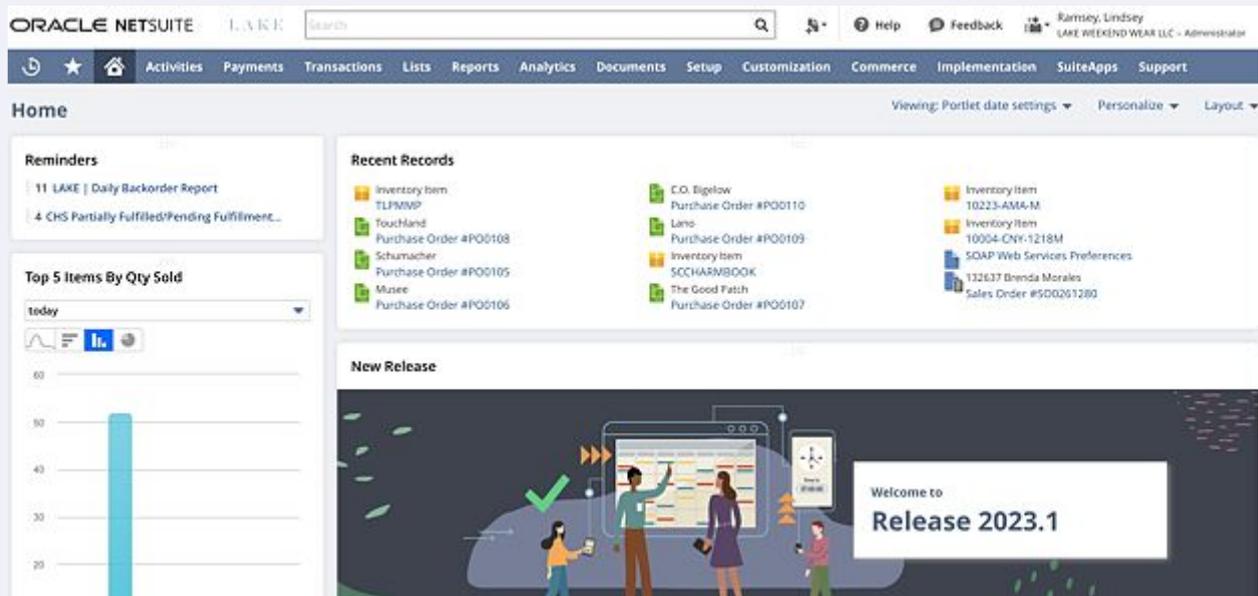


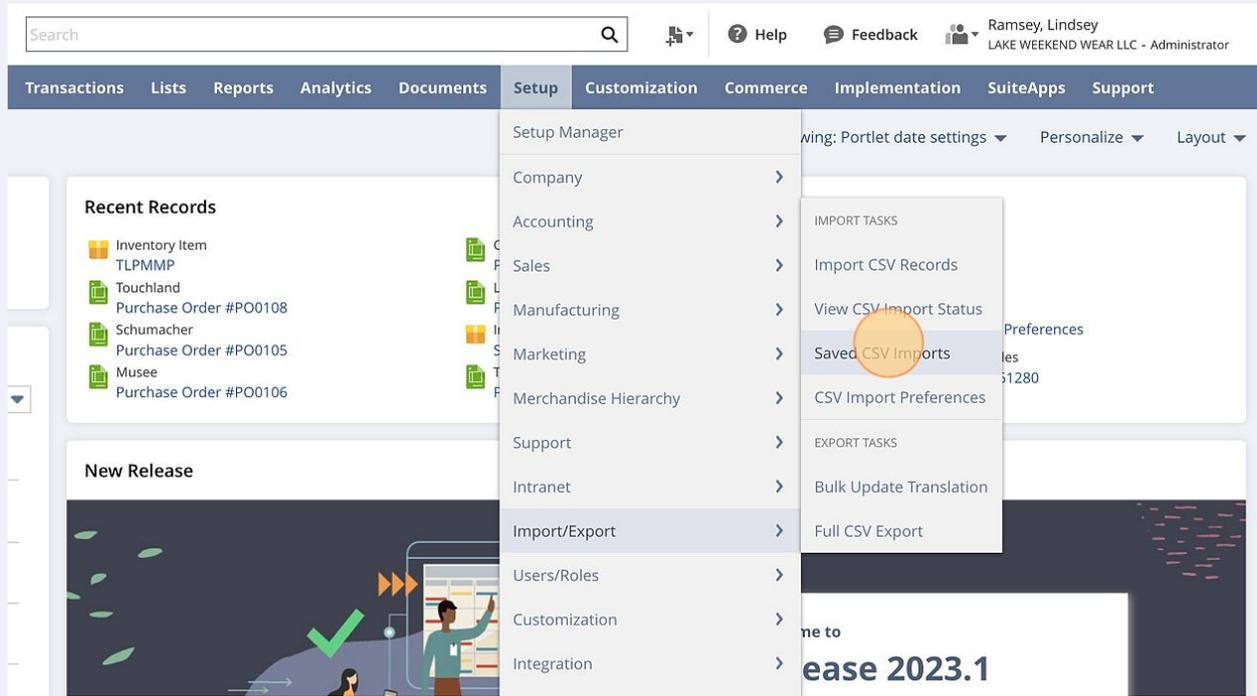
# How to Create Customers Via CSV Import

1 First you will take the Google Sheet Emily Parker (or anyone from the Marketing or Brand team) and Copy and Paste it into a new Excel sheet. Save as a CSV file.

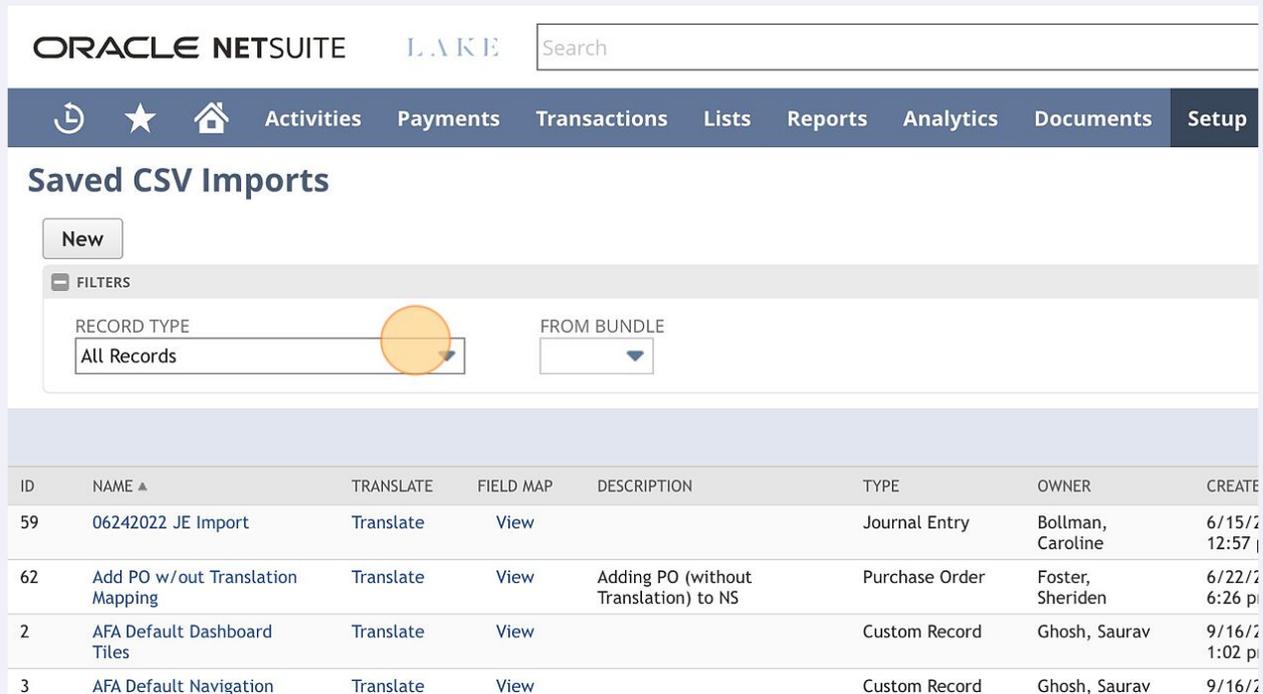
2 Navigate to NetSuite  
(<https://4816234.app.netsuite.com/app/center/card.nl?sc=-29&whence=>)



3 Click "Setup", then "Import/Export", and finally select "Saved CSV Imports".



4 Once on the Saved CSV Imports page, click into the "Record Type" filter.



5

Click "Customers Only" (to find this filter quicker, type "c" to filter to the c's in the list).

### Saved CSV Imports

New

FILTERS

RECORD TYPE: Cash Sale (dropdown menu open showing options: Customer Payment, Customer-Subsidiary Relationship, Customers And Contacts Together, Customers Only, Department, Description Item, Discount Item)

FROM BUNDLE: (dropdown menu)

ID	FIELD MAP	DESCRIPTION	TYPE	OWNER	CREATE
59	View		Journal Entry	Bollman, Caroline	6/15/2020 12:57 pm
62	View	Adding PO (without Translation) to NS	Purchase Order	Foster, Sheriden	6/22/2020 6:26 pm
2	View		Custom Record	Ghosh, Saurav	9/16/2020 1:02 pm
3	Translate	AFA Default Navigation Categories	View	Ghosh, Saurav	9/16/2020 1:02 pm
1	Translate	AFA Default Navigation Shorcut Groups	View	Ghosh, Saurav	9/16/2020 1:02 pm
5	Translate	AFA Default Navigation Shorcut Links	View	Ghosh, Saurav	9/16/2020 1:02 pm
4	Translate	AFA Default Navigation	View	Ghosh, Saurav	9/16/2020 1:02 pm

6

Once filtered you will see five options. Click "LAKE - PR Customer Import-EP".

Customers Only (dropdown menu)

ID	NAME ▲	TRANSLATE	FIELD MAP	DESCRIPTION	TYPE	OWNER	CREATE
15	Customer CSV - AFA	Translate	View		Customers Only	Ghosh, Saurav	9/16/2020 1:02 pm
114	LAKE - Customer Update Import	Translate	View	To update customer addresses.	Customers Only	Garrett, Elizabeth	9/28/2020 10:18 am
82	LAKE - PR Customer Import	Translate	View	To create new influencer and other PR customer records.	Customers Only	Garrett, Elizabeth	7/13/2020 10:18 am
109	LAKE - PR Customer Import-EP	Translate	View	To create new influencer and other PR customer records.	Customers Only	Piasio, Grace	8/10/2020 10:18 am
44	LAKE Customers	Translate	View		Customers Only	Koulogeorgas, Maria	10/15/2020 3:20 pm



7

Once in the Import Assistant, scroll down, and click "Select.." under the CSV File(s) field. Select the CSV file you are wanting to upload.

3 File Mapping

4 Field Mapping

5 Save mapping & Start Import

CHARACTER ENCODING  
Unicode (UTF-8)

Choose another character encoding format if you use an international or Macintosh version of Microsoft Excel, or if you

CSV COLUMN DELIMITER  
Comma

Select the symbol to be used as a column separator in the CSV files you import. This setting overrides the column separ

CSV File(s)

ONE FILE TO UPLOAD

MULTIPLE FILES TO UPLOAD

Select...

8

Once your file is uploaded, click the "Next >" button.

Macintosh version of Microsoft Excel, or if you typically use special characters.

import. This setting overrides the column separator preference specified at Home > Set Preferences.

✕ REMOVE

Cancel < Back Next >

9

Since we will be creating new customers we will want to select "Add" instead of "Update" or "Add or Update".

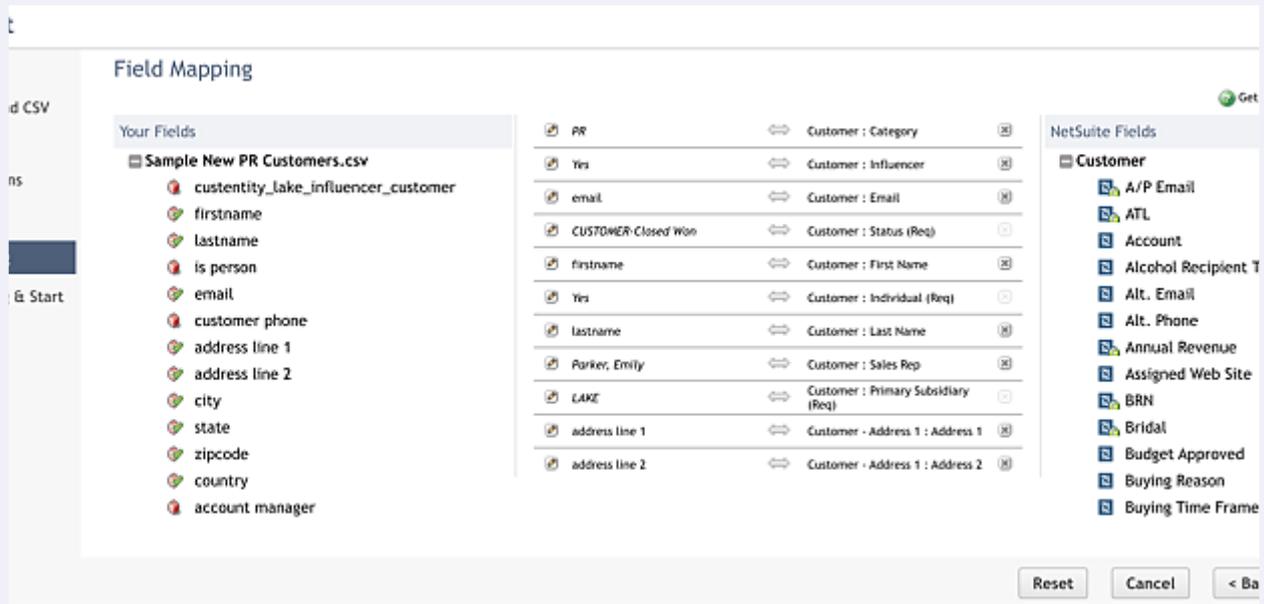
The screenshot shows the Oracle NetSuite interface. At the top, there is a header with "ORACLE NETSUITE" and "LAKE" next to a search bar. Below the header is a navigation bar with icons for Home, Star, and a list of menu items: Activities, Payments, Transactions, Lists, Reports, Analytics, Documents, and Setup. The main content area is titled "Import Assistant" and is divided into two sections. On the left, under "STEPS", there is a list of five steps: 1 Scan & Upload CSV (with a green checkmark), 2 Import Options (highlighted in a dark blue bar), 3 File Mapping, 4 Field Mapping, and 5 Save mapping & Start Import. On the right, under "Import Options", there is a "Data Handling" section with three radio button options: ADD (highlighted with an orange circle), UPDATE, and ADD OR UPDATE. Below this is an "Advanced Options" section with a right-pointing arrow.

10

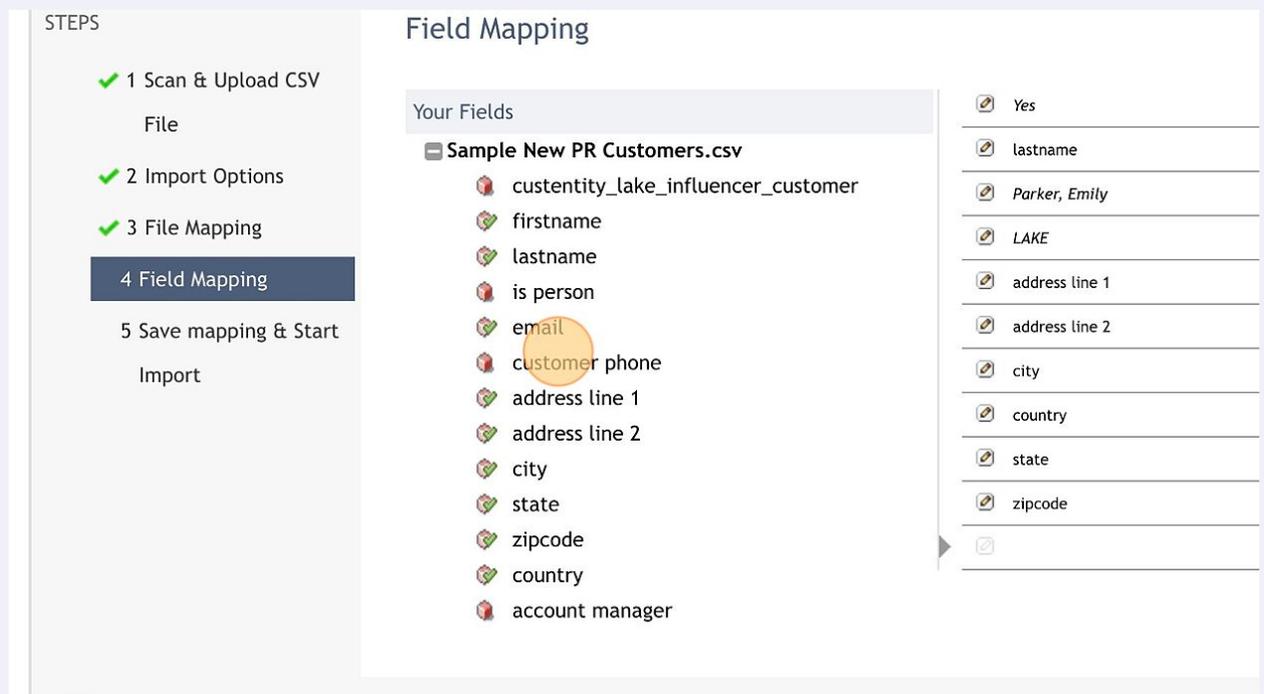
Once you select "Add", click the "Next >" button.

This screenshot shows the bottom portion of the Oracle NetSuite Import Assistant interface. It features a light gray footer bar containing three buttons: "Cancel", "< Back", and "Next >". The "Next >" button is highlighted with an orange circle.

11 You will then be brought to the Field Mapping screen.



12 Review to make sure all necessary fields are mapped for the import. In this example the "customer phone" did not map over naturally, so we will add it to the mapping.



13

After adding the "customer phone" to the mapping, click "Phone". This will map the phone number in our import to the phone section in NetSuite under that customers profile.

lastname	↔	Customer : Last Name
Parker, Emily	↔	Customer : Sales Rep
LAKE	↔	Customer : Primary Subsidiary (Req)
address line 1	↔	Customer - Address 1 : Address 1
address line 2	↔	Customer - Address 1 : Address 2
city	↔	Customer - Address 1 : City
country	↔	Customer - Address 1 : Country (Req)
state	↔	Customer - Address 1 : State
zipcode	↔	Customer - Address 1 : Zip
customer phone	↔	

NetSuite Fields

- No. of Employees
- Number Format
- Opening Balance
- Opening Balance Account
- Opening Balance Date
- PST Exempt
- Parent Company
- Partner
- Password
- Phone
- Pref. CC Processor
- Price Level
- Primary Contact
- Primary Subsidiary (Req)
- Print on Check Ac

Reset Cancel < Back Next >

14

Once you have gone over all of your field mappings, click the "Next >" button.

Parker, Emily	↔	Customer : Sales Rep
LAKE	↔	Customer : Primary Subsidiary (Req)
address line 1	↔	Customer - Address 1 : Address 1
address line 2	↔	Customer - Address 1 : Address 2
city	↔	Customer - Address 1 : City
country	↔	Customer - Address 1 : Country (Req)
state	↔	Customer - Address 1 : State
zipcode	↔	Customer - Address 1 : Zip
customer phone	↔	Customer : Phone

NetSuite Fields

- Number Format
- Opening Balance
- Opening Balance Account
- Opening Balance Date
- PST Exempt
- Parent Company
- Partner
- Password
- Phone
- Pref. CC Processor
- Price Level
- Primary Contact
- Primary Subsidiary (Req)
- Print on Check Ac

Reset Cancel < Back Next >

15

For the final step, you will be brought to the Save mapping & Start Import screen. This is where you will see if there were any errors in your import and run your import.

**Save mapping & Start Import**

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**  
LARE - PR Customer Import-EP

Provide a unique Import Map name to save the current mapping choices for future imports.

**DESCRIPTION**  
To create new influencer and other PR customer records.

(Optional) Provide a useful description for this Import Map.

**ID**  
\_PRCUSTIMPORT\_EP

(Placeholder) Provide a unique ID to identify this Import Map in External Tools

Cancel < Back Sa

16

Select "Run" or "Save As & Run".

Save As & Run ▼

Run

Save As

17

Congratulations! You have successfully created new customers in NetSuite via CSV import!