Company > Subsidiaries. Most CSV imports require the use of the full hierarchical name, but journal entry import supports the use of the simplified name. For example, both EMEA : Germany and Germany are supported.
Transaction Order	Required. Must use one of the following values: <ul style="list-style-type: none">■ First transaction in day - posts the worksheet at the beginning of the day and does not include additional inventory transactions entered during that day for this worksheet.■ Last transaction in day - posts the worksheet at the end of the day and includes all inventory transactions entered during that day for this worksheet.

Each line in the CSV file should include a different value for each line-level field.

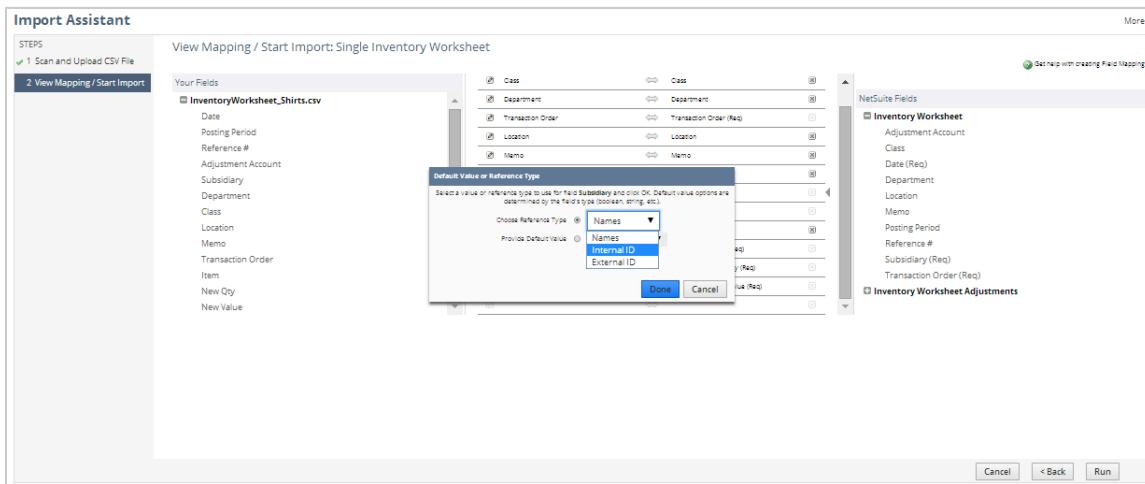
Line-Level Field	Notes
Item	<p>Required.</p> <p>Item to be adjusted. Must match an existing item at Lists > Accounting > Items.</p> <p>You cannot reference the same item in multiple lines.</p> <p>Note: By default item names should be used as values for this field, but you can also choose to use internal ID or external ID values. See Select Reference Types.</p>
New Qty	<p>Required.</p> <p>The new total quantity on hand for the item.</p>
New Value	<p>Required.</p> <p>The new value for the new quantity of item in stock.</p>

Using IDs Instead of Names for Items

By default, the Import Assistant expects the values in the Item column of your CSV file to match the names of existing items in the system. You have the option of setting up the import to expect either internal ID or external ID values instead.

- The internal ID is a NetSuite system-assigned ID number. To display internal ID values on NetSuite forms, go to Home > Set Preferences. Click the General subtab, and in the Defaults section, check Show internal IDs. When this preference is enabled, a list displays the IDs as one of the columns.
- The external ID is an ID number used by an external system. A record has an external ID only if the user created one when bringing the record into NetSuite.

To set the Item field to use ID instead of name values, click its edit icon on the Field Mapping page, and in the popup, select either Internal ID or External ID.



Example Inventory Worksheet CSV File

The following table illustrates a sample CSV file containing data for an inventory worksheet. Columns A-J contain header-level data, whereas columns K-M contain line-level data. Notice that the header-level fields include values only in the first row.

A	B	C	D	E	F	G	H	I	J	K	L	M
Date	Posting Period	Reference #	Adjustment Account	Subsidiary	Department	Class	Location	Memo	Transaction Order	Item	New Qty	New Value
7/22/2011	—	—	10100 Uncat Exp	USA	—	—	East Coast	July Cycle	Last Transaction in Day	Kid Sport Lunch Box	120	1200.00
—	—	—	—	—	—	—	—	—	—	Medium Cooler	255	5100.00
—	—	—	—	—	—	—	—	—	—	Small Icepak	125	500.00
—	—	—	—	—	—	—	—	—	—	Large Icepak	180	1080.00
—	—	—	—	—	—	—	—	—	—	Multicolor Snack Bag	60	480.00
—	—	—	—	—	—	—	—	—	—	Kid Flower Lunch Box	85	850.00

For more information about adjusting inventory, see the help topic [Inventory Adjustments](#).

Project Tasks Import

The Project Tasks Import lets you import project tasks from a Microsoft Project plan. You can build project plans in Microsoft Project, then bring the data into NetSuite after the plan has been well developed, or develop project plan templates in Microsoft Project for use in NetSuite.



Note: The project tasks import supports addition of new data into NetSuite; updates currently are not supported.

The process for project tasks imports differs from other types:

- A simplified version of the Import Assistant is used for project task imports, with two pages to complete instead of five. This Assistant is available from Activities > Scheduling > Project Tasks > Import instead of the Setup menu.
- NetSuite provides a blank project file with a predefined export map that you can download and use to export MPP file data into a properly formatted CSV file. You can then use the Import Assistant to import this CSV file data.

Be aware of the following requirements for the project tasks import:

- Your account must have Project Management enabled.
- To do an import, users must have the following NetSuite permissions:
 - Import CSV File
 - Projects (at least View level)
 - Project Tasks (at least Create level)
- The following tasks should be completed before a project tasks import:
 - Create a project in NetSuite to which the project tasks can be added. Be sure to enter a value for start date, as all scheduling for project tasks is generated from this date. Also, all assignees listed in Microsoft Project should be listed in the Project's Resources subtab.
 - Edit the NetSuite Employee records of project task assignees, enabling the Job Resource check box on the Human Resources subtab, so that the import can include assignments.

For instructions for importing Microsoft Project tasks into NetSuite, see the help topic [Importing Project Tasks from Microsoft Project](#). To create project records by importing jobs, see [Projects \(Jobs\) Import](#).



Note: CRM tasks are imported with the Import Assistant, available to users with the Import CSV File permission, at Setup > Import/Export > Import CSV Records. See [Tasks Import](#).



Note: Every project task record is designated as either a project task or a milestone task. If you import a project task record and do not include any estimated work, the record is saved as a milestone task. If you do include estimated work, the record is saved as a project task. For more details on the difference between project tasks and milestone tasks, see the help topic [Project Tasks](#).

Web Site Redirects Import

The Web Site Redirects import lets you add and update URL redirects in bulk. You can create URL redirects in NetSuite to make Web pages available under multiple URLs. This functionality is useful if you have moved a site to a new domain, or if you want to redirect a typically misspelled domain to the correct location.

The Web site redirects import assistant is at Commerce > Hosting > Redirects > Import, when the Web Site and Host HTML Files features are enabled. You need the Set Up Web Site permission. A link to a CSV template file is available in this import assistant.

For instructions for completing this import, see the help topic [Importing Website Redirects](#).

For more information about search engine optimization (SEO) and redirects, see the help topic [SEO and Redirects](#).

Tips for Successful CSV Imports

To set up your CSV files correctly before importing:

- Review guidelines for the specific record type of data you want to import, in the [Supported Record Types for CSV Import](#) section.
- Review information about the sublist data that can be imported for the record type you want to import, meaning the related data, for example pricing data for item records. For a complete list of sublists supported for import, and identification of which sublists are keyed for selective updates, see [Sublist Data Import](#).
- Review information about the subrecord data that can be imported for the record type you want to import, meaning a specialized set of important related data, for example item inventory details for sales order records. For information and a complete list of subrecords supported for import, see [Importing Subrecord Data](#) and [Supported Subrecord Imports](#).
- Determine whether auto-generated numbering is enabled for the record type of imported data, and review the related effects, in [Effects of Auto-Generated Numbers during Imports](#).
- Review general requirements and limitations for imported CSV files, in [General CSV File Conventions](#) and related topics.
- If your CSV file contains numbers, see [Tips for Using Numbers in CSV Files](#).
- For imports that include values for check boxes and radio button fields, see [Boolean Values in CSV Files](#).
- Ensure that your CSV file does not contain extra, unneeded characters. See [Avoiding Errors for Commas and Other Delimiter Symbols within CSV File Fields](#).
- If you are importing records that contain hierarchical relationships, review the delimiters that you have used in [Delimiters for Hierarchical and Multi-Select Fields](#).
- Ensure that name references duplicate how the name is displayed in the NetSuite user interface. For information, see [Name References](#).

- State and province names should use the short name values set up for your site. For information, see [State and Province Names for CSV Import](#).
- Replace any country codes with names, in [Country Names for CSV Import](#).
- If your file contains two columns with the same header, the import assistant will ignore the value of the first column and import only the value of the second column. If the second column has no value, the Import Assistant will leave the field empty.

Sublist Data Import

Some types of NetSuite records may include sets of related data called sublists. For example, each sales order record includes a set of items. The items data is considered a sublist of sales order. You can use the Import Assistant to import sublist data for some record types. Sublist data can be included in the same file as other record type data, or you can upload a separate file for each sublist's data.

i Note: Some related data may be structured as a subrecord rather than a sublist of a record type. See [Importing Subrecord Data](#).

Supported sublist imports vary according to the features that are enabled in your account. For a list of sublists supported for import, see [Supported Sublist Imports](#).

Some sublists include one or more key fields that can uniquely identify each sublist record. For keyed sublists, imported CSV file sublist data can selectively update or completely overwrite existing sublist data, depending upon the setting of the [Overwrite Sublists](#) option. For non-keyed sublists, CSV file sublist data can either be appended to or completely overwrite existing sublist data. Complete deletion of sublist data currently is not supported.

Be aware that if you do not map any fields for a sublist, no sublist data is imported, even if you set a default value for one or more sublist fields on the Field Mapping page. For information about mapping sublist fields, see [Required Fields for Sublist Import Mapping](#).

Be aware that the CSV Import Assistant allows the import of records without a sublist, even if the sublist contains required fields. The Never Empty option, that makes a sublist mandatory and is available in the UI, is not supported in CSV import.

For some transaction types, you can update items data during the CSV import. For more information, see [Line Item Updates on Transactions Imports](#).

Supported Sublist Imports

The following table shows the sublists for which you may be able to add or update data through CSV imports. These sublists depend upon the features enabled in your account. You can see the sublists available in your account for a particular record type on the Import Assistant's Field Mapping page.

i Note: Some related data may be structured as a subrecord rather than as a sublist of a record type. If you do not see a sublist in the table below, see [Supported Subrecord Imports](#) to check if the data is set up as a subrecord instead.

Record Type	Sublist	Notes
Accounting: Chart of Accounts	Translations	When Multi-Language feature enabled. Selectively updatable based on the Language key field.
Accounting: Expense Categories	Rates	Sublist available to OneWorld accounts only. Selectively updatable based on the Subsidiary field.

Record Type	Sublist	Notes
Accounting: Price Book	Price Book Lines	When SuiteBilling feature enabled. Selectively updatable based on the Subscription Plan Line field.
Accounting: Price Plan	Pricing	When SuiteBilling feature enabled. Selectively updatable based on the Above Quantity field.
Activities: Events	Attendees	Selectively updatable based on the Attendee field.
—	Resources	Selectively updatable based on the Resource field. For more information, see Event CSV File Examples .
—	Time Track	—
Activities: Phone Calls	Contacts	Selectively updatable based on the Participant or Contact key field.
—	Time Tracking	When Time Tracking feature enabled.
Activities: Tasks	Contacts	Selectively updatable based on the Company/Project or Contact key field.
	Time Tracking	When Time Tracking feature enabled.
Classification: Class	Class Translations	When Multi-Language feature enabled. Selectively updatable based on the Language key field.
Classification: Department	Department Translations	When Multi-Language feature enabled. Selectively updatable based on the Language key field.
Classification: Location	Location Translations	When Multi-Language feature enabled. Selectively updatable based on the Language key field.
Classification: Merchandise Hierarchy Node	Hierarchy Versions	The Included in Version box on the Hierarchy Versions subtab indicates if the hierarchy node is assigned to a hierarchy version. You can assign a node to multiple versions.
Custom Records: Translations	Translations	When Multi-Language feature is enabled.

Record Type	Sublist	Notes
Customization: Custom Lists	Custom List Values	Selectively updatable based on the ID field. For more information, see Custom List CSV Multiple File Examples .
—	Custom List Translations	When Multi-Language feature enabled. Selectively updatable based on the Language key field.
Employees: Employees	Payroll Accrued Times	Selectively updatable based on the Payroll Item key field. When Payroll feature enabled.
—	Address	Selectively updatable based on the Internal ID or Label key field.
—	Payroll Contributions	Selectively updatable based on the Payroll Item key field. When Payroll feature enabled.
—	Payroll Deductions	Selectively updatable based on the Payroll Item key field. When Payroll feature enabled.
—	Direct Deposit	Selectively updatable based on the Internal ID key field. When Direct Deposit feature enabled.
—	Payroll Earnings	Selectively updatable based on the Payroll Item key field. When Payroll feature enabled.
—	Education	—
—	Emergency Contacts	—
—	Roles	—
—	Subscriptions	Selectively updatable based on the Subscriptions key field.
Employees: Expense Reports	Expenses	Available when Expense Reports feature is enabled. Selectively updatable based on the Line Id or Ref No. field. For more information, see Expense Report CSV Examples .
—	Accounting Book Detail	Available when the Multi-Book Accounting feature is enabled, and when more than one active accounting book exists. Selectively updateable based on the Accounting Book key field.
Items	Bin Numbers	When Bin Management or Advanced Bin/Numbered Inventory Management feature enabled. Selectively updatable based on the Bin Number key field. For Assembly/BOM Item and Inventory Item imports.

Record Type	Sublist	Notes
—	Locations	<p> Note: If you are importing bin records, you should complete this import before you import items with associated bin numbers. See Bin Import.</p> <p>When Multi-Location Inventory feature enabled.</p> <p>Selectively updatable based on Internal ID, External ID, or Location.</p> <p>For Assembly/BOM Item and Inventory Item imports.</p> <p>For more information, see Updating Locations on Items.</p>
—	Members	<p>For Assembly/BOM Item, Item Group, and Kit/Package Item imports.</p>
—	Merchandise Hierarchy	<p>For Inventory Items, Lot Numbered Inventory Items, and Serialized Inventory Items.</p> <p>Available when the Merchandise Hierarchy feature is enabled.</p>
—	Pricing	<p>When Multiple Prices, Quantity Pricing, and/or Multiple Currencies feature enabled.</p> <p>Selectively updatable based on Currency, Quantity, and/or Level fields, depending on enabled features.</p> <p>(See Keys for Item Pricing Sublist.)</p>
—	Related Items	<p>When Web Site feature enabled.</p> <p>Not available for Non-Inventory Item for Purchase, Service Item for Purchase, or any Other Charge Item imports.</p> <p>For more information, see Importing Related Items Groups.</p>
—	Site Category	<p>When Web Site feature enabled.</p> <p>Not available for Non-Inventory Item for Purchase, Service Item for Purchase, or any Other Charge Item imports.</p> <p>For more information, see Site Category Import.</p>
—	Task Templates	<p>When Project Management feature enabled.</p> <p>For Service Item for Sale imports.</p>
—	Translations	<p>When Multi-Language feature enabled.</p> <p>Selectively updatable based on the Language key field.</p>
—	Vendors	<p>When Multiple Vendors feature enabled.</p> <p>Selectively updatable based on the Vendor.</p> <p>For Inventory Item, Non-Inventory Item for Resale or Purchase, Service Item for Resale or Purchase, and Other Charge Item for Resale or Purchase imports, and Assembly/BOM Item when Allow Purchase of Assembly Items preference is enabled.</p> <p>For more information, see Updating Vendors on Items.</p>

Record Type	Sublist	Notes
Items: Subscription Plan	Subscription Plan Members	When SuiteBilling feature enabled.
Relationships: Contacts	Address	Selectively updatable based on Internal ID or Label key field. Available for Contacts Only imports. Not available for Customers and Contacts Together, Leads and Contacts Together, or Prospects and Contacts Together imports.
—	Subscriptions	Selectively updatable based on Subscription key field.
Relationships: Customers	Address	Selectively updatable based on the Internal ID or Label key field.
—	Contact Access	Available for updates of existing customers only, to add or update NetSuite access information for existing customer contacts. Selectively updatable based on the Contact key field.
—	Credit Cards	Addition of new records is supported; update of existing lines is not supported.
—	Currencies	When Multiple Currencies feature enabled. For more information, see Setting Multiple Transaction Currencies for Customers .
—	Downloads	When Sell Downloadable Files feature enabled.
—	Group Pricing	When Multiple Prices feature enabled.
—	Item Pricing	When Multiple Prices feature enabled.
—	Partners	When Multi-Partner Management feature enabled. Selectively updatable based on Internal ID, External ID, or Partner.
—	Sales Team	When Team Selling feature enabled.
—	Subscriptions	Selectively updatable based on Subscription key field.
—	Tax Registrations	Available when the SuiteTax feature is enabled.
Relationships: Groups	Group Members	Can be updated using Internal ID, External ID or Names key field for the group member.
Relationships: Jobs	Address	When Project Management feature disabled. Selectively updatable based on the Internal ID or Label key field.
—	Resource	When Project Management feature enabled.

Record Type	Sublist	Notes
Relationships: Leads	Address	Selectively updatable based on the Internal ID or Label key field.
	Credit Cards	Addition of new records is supported. Update of existing lines is not supported.
	Downloads	When Sell Downloadable Files feature enabled.
	Group Pricing	When Multiple Prices feature enabled.
	Item Pricing	When Multiple Prices feature enabled.
	Partners	When Multi-Partner Management feature enabled. Selectively updatable based on Internal ID, External ID, or Partner.
	Sales Team	When Team Selling feature enabled.
Relationships: Partners	Address	Selectively updatable based on the Internal ID or Label key field.
	Contact Access	Available for updates of existing partners only, to add or update NetSuite access information for existing partner contacts. Selectively updatable based on the Contact key field.
	Promotion Codes	—
	Subscriptions	Selectively updatable based on the Subscription key field.
	Tax Registrations	Available when the SuiteTax feature is enabled.
Relationships: Prospects	Address	Selectively updatable based on the Internal ID or Label key field.
	Credit Cards	Addition of new records is supported. Update of existing lines is not supported.
	Downloads	When Sell Downloadable Files feature enabled.
	Group Pricing	When Multiple Prices feature enabled.
	Item Pricing	When Multiple Prices feature enabled.
	Partners	When Multi-Partner Management feature enabled. Selectively updatable based on Internal ID, External ID, or Partner.
	Sales Team	When Team Selling feature enabled.
Relationships: Vendors	Address	Selectively updatable based on the Internal ID or Label key field.
	Roles	—
	Subscriptions	Selectively updatable based on the Subscription key field.

Record Type	Sublist	Notes
—	Tax Registrations	Available when the SuiteTax feature is enabled.
Rules Setup: Foreign Currency Variance Posting Rule	Criteria	Available when the Foreign Currency Variance Mapping feature is enabled.
Supply Chain: Bill of Materials Revision	Bill of Materials Revision Components	Available when the Advanced Bill of Materials feature is enabled.
Supply Chain: Manufacturing Cost Template	Cost Detail	At least one line item is required for new records. (See Cost Template Body and Sublist Fields .)
Supply Chain: Manufacturing Routing	Routing Steps	Selectively updatable based on the Operation Sequence key field. At least one line item is required for new records. (See Routing Body and Sublist Fields .)
—	Component per Operation	—
Support: Solutions	Solutions	—
—	Topics	—
Support: Support Cases	Escalate to	—
Transactions: Advanced Intercompany Journal Entry	Advanced Intercompany Journal Entry Line	Each imported intercompany journal entry must include at least 4 lines, with one debit and one credit each for originating and receiving subsidiary. Line debits and credits must balance. For more information, see Advanced Intercompany Journal Entry Import .
Transactions: Cash Sale	Auth. Code	When Gift Certificates feature enabled.
—	Billable Time	Selectively updatable based on related transaction ID (**doc).
—	Items	Selectively updatable based on the Line/Order Line or Item key field (See Line Item Updates on Transactions Imports). At least one line item is required for new records. (See Required Items Sublist Fields for Transactions Imports .)
—	Partners	When Team Selling feature enabled. Selectively updatable based on Internal ID, External ID, or Partner.

Record Type	Sublist	Notes
—	Sales Team	When Team Selling feature enabled.
—	Shipment	When Multiple Shipping Routes feature enabled.
Transactions: Check	Accounting Books	When Multi-Book Accounting feature is enabled, and when more than one active accounting book exists.
—	Expenses	Selectively updatable based on Line.
—	Items	Selectively updatable based on Item.
Transactions: Credit Card Charge	Accounting Books	When Multi-Book Accounting feature is enabled, and when more than one active accounting book exists.
—		Selectively updatable based on Line or Order Line.
—	Expenses	Selectively updatable based on Line.
—	Items	Selectively updatable based on Item.
Transactions: Credit Card Refund	Accounting Books	When Multi-Book Accounting feature is enabled, and when more than one active accounting book exists.
—		Selectively updatable based on Line or Order Line.
—	Expenses	Selectively updatable based on Line.
—	Items	Selectively updatable based on Item.
Transactions: Credit Memo	Apply	For more information, see Credit Memo Import .
—	Items	For more information, see Credit Memo Import .
Transactions: Custom Transaction	Accounting Books	
—	Lines	When Custom Transactions feature is enabled and at least one custom transaction type is created. Selectively updatable based on the Line and Account fields. Note that the Account field can be used as the key only when every line in the sublist has a unique value in the Account field. This behavior differs from SOAP web services, where you can use only Line as a key, even when every line has a unique Account value. For more information, see Custom Transaction CSV File Examples .
—	Accounting Book Detail	Available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. Selectively updateable based on the Accounting Book key field.

Record Type	Sublist	Notes
Transactions: Customer Payment	Invoices	Selectively updatable based on the Invoice key field (and optionally Line key field).
—	Accounting Book Detail	Available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. Selectively updateable based on the Accounting Book key field.
Transactions: Estimate	Items	Selectively updatable based on the Line/Order Line or Item key field (See Line Item Updates on Transactions Imports). At least one line item is required for new records. (See Required Items Sublist Fields for Transactions Imports .)
—	Partners	When Multi-Partner Management feature enabled. Selectively updatable based on Internal ID, External ID, or Partner.
—	Sales Team	When Team Selling feature enabled.
—	Shipment	When Multiple Shipping Routes feature enabled.
Transactions: Inbound Shipment	Items	—
Transactions: Intercompany Journal Entry	Intercompany Journal Entry Line	Each imported intercompany journal entry must include at least 4 lines, with one debit and one credit each for originating and receiving subsidiary. Line debits and credits must balance. For more information, see Journal Entry Import and Intercompany Journal Entry Import .
—	Accounting Book Detail	Available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. Selectively updateable based on the Accounting Book key field.
Transactions: Inventory Cost Revaluation	Cost Components	Available when Standard Costing feature is enabled. Selectively updatable based on the Component and Cost Category fields.
—	Accounting Book Detail	Available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. Selectively updateable based on the Accounting Book key field.

Record Type	Sublist	Notes
Transactions: Inventory Transfer	Adjustments	—
—	Adjustments — Inventory Detail	Available with the Advanced Bin/Numbered inventory Management feature is enabled
Transactions: Invoice	Accounting Book Detail	Available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. Selectively updateable based on the Accounting Book key field.
—	Auth. Code	When Gift Certificates feature enabled.
—	Billable Time	Selectively updatable based on related transaction ID (**doc).
—	Items	Selectively updatable based on the Line/Order Line or Item key field (See Line Item Updates on Transactions Imports). At least one line item is required for new records. (see Required Items Sublist Fields for Transactions Imports)
—	Partners	When Multi-Partner Management feature enabled. Selectively updatable based on Internal ID, External ID, or Partner.
—	Sales Team	When Team Selling feature enabled.
—	Shipment	When Multiple Shipping Routes feature enabled.
Transactions: Item Demand Plan	Demand Planning	Fields vary according to type of demand plan: monthly, weekly, or daily. See Demand Plan Sublist Data .
Transactions: Item Supply Plan	Orders	—
Transactions: Journal Entry	Journal Entry Line	Each imported journal entry must include at least 2 lines, with balancing debits and credits. For more information, see Journal Entry Import and Intercompany Journal Entry Import .
—	Accounting Book Detail	Available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. Selectively updateable based on the Accounting Book key field.
Transactions: Opportunity	Items	Selectively updatable based on the Line/Order Line or Item key field (See Line Item Updates on Transactions Imports).

Record Type	Sublist	Notes
—	Opportunity	—
—	Partners	When Multi-Partner Management feature enabled. Selectively updatable based on Internal ID, External ID, or Partner.
—	Sales Team	When Team Selling feature enabled.
Transactions: Paycheck	Contributions, Deductions, Earnings, Expenses, Taxes, Time	—
Transactions: Period End Journal Entry	Period End Journal Entry Line	—
Transactions: Purchase Order	Items	Selectively updatable based on the Line/Order Line or Item key field (See Line Item Updates on Transactions Imports). At least one line item is required for new records. (See Required Items Sublist Fields for Transactions Imports .) For more information, see Purchase Order Import .
	Expenses	When Allow Expenses on Purchase Orders preference enabled. Expenses data must be in a separate CSV file. For more information, see Purchase Order Import .
Transactions: Return Authorization	Items	Selectively updatable based on Order Line or Item key field.
—	Partners	When Multi-Partner Management feature enabled. Selectively updatable based on Partner key field.
—	Sales Team	When Team Selling feature enabled. Selectively updatable based on Employee key field.
Transactions: Sales Order	Accounting Book Detail	Available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. Selectively updateable based on the Accounting Book key field.
—	Auth. Code	When Gift Certificates feature enabled.
—	Items	Selectively updatable based on the Line/Order Line or Item key field (See Line Item Updates on Transactions Imports).

		At least one line item is required for new records. (See Required Items Sublist Fields for Transactions Imports .)
—	Partners	When Multi-Partner Management feature enabled. Selectively updatable based on Internal ID, External ID, or Partner.
—	Sales Team	When Team Selling feature enabled.
—	Shipment	When Multiple Shipping Routes feature enabled.
Transactions: Statistical Journal Entry	Line	At least one line is required for new records (see Statistical Journal Entry Body and Sublist Fields).
Transactions: Subscription	Price Book Lines	When SuiteBilling feature enabled.
Transactions: Subscription Change Order	Subscription Change Order Items	When SuiteBilling feature enabled. Selectively updatable based on the Line Number field.
Transactions: Transfer Order	Accounting Books	—
—	Items	Selectively updatable based on the Line/Order Line or Item key field (See Line Item Updates on Transactions Imports).
Transactions: Vendor Bill	Accounting Book Detail	Available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. selectively updateable based on the Accounting Book key field
—	Items	Selectively updatable based on the Line/Order Line or Item key field (See Line Item Updates on Transactions Imports). At least one item line is required for new records (see Required Items Sublist Fields for Transactions Imports). For more information, see Vendor Bill Import .
—	Expenses	Expenses data must be in a separate file. For more information, see Vendor Bill Import .
Transactions: Vendor Credit	Items	Selectively updatable based on the Line/Order Line or Item key field (See Line Item Updates on Transactions Imports). At least one item line is required for new records (see Required Items Sublist Fields for Transactions Imports).

—	Expenses	Expenses data must be in a separate file. Selectively updatable based on the Line/Order Line key field.
—	Apply	Apply data must be in a separate file. Selectively updatable based on the Apply or Line key field.
—	Accounting Book Detail	Available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. Selectively updateable based on the Accounting Book key field.
Transactions: Vendor Payment	Bills	Selectively updatable based on the Bill key field (and optionally Line key field).
—	Accounting Book Detail	Available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. Selectively updateable based on the Accounting Book key field.
Transactions: Vendor Return Authorization	Items	Selectively updatable based on the Line/Order Line or Item key field (See Line Item Updates on Transactions Imports). At least one item line is required for new records (see Required Items Sublist Fields for Transactions Imports).
—	Expenses	Expenses data must be in a separate file. Selectively updatable based on the Line/Order Line key field.
—	Accounting Book Detail	Available only when the Multi-Book Accounting feature is enabled, and only when more than one active accounting book exists. Selectively updateable based on the Accounting Book key field.
Website: Site Category	Presentation Items	—

Importing Sublist Data in a Single File

When you import body and sublist data in a single file, the sublist data in the import file can be represented and handled in distinct ways based on the record type. NetSuite distinguishes between two types of sublists, and this determines how you can format your file when you import sublist data.

The first sublist type is the multiline sublist. With this type of sublist, the import file can contain one or more line of sublist data for a record in consecutive rows of the import file.

External ID	Customer	Item	Quantity
CM-PT3-042601	ABC Trucking	Carburetor MK60	10
CM-PT3-042601		Carburetor MK65	3
CM-PT3-042602	Happy Day Motors	Carburetor MK80	5
CM-PT3-042603	Smithson Auto Body	Alternator BS40	2
CM-PT3-042603		Alternator BS52	3
CM-PT3-042603		Carburetor MK60	8

The other sublist type is the multicolumn sublist. With this sublist, the import file can also contain one or more lines of sublist data for a record, but the sublist data is represented in columns rather than rows.

Custom list name	Custom list ID	Language 1	Translation 1	Language 2	Translation 2
Electronics	_electronics	German	Elektronik	French	electronique
Computers	_computers	German	Computer	French	ordinateur
Musical instruments	_musical_instruments	German	Musikinstrumente	French	instruments de musique

The sublists that support multicolumn import are marked with a plus sign in the import assistant. By adding a copy of these sublist fields to the import assistant, you can import and map the same type of data multiple times.

For example, your data can be translated to more than one language. By adding a copy of the Translation sublist fields, you can import and map multiple translations in one import file.

NetSuite Fields

- Owner
- Show options in order entered
- Custom List Values**
- Custom List Translation** 

 - Custom List Translation 1**
 - Language
 - Name

- Custom List Translation 2**

An import file may contain sublist data structured in either or both ways. It can contain:

- One or more lines of data for a single multiline sublist.
- One or more lines of data for more than one multiline sublist.
- One or more lines of data for multiple copies of the same multicolumn sublist.
- One or more lines of data for multiple copies of more than one multicolumn sublist.
- One or more lines of data for both multicolumn and multiline sublists.



Important: It depends on the record type whether sublist data can be mapped in multiline or in multicolumn sublists. This is an internal attribute and you cannot override this behavior. For information about the sublists that support multiline import, see [Multiline Sublists for CSV Import](#).

Each sublist structure is best suited for a particular purpose, depending on whether your sublist data has a variable number of lines, or a limited and fixed number of lines.

For example, if you import customer payments, each record may contain sublist data for a variable number of invoices. In this case, the first and second methods are the best.

As opposed to this, if you import translations of your data, you usually want to provide the translations in a fixed and limited number of languages. In this case, use the third or fourth method.

Import Format and Mapping Considerations

In a single-file import format, where you import both body and sublist data in one file, and the sublist data consists of multiple lines for each sublist item, you must provide a mapping to identify the record the sublist belongs to. This is necessary because the record ranges over more than one line of the import file.

Even though the external ID is not a required field on the Field Mapping page of the import assistant for transaction imports, you must include it to uniquely identify the record when you use the single-file import format and you are importing new data. The unique ID must be included in every line of the CSV file. If you attempt to import a file without specifying a unique identifier, you will receive the following error:

"You must map one of the following NetSuite fields to a column in your CSV file, to be a unique identifier: External ID, Internal ID, or a transaction number field, such as Order # or Invoice #"

If you import new data, the transaction ID is not yet available, and the Internal ID is created during import. The only unique identifier in this case is the External ID, and you must include it in each row of the file. When you update existing data, you can use internal IDs for the same purpose.

When you import new data, each record must be created with all the required data during an import, and the import file must contain values for the required body and sublist fields. When you update existing records, you can update the values of body fields and sublists separately.

Handling Gaps in Sublist Data

If you import file contains multiple lines of data for sublists, some lines of the sublist data may be empty. If you have empty lines in your sublist data, you must structure your import file in a way that the sublist data is at the beginning of your sublist data lines for each record. Additionally, the sublist data for each record must be consecutive.

In the following example, the data for one or more sublists is missing from the first line of sublist data. This leads to problems during the import.

External ID	Customer	Item	Quantity	Apply	Payment
CM-PT3-042601	ABC Trucking			EXTINV02134	2500
CM-PT3-042601		Carburetor MK60	10	EXTINV02183	1500
CM-PT3-042601		Carburetor MK65	3	EXTINV02190	750
CM-PT3-042602	Happy Day Motors			EXTSO12456	500
CM-PT3-042603	Smithson Auto Body				
CM-PT3-042603		Alternator BS40	2	EXTINV02210	1200
CM-PT3-042603		Alternator BS52	3	EXTINV02199	300

In the following example, the sublist data contains empty lines in the last position in the record, and the import works.

External ID	Customer	Item	Quantity	Apply	Payment
CM-PT3-042601	ABC Trucking	Carburetor MK60	10	EXTINV02134	2500
CM-PT3-042601		Carburetor MK65	3	EXTINV02183	1500
CM-PT3-042601				EXTINV02190	750
CM-PT3-042602	Happy Day Motors			EXTSO12456	500
CM-PT3-042603	Smithson Auto Body	Alternator BS40	2	EXTINV02210	1200
CM-PT3-042603		Alternator BS52	3	EXTINV02199	300
CM-PT3-042603				EXTINV02399	1500

Handling Multiple Values for Body Fields

If your file contains multiple lines of data for sublists, the body field values are only considered for the first line.

In the following example, the Date body field has three different values for the record CP-001, and two values for the record CP-002. In this case, only the first date value is imported, and the other two values will be skipped. The example in the [Import File with Sublist Data for a Multiline Sublist](#) section shows how to structure this import file correctly.

External ID	Customer	Date	Invoice ID	Payment Amount
CP-001	John Woodhouse	4/25/2017	INV-004	10000
CP-001		5/3/2017	INV-115	5800
CP-001		4/28/2017	INV-229	6200
CP-002	Tim Johnson	4/29/2017	INV-532	5600
CP-002		5/2/2017	INV-938	9800

Performance Considerations During Record Updates

To update sublist data in existing records, instead of using a single import file that includes body field and sublist data, consider using a separate import file for the sublist data, in which you provide a reference to the record you want to update. This approach leads to improved performance.



Important: If you move a set of sublist data to a separate import file, you must do this with all other sublist data. In the following example, if you move Item and Quantity into a separate Item import file, you must also move Apply and Payment into a separate Apply import file.

External ID	Customer	Item	Quantity	Apply	Payment
CM-PT3-042601	ABC Trucking	Carburetor MK60	10	EXTINV02134	2500
CM-PT3-042601	—	Carburetor MK65	3	EXTINV02183	1500
CM-PT3-042601	—	—	—	EXTINV02190	750
CM-PT3-042602	Happy Day Motors	—	—	EXTSO12456	500
CM-PT3-042603	Smithson Auto Body	Alternator BS40	2	EXTINV02210	1200
CM-PT3-042603	—	Alternator BS52	3	EXTINV02199	300

When you move sublist data to separate import files, make sure that the primary import file only contains data for body fields. If the import has more than one import file specified, multiline sublists are not supported. In this case, you must add all sublist data into separate import files, refer to the record ID in each additional file, and run the import.

Import File Examples

The following examples illustrate how sublist lines are handled when the import file contains sublist data for different numbers and types of sublists.

- [Import File with Sublist Data for a Multiline Sublist](#)

- Import File with Sublist Data for More Than One Multiline Sublists
- Import File with Sublist Data for a Multicolumn Sublist
- Import File with Sublist Data for More Than One Multicolumn Sublists
- Import File with Sublist Data for Both Multiline and Multicolumn Sublists

Import File with Sublist Data for a Multiline Sublist

The following example shows a customer payment import file that contains data for body fields and for the Invoices sublist. The external ID, the customer name, and the date are body fields. The invoice ID and the payment amount are sublist fields.

External ID	Customer	Date	Invoice ID	Payment Amount
CP-001	John Woodhouse	4/25/2017	INV-004	10000
CP-001	—	—	INV-115	5800
CP-001	—	—	INV-229	6200
CP-002	Tim Johnson	4/29/2017	INV-532	5600
CP-002	—	—	INV-938	9800

Import File with Sublist Data for More Than One Multiline Sublists

The following example shows a credit memo import file that contains data for body fields and for two different sublists, the Item sublist and the Apply sublist. The external ID and the customer name are body fields. Item and quantity are fields on the Item sublist. Apply and payment are fields on the Apply sublist.

External ID	Customer	Item	Quantity	Apply	Payment
CM-PT3-042601	ABC Trucking	Carburetor MK60	10	EXTINV02134	2500
CM-PT3-042601	—	Carburetor MK65	3	EXTINV02183	1500
CM-PT3-042601	—	—	—	EXTINV02190	750
CM-PT3-042602	Happy Day Motors	—	—	EXTSO12456	500
CM-PT3-042603	Smithson Auto Body	Alternator BS40	2	EXTINV02210	1200
CM-PT3-042603	—	Alternator BS52	3	EXTINV02199	300

Import File with Sublist Data for a Multicolumn Sublist

The following example shows a custom list import that contains data for body fields and for the fields of the Translation sublist in two languages. The custom list name and ID are body fields. Language and translation are fields on the Custom List Translation sublist.

Custom List Name	Custom List ID	Language 1	Translation 1	Language 2	Translation 2
Electronics	_electronics	German	Elektronik	French	electronique
Computers	_computers	German	Computer	French	ordinateur
Musical instruments	_musical_instruments	German	Musikinstrumente	French	instruments de musique

Import File with Sublist Data for More Than One Multicolumn Sublists

The following example shows a customer import that contains data for body fields and for the fields of two different multicolumn sublists, the Customer Credit Cards and the Customer Currencies sublists. The customer and company name are body fields. The credit card number and expiration date are fields on the Customer Credit Cards sublist. Currency is a field on the Customer Currencies sublist.

Customer	Company Name	CC Number 1	Expiration Date 1	CC Number 2	Expiration Date 2	Currency 1	Currency 2
Hannah King	King Enterprises	1111 2222 3333 4444	Jun-17	2222 3333 4444 5555	Sep-19	USD	AUD
Holly Fleming	Flemingway Inc.	3333 4444 5555 6666	Nov-23	5555 6666 7777 8888	Nov-20	CZK	EUR

Import File with Sublist Data for Both Multiline and Multicolumn Sublists

The following example shows a credit memo import that contains data for body fields and for the fields of both multiline and multicolumn sublists. The external ID and customer name are body fields. Apply and payment are fields on the Apply sublist. Accounting book and exchange rate are fields on the Credit Memo Accounting Books sublist.

External ID	Customer	Apply	Payment	Accounting Book 1	Exchange Rate 1	Accounting Book 2	Exchange Rate 2
CM-PT3-042601	ABC Trucking	EXTINV02134	2500	Accounting UK	1.2	Accounting US	1.5
CM-PT3-042601	—	EXTINV02183	1500	—	—	—	—
CM-PT3-042601	—	EXTINV02190	750	—	—	—	—
CM-PT3-042602	Happy Day Motors	EXTSO12456	500	Accounting UK	0.85	Accounting US	1.3
CM-PT3-042603	Smithson Auto Body	EXTINV02210	1200	Accounting AU	1.8	—	—
CM-PT3-042603	—	EXTINV02199	300	—	—	—	—

Limits of Using Multi-threaded CSV Import

If your import file contains multiple lines of data for sublist lines, you must consider whether you can use multi-threading to import the data. Multi-threading can lead to errors if the import file is structured incorrectly.

In the following example, each section marked with red is processed as one record.

External ID	Customer	Item	Quantity	Apply	Payment
CM-PT3-042601	ABC Trucking	Carburetor MK60	10	EXTINV02134	2500.00
CM-PT3-042601		Carburetor MK65	3	EXTINV02183	1500.00
CM-PT3-042601				EXTINV02190	750.00
CM-PT3-042602	Happy Day Motors			EXTSO12456	500.00
CM-PT3-042603	Smithson Auto Body	Alternator BS40	2		
CM-PT3-042603		Alternator BS52	3	EXTINV02199	300.00
CM-PT3-042603				EXTINV02210	1200.00

In this case, multi-threading works, but only if your import file is structured in a way that the lines that refer to the same record are consecutive.

In the following example, multi-threading can lead to an error because the lines referring to the same record are not consecutive. The first two lines of this example are processed as one record, and if multi-threading is used, it is possible that the process works on the last line at the same time, which modifies the same record.

External ID	Customer	Item	Quantity	Apply	Payment
CM-PT3-042601	ABC Trucking	Carburetor MK 60	10	EXTINV02134	2500
CM-PT3-042601		Carbureator MK65	3	EXTINV02183	1500
CM-PT3-042603	Smithson Auto Body			EXTINV02210	1200
CM-PT3-042602	Happy Day Motors			EXTSO12456	500
CM-PT3-042603	Smithson Auto Body	Alternator BS40	2		
CM-PT3-042603	Smithson Auto Body	Alternator BS52	3	EXTINV02199	300
CM-PT3-042601	ABC Trucking			EXTINV02190	750

 **Note:** When using an import file that contains multicolumn sublists, each line of the CSV file is submitted separately.

Custom list name	Custom list ID	Language 1	Translation 1	Language 2	Translation 2
Electronics	electronics	German	Elektronik	French	electronique
Computers	computers	German	Computer	French	ordinateur
Musical instruments	musical_instrument	German	Musikinstrumente	French	instruments de musique

Multiline Sublists for CSV Import

The following table lists in alphabetical order the sublists that support multiline import, and the record types for which each sublist is available.

For information about formatting the import file, see [Importing Sublist Data in a Single File](#).

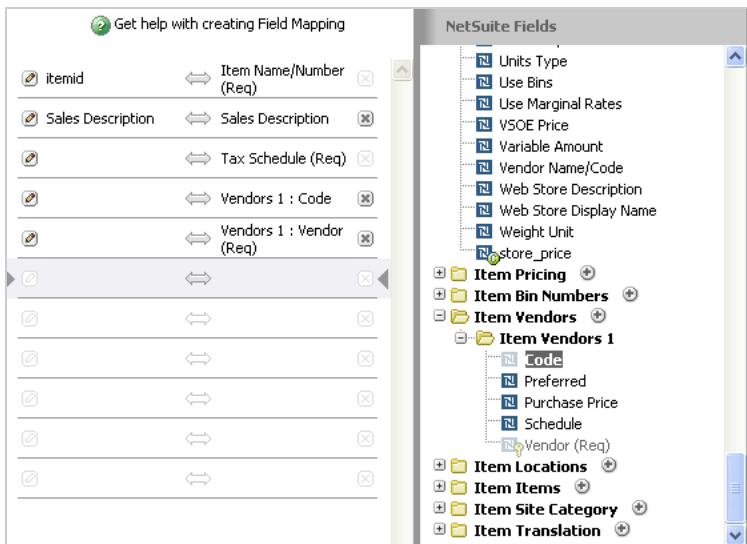
Sublist	Record Types
Add More Payees	Payroll Batch Add Employees
Machine	
Apply	Credit Memo, Customer Payment, Vendor Payment
Custom Value	Custom List
Exclude Location Regions	Location
Expense	Credit Card Charge, Credit Card Refund, Purchase Order, Vendor Bill, Vendor Credit, Vendor Return Authorization
Group Member	Groups
Include Location Regions	Location
Inventory	Inventory Adjustment, Inventory Transfer
Invt	Inventory Worksheet
Item	Cash Sale, Check, Credit Card Charge, Credit Card Refund, Credit Memo, Estimate, Invoice, Opportunity, Purchase Order, Return Authorization, Sales Order, Transfer Order, Vendor Bill, Vendor Credit, Vendor Return Authorization
Line	Custom Transaction, Intercompany Journal Entry, Journal Entry, Period End Journal Entry, Statistical Journal Entry
Member	Item Group, Subscription Plan

Sublist	Record Types
Order	Item Supply Plan
Pay Comm	Paycheck
Contribution	Paycheck
Deduction	Paycheck
Earnings	Paycheck
Expenses	Paycheck
Taxes	Paycheck
Time	Paycheck
Price Interval	Price Book, Subscription
Price Tiers	Price Plan
Subline	Subscription Change Order
Tax Details	Cash Sale, Credit Card Charge, Credit Card Refund, Credit Memo, Estimate, Invoice, Opportunity, Purchase Order, Return Authorization, Sales Order, Vendor Bill, Vendor Credit, Vendor Return Authorization

Required Fields for Sublist Import Mapping

Generally, fields marked (Req) on the Import Assistant Field Mapping page must be mapped for an import to proceed. These fields automatically display in the center pane of the Field Mapping page to make it clear that they must be mapped.

However, you do not always need to map sublist fields that are marked (Req), as these fields are only required if you are importing sublist records. For example, the Vendor field in the Item Vendors sublist is only required if you map one or more fields from this sublist.



The Import Assistant determines whether you are importing sublist records, and whether to treat mapping of the sublist's required fields as mandatory for import, based on your selection of **One File to Upload** or **Multiple Files to Upload** on the Scan & Upload CSV File page:

- If you choose a single file upload, the Import Assistant does not assume that you are importing any sublist data, so sublist required fields do not display in the center pane of the Field Mapping page and are not required for import.
- If you choose a multiple file upload, meaning one primary file for the record type and one or more linked files for sublists, the Import Assistant assumes you are importing data for each sublist that has a linked file, and sublist required fields display in the center pane of the Field Mapping page.

Processing for Import Assistant updates handles the addition and removal of dependent fields, in the same manner as the user interface. If an import adds a field that depends on other required fields, these other required fields are added. If an import removes a required field, all of its dependent fields are removed as well.

If a sublist field has the same name as a required body field, the required sublist field is automatically mapped. For an import where you are adding records, you can remove the required sublist field from the mapping if needed.



Note: The Import Assistant handles Items sublist required fields for some transactions imports differently, because items are required to add new records of these types, but not for updates to existing records. See [Required Items Sublist Fields for Transactions Imports](#).

For a single file upload, if you attempt to map a sublist field on the Field Mapping page, the system displays a pop-up dialog. This dialog states that if you map the field, you must map all required fields for the sublist. After you click OK, the sublist's required fields display in the center pane so you can map them.

Required Items Sublist Fields for Transactions Imports

The Import Assistant provides special handling of Items sublist required fields for the following transactions imports: Cash Sale, Estimate, Invoice, Purchase Order, Sales Order, Vendor Bill, Vendor Credit, and Vendor Return Authorization imports. This handling is necessary because new records for these transactions cannot be saved without any items. The import of Items sublist data is always required when new records are imported for these transaction types, but is not required when updated records are imported for these transaction types. (For Opportunity imports, Items sublist data is never required.)

The Import Assistant determines whether you are importing Items sublist records for transactions, and whether to treat mapping of the Items sublist's required fields as mandatory for import, based on your selection of **Add**, **Update**, or **Add or Update** data handling on the Import Options page

- If you select **Add**, Items required fields display in the center pane of the Field Mapping page and you are required to map these fields.
- If you select **Update**, or **Add or Update**, Items required fields do not display in the center pane of the Field Mapping page and you are not required to map these fields.

If you then attempt to map an Items sublist field on the Field Mapping page, you receive a warning that you must map Items required fields. When you click OK, the Items sublist's required fields display in the center pane so you can map them.

You can create a saved CSV import without the items sublist to add transactions without items. However, each time you run the import, the sublist Item field appears in the mapping. If you are not importing items, remove the sublist Item field from the mapping.

Line Item Updates on Transactions Imports

The Import Assistant lets you update items data for the following types of transactions: Cash Sale, Estimate, Invoice, Opportunity, Purchase Order, Sales Order, Vendor Bill, Vendor Credit, and Vendor Return Authorization. You can modify data for existing line items and/or add line items to existing transactions.

The Items sublist for transactions uses either Line/Order Line or Item as a key field to determine how to update or add line items.

- If a CSV file row includes values for both Line/Order Line and Item fields, Line/Order Line takes precedence over Item.
- CSV file rows with key field values that match existing line item key field values are used to update existing line items. CSV file rows with non-matching key field values are added as new line items.
- An error is returned if the import cannot determine which lines to update. This error occurs if there are two existing lines with duplicate Item values and if there are two lines in the CSV file that match a single existing line.
- You should use Line/Order Line as a key field. Because transactions may include multiple lines with the same Item value, using Item as the key may cause errors resulting from duplicate Item values.
- If you import line items to update a transaction and these new line items have the same Line/Order Line values as existing transaction line items, the import results in the new line items overwriting the existing line items. To instead add the line items, map a column with null values to the Line/Order Line field for the import.
- You can remove a line item from an existing transaction by exporting your data, removing the unnecessary line in your CSV file, and then importing the file again. In this case, set the [Overwrite Sublists](#) option to True.
- For updates of existing transaction line items (based on matching key field values), by default only mapped field values overwrite existing line item field values; fields that are not mapped for import do not change. If you want all CSV file values to overwrite existing values, set the [Overwrite Sublists](#) option to True. Generally you do not want to overwrite sublists, as there are many values set at the time of transactions that you would not want changed after the fact, such as Rate.



Important: Even if you do not have values for Line/Order Line, you should include it as a column in your CSV file and map it on the Field Mapping page. If Line/Order Line is mapped, even if its values are blank in the CSV file, errors do not result from duplicate Item values.

Review the following examples to get an understanding of how to format a CSV file to update transaction item lines.

CSV Data Example of Unsuccessful Transaction Line Item Update

- Existing Sales Order Transaction Lines
 - Item Y, Quantity 1
 - Item Y, Quantity 2
- CSV File for Import
 - Item Y, Quantity 5
 - Item Y, Quantity 5
 - Item Y, Quantity 15

This data results in an error because the import is trying to use the Item value as the key, and it is not clear which transaction lines should be updated.

CSV Data Example of Successful Transaction Line Item Addition

- Existing Sales Order Transaction Lines
 - Item Y, Quantity 1
 - Item Y, Quantity 2
- CSV File for Import
 - Item Y, Quantity 5, Order Line (no value)
 - Item Y, Quantity 5, Order Line (no value)

- Item Y, Quantity 15, Order Line (no value)
- Updated Sales Order Transaction Lines
 - Item Y, Quantity 1
 - Item Y, Quantity 2
 - Item Y, Quantity 5
 - Item Y, Quantity 5
 - Item Y, Quantity 15

The inclusion of the Order Line column in the CSV file prevents the error. Because the Order Line column does not have any values, CSV file lines are not matched with any existing line items, and are simply added.

The following example illustrates how you might structure your CSV import file. Because the order line ID is not specified, this example adds another line item to the specified sales order.

Customer	Date	Order Number	Item	Quantity	Order Line ID
Julie Homer	13/7/2017	7	Service Kit — Medium	6	—

CSV Data Example of Successful Transaction Line Item Update

- Existing Sales Order Transaction Lines
 - Item Y, Quantity 1, Order Line 22
 - Item Y, Quantity 2, Order Line 25
- CSV File for Import
 - Item Y, Quantity 5, Order Line 22
 - Item Y, Quantity 5, Order Line 25
 - Item Y, Quantity 15, Order Line (no value)
- Updated Sales Order Transaction Lines
 - Item Y, Quantity 6, Order Line 22
 - Item Y, Quantity 7, Order Line 25
 - Item Y, Quantity 15

The first two CSV file lines are matched to existing line items so the quantity amounts are added. The third CSV file line is not matched, so it is added as a new line item.

The following example illustrates how you might structure your CSV import file. Because the order line ID is specified, this example updates the matching line item in the specified sales order.

Customer	Date	Order Number	Item	Quantity	Order Line ID
Julie Homer	13/7/2017	7	Service Kit — Medium	8	4

 **Note:** You can create a saved transaction search to retrieve order line values for item lines, before setting up an import to update this data.

Importing Subrecord Data

Some types of NetSuite records may include sets of related data called subrecords. For example, each sales order record may include a set of item inventory detail subrecords. Subrecords are similar to record

types, but subrecords must be created, edited, removed, or viewed from within the context of a standard (parent) record type. You can use the Import Assistant to import subrecord data for some record types.

Subrecord data can be included in the same file as other record type data in a single-file import, or you can upload a separate file for each subrecord's data in a multi-file import. In either case, file formatting can be complex. Multi-file imports match foreign keys in subrecord data files to primary keys in the primary record file data to determine relationships, whereas single-file imports that include subrecord data may have recursively repeating rows to represent relationships. It may be easier to set up multi-file imports, but there are no performance gains with this format. Be aware that if you put data for one subrecord in a separate file for an import, you must put data for all other subrecords in their own separate files as well. CSV processing of subrecord data is divided strictly between a single file or multi-file approach, so you cannot mix the two approaches. If you put some subrecord data in the primary record data file and some in a separate file, the import will not process successfully.

Supported subrecord imports vary according to the features that are enabled in your account. For a list of subrecords supported for import, see [Supported Subrecord Imports](#).

 **Note:** Some related data may be structured as a sublist rather than as a subrecord of a record type. See [Sublist Data Import](#).

Supported Subrecord Imports

The following table shows the subrecords for which you may be able to add or update data through CSV imports. These subrecords depend upon the features enabled in your account. You can see the subrecords available in your account for a particular record type on the Import Assistant's Field Mapping page.

 **Note:** Some related data may be structured as a sublist rather than as a subrecord of a record type. If you do not see a subrecord in the table below, see [Supported Sublist Imports](#) to check if the data is set up as a sublist instead.

Record Type	Subrecord
Classification: Location	Return Address
Transactions: Cash Sale	Billing Address
—	Items — Inventory Detail
—	Shipping Address
Transactions: Check	Items — Inventory Detail
—	Items — Landed Cost
Transactions: Credit Memo	Billing Address
—	Items — Inventory Detail
—	Shipping Address
Transactions: Estimate	Billing Address

Record Type	Subrecord
—	Items — Inventory Detail
—	Shipping Address
Transactions: Inbound Shipment	Inventory Details
—	Items — Landed Cost
Transactions: Inventory Transfer	Adjustments — Inventory Detail
Transactions: Invoice	Billing Address
—	Items — Inventory Detail
—	Shipping Address
Transactions: Purchase Order	Billing Address
—	Items — Inventory Detail
—	Shipping Address
Transactions: Return Authorization	Billing Address
—	Items — Inventory Detail
—	Shipping Address
Transactions: Sales Order	Billing Address
—	Items — Inventory Detail
—	Shipping Address
Transactions:Transfer Order	Items — Inventory Detail
—	Shipping Address
Transactions:Vendor Bill	Items — Inventory Detail
—	Items — Landed Cost
Transactions: Vendor Credit	Items — Inventory Detail
Transactions: Vendor Return Authorization	Items — Inventory Detail

Effects of Auto-Generated Numbers during Imports

NetSuite lets you enable auto-generated numbering for many record types, including many types of transactions, so that records are numbered automatically in the order they are created. Auto-generated numbering is set up and recorded at Setup > Company > Auto-Generated Numbers.

- After auto-generated numbering is set up for a record type, NetSuite generates IDs for all records of that type. These IDs are stored in the name field of each record.
- If you need to import legacy IDs for a record type that has auto-generated numbering enabled, be sure to check the Allow Override box. Otherwise, your import job may return errors.

Set Up Auto-Generated Numbers								More																																																																																
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	<input type="button" value="Reset"/>																																																																																						
Record numbers cannot be reverted back to names once updated. If you check Update, a number is assigned to each existing record of that type, and the name is stored in the Company Name field.																																																																																								
You can return to this page at any time to turn on or off numbering for new records; however, once numbered, records will be listed by number instead of by name. It typically takes just a few minutes for 5000 records. While it is running, this page will not be available.																																																																																								
Entities • Transactions • CRM • Schedules • <table border="1"> <thead> <tr> <th>ENABLE</th> <th>WITHIN PARENT GROUP</th> <th>TYPE</th> <th>PREFIX</th> <th>SUFFIX</th> <th>MINIMUM DIGITS</th> <th>INITIAL NUMBER</th> <th>CURRENT NUMBER</th> <th>ALLOW OVERRIDE</th> <th>UPDATE</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td></td> <td>Customer</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Subcustomer</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td>Job</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td>Employee</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td>Partner</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td></td> <td>Subpartner</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td>Vendor</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>								ENABLE	WITHIN PARENT GROUP	TYPE	PREFIX	SUFFIX	MINIMUM DIGITS	INITIAL NUMBER	CURRENT NUMBER	ALLOW OVERRIDE	UPDATE	<input type="checkbox"/>		Customer						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Subcustomer						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Job						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Employee						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Partner						<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Subpartner						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Vendor						<input type="checkbox"/>	<input type="checkbox"/>	
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If auto-generated numbering is enabled for a record type, you should use the external ID as the key for matching imported records to existing NetSuite records during updates, and as the reference type for mapping CSV file values to that record's dropdown lists and multi-select fields. The external ID is a unique value referenced from an external database. Using the external ID avoids mismatches and errors that can occur if you attempt to use the NetSuite system-generated internal ID or name as a key or reference type.

Review the following for more details about auto-generated numbers and imports:

- [Auto-Generated Numbers and Imports that Add Data](#)
- [Auto-Generated Numbers and Imports that Update Data](#)
- [Enabling Auto-Generated Numbering After Importing Records](#)
- [Auto-Generated Numbers and Customers Only, Leads Only, and Prospects Only Imports](#)
- [Auto-Generated Numbers and Chart of Accounts Imports](#)

Note: For more information about setting up auto-generated numbering, see the help topic [Set Auto-Generated Numbers](#).

Auto-Generated Numbers and Imports that Add Data

If auto-generated numbering is enabled for a record type, you may not be able to import values for ID field data, even if you map the field in the Import Assistant, depending on the record type's Allow Override setting on the Set Up Auto-Generated Numbers page.

- If you have enabled auto-generated numbering for a record type and disabled Allow Override, any ID field values in the CSV file are ignored, and auto-generated numbers are saved with imported records.

- If you have enabled auto-generated numbering for a record type and enabled Allow Override, ID field values can be imported.

For example, if you import a customer with a Customer ID of **jack1** listed in the CSV file:

- If Allow Override is disabled, the new customer record has a Customer ID of **CUST0001**.
- If Allow Override is enabled, the new customer record has a Customer ID of **jack1**.

Auto-Generated Numbers and Imports that Update Data

For import jobs that update records that have auto-numbering enabled, you may receive an error like the following if your import file includes any ID field values other than the auto-generated ones, "You do not have permissions to set a value for element entityid...". To avoid this error, make sure that the Ignore Read-Only Fields advanced option is enabled, on the Import Options page. See [Ignore Read Only Fields](#). If you need this option to be disabled for some reason, you alternately can remove the ID field values from your file, or simply do not map the ID field.

An enabled auto-generated numbering preference changes the record names that NetSuite users see in dropdown lists, so this preference changes requirements for name references in imported CSV files. When you do an import of a record, all CSV file references to that record must match the exact name of the record that the user sees in the user interface dropdown list for that field. When auto-generated numbering is turned on, the name in the dropdown list is typically <auto-generated_#+ Name>, for example, "154 Bob Jones" or "4058 Budget".

The Import Assistant uses reference types to map individual CSV records to existing NetSuite records for updating. Internal IDs, external IDs, or names can be used as reference types. A reference type of External ID is recommended for the import of records with auto-generated numbers. For information about setting up reference types, see [Select Reference Types](#).

Enabling Auto-Generated Numbering After Importing Records

If you import new records with ID values included in the CSV files, and then you enable auto-generated numbering for their record type with the Update option checked, auto-generated numbers may be concatenated with imported ID values for imported records. (The Update option for auto-generated numbering indicates that existing records should be given auto-generated numbers.)

For example, for customer records, the imported ID value may be moved to the Company Name field when an auto-generated number is added, but if the Company Name field already is populated, the imported ID value appears after the auto-generated number.

So if you have imported a record for a customer with a Customer ID of **ABC0001** and a Company Name of **Star Records**, then after the import, you enable auto-generated numbering for customers and check the Update box, this record has a Customer ID of **CUST1 ABC0001** and a Company name of **Star Records**.

Auto-Generated Numbers and Customers Only, Leads Only, and Prospects Only Imports

In cases where Entities (Leads, Prospects, and Customers) are being imported in a separate import job from Contacts, auto-generated numbering behaves as follows:

- If auto-generated numbering is ON:
 - If you map the Lead, Prospect, or Customer ID, the value in the source column **must** match the generated ID

- If you map the company name, the value in the source column must match the descriptive name.
- When auto-generated numbering is OFF:
 - If you map the Lead, Prospect, or Customer ID, the value in the source column must match the descriptive name.
 - If you map the company name, it will not match any records.

Auto-Generated Numbers and Chart of Accounts Imports

For details about how auto-generated numbering works in the Chart of Accounts record type, see [Referencing Child Accounts by Name and Number](#).



Important: When entering numbers into a CSV file, many spreadsheet programs do not allow leading zeros. For example, if you use Auto-Generated Numbers, you cannot enter 01543 to reference a record. You can eliminate this problem by formatting the cells in your spreadsheet as Text cells instead of numbers. For information on formatting the cells, please refer to the help system for your spreadsheet software.

General CSV File Conventions

To be successfully imported, CSV files must contain values separated by **commas** or other supported column separators, such as the **semicolon**, **pipe**, **space**, and **tab**.

CSV files typically include a top row with column names as headers, and multiple rows of data below.

Review the following tips as you are setting up CSV files for the Import Assistant:

- The Import Assistant has a limit of 25,000 records or 50 MB per import job. For a multiple file upload, all files combined must be under these limits.

You should break large import jobs into smaller chunks to improve performance.

- The Import Assistant attempts to map each CSV file's column headers to field names for the selected NetSuite record type, so that data can be imported into the appropriate NetSuite fields. The Assistant includes a Field Mapping page where you can review and edit its mappings, and define mappings for columns that the Assistant was unable to map.

If a file contains fields of data without column headers, the Import Assistant does not import the trailing fields' data.

- Blank lines at the end of an imported CSV file are not included in the import.
- You can specify name references in a CSV file, but reference types such as External ID or Internal ID are preferable. Data values for fields used as reference types must be written exactly as they appear in dropdown lists in the NetSuite record form. For more information, see [Select Reference Types, Name References](#), and [Effects of Auto-Generated Numbers during Imports](#).
- If your account is using NetSuite OneWorld, the Subsidiary field is a required field for the following record types: Chart of Accounts, Contacts, Customers, Employees, Jobs, Leads, Partners, Prospects, and Vendors. For imports of these record types, you must include in your CSV file a field that can be mapped to the NetSuite Subsidiary field. If the import attempts to add or update records in a OneWorld account without identifying the subsidiary, the import will fail. CSV file values for subsidiaries should be hierarchical names, in the format grandparent : parent : child, for example, Consolidated Parent Company : UK Subsidiary : Euro Subsidiary.
- If your system's regional settings designate commas as decimal separators, CSV files that you generate with Microsoft Excel use semi-colons as CSV value separators. To learn more about the number formats supported for CSV imports, see [Tips for Using Numbers in CSV Files](#).

- Go to Home > Set Preferences. On the General tab, scroll down to Formatting. Make sure that the CSV Column Delimiter option is set to the column separator used in the CSV files you are planning to import.
- If you are importing CSV data in a language different from your NetSuite language preferences, the data import might be slow. To improve the import speed, change your NetSuite language settings at Home > Set Preferences before importing CSV data, so that your language settings match the language of the CSV file you are importing.

Tips for Using Numbers in CSV Files

Be careful when entering numbers into a CSV file. Many spreadsheet programs do not permit or do not show leading zeros by default, which can be a problem if your data needs those leading zeros. You can work around this problem by formatting the cells in the spreadsheet program as text rather than numbers.

If you plan to import a CSV file created in Excel, be aware that Excel uses scientific notation to save long numbers to CSV files. Long numbers will be imported into NetSuite in rounded form, resulting in incorrect values. You can work around this issue by formatting long numbers such as UPC codes as "Text" in Excel before doing a CSV import.

Commas Used as Decimal Marks

If you use commas as decimal marks in your CSV files, you should specify this choice in the Advanced Import Options of the Import Assistant. If appropriate, you can make it the default format for all CSV imports. To learn how to do that, see the help topics [General Personal Preferences](#) and [Setting CSV Import Preferences](#). If you want to set this format as the default for a subsidiary, see the help topic [Editing Subsidiary Records](#).

If the decimal mark is the same character that is used as the CSV column separator, you should put quotation marks around any floating point numbers in the CSV file you import. To learn more, see [Avoiding Errors for Commas and Other Delimiter Symbols within CSV File Fields](#).

Boolean Values in CSV Files

You should use only "TRUE" or "FALSE" as values for radio button fields to ensure that import of these fields is successful.

- Currently, radio button fields do not accept any other Boolean values.
- The Individual field for entities is an exception that accepts all forms of True or False. For information, see [Customers as Individuals or Companies](#).
- Check boxes accept the following forms for true values: TRUE, YES, T, Y.
- Check boxes accept the following forms for false values: FALSE, NO, F, N

When working with check boxes and radio buttons, note the following:

- True and false values are case insensitive.
- The Import Assistant does not honor localization. This means that true and false values are not accepted in languages other than English.
- The Import Assistant does not accept any other true or false value than the eight values listed.

Avoiding Errors for Commas and Other Delimiter Symbols within CSV File Fields

The Import Assistant ignores extra trailing commas and other column separators repeated at the end of fields or rows.

If any of the fields in the CSV file you import contains characters that are also used as column separators in the file (comma, semicolon, pipe, space, or tab), errors might occur during the import. To avoid errors when importing these files, either remove these characters or enclose the content of such fields in quotation marks ("for example"). This applies also to spaces before or after the value in the field. When opening a CSV file with a simple text editor, there should be no other characters that are also used as column separators in it, unless you enclose them in quotation marks.

If the CSV file you import uses commas as both value separators and decimal marks, make sure that all floating point numbers are enclosed in quotation marks (for example, "1,42").

Delimiters for Hierarchical and Multi-Select Fields

When importing records that contain hierarchical relationships, use a colon ":" as the field delimiter. If relationships are multi-tiered, place a colon between each record and subrecord. Place a space between each value and each delimiter.

If there is a hierarchy in a user interface dropdown list, then the CSV file requires the colon delimiter, even if a colon does not display in the UI dropdown list.

- For multi-select field values, the default delimiter is a pipe "|". You can specify a different single character to be used instead of the pipe, for an import job. Set this value on the Import Assistant's Import Options page, in the Advanced Options section. For information, see [Set Advanced CSV Import Options](#).
- If you are an administrator, you can specify a different character be used for all import jobs in the account, on the CSV Import Preferences page. For information, see [Setting CSV Import Preferences](#).
- The user-level character set as an advanced option for an import job overrides the account-level character, for that import job.
- In your CSV files' multi-select fields, leave a space between each value and each delimiter.

Example Hierarchical Delimiters

In this example, Solution 1 is associated with Topic B, which is a Subtopic of A. Solution 2 is associated with Topic Z, a Subtopic of Y, which is a Subtopic of X. The colon ":" is the field delimiter. You signify the hierarchy between items using the colon in the topic column.

Solution	...	Topic	Is Inactive
1	...	A : B	FALSE
2	...	X : Y : Z	FALSE

Name References

Name references need to duplicate exactly the name displayed in the NetSuite user interface. Name references can be prone to error:

- Name references may need specify a parent-child relationship between two objects using hierarchical delimiters, as described in [Delimiters for Hierarchical and Multi-Select Fields](#).
- For names that contain spaces, HTML rendering can sometimes distort the number of spaces included, causing mismatches between CSV file values and existing records, that result in import errors. To verify the number of spaces in names, you can create a saved search with a list of names and export it.
- Your preference for auto-generated numbering can affect the way that names display. For information, see [Effects of Auto-Generated Numbers during Imports](#).

If you are unsure or unable to verify the name reference for a record, you should use the External ID field instead. For updates, you can use the Internal ID.

State and Province Names for CSV Import

State and province names in CSV files need to match **Short Name** values listed at Setup > Company > States/Provinces/Counties.

States/Provinces/Counties		
New		
FILTERS		
Country		
United States		
Australia		
Canada		
China		
Japan		
Mexico		
United Kingdom (GB)		
United States		
	STATE	SHORT NAME
	Alabama	AL
	Alaska	AK
	Arizona	AZ
	Arkansas	AR
	Armed Forces Americas	AA
	Armed Forces Europe	AE
	Armed Forces Pacific	AP

NetSuite provides initial system lists of names for several countries. You can add custom states and provinces at Setup > Company > States/Provinces/Counties > New.

If an imported CSV file includes state or province names that do not match current system or custom names, the import job returns an error like "Invalid state state_name for country country_name". If you receive this error, review state and province names in your file, and either make corrections to the file or make additions to system States/Provinces/Counties.

Important: If a CSV file includes the full names for states or provinces rather than short names, the import job may complete, but state or province values may not be saved correctly. To avoid errors, use short names. For example, importing full names for the Shipping Address Country field in transactions can prevent later calculation of shipping costs.

Country Names for CSV Import

It is best to specify countries by name instead of country codes in CSV files. Country codes are used as countries' NetSuite internal IDs and using them in a CSV file can result to errors. Before an import, replace any country codes with names.



Note: On the Field Mapping page of the Import Assistant, you can click the edit icon for a country field, to select a default country value from a dropdown list. Selecting from this list can prevent errors.

In addition to country codes and names, NetSuite's SOAP web services schema includes country enumerations for use in SOAP web services operations. See the help topic [Country Enumerations](#).

The following table lists the country names in English that map to NetSuite country codes. NetSuite translates country names for each locale, so if you are running NetSuite in a language other than English, you should use the country names that appear in your NetSuite user interface rather than the names in this table.

Internal ID	Country Name in English
AD	Andorra
AE	United Arab Emirates
AF	Afghanistan
AG	Antigua and Barbuda
AI	Anguilla
AL	Albania
AM	Armenia
AO	Angola
AQ	Antarctica
AR	Argentina
AS	American Samoa
AT	Austria
AU	Australia
AW	Aruba
AX	Aland Islands
AZ	Azerbaijan
BA	Bosnia and Herzegovina
BB	Barbados
BD	Bangladesh
BE	Belgium
BF	Burkina Faso
BG	Bulgaria
BH	Bahrain
BI	Burundi
BJ	Benin

Internal ID	Country Name in English
BL	Saint Barthélemy
BM	Bermuda
BN	Brunei Darussalam
BO	Bolivia
BQ	Bonaire, Saint Eustatius, and Saba
BR	Brazil
BS	Bahamas
BT	Bhutan
BV	Bouvet Island
BW	Botswana
BY	Belarus
BZ	Belize
CA	Canada
CC	Cocos (Keeling) Islands
CD	Congo, Democratic People's Republic
CF	Central African Republic
CG	Congo, Republic of
CH	Switzerland
CI	Cote d'Ivoire
CK	Cook Islands
CL	Chile
CM	Cameroon
CN	China
CO	Colombia
CR	Costa Rica
CU	Cuba
CV	Cape Verde
CW	Curacao
CX	Christmas Island
CY	Cyprus
CZ	Czech Republic
DE	Germany

Internal ID	Country Name in English
DJ	Djibouti
DK	Denmark
DM	Dominica
DO	Dominican Republic
DZ	Algeria
EA	Ceuta and Melilla
EC	Ecuador
EE	Estonia
EG	Egypt
EH	Western Sahara
ER	Eritrea
ES	Spain
ET	Ethiopia
FI	Finland
FJ	Fiji
FK	Falkland Islands
FM	Micronesia, Federal State of
FO	Faroe Islands
FR	France
GA	Gabon
GB	United Kingdom
GD	Grenada
GE	Georgia
GF	French Guiana
GG	Guernsey
GH	Ghana
GI	Gibraltar
GL	Greenland
GM	Gambia
GN	Guinea
GP	Guadeloupe
GQ	Equatorial Guinea

Internal ID	Country Name in English
GR	Greece
GS	South Georgia
GT	Guatemala
GU	Guam
GW	Guinea-Bissau
GY	Guyana
HK	Hong Kong
HM	Heard and McDonald Islands
HN	Honduras
HR	Croatia/Hrvatska
HT	Haiti
HU	Hungary
IC	Canary Islands
ID	Indonesia
IE	Ireland
IL	Israel
IM	Isle of Man
IN	India
IO	British Indian Ocean Territory
IQ	Iraq
IR	Iran (Islamic Republic of)
IS	Iceland
IT	Italy
JE	Jersey
JM	Jamaica
JO	Jordan
JP	Japan
KE	Kenya
KG	Kyrgyzstan
KH	Cambodia
KI	Kiribati
KM	Comoros

Internal ID	Country Name in English
KN	Saint Kitts and Nevis
KP	Korea, Democratic People's Republic
KR	Korea, Republic of
KW	Kuwait
KY	Cayman Islands
KZ	Kazakhstan
LA	Lao People's Democratic Republic
LB	Lebanon
LC	Saint Lucia
LI	Liechtenstein
LK	Sri Lanka
LR	Liberia
LS	Lesotho
LT	Lithuania
LU	Luxembourg
LV	Latvia
LY	Libya
MA	Morocco
MC	Monaco
MD	Moldova, Republic of
ME	Montenegro
MF	Saint Martin
MG	Madagascar
MH	Marshall Islands
MK	Macedonia
ML	Mali
MM	Myanmar
MN	Mongolia
MO	Macau
MP	Northern Mariana Islands
MQ	Martinique
MR	Mauritania

Internal ID	Country Name in English
MS	Montserrat
MT	Malta
MU	Mauritius
MV	Maldives
MW	Malawi
MX	Mexico
MY	Malaysia
MZ	Mozambique
NA	Namibia
NC	New Caledonia
NE	Niger
NF	Norfolk Island
NG	Nigeria
NI	Nicaragua
NL	Netherlands
NO	Norway
NP	Nepal
NR	Nauru
NU	Niue
NZ	New Zealand
OM	Oman
PA	Panama
PE	Peru
PF	French Polynesia
PG	Papua New Guinea
PH	Philippines
PK	Pakistan
PL	Poland
PM	St. Pierre and Miquelon
PN	Pitcairn Island
PR	Puerto Rico
PS	State of Palestine

Internal ID	Country Name in English
PT	Portugal
PW	Palau
PY	Paraguay
QA	Qatar
RE	Reunion Island
RO	Romania
RS	Serbia
RU	Russian Federation
RW	Rwanda
SA	Saudi Arabia
SB	Solomon Islands
SC	Seychelles
SD	Sudan
SE	Sweden
SG	Singapore
SH	Saint Helena
SI	Slovenia
SJ	Svalbard and Jan Mayen Islands
SK	Slovak Republic
SL	Sierra Leone
SM	San Marino
SN	Senegal
SO	Somalia
SR	Suriname
SS	South Sudan
ST	Sao Tome and Principe
SV	El Salvador
SX	Sint Maarten
SY	Syrian Arab Republic
SZ	Swaziland
TC	Turks and Caicos Islands
TD	Chad

Internal ID	Country Name in English
TF	French Southern Territories
TG	Togo
TH	Thailand
TJ	Tajikistan
TK	Tokelau
TL	East Timor
TM	Turkmenistan
TN	Tunisia
TO	Tonga
TR	Turkey
TT	Trinidad and Tobago
TV	Tuvalu
TW	Taiwan
TZ	Tanzania
UA	Ukraine
UG	Uganda
UM	US Minor Outlying Islands
US	United States
UY	Uruguay
UZ	Uzbekistan
VA	Holy See (City Vatican State)
VC	Saint Vincent and the Grenadines
VE	Venezuela
VG	Virgin Islands (British)
VI	Virgin Islands (USA)
VN	Vietnam
VU	Vanuatu
WF	Wallis and Futuna Islands
WS	Samoa
XK	Kosovo
YE	Yemen
YT	Mayotte

Internal ID	Country Name in English
ZA	South Africa
ZM	Zambia
ZW	Zimbabwe

CSV Import Error Messages

This section lists some of the common errors found during a CSV import and what you can do to correct the error. The errors are organized by import record type.

- General Import Errors
- Employee Import Errors
- Relationship Import Errors
- Items Import Errors
- Transactions Import Errors
- Website Import Errors

General Import Errors

This section describes errors that you might see on any type of import. See the following:

- There is already an item with that name or name/parent combination
- The following file(s) could not be uploaded because of one or more errors. Please correct and re-upload.
- Mandatory field missing for field "XXXX"
- You do not have permissions to set a value for element XXXX due to one of the following reasons: 1) The field is read-only; 2) An associated feature is disabled
- Invalid effective date reference key
- A Saved Search with Internal ID xxx does not exist
- Please enter a value for amount
- Different number of columns than in the header row
- AfterSubmit Script failed, record created with internalId xxx
- Warning: Your personal language settings do not match your company's language preferences. This may slow down the import of CSV data.

There is already an item with that name or name/parent combination

The error occurs when the CSV file contains duplicate data for a multi-select field column.

To resolve the error, review the CSV file, look for a multi-select field column, and make sure that no data (internal ID) is entered twice.

Example

Incorrect:

(CSV File) Custom Field value = 1|2|3|4|5|5|6

Correct:

(CSV File) Custom Field value = 1|2|3|4|5|6

The following file(s) could not be uploaded because of one or more errors. Please correct and re-upload.

CSV import errors are encountered if leads, estimates and opportunity CSV files that have a character encoding option of UTF-8 are saved with ANSI encoding. The error is resolved if the special character for example 'à', is removed from the CSV file.

Incorrect file encoding was used when the file is saved for import. When saving the file for import:

1. Open the CSV file in Notepad.
2. Select **File > Save as**.
3. In the **Encoding** dropdown list, select **UTF-8**.
4. Click **Save**.
5. Import this file using the Import Assistant.

Mandatory field missing for field "XXXX"

The file might contain extra commas. When you open a CSV file in Excel, extra commas are not visible. However, extra commas are visible when you open the file in Notepad.

Use Notepad or a similar application to open the CSV file and look for extra commas.

You do not have permissions to set a value for element XXXX due to one of the following reasons: 1) The field is read-only; 2) An associated feature is disabled

To resolve the error, in the Import Assistant, expand the Advanced Options menu and check **Ignore Read-Only Fields**. This option is enabled by default; however, for existing imports, **Ignore Read-Only Fields** is disabled.

Invalid effective date reference key

The error occurs when the date format of the Effective Date column in the CSV file is inconsistent with the date format used in the Date Format field found in Home > Set Preferences > General, in the Formatting field group.

To resolve the issue, do one of the following:

- Modify the Date Format in the CSV file to match the format in NetSuite.
- Modify the Date Format in the NetSuite preferences to match the format in the CSV file.
- Modify the Effective Date value during field mapping by clicking the edit icon and setting a default value that matches the date format of the NetSuite preferences.

Excel converts value from text to date format

The format conversion happens when:

1. A value is initially formatted as text
2. The file is saved as a CSV file.

3. Excel incorrectly converts the value to the date format.
4. The file is opened again.

If the CSV file is saved again, it retains the incorrect formatting. Then, if that file is used in a CSV import, an invalid reference error is received.

To prevent Microsoft Excel from automatically converting text values to the date format, enter an equal sign with quotation marks on the value. This notation forces the use of the text format.

For example, to enter Sept 2013, in Excel, enter = "Sept 2013". Note the space after the quotation marks.

A Saved Search with Internal ID xxx does not exist

The error is triggered by a custom field on the form that pulls its value from the results of a saved search and one of the following conditions is met:

- The saved search is inactive or no longer exists
- The saved search is set to private and the user running the CSV import does not belong to the search's audience

To resolve the error, the administrator needs to ensure that:

1. The saved search is active, and
2. The user has access to the saved search (either the saved search is public or the user belongs to the audience for the search). For more information, see the help topic [Defining Audiences for Saved Searches](#).

Please enter a value for amount

The error occurs when:

- the import contains duplicate records, for example duplicate items when importing sales order. Remove duplicate records to resolve.
- the format of the data in the CSV file is not recognized. Set formatting on the amount column.

To format the Amount column in the CSV file:

1. Select the column.
2. Right-click and select **Format Cells**.
3. On the Number tab, select **Number**.
4. Click **OK**.
5. Save the file.

Also ensure that there are no zero values in the Amount column. Some imports require that the amount not be zero.

There is already a Custom Record Entry with that name

The error occurs when the external ID is specified in the CSV file. The external ID serves as a reference key and should be unique for each record type. To resolve the error, make sure that the external ID has not yet been used for another record.

Different number of columns than in the header row

This error occurs if a row in the CSV file contains more values than the specified header row. Consider the following example.

The first row leads to an error because it contains more columns than the number of headers. The second row contains data for all columns, therefore it does not lead to an error. The third row is also processed correctly because the CSV file does not need to contain data in all rows for all columns.

Name	Country	Item	<empty header>
John Smith	USA	Travel kit — medium	TAX-CA-125
Katherine Thomas	France	Travel kit — large	—
Jane Murray	USA	—	—

AfterSubmit Script failed, record created with internalId xxx

When an afterSubmit script runs after a CSV import, and the script fails, the records are still created or updated in NetSuite. The CSV response indicates that the record has been created or updated even if an afterSubmit script that runs after the CSV import fails.

In this case, the CSV response contains a message similar to the following:

[AFTERSUBMIT Script failed, record created with InternalId 123] You must enter at least one line item for this transaction.

This message indicates that the records have been saved, and you only need to retry the user event script, but should not run the CSV import again.



Note: For information about working with afterSubmit scripts, see the help topics [afterSubmit\(context\)](#) and [SuiteScript 2.x User Event Script Type](#).

Warning: Your personal language settings do not match your company's language preferences. This may slow down the import of CSV data.

The error occurs when your language preference do not match the company's language preference.

This may happen when there is a difference between subsidiary, or parent subsidiary language preference, and your company's language preference. The company default language cannot be changed, after the account is set up. The parent subsidiary, subsidiary, and personal language preferences can be changed. This may cause the difference in language preferences. For more information, see the help topics [Multi-Language Preferences](#), and [Choosing a Language for Your NetSuite User Interface](#).

Employee Import Errors

This section describes errors that you might see on an employee import. See the following:

- Please enter value(s) for: Currency
- Invalid category reference key xx
- Expense Categories – The field name contained more than the maximum number (61) of characters allowed
- Invalid employee reference key xx

Please enter value(s) for: Currency

When adding a new Expense Report, the error occurs if Use Multicurrency is checked on the Expense Report form and no currency information was mapped or provided in the Import Assistant.

To resolve the error, choose one of the following options.

Option 1: Disable the Use Multicurrency Expense Reports preference.

1. Go to Home > Set Preferences.
2. On the General subtab, in the Defaults field group, clear the **Use Multicurrency Expense Reports** box.
3. Click **Save**.

Option 2: Edit the CSV file and add a Currency column.

Option 3: Enter a default value in the Expenses 1 : Currency field on the Field Mapping page of the Import Assistant.

1. On the Field Mapping page, click the edit icon beside Expenses 1 : Currency.
2. Click **Provide Default Value**.
3. Select **USD** from the dropdown list.
4. Click **Done**.

Option 4: Edit the CSV file and add a Use MultiCurrency column with a value of **No**.

Option 5: Provide a default value to the Use MultiCurrency field on the Field Mapping page of the Import Assistant.

1. On the Field Mapping page, click the pencil button beside MultiCurrency.
2. Click **Provide Default Value**.
3. Select **No** from the dropdown list.
4. Click **Done**.

Invalid category reference key xx

To resolve the error:

1. Make sure that the Expense Category is active. Go to Setup > Accounting > Expense Categories. Check the **Show Inactives** box.
2. If Expense Category Names are being used, the format of the field must be the same as the **Category** dropdown list displayed on the Expense Report Form. Go to Transactions > Employees > Enter Expense Reports > Expenses.
3. Expense category internal IDs can be used instead of names. On the Field Mapping page, click the edit icon beside the **Category** field, click **Choose Reference Type**, and select **Internal ID**.

Expense Categories – The field name contained more than the maximum number (61) of characters allowed

The Expense Account field on expense category records should contain a maximum of 61 characters, including spaces and symbols.

Edit the CSV file to ensure that the Expense Account field is not longer than 61 characters.

Invalid employee reference key xx

The error may occur when doing a time track record type import. To resolve the error, the Employee value in the CSV import file should contain either:

- Employee Internal ID - This option helps to avoid errors with incorrect employee names; or
- Employee Name – This field should use the same format as the **Employee** field in the Time Tracking Form.

Depending on which employee value was entered in the CSV file, on the Field Mapping page, click the edit icon beside the **Employee** field and set **Choose Reference Type** to either **Internal ID** or **Names**.

Relationship Import Errors

This section describes errors associated with relationship imports, including the following record type imports:

- [General Relationship Import Errors](#)
- [Customer Import Errors](#)
- [Customers and Contacts Import Errors](#)
- [Prospects and Contacts Import Errors](#)

General Relationship Import Errors

This section describes errors that you might see on a relationship import. See the following:

- [Invalid Lead Source Reference Key](#)
- [You have entered an Invalid Field Value incoming for the following field: email](#)

Invalid Lead Source Reference Key

The error can occur when importing entity records that include assigning lead sources.

Common causes of this error include the following:

- The values in the CSV file do not match the values in the Lead Sources list, for example, typographical errors.
- The lead source value in the CSV file does not exist in the Lead Sources list.
 - If Marketing Automation is enabled, the list can be found in Lists > Marketing > Marketing Campaigns. To add a new Lead Source, create a campaign.

- If Marketing Automation is disabled, go to Setup > Sales > CRM Lists > New. To add a new Lead Source, click Lead Source.
- The lead source value in the CSV file does not match the naming convention in the Lead Sources list. If the Lead Source name contains Campaign ID + Title, then the CSV file must have the same value.
For example:
1 LeadSource
34 OnlineForm

You have entered an Invalid Field Value incoming for the following field: email

When importing entity records or performing a relationship import type, the following error appears when you click **Next** on the Field Mapping page:

Column : Email. Value : null. Error : You have entered an Invalid Field Value incoming for the following field: email

Check the CSV file to ensure that an email address exists in the email column for each record, and its format is correct (for example, abc123@yahoo.com).

This entity already exists.

When performing an import to update the external ID of leads, prospects, or customers, the error occurs if there is another entity that already uses that external ID.

To find the record that uses that external ID, create a saved search for an entity:

1. Go to Lists > Search > Saved Searches > New.
2. Click **Entity**.
3. Enter a title for the search.
4. On the Criteria > Standard subtab, add the following filter:
 - External ID is XXXXX (where XXXXX is the external ID used in the CSV file that had the error)
5. On the Results > Columns subtab, add the fields to display in the search result, for example:
 - ID
 - Name
 - Type
6. Click **Save & Run**.

The duplicate external ID can be edited in the CSV file to add a character.

Customer Import Errors

This section describes errors that you might see on a customer import. See the following:

- Could not find matching record. Primary name field was not mapped or is empty.
- Please set value for Type
- The field vatregnumber contained more than the maximum number (20) of characters allowed.
- The country and state/province are mismatched, the country is US and the state/province is XX. Please enter a state/province short name that matches the country.

- Invalid isperson reference key (customer name)
- Illegal ID. Please enter a name.

Could not find matching record. Primary name field was not mapped or is empty.

The error occurs if the company name or another field on the customer record is used as a reference key when updating the customer record.

There are only three reference keys that can be used when updating a customer record: internal ID, external ID, or customer ID.



Note: A 'Matched more than one record' error is encountered if:

1. The customer record being updated has a parent customer with several child customers.
2. The **Data Handling** specified is **Add or Update**.
3. **Child of** is mapped.
4. None of internal ID, external ID, or customer ID are mapped.

Please set value for Type

To resolve the error:

1. Go to Setup > Customization > Entry Forms.
2. Edit the preferred Customer, Lead, or Prospect form.
3. On the Customize Form page, select Fields > Main.
4. Find the **Type** field and clear the **Mandatory** box.
5. Click **Save**.

The field vatregnumber contained more than the maximum number (20) of characters allowed.

This error might occur on the Field Mapping page of the Import Assistant when updating the Tax Reg. Number field in customer records.

The vatregnumber field is the field ID of the Tax Reg. Number field. The maximum number of characters allowed for this field is 20 characters. Edit the CSV file and ensure that the Tax Reg. Number field is no more than 20 characters.

The country and state/province are mismatched, the country is US and the state/province is XX. Please enter a state/province short name that matches the country.

If you are adding new customer records and the Country field is not available on the Field Mapping page, the country might not be shown. You can verify by checking the Address subtab of a customer record to see if the Country field is available.

To make the country available, perform the following steps:

1. Go to Setup > Customization > Address Form.
2. Check the **Show** box for the **Country** field.
3. Click **Save**.

Invalid isperson reference key (customer name)

The error may occur when importing customer records. The isperson field is the field ID of the Company Type field. An individual or a company should be specified on the import.

To correct the error:

1. Run a CSV import, specifying a Relationships import type and Customers record type.
2. Set the **Data Handling** field to **Add**.
3. Map all mandatory fields.
4. Map **Individual (Req)** or click the edit icon and select **Yes** or **No**.
5. Complete the import.

Illegal ID. Please enter a name.

The error occurs when the following conditions are met:

1. On Setup > Company > General Preferences, the **Default Customer Type** field is set to **Individual**.
2. The **Type** field is not exposed on the form selected in [Custom Form](#).

To correct the error:

1. Go to Customization > Forms > Entry Forms.
2. Edit the custom form that was selected in step 2 of the CSV import on the Advanced Options menu.
3. On the Fields > Main subtab, check the **Show** box for the **Type** field.
4. Click **Save**.

Customers and Contacts Import Errors

This section describes errors that you may see on a customers and contacts import. For more information, see [Illegal ID. Please enter a name..](#)

Illegal ID. Please enter a name.

The error occurs when all of the following conditions exist during the import to add a new customer:

- The customer type is Individual.
- A contact record is also added.
- In the Import Assistant, the record type selected is **Customers and Contacts Together**.

It is not possible to add individual customers and contacts together. The Customers and Contacts Together record type should only be selected in the Import Assistant for customers that have the Company customer type.

To resolve the error and successfully add the individual customer record, in the Import Assistant, choose the following:

Import Type = Relationships

Record Type = Customers Only

Invalid company reference key ***.

The error occurs when the customer imported was set to inactive.

To resolve the error import the customer and contacts with the customer set to active and then perform a mass update to deactivate the customer.

Prospects and Contacts Import Errors

This section describes errors that you may see on a prospects and contacts import. For more information, see [That Record Does Not Exist](#).

That Record Does Not Exist

The error occurs when phone numbers are not mapped correctly.

To correct the error:

1. Go to Lists > Search > Saved Searches > New.
2. Click **Customer**.
3. On the Criteria > Standard subtab, add the following filters in addition to any other required fields:
 - Stage is Prospect
4. In the Results > Columns subtab, add the following fields:
 - Name
 - Phone Number
 - Contact Fields: Name
 - Contact Fields: Internal ID
 - Other required fields
5. Click **Preview**.
6. Click **Export - CSV**.
7. Save the CSV file.
8. Open the CSV file and edit as required (for example, update the phone number field).
9. Save the CSV file.

When importing the CSV file, map the fields as follows:

Your Fields	NetSuite Fields
Internal ID	Internal ID (Internal ID of Prospect)
Company	Company Name (Prospect Folder)
Phone	Phone (Prospect Folder)

Your Fields	NetSuite Fields
Contact	Contact (Contact Folder)
Contact Phone Number	Main Phone (Contact Folder)
Internal ID of Contacts	Internal ID (Contact Folder)

Items Import Errors

This section describes errors that you might see on an items import. See the following:

- General Item Import Errors
- Assembly Item Import Errors
- Item Demand Plan Import Errors
- Inventory Detail Import Errors
- Inventory Item Import Errors
- Kit/Package Import Errors

General Item Import Errors

This section describes errors that you might see on an item import. See the following:

- Please Enter Missing Price(s)
- Invalid Purchaseunit Reference Key
- Invalid Custitem Reference Key xxx
- Invalid Item Reference Key xx
- Adding New Line to Sublist Locations is not Allowed
- You cannot remove subsidiary: xxx because this record is used on a transaction for subsidiary: xxx
- Please enter value(s) for: Type
- If you are not replacing the entire matrix you may only update existing headers. X is not in the existing matrix
- Invalid assetaccount reference key xxx or Invalid cogsaccount reference key xxx
- Unexpected Error
- Invalid price level reference key XXX
- 'Invalid parent reference key' on Item Record Import
- Could not find any records by this name
- You have entered an Invalid Field Value for [CostEstimate]
- Invalid Parent Reference Key

Please Enter Missing Price(s)

The error occurs when the quantity imported is more than zero, for example, Qty 1, whereas Qty 0 does not have any quantity pricing information set in the item record.

To resolve this error, import pricing quantity information first for Qty 0. Both Qty 0 and Qty1 quantity information can be imported at the same time.

Invalid Purchaseunit Reference Key

You might receive one of the following errors: Invalid purchaseunit reference key xx for unitstype <NULL>, Invalid saleunit reference key xx for unitstype <NULL>, or Invalid stockunit reference key xx for unitstype <NULL>

The error occurs when the Purchase Units, Sales Unit, or Stock Units field is updated without mapping the Units Type field. The Units Type field is set to Null (Blank) on the item record. To resolve the error, include the Units Type field on the Field Mapping page as shown below, selecting the appropriate unit type:

Internal ID = Internal ID

Purchase Units = Purchase Units

Sales Units = Sales Units

Stock Units = Stock Units

Units Type = Units Type



Note: In the UI, you cannot select values for Stock, Purchase or Sale Units without first selecting a value in the Units field.

Invalid Custitem Reference Key xxx

The xxx refers to the customized field. When this error message is encountered, NetSuite cannot find the values on the customized field included on the CSV file.

To correct the error:

1. Go to the list for the type of custom field mentioned in the error message. Go to Customization > Lists, Records, & Fields > [Field Type].
2. Open the CSV file.
3. Check the values entered in the CSV file. Make sure the values are consistent with the values in NetSuite:
 - Consistency of spaces before and after the values.
 - Ensure values are spelled correctly.
 - Check consistency of uppercase and lowercase letters
 - Make sure values exist in NetSuite, and add to the list if necessary
 - When importing multi-select fields, check that the multi-select value delimiter specified in the import advanced options matches the delimiter used in the CSV file.
4. If there are other custom fields on the file, verify the formatting of them.

Invalid Item Reference Key xx

The error occurs when adding related items data to an item record. The Import Assistant supports the import of related item sublist data for item records when the Web Site feature is enabled. Related Items data are mapped to the NetSuite field Presentation Items 1 : Item (Req) and you have the option to choose the following reference types:

1. Names (Item Name/Number or Web Store Display Name*).
2. Internal ID.

The error occurs when Name is chosen as the reference type for the following reasons:

1. The Item Name/Number was incorrectly used (for example, misspelled or incorrect Item Name/Number).
2. The Internal ID was used.
3. The Item Name/Number is used correctly but there is a value set on the Web Store Display Name of the related item record. Use the Web Store Display Name instead of the Item Name/Number.

Adding New Line to Sublist Locations is not Allowed

The error occurs when the Location sublist field is not mapped.

To resolve the error, when updating fields that are updateable per location, the Location sublist must also be mapped. When importing Preferred Stock Level, Quantity on Hand, and Reorder Point, map the Location sublist, which is a keyed sublist (key icon). The Location field can be based on internal ID, external ID, or location name.

You cannot remove subsidiary: xxx because this record is used on a transaction for subsidiary: xxx

The error occurs when updating or adding another subsidiary on an item record.

Enter the information in the CSV file as shown in the following example.

Name | Subsidiary

Apple | Parent Company | Parent Company: US: California | Parent Company: US: California: Sub A

Because the Subsidiary field in the item record is a multi-select field type, values in the CSV file are entered in one row with a delimiter, for example, the pipe, (|).

On the File Mapping page, set Name to Item Name/Number and Subsidiary to Subsidiary.

Please enter value(s) for: Type

The error appears when no type is selected for the related items being imported. To find the Type field for related items on the Field Mapping page, open Items Presentation Items > Item Presentation Item 1.

When performing the import, use the following settings:

- Set **Data Handling to Update**. Only existing items can be added as a related item.
- On the Field Mapping page, ensure the following fields are mapped:
 - Internal ID = Internal ID Internal ID of the main item.
 - Item Number = Presentation Items 1: Item Number of the related item.
 - Type = Presentation Items 1: Item Set this field manually or through a CSV field.

If you are not replacing the entire matrix you may only update existing headers. X is not in the existing matrix

Verify the following settings:

- In the CSV file, include all existing prices for each quantity.
- Set **Data Handling to Update**.
- On the Advanced Options menu, check the **Overwrite Sublist** box.
- Map the fields. All quantity pricing must be included in the mapping.

Invalid assetaccount reference key xxx or Invalid cogsaccount reference key xxx

The error occurs when updating the asset or COGS account on Item record. There are three options to set a value on the Asset Account or COGS Account field.

Choose an option:

1. Use the internal ID of the account. On the Field Mapping page, click the edit icon beside the **Asset Account** field. Click **Choose Reference Type**, and then select **Internal ID**.
2. Use the account name. In the CSV file, the asset account should have the same format used in NetSuite.
 - a. Go to Lists > Accounting > Items.
 - b. Click **Edit** on any item record.
 - c. In the **Asset Account** field on the Accounting subtab, copy the format of the field to the CSV file. The format used is as follows:
 - Account Number is not enabled: Parent Account
 - Account Number is enabled: Number Parent Account
 - Account Number is not enabled and there is a Child Account: Parent Account : Child Account
 - Account Number is enabled and there is a Child Account: Number Parent Account : Child Account
3. Set a default value for the asset or COGS account. This option is feasible if the same asset or COGS account is to be set on all of the item records. On the Field Mapping page, select Asset Account or COGS Account under NetSuite Fields. Click the edit icon, click **Provide Default Value**, and select the asset or COGS account.

Unexpected Error

The error occurs when the Item Name field and the Store Display Name field are mapped. You must map only the Item Name field or the Store Display Name field. Ensure that the Item Translation : Language field is also mapped.

Invalid price level reference key XXX

Use one of the following options to resolve the error.

Option 1

1. Go to Setup > Accounting > Accounting Lists.
2. Set Type to Price Level.
3. Make sure that the Price Level set in the CSV file is:
 - a. Not set to Inactive

- b. Correctly spelled

Option 2

When performing the import, on the Mapping Page:

1. Select Item Pricing > Item Pricing 1.
2. Map Pricing 1 to Price Level (Req).
3. Click the edit icon and select the correct Price Level from the dropdown list.

'Invalid parent reference key' on Item Record Import

The error occurs when the parent item being referenced is of a different item type (for example, Inventory, Description, and so on) than the item being imported. The parent item must be the same type (for example, Inventory, Non-Inventory, Description, and so on) as the items being imported.

There are two ways to resolve this error:

Option One

If the parent item being referenced has been set up with the incorrect item type, delete or deactivate the parent item, and then recreate it.

1. Go to List > Accounting > Items.
2. Check the **Show Inactives** box.
3. Choose an option:
 - Inactivate the parent item by checking the **Inactive** box.
 - Delete the item by editing the item and selecting More Actions > Delete.
4. Go to Lists > Accounting > Items> New.
5. Create the correct item type.

Option Two

If the parent item being referenced has been set up correctly, select the appropriate record type in the Import Assistant.

Could not find any records by this name

The error occurs when updating child matrix items.

In the CSV file, enter a separate column for the parent matrix item and another for the child matrix item. The CSV file will look like the following:

Item Name/Number	Subitem of	Department
Child item	Parent item	—

The previous example assumes that the Department field is being updated on the Child Matrix Item record.

Also, in the Item Name/Number column, the Parent : Child format should not be used. The Child Matrix Item Name is entered without the Parent Matrix Item name. For example, use Basket rather than Containers : Basket.

You can also use the internal ID of the child matrix item.

Go to Home > Set Preferences > General. In the Defaults field group, check the **Show Internal Ids** box to show the internal id on a list.

You have entered an Invalid Field Value for [CostEstimate]

When trying to update the item defined cost, the error appears even though the field has the correct currency amount.

A sample CSV file has the following columns:

- Internal ID
- Name (Item Name)
- Cost Estimate Type = Item Defined Cost
- Item Defined Cost = \$123.00

Make sure the column **does not have the \$ symbol**. The field in NetSuite holds the amount without the currency symbol.

On the Mapping Page, check the format of the Item Defined Cost field, select **Currency with Symbol** and set it to **None**.

Invalid Parent Reference Key

The error occurs because the **Show Display Name with Item Codes** option is enabled in General Preferences.

There are two ways to resolve this error:

- Disable the **Show Display name with Item Codes** option in General Preferences.
- Update the CSV file used for the import to include the item name/number display name/code. External ID and Matrix Option fields are still required.

Assembly Item Import Errors

This section describes errors that you might see on an assembly item import. See the following:

- Please select member items before submitting
- An Unexpected Error has Occurred

Please select member items before submitting

When member items are created in a separate CSV file, there needs to be a linking column: Assembly Item: External ID, Internal ID or Name.

When performing the import, ensure that the following options are specified:

- Import Type – enter Item
- **Record Type** – enter Assembly/BOM Item
- Click **Multiple Files to Upload**
 - For Primary File - Item, select the file with the Assembly Item

- For Linked File (Optional) - Item Members, select the file with member items
- Data Handling – click **Add**
- Map all Assembly Item fields with fields from the Item folder
- Map the Member Items name and quantity with Item (Req) and Quantity in the Item Members folder

An Unexpected Error has Occurred

This item type (Assembly, subtype) is missing a required unit parameter. Instead of Assembly, InvPart might be listed.

To resolve the error:

1. Check the assembly record and its component records to determine if the following fields have values:
 - Unit Type
 - Stock Units
 - Purchase Units
 - Sales Units
2. Enter values on these fields.
3. If the fields have values and you are still experiencing the error, click **Edit** to edit the assembly. Without making any changes, save the assembly record and its components.

Item Demand Plan Import Errors

This section describes errors that you might see on an item demand plan import. See the following:

- Could not find record with internal ID = xxx
- Invalid start date ref key mm/dd/yyyy

Could not find record with internal ID = xxx

The error occurs when importing the Item Demand Plan. To resolve the error, map the internal ID of the item demand plan record to the field: Demand: Item (Req).

The internal ID of the item demand plan record serves as the identifier to complete the import. Updating an Item Demand Plan through the user interface requires that you edit and overwrite the existing record. This concept also applies when performing a CSV import of the Item Demand Plan.

Invalid start date ref key mm/dd/yyyy

The error occurs when the plan start date falls on a year ahead of the current year, and both the year and plan end date fields are not included in the mapping.

You can see these dates in the UI. For example, the current year is 2013, and you want to create a new item demand plan with a start plan date of 1/1/2014, and an end plan date of 12/31/2014.

Go to Transactions > Demand Planning > Item Demand Plans > New. The default fields in the header show:

- Year = 2013

- Start Date = 1/1/2013
- End Date = 12/31/2013

Change the **Start Date** field to 1/1/2014. Notice the following:

- **Year** field becomes null.
- **End Date** remains at 12/31/2013. It does not automatically update to 12/31/2014
- No Monthly/Weekly Start Date and End Dates appear.

To resolve the issue:

- Map the **Year** to 2014
- Map both **Plan Start Date** and **Plan End Date** in the CSV Import.

Inventory Detail Import Errors

This section describes errors that you may see on an inventory detail import. For more information, see [Unable to Import Inventory Worksheet due to CSV Response/Error message 'Please configure the inventory detail for "Item xxx"'](#).

Unable to Import Inventory Worksheet due to CSV Response/Error message 'Please configure the inventory detail for "Item xxx"'

To perform the inventory worksheet import:

1. Go to Setup > Accounting > Accounting Preferences > Items/Transactions.
2. Clear the **Require Bins on All Transactions Except Item Receipts** box and save.
3. Proceed with the CSV import of the Inventory Worksheet.
4. Return to Setup > Accounting > Accounting Preferences > Items/Transactions and check the **Require Bins on All Transactions Except Item Receipts** box.
5. Click **Save**.

Inventory Item Import Errors

This section describes errors that you might see on an inventory item import. See the following:

- [Invalid Locale Reference Key XX](#)
- The record you are attempting to load has a different type: `inventoryitem` from the type specified: `serializedinventoryitem`
- The following CSV file(s) have errors in them and can't be imported into the system: Multiple values found for a dropdown field that can only take one when importing a record with External ID that uses special character

Invalid Locale Reference Key XX

The error occurs when:

1. The Multi-Language feature is enabled, and
2. You are creating an inventory item, and
3. The CSV file contains following columns:
 - Item Name
 - Purchase Tax Code
 - Sales Tax Code
 - Quantity On Hand
 - Price
 - Price Level
 - Location
 - Translation Language
 - Translation Display Name

To resolve this error, first import the item without the translation, and then update the imported items with the translation data.

Importing the Item

To import the item, ensure that you choose the following options:

- Set **Data Handling** to **Add**.
- On the Field Mapping page, set the following:
 - Item Name = Item Name/Number
 - Purchase Tax Code = Purchase Tax Code
 - Sales Tax Code = Sales Tax Code
 - Quantity On Hand = Locations 1: Quantity on Hand
 - Location = Locations 1: Location
 - Price = Pricing 1: Price (Req)
 - Price Level = Pricing 1: Price Level
- If Quantity Pricing is enabled, add the following field to the mapping:
 - 0 = Pricing 1: Quantity (Reg)

Update the Imported Items

Next, update the imported Items with the translation data using the same CSV file, but with different data handling, and different mapping.

- Set **Data Handling** to **Update**.
- On the **Field Mapping** page, set the following:
 - Item Name = Item Name/Number
 - Purchase Tax Code = Purchase Tax Code
 - Sales Tax Code = Sales Tax Code
 - Translation Language = Translation 1: Language
 - Translation Display Name = Translation 1: Display Name

The record you are attempting to load has a different type: inventoryitem from the type specified: serializedinventoryitem

The record type selected in the Import Assistant must be the same as the item type. The error states that the inventory item is to be updated, but the record type selected was serialized inventory item. Ensure that you select the inventory item record type for the import.

The following CSV file(s) have errors in them and can't be imported into the system: Multiple values found for a dropdown field that can only take one when importing a record with External ID that uses special character

To remove the field mapping error, select the items import type and inventory item record type.

On the Advanced Options menu, set the **Custom Multi-Select Value Delimiter** field to any special character that **is not** used in the string "SNG-EDUC|SKU-1004921210/08/2010|14:06:00"

For example, do not use the pipe (|) or slash (/). Also, do not use a space as a delimiter.

Setting the **Custom Multi-Select Value Delimiter** field to **NULL** results in an error because NetSuite considers it to be the same as **Space**.

Kit/Package Import Errors

This section describes errors that you may see on a kit or package import. For more information, see [Invalid item reference key xx](#).

Invalid item reference key xx

To resolve the error, verify the following:

- In the CSV file, enter the same format for the member item that is shown in the Item dropdown list in Lists > Accounting > Items > Kit/Package > Purchasing/Inventory.
- Internal ID can be used instead of member item name. To use the internal ID, on the Field Mapping page, click the edit icon for the **Members xx : Item (Req)** field and **Choose Reference Type = Internal ID**.
- Verify that the member item exists and is active.

Transactions Import Errors

This section includes errors that you might encounter when performing a transactions import:

- [General Transaction Import Errors](#)
- [Customer Payment Errors](#)
- [Invoice Import Errors](#)
- [Journal Entry Import Errors](#)
- [Purchase Order Import Errors](#)

- Sales Order Import Errors
- Vendor Bills Import Errors
- Vendor Payment Import Errors
- Item Demand Plan Import Errors

General Transaction Import Errors

This section describes errors that you might see on any transaction import. See the following:

- You must map one of the following NetSuite fields to a column in your CSV file, to be a unique identifier: External ID, Internal ID, or a transaction number field, such as Order # or Invoice #
- Adding Multiple Line Items with the Same Item on a Transaction Through CSV Import Throws Ambiguity Error
- This record already exists
- Date field not in your preferred date format for field "Date" – You have entered an Invalid Field Value x/x/xxxx for the following field:trandate
- Total contribution for sales reps cannot exceed 100%

You must map one of the following NetSuite fields to a column in your CSV file, to be a unique identifier: External ID, Internal ID, or a transaction number field, such as Order # or Invoice #

The error occurs when clicking **Next** on the Field Mapping page.

To import new transactions, at least one of the following NetSuite fields must be mapped on the Field Mapping page to uniquely identify transactions:

- External ID (for more information, see the help topic [External IDs Overview](#)).
- Internal ID (for more information, see the help topic [Setting the Internal ID Preference](#).)
- Order #, Invoice #, or another transaction number field

For more information, see also [Select Reference Types](#).

Adding Multiple Line Items with the Same Item on a Transaction Through CSV Import Throws Ambiguity Error

The error occurs when you are adding line items to an existing transaction (for example, sales order). The line item information in the CSV import uses the same item record, as shown in the following example.

The sales order has the following items:

- Item X -- Quantity 1
- Item Y -- Quantity 2

You want to update the sales order to:

- Item X -- Quantity 10
- Item X -- Quantity 11

- Item X -- Quantity 12

To perform the import:

1. Create a CSV file that has the Line ID column. Set the column value as blank.

Sample CSV file format

Sales Order's Internal ID, Item Name, Quantity, Price, Tax Code, Line ID



Note: The Line ID of new items can be assigned a new value. The system will know these new items are added in the same transaction. For example, the last line ID in the transaction is 10. To avoid the ambiguity error, assign a Line ID of higher than 10.

2. Go to Setup > Import/Export > Import CSV Records.
3. In the **Import Type** field, select **Transactions**.
4. In the **Record Type** field, select the transaction type, for example, **Sales Order**.
5. Locate and open the CSV file, and then click **Next**.
6. Set the **Data Handling** field to **Update**, and then click **Next**.
7. On the Field Mapping page, map the following fields:

Your Fields	NetSuite Fields
SO Internal ID	Internal ID
Item Name	Items: Item
Quantity	Items: Quantity
Price	Items: Rate
Tax Code	Items: Tax Code
Line ID	Items: Line ID

This record already exists

The error appears if the external ID was already used in a previous transaction. To successfully import the transaction, use a unique external ID.

Use a saved search to see if an external ID is already used in the system.

1. Go to Lists > Search > Saved Searches > Net.
2. Click **Transaction**.
3. On Criteria > Standard subtab, add a filter of External ID = XXX (where XXX is the external ID that had the error).
4. Click **Preview**.

Date field not in your preferred date format for field "Date" – You have entered an Invalid Field Value x/x/yyyy for the following field: trandate

In the CSV file, highlight the Date column and ensure that the format is the same as the **Date** field in the Time Tracking Form found in Transactions > Employees > Track Time.

Total contribution for sales reps cannot exceed 100%

The error occurs when the sales team assigned to the record you are updating or creating has a contribution percentage of greater than 100.

When creating a transaction record, this error usually occurs because in the Advanced Option menu, you did not check the **Overwrite Sublists** box.

If **Overwrite Sublists** is not checked, then the system will try to use the sales team currently assigned to the entity and any sales representatives in your CSV file.

Customer Payment Errors

This section describes errors that you may see on a customer payment import. For more information, see [Could not find record with Internal ID = xxxx](#).

Could not find record with Internal ID = xxxx

The error can occur when you link a Customer Payment to an invoice. NetSuite looks for a record with an internal ID that does not exist in the system.

Use the correct internal ID of the Customer Payment and the Invoice.

To show the internal ID in the list of transactions:

1. Go to Home > Set Preferences > General.
2. Check the **Show Internal IDs** box.
3. Click **Save**.

The system will give priority to using the internal ID to locate the transaction rather than the payment's external ID.

Invoice Import Errors

This section describes errors that you might see on an invoice import. See the following:

- You must enter at least one line item for this transaction
- Unable to find a matching line for sublist apply with key: [doc,line]
- Invalid item reference key xx

You must enter at least one line item for this transaction

When importing a new invoice, the error is received if a default value was entered in the **Items : Item (Req)** NetSuite field on the Field Mapping page of the Import Assistant.

If you are importing an invoice with a single item, it must be referenced in the CSV file as a separate column.

Set Data Handling to **Add**, and then on the Field Mapping page, map the following fields:

Customer	Customer (Req)
External ID	External ID

Location	Location (Req)
Date	Date (Req)
Item	Items: Item (Req)

Unable to find a matching line for sublist apply with key: [doc,line]

The error occurs when there are multiple invoice numbers being matched to a single credit memo. If the invoice internal ID is listed multiple times, NetSuite looks for corresponding amounts for the other lines, which do not exist.

For example, there are three items on a credit memo and it is being applied to a single invoice. The CSV file contains the following information:

Invoice Internal ID	Credit Memo Internal ID	Customer Name	Amount Applied
1234	5678	John Smith	300
1234	5678	John Smith	—
1234	5678	John Smith	—

This will generate the error. To resolve the error, modify the CSV file as follows:

Invoice Internal ID	Credit Memo Internal ID	Customer Name	Amount Applied
1234	5678	John Smith	300
—	5678	John Smith	—
—	5678	John Smith	—

There should be one invoice internal ID for each line item. Since the invoice has one line item, the invoice is listed one time and the corresponding total amount being applied is also listed one time.

Invalid item reference key xx

The CSV file should contain the same Item Name format as shown in the **Item** dropdown list shown in Transactions > Sales > Create Invoices > Items > Items.

The internal ID can be used instead of the item name. On the Field Mapping page, click the edit icon beside the **Item** field, click **Choose Reference Type**, and then select **Internal ID**.

Determine if the item is inactive. If the item record is inactive, set its status to active:

1. Go to Lists > Accounting > Items.
2. Check the **Show Inactives** box.
3. Clear the **Inactive** box beside the item name.
4. Click **Submit**.

Journal Entry Import Errors

This section describes errors that you might see on a journal entry import. See the following:

- Invalid account reference key 'xxx' for subsidiary 'xxx'
- Invalid department reference key xxx
- Invalid department reference key xxx
- No empty or blank headers are allowed in the CSV file
- Please enter the value(s) for Account
- Amortization end date cannot be before amortization start date
- Rounding Error xx.xx



Note: For information about other errors you might see on a journal entry import, search for the error message on SuiteAnswers.

Invalid account reference key 'xxx' for subsidiary 'xxx'

To resolve the error, verify the format of the Account field, ensure that the account is active, and map the internal ID, if required.

First, verify that the format of the Account field in the CSV file uses the same format that is used in NetSuite:

1. Go to Transactions > Financial > Make Journal Entries.
2. From the **Account** dropdown list, select the account. Ensure that the format of the account in the CSV file matches the format of the account name displayed.

Next, determine whether the account is inactive.

1. First, ensure that internal IDs are displayed. Go to Home > Set Preferences > General.
2. In the Defaults field group, check the **Show Internal IDs** box and save.
3. Go to Lists > Accounting > Accounts.
4. Check the **Show Inactives** box.
5. Look for the Internal ID that was referenced in the error message.
6. Clear the **Inactive** box for the account. Also verify that the account is associated with the correct subsidiary.

If the internal ID is used, on the Field Mapping page, click the edit icon beside the **Account** field.

Click **Choose Reference Type**, and then select **Internal ID**.

Invalid department reference key xxx

Verify the following for departments:

- Ensure that the department is spelled correctly. If a parent-child relationship exists, make sure that the names of the parent departments are included. For example, if Accounting is a child of Finance, the department must be entered as Finance : Accounting.
- Ensure that the department is active. Go to Setup > Company > Departments. Check the **Show Inactives** box and make sure that the department specified in the error message is not inactive.
- If internal IDs are used, on the Field Mapping page, click the edit icon beside the **Department** field. Then, click **Choose Reference Type** and select **Internal Id**.
- If external IDs are used, on the Field Mapping Page of the CSV import, click the edit icon beside the **Department** field. Then, click **Choose Reference Type** and select **External Id**.

Invalid entity reference key xx for currency xx

To correct the error, verify the following:

- Ensure that the entity record (customer, vendor, employee, other name) is active.
- Check to see how the entity record (customer, vendor, employee, other name) is listed in NetSuite, and ensure that the value in the CSV file has the same format.
- Check the entity record and makes sure that it has the same currency as the Journal Transaction Currency. You can assign the Currency as Secondary Currency in the entity record if its Primary Currency is different than the Transaction Currency.

No empty or blank headers are allowed in the CSV file

Ensure that you have included column headings in row 1 of your CSV file, similar to the following example.

Amount	Debit	Credit	Memo	Entity	Class	Department	Location
Account 1	—	100	Example JE #1	—	—	Customer Support	Head Office
Account 2	100		Example JE #1	—	—	Customer Support	Head Office
Account 1	525.67		Example JE #2	—	—	Customer Support	Head Office
Account 2	—	525.67	Example JE #2	—	—	Customer Support	Head Office

Please enter the value(s) for Account

The error might appear even if the Account field has already been included in the field mapping. The error occurs when there is an extra line in the CSV file, usually a line or row for the total of both the **Debit** and the **Credit** columns.

Since one row is assigned per account line, the system treats this row as another account line and looks for the fields required in a Journal Entry import, including the Account field.

Modify the CSV file and remove the extra total row.

Amortization end date cannot be before amortization start date

The Start Date and End Date fields on a Journal Entry form are only available when the Revenue Recognition feature is enabled under Setup > Company > Enable Features > Accounting.

In the CSV file, check the dates entered in the Start Date and End Date columns. The start date must be before the end date. Modify the CSV file as needed.

Rounding Error xx.xx

To correct the error:

- Remove amounts with value = 0.00 in the Debit or Credit column.
- NetSuite formats columns to expose additional decimal places. When the file was exported from the source, NetSuite might still see additional decimal places in the Debit/Credit amount beyond the 0.00 shown in the CSV file.

- If there is already an amount on the Debit side for the line item that is greater than or less than zero, then there is no need to enter zero (0.00) in the Credit side, and vice versa.

Purchase Order Import Errors

This section describes errors that you may see on a purchase order import. For more information, see [Invalid entity reference key xxx](#).

Invalid entity reference key xxx

To correct the error, verify the following.

- Vendor names in the CSV file must be entered the same way they appear in the **Vendor** field on the Transactions > Purchases > Enter Purchase Orders page. If auto-generated numbering is enabled, the format will be Vendor ID Vendor Name.
- The vendor record must be active. Go to List > Relationships > Vendors and check the **Show Inactive** box to see if the vendor is inactive.
- Internal IDs of the vendors can also be used. If the CSV file contains the internal IDs, on the Field Mapping page, click the edit icon beside the **Vendor** field, click **Choose Reference Type**, and select **Internal Id**.
- External IDs of the vendors can also be used. If the CSV file contains the external IDs, on the Field Mapping page, click the edit icon beside the **Vendor** field, click **Choose Reference Type**, and select **External Id**.

Sales Order Import Errors

This section describes errors that you might see on a sales order import. See the following:

- You must enter at least one line item for this transaction
- The record has been deleted since you retrieved it
- `TypeError: Cannot find function getFullYear in object NaN. (NLRecordScripting.scriptInit$sys#3881)`
- Invalid item reference key xx
- Please choose an item to add
- Please enter value(s) for: <Field XYZ>

You must enter at least one line item for this transaction

The CSV file should include the value for the Item field, which should be mapped to the Items : Item (Req) field. There is no need to map the Line ID.

Even if you set a default value for one or more fields in a sublist, no sublist data is imported unless you map at least one field for that sublist.

The record has been deleted since you retrieved it

Ensure that the CSV import has been set up as follows:

- Go to Setup > Import/Export > Import CSV Records.
- Specify an import type of **Transaction** and a record type of **Sales Order**.
- Specify data handling of **Update**.

4. On the Advanced Options menu, check **Overwrite Sublists**.



Warning: Use this option with extreme caution.

5. On Field Mapping page, ensure that Line ID is **not** mapped to anything.

TypeError: Cannot find function getFullYear in object NaN. (NLRecordScripting.scriptInit\$sys#3881).

The error occurs when the date format entered in the Date field is incorrect. For example instead of entering a date of 3/29/2014 the date was incorrectly entered as 3/29/20014.

The `getFullYear()` function returns a four-digit year, and an error occurs if the year contains more than four digits.

Please specify either a terms parameter or a paymentmethod parameter in the request but not both

When you import a sales order, the Terms and Payment Method fields cannot be mapped simultaneously. You can only map one of those fields on the Field Mapping page.

If you enter Terms on a sales order, an invoice is automatically generated when it is billed. If you enter a Payment Method, a cash sale is automatically generated when it is billed.

Invalid item reference key xx

Please verify your import using the following recommendations:

- The Item Name column in the CSV file should use the format that is used in NetSuite. Verify that the format in the file matches the format of the **Item** dropdown list in Transactions > Sales > Enter Sales Orders> Items > Items.
- Internal ID can also be used instead of Item Name. On the Field Mapping page, click the edit icon beside the **Item** field, click **Choose Reference Type**, and select **Internal ID**.
- Ensure that the item is active. Go to Lists > Accounting > Items. Check the **Show Inactives** box. If the item record is inactive, clear the Inactive box to make it active.

Please choose an item to add

The error might occur when incorrect item line IDs are entered in the CSV file. Create a saved search to extract the correct item line IDs.

To create the saved search:

1. Go to Lists > Search > Saved Searches > New > Transaction.
2. On the Criteria > Standard subtab, add a filter Type of Sales Order.
3. On the Results > Columns subtab, add the **Line ID** field.
4. Modify the CSV file and enter the correct line ID of the items.

Please enter value(s) for: <Field XYZ>

In NetSuite, transactions like sales orders are stored with the forms when they are created.

When performing an import to update sales orders, the validation for mandatory fields is not performed on the form selected on the Advanced Options menu of the import. Instead, mandatory fields are validated on the form where the record being updated is saved.

If a sales order was saved using a custom form, and later that form is customized to set a certain field to mandatory, you will get an error about missing field values.

The sales order cannot be updated via CSV import unless you perform one of the following:

- Set a value for the mandatory field specified in the error, **or**
- Clear the **Validate Mandatory Custom Fields** box on the Advanced Options menu.



Important: This behavior applies **only** to CSV updates for transactions.

Vendor Bills Import Errors

This section describes errors that you might see on a vendor bills import. See the following:

- You must enter a line item for this transaction
- Multiple rows in your primary CSV file have the same value for the key column. Please edit this file to eliminate rows with duplicate key column values for field "ExternalId"
- Your transaction does not balance. Please Adjust Expenses/Items.: userTotal:xx: totalField:xx
- Invalid location reference key xx for subsidiary xx
- You have entered an invalid field value for the following field: amount

You must enter a line item for this transaction

If you are importing vendor bills with expenses, use two files for the import.

1. One file for the bills that contains the following fields:
 - External ID (match to Vendor Bill: External ID)
 - Date
 - Memo
 - Reference No.
 - Vendor Internal ID
 - Posting Period
 - Terms
 - Due Date
2. One file for the expenses line that contains the following fields:
 - External ID (match the external ID in your file to the Line field of the Vendor Bill Expenses sublist)
 - Account
 - Total (**Do not** enter Amount as the column name.)
 - Memo

Multiple rows in your primary CSV file have the same value for the key column. Please edit this file to eliminate rows with duplicate key column values for field "ExternalId"

You may encounter the error if you are using multiple files to import vendor bills with expense line items, and you are using the external ID as the reference key.

Make sure that the Primary File - Vendor Bill does not contain more than one row with the same external ID.

Sample Correct CSV Import Files

*Primary File - Vendor Bill

External ID	Vendor	Date	Posting Period
VB01	ABC Company	11/24/2012	Nov 2012
VB02	DEF Company	10/20/2012	Oct 2012

*Linked File (Optional) - Vendor Bill Expenses

External ID	Account	Amount
VB01	Selling	100
VB01	Amortization	200
VB01	Gas and Oil	300
VB02	Automobile	150
VB02	Amortization	250
VB02	Gas and Oil	350

Your transaction does not balance. Please Adjust Expenses/ Items.: userTotal:xx: totalField:xx

When importing vendor bills, there are three Amount fields available on the Field Mapping page:

- Vendor Bill folder > Amount – The Amount field on the header of the bill record. This value is automatically computed by the system.
- Vendor Bill Expenses folder > Amount – The amount of each expense line added on the bill.
- Vendor Bill Items folder > Amount – The amount of each item added on the bill.

On the Field Mapping page, remove the mapping for the Amount field taken from the Vendor Bill folder. This value is automatically computed by the system, depending on the total of Expenses:Amount and/or Items:Amount fields.

Invalid location reference key xx for subsidiary xx

The xx in the error message refers to the internal ID of the location and subsidiary.

In a OneWorld account, this error occurs when the subsidiary of the location selected does not match the transaction subsidiary. Choose another location for the vendor subsidiary that is valid.

To confirm, perform the following steps:

1. Go to Lists > Relationships > Vendors.
2. Open the vendor used in the CSV file.

3. On the vendor record, take note of the subsidiary assigned.
4. Go to Setup > Company > Locations.
5. Open the record of the location used in the CSV file.
6. In the location record, the subsidiary assigned does not match the vendor's subsidiary.

You have entered an invalid field value for the following field: amount

Make sure that the Amount column does not contain a comma (,) as a separator or any currency symbols, for example, \$.

Vendor Payment Import Errors

This section describes errors that you might see on a vendor payment import. See the following:

- Invalid account reference key Accounts Payable xx for entity xx
- Unable to find a matching line for sublist apply with key: [doc,line]
- One or more bills or invoices has had a payment made on it since you retrieved the form
- Adding new line to sublist apply is not allowed
- Unparseable Internal Id, did you mean to lookup this field by Name or External ID? for field xx

Invalid account reference key Accounts Payable xx for entity xx

The Accounts Payable account listed on the Transactions > Payables > Pay Bills page serves as the filter for bills available for payment.

If you use the internal ID to map the bill to be paid, you do not need to map the Accounts Payable account since the system will search for the bill and then in turn encounter the applicable AP account for the bill.

To resolve the error, remove the AP account from the field mapping.

Unable to find a matching line for sublist apply with key: [doc,line]

The error can occur when importing new customer or vendor payments and there are no open invoices with the internal ID or external ID specified in the CSV file.

In this situation you need to verify if:

- The payments being imported are applied to invoices that are open and not already paid with a status of Paid in Full.
- The internal ID or external ID specified in the CSV file corresponds to an existing open invoice in the system.

You can search for invoices using the external ID or internal ID. These are the only two reference fields that can be used to import vendor or customer payments, so use either the internal ID or external ID of the bill in the CSV file.

Perform one or more of the following procedures to verify the status of the invoices and resolve the error.

Use a Saved Search

To create a saved search that uses the external ID or internal ID of the invoice as a filter:

1. Go to Lists > Search > Saved Searches > New.
2. Click **Transaction**.
3. On the Criteria > Standard subtab, add **Internal Id (Number)** to use the internal ID of the invoice. You can also enter the external ID as a filter.
4. Click **Save and Run**. Look for the invoice and check its status.

Use the Invoice List

If you know the internal ID of the invoice that you want to verify, look for the invoice on the invoice list.

To use the invoice list:

1. Go to Home > Set Preferences > General.
2. Check **Show Internal Ids** and save.
3. Go to Transactions > Sales > Create Invoices > List. Look for the invoice and check its status.

Use Accept Customer Payments

1. Go to Transactions > Customers > Accept Customer Payments.
2. In the **Customer** field, enter the name of the customer.
3. Select the correct A/R account. Only open invoices appear on the Apply > Invoices subtab.

Use Vendor Bill Payments

1. Go to Home > Set Preferences > General.
2. Check **Show Internal Ids** and save.
3. Go to Transactions > Purchases/Vendors > Enter Bills > List. Look for the bill and check its status.

Use Pay Single Vendor

1. Go to Transactions > Purchases/Vendors > Pay Single Vendor.
2. Enter the name of the Vendor in the **Payee** field.
3. Select the correct A/P account. Notice only open Bills appear on the Apply subtab.

Use Pay Bills

1. Go to Transactions > Purchases/Vendors > Pay Bills.
2. Select the correct A/P Account. Only open bills appear on the Apply subtab.

One or more bills or invoices has had a payment made on it since you retrieved the form

The error usually occurs when the vendor bill has a term and a discount amount.

To resolve, consider the following:

- Update the CSV import file. Payment amount should be equal to the actual payment amount due, that is, the net amount (Amount – Discount Amount = Payment Amount Due).
- If there should not be a discount on the vendor bills, update the bill records and clear out the Terms and Disc. Amt. fields.



Note: This error also applies when importing customer payments.

Adding new line to sublist apply is not allowed

The error occurs when trying to import vendor payments and apply existing vendor credits simultaneously. Also, the following conditions apply.

- Vendor credits are already posted in NetSuite, and the CSV file contains the following fields:
 - External ID
 - Vendor ID
 - Payment Amount
 - ID of the Bill
- The Payment Amount for the vendor bill is positive and for the bill credit the amount is negative.
- The Vendor Bill Credit Internal ID and the Vendor Bill Internal ID are used on the ID of the Bill column.

The error will be encountered if:

- Data Handling is set to **Add**. Set it to **Add/Update**.
- The **Vendor Bill** is no longer Open or has already been paid with status Paid in Full.
- The **Bill Credit** has already been applied.
- The **Vendor Bill** and **Bill Credit** do not have the same A/P Account.

Unparseable Internal Id, did you mean to lookup this field by Name or External ID? for field xx

The xx in the error message refers to the mapped field name in the CSV file.

The value of the field mapped onto the NetSuite field Bill (Req) could not be found. Ensure that the value corresponds to the internal ID of the bill being paid. The internal ID can be taken from the URL of the bill or via a saved bill search that includes the internal ID column.

Item Demand Plan Import Errors

This section describes errors that you may see on an item demand plan import. For more information, see [Invalid Location Reference Key xxx for Subsidiary xxx](#).

Invalid Location Reference Key xxx for Subsidiary xxx

The first xxx in the error message is the reference key and the second xxx is the subsidiary. See below the example of the error message:

Invalid location reference key Item no Tax 2 Lbs(US) - BinUSA1_and_BinUSA2 for subsidiary 1

Updating the item demand plan without using an external ID is not possible due to the nature of the record.



Important: You should use the external ID for the import as it is a straightforward solution for these type of issues.

Website Import Errors

This section describes errors that you may see on a website import. For more information, see [Invalid category reference key Information for website <NULL>](#).

Invalid category reference key Information for website <NULL>

In the UI, before you can select a site category for an item, a site must be chosen first.

Because the Site is a required field, you must include the site name in the CSV file and map it during the import. The site name is the one given to the site at its creation in NetSuite.

If you do not want to include the site name in each CSV file, you can assign a default value for the Site field in the mapping page by clicking the edit icon and choosing a site. If you assign a default value, the error is eliminated.

Additional Import and Export Options

This section describes options for data import and export that do not use the CSV Import Assistant.

- [Importing a Peachtree CSV File](#)
- [Exporting Selected Lists and Reports as CSV Files \(CSV Export\)](#)
- [Extracting Data from NetSuite](#)
- [Replacements for smbXML](#)
- [Emailing or Faxing NetSuite Forms](#)

For information about importing CSV data into NetSuite with the Import Assistant, see [CSV Imports Overview](#).

Importing a Peachtree CSV File

If you use Peachtree Accounting® or Peachtree Complete Accounting®, you can import these lists into NetSuite:

- Accounts Receivable Customer list
- Accounts Payable Vendor list
- Payroll Employee list
- General Ledger Chart of Accounts list
- Inventory Item list

If you import an item list, you must also import your chart of accounts at the same time.

First you export the lists from Peachtree, and then you import them into NetSuite.

To export lists from Peachtree:

1. In Peachtree, click File > Select Import/Export.
2. On the left side of the Select Import/Export window that appears, select the category of the list you want to export.
For example, to export your chart of accounts, select General Ledger.
3. On the right side of the Select Import/Export window, select the list you want to export.
For example, to export your chart of accounts, select Chart of Accounts list.
4. Click **Export** at the top of this window.
Another window with list information appears.
5. Click the **Options** tab.
6. In the **Export Options** field group, check the **Include Headings** box.
You do not need to make changes to the Fields tab.
The import works in NetSuite even if Peachtree exports more columns than NetSuite requires.
7. Click **OK**.
8. Repeat these steps for each list you want to export.

If you are using a version besides Peachtree 7 or 8, you can open your CSV file in a spreadsheet and examine it to be certain that all the column headings match the required mapping to NetSuite fields. If not, you can change the column headings to match.

To import your CSV files into NetSuite:

See [Importing CSV Files with the Import Assistant](#).

Exporting Selected Lists and Reports as CSV Files (CSV Export)

The Full CSV Export option in NetSuite does not currently export **all** data as CSV files.

This menu option exports the following data:

- Accounting Lists
- Classes
- Contacts
- Customers
- Departments
- Employees
- Expense Categories
- Items
- Memorized Transactions
- Notes
- Other Names
- Partners
- Saved Reports (that you own)
- Ship Items
- Solutions
- Tasks
- Topics
- Transaction Detail Report
- Vendors



Note: On record lists such as Customer and Item, the export mechanism exports the data based on the view you have selected for each list. For more information about options for exporting from record lists, see the help topic [Exporting Lists](#).

Known Excel Limitation for Values with More Than 16 Digits

When opening a CSV file directly, Excel treats long numeric sequences as numbers and displays them using scientific notation. This treatment leads to a loss of precision when the number has more than 16 digits and to loss of information when digits at 16+ position are truncated. Even if apostrophes or double quotes are used as text qualifiers, the text within them is still recognized by Excel heuristics as a number and an additional formatting hint must be provided. This heuristics is known in Excel as the "General" format. One way to work around this limitation is to always open CSV files using the Excel's

multistep Text Import Wizard. The wizard enables you to set column formatting in the last step ("Text" format). Alternatively, you can use a different Office suite, for example LibreOffice, which always displays the import wizard when opening a CSV file.

For suggestions of other methods to export data from NetSuite, see [Extracting Data from NetSuite](#).

To export selected data as a CSV file:

1. Go to Setup > Import/Export > Export Tasks > Full CSV Export.
2. Click **Submit**.

A progress bar will appear.

When progress is complete, the **File Download** window appears.

Note: If the export times out, you can export smaller sets of data by opening pages for the lists or reports listed above and clicking the Export - CSV button.

3. In the **File Download** window, select **Save** this file to disk and then **OK**.
The **Save As** window appears with **File Name** highlighted.
4. In the **Save As** window, enter a file name that means something to you, like your company name and 'listsandrecords', with the extension ZIP.
For example, you might name your file **WOLFELISTSANDRECORDS.ZIP**.
5. Click **Save**.
6. Open the ZIP file to see the titles of the generated CSV files.
For example, when you unzip the exported file, you can choose the file **custjobs.csv**.
7. Open the CSV file in a spreadsheet or text editor program.

Note: The CSV Export function runs your saved searches and saves the results in a CSV file. A saved search that fails may cause the export to fail. So if you encounter errors during the export, review your saved searches to find the problem.

Permissions

Only users who have the Administrator role can use the CSV Export function.

Extracting Data from NetSuite

NetSuite provides an export function at Setup > Import/Export > Export Tasks > Full CSV Export, described in [Exporting Selected Lists and Reports as CSV Files \(CSV Export\)](#).

If this export functionality does not meet your needs, you can use a combination of the following options to extract detailed data from NetSuite:

- Exporting saved search results to CSV files. For information, see the help topic [Exporting Search Results](#).
- Exporting report results as CSV files. For information, see the help topic [Exporting a Report](#).
- Writing a SOAP web services program to query record data. For information, see the help topic [SuiteTalk SOAP Web Services Platform Overview](#).

- Using SuiteAnalytics Connect to access NetSuite data through an ODBC, JDBC, or ADO.NET driver and an external application such as Microsoft Excel or Crystal Reports. For information, see the help topic [SuiteAnalytics Connect](#). Note that ODBC access is an additional service with an associated fee.

You can use the detailed records that you obtain from these approaches to create spreadsheets of relevant information. All of these approaches can preserve the relational aspects of data, as long as you export the Internal ID with each data row.

Recommendations for Financial Data Extraction

Reports may be more useful for the extraction of transaction information than saved searches, because they provide easier matching of totals.

- A possible organizing mechanism is to aggregate purchase transactions in one spreadsheet and sales transactions in another.
- The Transaction Detail report can be customized to be filtered by transaction type and to include relevant columns such as transaction number and memo, before export.
- In some cases, it may be necessary to set date range filters to limit report run time, and run multiple versions of the same report to extract data from multiple date ranges.

Recommendations for CRM Data Extraction

Saved searches can be used to extract CRM data from NetSuite.

- Saved searches are organized by record type, such as contact, customer, and vendor; and you should organize extracted information by record type as well.
- Notes field data on entity records (such as customers and vendors) can be extracted through a separate type of search, either System Note or User Note. In some cases, you may need to run separate searches and combine their data into an aggregated spreadsheet. In other cases, you can access notes data through a search for Contacts, Customers, or Vendors.

For information about saved searches, see the help topic [Saved Searches](#).

Replacements for smbXML

As of Version 2013 Release 2, NetSuite no longer supports data imports using smbXML.

There are two methods that can replace smbXML import: CSV Import and NetSuite's SOAP web services. Many customers choose the CSV Import Assistant because it has an easy-to-use UI and requires no programming knowledge. You can also import data using SOAP web services; however, programming knowledge and SOAP web services development are required. This method is more beneficial if you seek an automated system-to-system integration model.

To start learning about the CSV Import Assistant, see [Additional Import and Export Options](#). You can find this topic in the NetSuite Help Center at Account Administration > CSV Imports > CSV Imports Overview.

To start learning about SOAP Web Services, see the help topic [SuiteTalk SOAP Web Services Platform Overview](#).

Emailing or Faxing NetSuite Forms

In NetSuite, you can automatically email or fax your transaction forms when you save them to your account.

Emailing your forms only requires that you enter an email address. Faxing your forms requires that you set up faxing through NetSuite. To set up fax service, an administrator must go to Setup > Company > Preferences > Printing & Fax.

For additional information, see the help topic [Sending Email from NetSuite](#). Also, for details about emailing or faxing a specific type of transaction, search for transaction-specific help topics. For example, if you need details about emailing an invoice, search for Invoice in the Help Center.

To email a transaction form:

1. Go to the type of transaction you want to enter.
2. Check the **To Be Emailed** box, and enter or verify an email address to email the form.
You can enter multiple email addresses by separating them with a semicolon.
It is important to separate the addresses with a semicolon only, and to not include any spaces.
3. When you have finished entering information for this transaction, choose one of the following options to post the information to your NetSuite account:
 - Click **Save** to save the information, email the transaction form and return to the Transactions page.
 - Click **Save & New** to save the information, email the transaction form and return to a new transaction page of the same type.
 - Click **Print** to save the information, email the transaction form, and immediately print the transaction form.

To fax a transaction form:

1. Go to the type of transaction you want to enter.
2. Check the **To Be Faxed** box, and enter or verify a fax number to fax the form.
If you have not set up fax service, a warning message appears.
An administrator must set up fax service at Setup > Company > Preferences > Printing & Fax.
3. When you have finished entering information for this transaction, you can choose from three ways to post the information to your NetSuite account:
 - Click **Save** to save the information, fax the transaction form and return to the Transactions page.
 - Click **Save & New** to save the information, fax the transaction form and return to a new transaction page of the same type.
 - Click **Print** to save the information, fax the transaction form and immediately print the transaction form.

You can choose to print, email and fax the same transaction form from the transaction page. Check the To Be Printed, To Be Emailed and To Be Faxed boxes. When you click Save, NetSuite automatically queues the transaction form for printing, emailing, and faxing.

CSV Import FAQ

See the questions and answers below for information on CSV Import.

Can I use the Import Assistant for all data imports into NetSuite?

The Import Assistant supports most commonly imported record types, and is the recommended method for transferring small to medium-sized data sets from other applications into NetSuite. For information about record types that the Import Assistant supports, see [Supported Record Types for CSV Import](#).

NetSuite's SOAP Web Services import tools provide another alternative for migrating data for record types not currently supported for CSV import, as well a solution for large or ongoing data migration projects. For information, see the SOAP Web Services Platform Guide.

NetSuite also supports specialized imports. See [Importing a Peachtree CSV File](#).



Important: As of 2017.1, the Quicken® QIF file import capability has been deprecated.

Related Topics

- [CSV Imports Overview](#)
- [Importing CSV Files with the Import Assistant](#)
- [Additional Import and Export Options](#)

What is the recommended order for importing data into NetSuite?

The following order is recommended for data imports:

1. Chart of Accounts

Note that you should enter opening balances as journal entries on "go live", using the specialized journal entry import process. See the help topic [Importing a Journal Entry](#).

2. Classifications

Departments, Classes, Locations - supported by Import Assistant

3. Entities

Employees, Vendors, Partners, Customers (including Leads, Prospects, and Customers), Contacts - supported by Import Assistant

4. Items

Assembly/BOM Item, Lot Numbered Assembly/BOM Item, Serialized Assembly/BOM Item, Inventory Item, Lot Numbered Inventory Item, Serialized Inventory Item, Kit/Package Item, Non-Inventory Item for Sale, Non-Inventory Item for Resale, Non-Inventory Item for Purchase, Service Item for Sale, Service Item for Resale, Service Item for Purchase, Other Charge Item for Sale, Other Charge Item for Resale, Other Charge Item for Purchase - supported by Import Assistant

5. CRM Records

Notes, Issues, Solutions, Topics - supported by Import Assistant

Cases, Events, CRM Tasks, Messages - not yet supported, need another method

6. Transactions

Cash Sales, Customer Payments, Estimates, Invoices, Opportunities, Purchase Orders, Sales Orders, Vendor Bills, Vendor Payments - supported by Import Assistant

Credit Memos, Return Authorizations - not yet supported, need another method

Related Topics

- [CSV Imports Overview](#)
- [Importing CSV Files with the Import Assistant](#)
- [Guidelines for CSV Import Files](#)

How do I set up a CSV file for use by the Import Assistant?

The Import Assistant performs imports by record type, so you should put data for each record type in its own CSV file.

The first step is usually to export data from your current application to a CSV file. After that, you may need to add columns required by NetSuite to the file, to ensure the import is successful. You can determine the fields required for import, and set default values for these added columns, on the Import Assistant's Field Mapping page.

If you want to take full advantage of the Import Assistant's automatic mapping capabilities, you can change the column names in your CSV file to match NetSuite field names. You can see these field names on the Field Mapping page.

It is a good idea to include unique ID values from the current application in the CSV file, rename their CSV column to "External ID", and import these values into NetSuite. These ID values uniquely identify each records, and can provide primary keys to use for record matching and linking.

Related Topics

- [Importing CSV Files with the Import Assistant](#)
- [Step Four Field Mapping](#)
- [Guidelines for CSV Import Files](#)

What is sublist data and how do I import it?

Most records in NetSuite include sublists. Each record's sublist can include a list of references to other records. For example, a transaction record can include an items sublist, and a customer record can include an address sublist.

The Import Assistant enables you to import sublist data at the same time that you import other record type data. For more information, see [Sublist Data Import](#).

On the first page of the Import Assistant, you can choose whether to use a single file or multiple files to import data. If you choose to use a single CSV file, this one file includes all sublist data as well as other record type data. If you choose to use multiple CSV files, the Import Assistant enables you to specify a primary file for record type data and separate files for data from different sublists. See [Select a File for Import](#).

Sublist data fields are listed at the bottom of the Import Assistant Field Mapping page, within separate folders for each sublist. You can click Add New  (to the right of the sublist folder name) to add instances of the sublist to be imported. You need to map sublist fields on this page for sublist data to be imported. See [Step Four Field Mapping](#).

Import Assistant updates of sublist data vary according to whether sublists are keyed or non-keyed. Keyed sublists have individual sublist lines that can be searched for and updated.

Related Topics

- [Sublist Data Import](#)
- [Importing CSV Files with the Import Assistant](#)

- [Guidelines for CSV Import Files](#)

Why is my import job processing so slowly?

Your import may be slow because of the time at which it is processed or because it includes a large number of records.

You can save your import to be run at a later time. See [Step Five Save Mapping & Start Import](#).

You should break large CSV files into multiple, smaller files that you import as separate jobs, to improve performance. There is a limit of 25,000 records per imported file. If you would like to speed performance, you may wish to make CSV files smaller than this limit.

Related Topics

- [Checking CSV Import Status](#)
- [Importing CSV Files with the Import Assistant](#)
- [Guidelines for CSV Import Files](#)

Where are email messages regarding a CSV import job sent?

Email notifications about the status of a CSV import job, including information about post-processing errors, go to the email address used to log in to the session that initiated the import job.

For example, if you log in as jsmith@companyx.com and run the CSV Import Assistant to initiate an import job, any related email notification are sent to jsmith@companyx.com.

Related Topics

- [Checking CSV Import Status](#)
- [CSV Import Error Reporting](#)
- [Importing CSV Files with the Import Assistant](#)

Are there any special requirements for importing data into OneWorld accounts?

If your account is using NetSuite OneWorld, you should set up subsidiaries in NetSuite before you begin importing data. For instructions, see the help topic [Subsidiary Setup](#).

For NetSuite OneWorld accounts, the Subsidiary field is a required field for the following record types: Chart of Accounts, Contacts, Customers, Employees, Jobs (Projects), Leads, Partners, Prospects, and Vendors. For imports of these record types, you must include in your CSV file a field that can be mapped to the NetSuite Subsidiary field, and map this field on the Import Assistant Field Mapping page. If the import attempts to add or update records in a OneWorld account without identifying the subsidiary, the import will fail.

CSV file values for subsidiaries should be hierarchical names, in the format **grandparent : parent : child**, for example, **Consolidated Parent Company : UK Subsidiary : Euro Subsidiary**.

Related Topics

- [Importing CSV Files with the Import Assistant](#)
- [Guidelines for CSV Import Files](#)
- [OneWorld Overview](#)
- [Set up NetSuite OneWorld](#)
- [Subsidiary Setup](#)

How can I use the Import Assistant to update existing NetSuite records?

To update records with the Import Assistant, select either the **Update** or the **Add or Update** data handling option on the Import Options page. See [Step Two Import Options](#).

Your CSV file should include data for a primary key field that can be used to match CSV file records with existing NetSuite records and correctly update them.

- For best results, use the Internal ID field as the primary key, include a column of NetSuite Internal ID values in your CSV file, and map this column to the Internal ID field.

You can obtain Internal ID values by creating a saved search of the record type in NetSuite that includes Internal ID as a results column and exporting saved search results to a CSV file. For instructions on how to do this for transactions, see [Creating Transaction Saved Searches for Reimport](#).

- If internal ID values are not available, use the External ID field as the primary key, include a column of unique identifier values in your CSV file, and map this column to the External ID field.

If the external application from which you want to import data includes unique identifiers, you can save these to a column in your CSV file, and name this column External ID.

Note that External ID field values are never visible or editable in the NetSuite user interface. However, these values can be modified by CSV import, SuiteScript, and SOAP Web Services, and can be returned by saved searches.

- The last possibility is to use a name field as a primary key.

This option is not recommended, as name formatting can be complex, and key matching for updates can be difficult and error-prone if CSV file name values are formatted incorrectly.

For example, customer names are mapped to the Customer ID field and should have the format

Parent : Child, such as **ABC Medical : A1 Bandages**.

Also, for names that contain spaces, HTML rendering can sometimes distort the number of spaces included, causing mismatches between CSV file values and existing records, that result in import errors. To verify the number of spaces in names, you can create a saved search with a list of names and export it.

The above text refers to the update of body fields. Sublists have predefined key fields that you need to use as unique identifiers for updates. Note that not all sublists are selectively updateable; only a subset of the sublists supported for import are keyed.

When you use the Import Assistant to update data, you need to be aware of the effects of the Advanced Options, Overwrite Missing Fields and Overwrite Sublists. See [Set Advanced CSV Import Options](#). You also need to be aware of how sublist data records are updated.

Related Topics

- [Importing CSV Files with the Import Assistant](#)
- [Guidelines for CSV Import Files](#)
- [Select Reference Types](#)

Why does my import keep returning invalid reference key errors?

These errors usually occur when you are using name rather than internal ID or external ID as the primary key for your imported records, or as one or more reference types, and one or more names in your CSV files do not match names in existing records.

Using names as primary keys or reference types is not recommended, as name formatting can be complex, and matching for updates can be difficult and error-prone if CSV file name values are formatted incorrectly. For example, customer names are mapped to the Customer ID field and should have the format **Parent : Child**, such as **ABC Medical : A1 Bandages**.

Also, for names that contain spaces, HTML rendering can sometimes distort the number of spaces included, causing mismatches between CSV file values and existing records, that result in import errors. To verify the number of spaces in names, you can create a saved search with a list of names and export it.

Related Topics

- [Importing CSV Files with the Import Assistant](#)
- [Guidelines for CSV Import Files](#)
- [Select Reference Types](#)

Should I import account balances as part of the Chart of Accounts import?

You should not include account balances as part of your Chart of Accounts import. This import should include account numbers, names, and descriptive information like type, description, and currency.

Because the Chart of Accounts is the basis for all company data, you should complete this import first when you are setting up your account. You should not import account balances until your account is ready to go live.

You can use NetSuite's journal entry import process to import balances as journal entries. This import uses a template rather than the Import Assistant. See the help topic [Importing a Journal Entry](#).

Related Topics

- [Importing CSV Files with the Import Assistant](#)
- [Guidelines for CSV Import Files](#)
- [Chart of Accounts Import](#)

How do I create template files for CSV imports?

You do not need to create template files for CSV import, as the Import Assistant is not template-based. You can use any CSV file for an import; you do not need to start with a template file provided by NetSuite.

If you want to set up your own standard CSV file columns for particular record type imports, you can obtain information about NetSuite fields to which you can map CSV file fields in the following ways:

- Walk through the Import Assistant for an import of the selected record type and review the fields listed in the NetSuite Fields pane on the Field Mapping page. You can use these field names as column names in your CSV file to facilitate automatic mapping.
- Another way to understand these fields is to review carefully the form in the NetSuite user interface for the selected record type. You can click each field label to get help that describes each field.
- For more descriptions of fields, review the [SOAP Schema Browser](#) for details about fields for each record type. For information about working with this tool, see the help topic [SOAP Schema Browser](#).
- Be aware that, by default, mappable NetSuite fields are those available on your preferred form for the selected record type. Fields can be mapped for the import job if they are displayed (not hidden) and not disabled on your preferred form. For example, when you import customer records, the fields that you can map to be imported are those that you can edit on the NetSuite customer form.

If these fields do not include all of the data you want to import, for some record types, you can specify a custom form that includes the fields you need, as an Advanced Option in the CSV Import Assistant. This specification changes the NetSuite fields listed on the Field Mapping page. See [Set Advanced CSV Import Options](#).

Related Topics

- [Importing CSV Files with the Import Assistant](#)
- [Guidelines for CSV Import Files](#)

- [Tips for Successful CSV Imports](#)

How do I complete an import if my CSV file does not include values for a required field?

NetSuite fields that are required to be mapped are marked as (Req) on the Import Assistant Field Mapping page and usually are automatically placed in the center pane of this page, to remind you to map them. If you do not map one or more required fields, you cannot move past the Field Mapping page.

If you do not have any values to import for a required field, you can do one of the following:

- Include a column with blank values in your CSV file and map this column to the required NetSuite field.
- Click the edit icon next to the required field and set the value for the required field to be NULL.
- Click the edit icon next to the required field and select a default value for the required field. (This is possible only if values are set up in NetSuite).



Note: You do not need to map required fields for a sublist unless you are importing data for the sublist. See [Required Fields for Sublist Import Mapping](#).

Related Topics

- [Importing CSV Files with the Import Assistant](#)
- [Guidelines for CSV Import Files](#)
- [Assign Default Values during Field Mapping](#)
- [Assign Null Values during Field Mapping](#)

What is a reference type?

A reference type enables you to map a column in an imported CSV file to a NetSuite field that can have one or more list values, such as a dropdown list or a multi-select. You specify reference types on the Import Assistant Field Mapping page by clicking on the edit icon next to a mapped field that is a dropdown list or multi-select. See [Select Reference Types](#).

Related Topics

- [Importing CSV Files with the Import Assistant](#)
- [Guidelines for CSV Import Files](#)

Can I use the Import Assistant to import pricing data for items?

The Import Assistant supports the import of items' pricing data, including multiple price levels, quantity-based pricing, quantity pricing schedules, and multiple currencies. Import of item pricing data can occur only when one or more of the following related features are enabled: Multiple Prices, Quantity Pricing, and Multiple Currencies.

- You should import multiple files, rather than a single file for item pricing, with pricing data in a separate file from other item data. For more information, see [Guidelines for CSV Import Files](#).
- Recommended column headers for item pricing CSV files vary, depending upon whether you plan to upload a single file or multiple files. For more information, see [Guidelines for CSV Import Files](#).
- Pricing data can be selectively updated based on key field values. The key fields depend upon the pricing-related features that are enabled. For information, see [Guidelines for CSV Import Files](#).

For more information, see [Guidelines for CSV Import Files](#).

Related Topics

- [Importing CSV Files with the Import Assistant](#)
- [Guidelines for CSV Import Files](#)
- [Guidelines for CSV Import Files](#)

Why is the Individual field required for an import of customers, when all of my customers are companies, not individuals?

NetSuite enables you to define each customer, partner, and vendor as either an individual (a person) or a company. The NetSuite Fields pane of the Import Assistant's Field Mapping page includes an Individual field for all of these entities. This field is required.

- The Individual field is a Boolean indicating whether the entity is a company or a person.
- It corresponds to the Type option buttons on NetSuite's user interface forms for customers, partners, and vendors.
- Unlike most radio button fields, an import of this field's data accepts all forms of True or False. For example, the following values are acceptable as a "True" value: True, true, TRUE, T, yes, Yes, YES.
 - A True value indicates an individual; a False value indicates a company.
 - The Company Name field is required for records with a False value, but not for records with a True value.
- You can set a default value for the Individual field by clicking its edit icon on the Field Mapping page. In the Default Value popup: choose Yes to default customer type to individual, choose No to default customer type to company.

i Note: Your account's settings for the Default Customer Type, Default Partner Type, and Default Vendor Type fields, at Setup > Company > General Preferences, may affect the value of the Individual field for imports.

Related Topics

- [Importing CSV Files with the Import Assistant](#)
- [Guidelines for CSV Import Files](#)
- [Customers Only Import](#)
- [Partners Import](#)
- [Vendors Import](#)

What values should I import for the Global Subscription Status field for customers?

The **Global Subscription Status** field on customer records determines whether or not a customer can receive email sent through campaigns and email merge operations.

- Four values are possible: Confirmed Opt-In, Soft Opt-In, Soft Opt-Out, and Confirmed Opt-Out, but only the soft values are available to be set by import.
- If you want to send campaign email to a customer, set this field's value to Soft Opt-In, because you cannot send campaign email to users with Soft Opt-Out status, only opt-in email.
- If you do not include this field in an import, its value is defaulted, based on the Unsubscribed to Marketing By Default option at Setup > Marketing > Marketing Preferences. By default, this option is disabled, and the Global Subscription Status field defaults to Soft Opt-In. When this option is enabled, the field defaults to Soft Opt-Out.
- After an import, you can change the value of the Global Subscription Status between Soft Opt-In and Soft Opt-Out manually in the user interface and through mass updates. Only recipients themselves can change the value to Confirmed Opt-In or Confirmed Opt-Out.



Note: The Global Subscription Status field replaces the previously used Unsubscribed field and enhances on its functionality.

Related Topics

- [Importing CSV Files with the Import Assistant](#)
- [Guidelines for CSV Import Files](#)
- [Setting Up Campaign Subscriptions](#)

What is the difference between leads, prospects, and customers imports?

When you import Lead, Prospect, or Customer data into NetSuite, you import into the Customer record. The Stage field on the Customer record defines the stage of "Customer" that is currently in the system - a Customer can be a Lead, Prospect or Customer. Leads automatically can become Prospects, and Prospects can become Customers.

Specifically:

- **Lead:** enables you to track all the information you need to convert a lead into a customer. Leads have no estimates, opportunities or transactions associated with them. If an estimate or opportunity is created for a lead, the lead becomes a prospect. If you create a sales transaction for a lead, the lead becomes a customer.
- **Prospect:** enables you to track all the information you need to convert a prospect into a customer. Prospects have no sales orders, invoices, cash sales or other sales transactions associated with them. They can have opportunities and estimates associated with them, however. If a sales transaction is created for a prospect, or an opportunity is closed for a prospect, the prospect becomes a customer.
- **Customer:** enables you to track all the information on your current customers.

Related Topics

- [Importing CSV Files with the Import Assistant](#)
- [Guidelines for CSV Import Files](#)
- [Customers Only Import](#)
- [Leads Only Import](#)
- [Prospects Only Import](#)

Should I import customers and contacts together or separately?

The Import Assistant enables you to perform separate import jobs for customers (meaning leads, prospects, or customers) and contacts, or to import both at the same time.

Setting up files for importing customers and contacts together can be complex. For instructions for importing customers and contacts together, see [Importing Entities and Contacts Together](#). For information about how data is processed for these types of imports, see [Import Job Processing for Entities and Contacts Imports](#).

You may find it simpler to import contacts and customers separately. For tips on how to do this, see [Contacts Only Import](#). Especially review [Importing Contacts for Existing Entity Data](#) and [Importing Contacts and New Entities Data](#).

Related Topics

- [Importing CSV Files with the Import Assistant](#)
- [Guidelines for CSV Import Files](#)

- [Customers Only Import](#)
- [Leads Only Import](#)
- [Prospects Only Import](#)

Can I use the Import Assistant to import project data?

The Jobs import, a Relationships type import, enables you to import core project data and project resource data into NetSuite. See [Projects \(Jobs\) Import](#).

In addition, a simplified Import Assistant is available for you to import project tasks data from Microsoft Project into NetSuite. See [Project Tasks Import](#).

Related Topics

- [Importing CSV Files with the Import Assistant](#)
- [Guidelines for CSV Import Files](#)
- [Project Tasks](#)

What is the difference between the following advanced options: Overwrite Sublists and Overwrite Missing Fields?

Both of these options apply to updates, and are not enabled by default, but one option applies at the sublist level and the other applies at the field level.

The Overwrite Sublists option applies to all data in sublists that have fields mapped for an import job. When this option is enabled, CSV file data for any sublists with mapped fields completely replaces any existing sublist data in NetSuite. If this option is not enabled, CSV file sublist data either selectively updates or appends to existing sublist data.

The Overwrite Missing Fields option applies to individual fields. When this option is enabled, any mapped CSV file fields with null values overwrite existing data in NetSuite fields, blanking it out.

Related Topics

- [Importing CSV Files with the Import Assistant](#)
- [Guidelines for CSV Import Files](#)
- [Set Advanced CSV Import Options](#)

Why didn't my CSV import job that created new records trigger my workflow based on record creation or update?

If a workflow is triggered when you create or update records in the NetSuite user interface, but is not triggered when a CSV import job creates or updates records, you probably need to enable the **Run Server SuiteScript CSV and Trigger Workflows** preference when performing the import. Workflows are treated as server-side SuiteScript, so they do not run if this preference is not enabled.

You enable this preference for the current import on the Advanced Options of the Import Assistant. Go to Setup > Import/Export > Import Tasks > Import CSV Records. On Step 2 of the Import Assistant, in the Advanced Options, check the Run Server SuiteScript and Trigger Workflows box. If the box is unavailable, you do not have permission to change the setting for the import, and the company setting will apply.

Related Topics

- [Importing CSV Files with the Import Assistant](#)
- [Setting CSV Import Preferences](#)

How can I import Price Level for transaction line items?

On the Field Mapping page of the CSV Import Assistant, expand the Items folder in the NetSuite Fields pane on the right side. Double-click the Price Level field to display it in the middle pane.

You should include a Price Level column (with values) in your CSV file that can be mapped to the NetSuite Price Level field. If you are unable to add this column, you can still map the Price Level field on the Field Mapping page, and then click the edit icon and select Custom as the default value. However, this default is not guaranteed to be a valid level for all items.



Important: If you do not map the Price Level field for a CSV import, the base price from each item record is used as the price for each transaction line item. This behavior is consistent with the behavior when you add transaction line items in the user interface.

Related Topics

- [Importing CSV Files with the Import Assistant](#)
- [Transactions Import Type](#)
- [Step Four Field Mapping](#)

How do I know what the number is for an imported journal entry?

There are two methods for journal entry: a simple method you can use to import one journal entry at a time, and a more involved method you can use to import multiple journal entries.

If you use the simple method, available at Transactions > Financial > Make Journal Entries > Import, you do not have to provide the number for the journal entry in your CSV file. If you do not include this number, a default number is applied during the import process.

If you want to know the defaulted number for an imported journal entry, you can obtain it before you start the import from the View Mapping / Start Import page. Before you click the button to Run the import, do the following:

Click the Entry No. field in the right pane so that it appears in the center pane, then click its edit icon. The default value displays in the popup.

If you are importing multiple journal entries, you need to provide numbers in your CSV file.