

NETSUITE DATA IMPORTS

Essential NetSuite Data Import Tips & Tricks

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As with any ERP system, data imports are part of the work. I deal with multiple customers daily on a range of topics related to their NetSuite environments. These engagements range from new NetSuite customers and existing customers. Data importing is common to most activities in NetSuite. This is especially true if you are migrating from a legacy ERP system, adding a module, or just simply doing some data clean up.

The purpose of this post is to give some tips and tricks related to CSV data imports. NetSuite has built user-friendly functionality, although like with most areas of software, the nuances or deep complexities must be understood to ensure the outcome of the result is expected.

This document is meant to give suggestions based on my years of experience; however, I would encourage you to read NetSuite documentation related to CSV imports for additional background.


Getting Organized

Getting Organized Will Save You Time & Future Headaches


- 1.** Determine what type of import is needed. Are you adding new records or updating existing records? It's a simple question, but there could be huge ramifications if this is done incorrectly.
- 2.** What specific records are you updating? If you need to create new items in NetSuite, you will need, multiple CSV sheets for each type of item (i.e. lot numbered assembly serialized assembly, or assembly).
- 3.** Understand what information is mandatory from the NetSuite system and any customizations you have in place. Create the record in the user interface first and then go through each step to reproduce in the CSV import.
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- 5.** Create saved search(s) to monitor the data as it is imported and then run validations on the outcome.
- 6.** Determine any scripts or workflows that could trigger with your import. Go to scripted records and go through each script and workflow to make sure you understand the flow and ramifications of your CSV import. You can setup a CSV import to not trigger a script or workflow; however, this is a decision that must be made once you understand the expected outcome you desire.
- 7.** Understand your role permissions and restrictions. Test what you are trying to import in the user interface. If you are not able to update the value, then higher permission may be needed.

Create a Sample Run Before All Records are Imported

I typically do a small CSV import first. Import or update 1-2 records, save the CSV import, then import the remainder once everything is perfect. Sometimes I create a couple of sample imports and will iterate through the sample imports until I am satisfied that I am not missing a detail.



If you have 100 plus records to create, it could be a nightmare if you make a mistake that is hard to back out.



I create sample runs to make sure my field mapping is exact. NetSuite can be picky about what is accepted and how it is accepted.

Validate your Import

- 1.** Use the saved search that was created earlier to validate the data. I typically create a saved search based on system notes which then allows me to do a quick analysis of the saved search to determine any abnormalities that come to surface.
- 2.** Load the sample records that were created earlier. Go through every field to ensure the actual result matches the expected result.
- 3.** Did anything unexpected happen on your sample import? Always determine the root cause of the change and why the system behaved the way it did. Once the why is understood then further future actions can be determined.

NEED HELP WITH CSV?

Want to talk to an expert before you spend a couple of days or weeks on your import? Protelo is here to help. From simple questions to more complex questions, we have a dedicated team of highly experienced business consultants ready to help!

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