

CSV Upload Assignment

Business Example: You are working on implementing NetSuite and need to upload all the past sales orders from your business from the past 30 days. Assume you already have the data (even though you are creating some of it right now).

1. Create an Excel file and save it as a CSV (comma delimited) file type
2. Add titles for the first row for all the required fields plus other necessary data you want to pull.
Hint: It is useful to go to the sales order in NetSuite to see all the types of fields you may want to bring it.
3. Add at a minimum to the excel file:
 - a. Customer (remember this is pulling from the customer record so make sure that there is a selectable customer already created)
 - b. Date
 - c. Status
 - d. Item (Other required fields for the item line. You will need to have an Item available too)
 - e. Memo
4. In the appropriate column, add the data you want to upload
5. Save the file
6. Navigate to the Import CSV
7. Select the appropriate fields
Hint: Sales Orders are under "Transactions"
8. Upload your file and click next
9. Map the fields from your Excel columns to the NetSuite fields
10. Ensure the status was successful

Lecture Notes

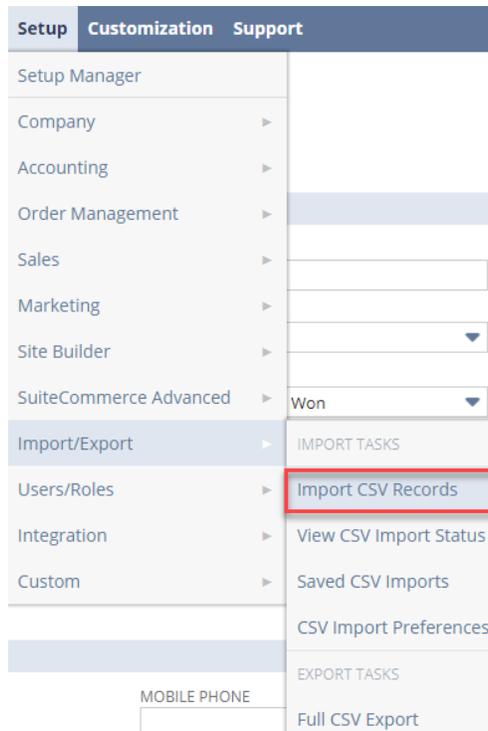


Figure 1: Navigation to CSV Upload



Figure 2: In Excel, make sure to Save As a CSV UTF-8

- Find out the required fields for the form (this can be unique for every NetSuite account based on how the required fields were made)
- To save a file as a CSV file in Excel: File > Save As > Dropdown to CSV UTF-8
- Remember Boolean values would have 'T' or 'F'
- Finally, don't let yourself get frustrated when you have to keep massaging the data in excel. 😊