

How to Create Matrix Items in NetSuite via CSV Import

This will mainly be used for Support Product due to our LAKE Product having its own work flow. You will receive a matrix upload file from Meredith.

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When you receive the CSV file you should look over the file to make sure all items in the document are correct.

displayname	parentRef	matrixType	matrix_option1 Color Support Product	matrix_option2 Size	upccode	unitstype	stockunit	purchaseun
CAP Sofia Hat		Parent Matrix Item						
S CAP Sofia Hat Small	CAPSOFIAH CAP Sofia Hat	Child Matrix Item		S	7.93889E+11	Each	Eaches	Eaches
M CAP Sofia Hat Medium	CAPSOFIAH CAP Sofia Hat	Child Matrix Item		M	7.93889E+11	Each	Eaches	Eaches
L CAP Sofia Hat Large	CAPSOFIAH CAP Sofia Hat	Child Matrix Item		L	7.93889E+11	Each	Eaches	Eaches
CAP Gemma Hat		Parent Matrix Item						
CAP Gemma Hat Small	CAPGEMH CAP Gemma Hat	Child Matrix Item		S	7.93889E+11	Each	Eaches	Eaches
M CAP Gemma Hat Medium	CAPGEMH CAP Gemma Hat	Child Matrix Item		M	7.93889E+11	Each	Eaches	Eaches
L CAP Gemma Hat Large	CAPGEMH CAP Gemma Hat	Child Matrix Item		L	7.93889E+11	Each	Eaches	Eaches
CAP Edetta Hat		Parent Matrix Item						
S CAP Edetta Hat Small	CAPEDEH CAP Edetta Hat	Child Matrix Item		S	7.93889E+11	Each	Eaches	Eaches
M CAP Edetta Hat Medium	CAPEDEH CAP Edetta Hat	Child Matrix Item		M	7.93889E+11	Each	Eaches	Eaches
L CAP Edetta Hat Large	CAPEDEH CAP Edetta Hat	Child Matrix Item		L	7.93889E+11	Each	Eaches	Eaches
CAP Lelia Hat		Parent Matrix Item						
S CAP Lelia Hat Small	CAPLELIAH CAP Lelia Hat	Child Matrix Item		S	7.93889E+11	Each	Eaches	Eaches
M CAP Lelia Hat Medium	CAPLELIAH CAP Lelia Hat	Child Matrix Item		M	7.93889E+11	Each	Eaches	Eaches
L CAP Lelia Hat Large	CAPLELIAH CAP Lelia Hat	Child Matrix Item		L	7.93889E+11	Each	Eaches	Eaches

Some key items to note:

2 Make sure the External ID and Name match.

ExternalID	name
CAPSOFIAH	CAPSOFIAH
CAPSOFIAH-S	CAPSOFIAH-S
CAPSOFIAH-M	CAPSOFIAH-M
CAPSOFIAH-L	CAPSOFIAH-L
CAPGEMH	CAPGEMH
CAPGEMH-S	CAPGEMH-S
CAPGEMH-M	CAPGEMH-M
CAPGEMH-L	CAPGEMH-L
CAPEDEH	CAPEDEH
CAPEDEH-S	CAPEDEH-S
CAPEDEH-M	CAPEDEH-M
CAPEDEH-L	CAPEDEH-L
CAPLELIAH	CAPLELIAH
CAPLELIAH-S	CAPLELIAH-S
CAPLELIAH-M	CAPLELIAH-M
CAPLELIAH-L	CAPLELIAH-L

3 The Parent Reference equals the External ID plus the Display Name.

ExternalID	name	displayname	parentRef
CAPSOFIAH	CAPSOFIAH	CAP Sofia Hat	
CAPSOFIAH-S	CAPSOFIAH-S	CAP Sofia Hat Small	CAPSOFIAH CAP Sofia Hat
CAPSOFIAH-M	CAPSOFIAH-M	CAP Sofia Hat Medium	CAPSOFIAH CAP Sofia Hat
CAPSOFIAH-L	CAPSOFIAH-L	CAP Sofia Hat Large	CAPSOFIAH CAP Sofia Hat
CAPGEMH	CAPGEMH	CAP Gemma Hat	
CAPGEMH-S	CAPGEMH-S	CAP Gemma Hat Small	CAPGEMH CAP Gemma Hat
CAPGEMH-M	CAPGEMH-M	CAP Gemma Hat Medium	CAPGEMH CAP Gemma Hat
CAPGEMH-L	CAPGEMH-L	CAP Gemma Hat Large	CAPGEMH CAP Gemma Hat
CAPEDEH	CAPEDEH	CAP Edetta Hat	
CAPEDEH-S	CAPEDEH-S	CAP Edetta Hat Small	CAPEDEH CAP Edetta Hat
CAPEDEH-M	CAPEDEH-M	CAP Edetta Hat Medium	CAPEDEH CAP Edetta Hat
CAPEDEH-L	CAPEDEH-L	CAP Edetta Hat Large	CAPEDEH CAP Edetta Hat
CAPLELIAH	CAPLELIAH	CAP Lelia Hat	
CAPLELIAH-S	CAPLELIAH-S	CAP Lelia Hat Small	CAPLELIAH CAP Lelia Hat
CAPLELIAH-M	CAPLELIAH-M	CAP Lelia Hat Medium	CAPLELIAH CAP Lelia Hat
CAPLELIAH-L	CAPLELIAH-L	CAP Lelia Hat Large	CAPLELIAH CAP Lelia Hat

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Check in NetSuite to make sure your Product Style and Support Product Brand are created in NetSuite. To check Product Style, you will go into NetSuite and search "page: merchandise style". To check Support Product Brand, you will go into NetSuite and search "page: support product brand".

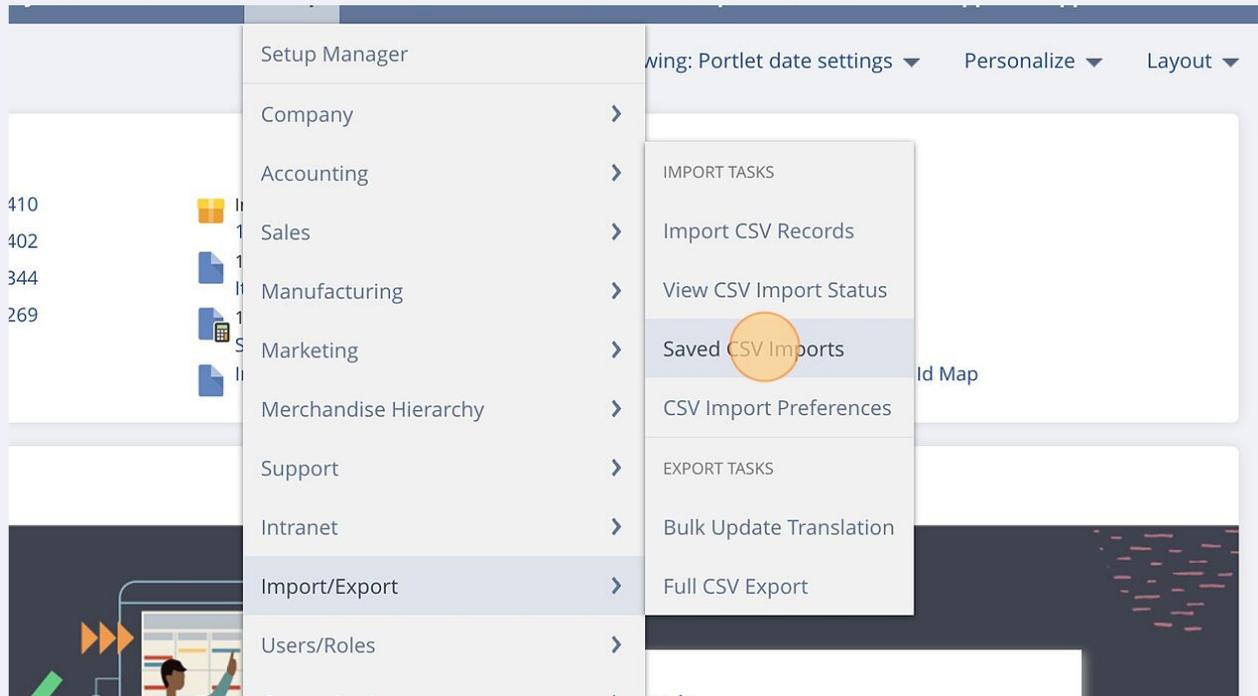
Product Style	Support Product Brand
Cappello Hats	Cappello Hats

Once you have checked over everything you are ready to upload your file.

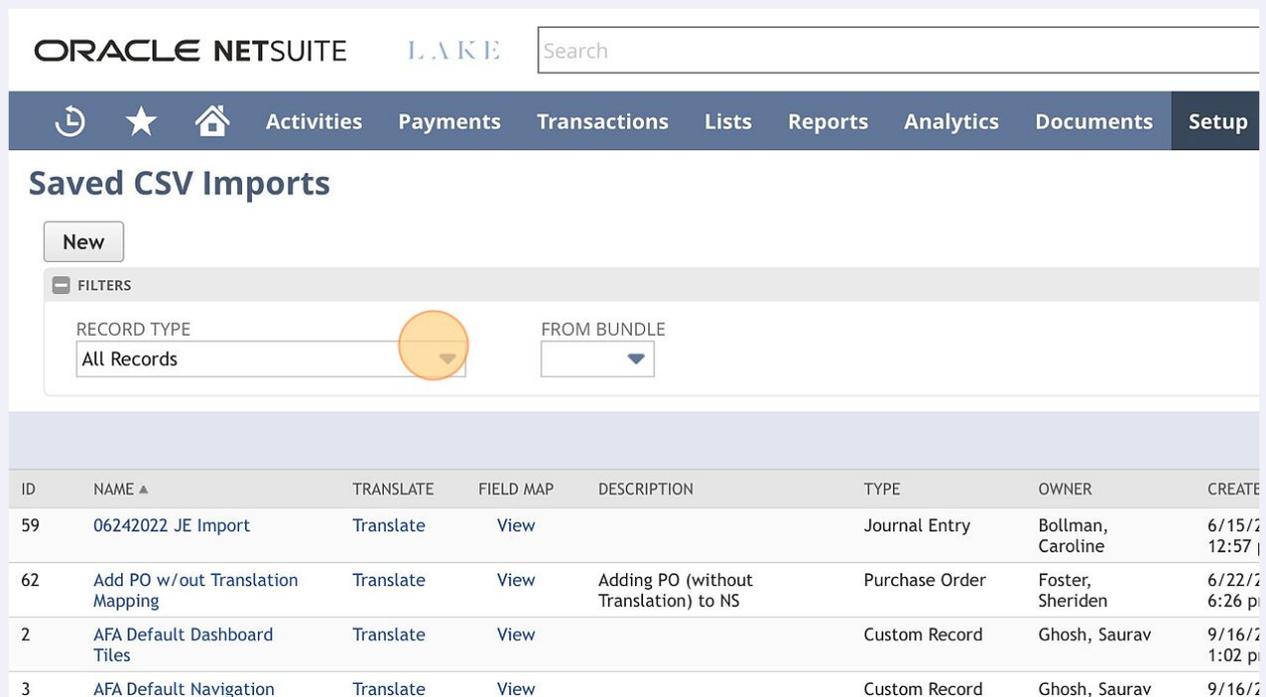
7

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

8 Go to "Setup", "Import/Export", and click "Saved CSV Imports".



9 In your Saved CSV Imports page, select the Record Type filter.



10 Filter by typing in the letter "i", and click "Inventory Item".

FILTERS

RECORD TYPE: Imported Employee Expense (dropdown menu open showing: Imported Employee Expense, Inbound Shipment, Intercompany Journal Entry, Inventory Adjustment, Inventory Cost Revaluation, **Inventory Item**, Inventory Transfer)

FROM BUNDLE: (dropdown menu)

ID	NAME	TRANSLATE	FIELD MAP	DESCRIPTION	TYPE	OWNER	CREATED
59	Journal Entry		View		Journal Entry	Bollman, Caroline	6/15/2023 12:57 pm
62	Adding PO (without Translation) to NS		View	Adding PO (without Translation) to NS	Purchase Order	Foster, Sheriden	6/22/2023 6:26 pm
2	Custom Record		View		Custom Record	Ghosh, Saurav	9/16/2023 1:02 pm
3	AFA Default Navigation Categories	Translate	View		Custom Record	Ghosh, Saurav	9/16/2023 1:02 pm
1	AFA Default Navigation Shorcut Groups	Translate	View		Custom Record	Ghosh, Saurav	9/16/2023 1:02 pm
5	AFA Default Navigation Shorcut Links	Translate	View		Custom Record	Ghosh, Saurav	9/16/2023 1:02 pm
4	AFA Default Navigation Shorcut Tooltips	Translate	View		Custom Record	Ghosh, Saurav	9/16/2023 1:02 pm
130	Amex - Concur Upload 4.14.2023	Translate	View		Credit Card Charge	Bollman, Caroline	4/14/2023 12:41 pm

11 Click "LAKE - Support Product Matrix Inventory Items DE"

Inventory Item (dropdown menu)

ID	NAME	TRANSLATE	FIELD MAP	DESCRIPTION	TYPE	OWNER	CREATED
116	LAKE - Support Product Inventory Items DE	Translate	View		Inventory Item	Escobedo, Don	10/6/2023 10:06 am
65	LAKE - Support Product Inventory Items LKA	Translate	View		Inventory Item	Andrews, Lockie	6/24/2023 6:24 pm
54	LAKE - Support Product Matrix Inventory Items	Translate	View		Inventory Item	Koulogeorgas, Maria	1/18/2023 1:06 pm
117	<u>LAKE - Support Product Matrix Inventory Items DE</u>	Translate	View		Inventory Item	Escobedo, Don	10/13/2023 12:39 pm
67	LAKE - Support Product Matrix Inventory Items EG	Translate	View		Inventory Item	Garrett, Elizabeth	6/25/2023 6:25 pm
64	LAKE - Support Product Matrix Inventory Items LKA	Translate	View		Inventory Item	Andrews, Lockie	6/24/2023 6:24 am
51	LAKE Inventory Items	Translate	View		Inventory Item	Koulogeorgas, Maria	10/29/2023 10:06 am
112	LAKE Inventory Items - EG	Translate	View		Inventory Item	Garrett, Elizabeth	8/26/2023 6:26 pm
50	LAKE Matrix Inventory Items	Translate	View		Inventory Item	Koulogeorgas, Maria	10/29/2023 10:06 am
62	LAKE Matrix Inventory Items LKA	Translate	View		Inventory Item	Andrews, Lockie	6/24/2023 6:24 am

12 Once in your Import Assistant, click the "Select..." to upload your CSV file.

The screenshot shows the 'Import' step of an Import Assistant. On the left, a sidebar lists steps: '3 File Mapping', '4 Field Mapping', '5 Save mapping & Start Import', and 'Import'. The main area contains the following settings:

- CHARACTER ENCODING:** A dropdown menu set to 'Unicode (UTF-8)'. Below it, text reads: 'Choose another character encoding format if you use an international or Macintosh version of Microsoft Excel, or if you'.
- CSV COLUMN DELIMITER:** A dropdown menu set to 'Comma'. Below it, text reads: '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):** Two radio buttons: 'ONE FILE TO UPLOAD' (selected) and 'MULTIPLE FILES TO UPLOAD'. Below them is a 'Select...' button, which is highlighted with an orange circle.

A blue circular icon with a red center is visible in the bottom-left corner of the interface.

13 Once your file is uploaded click "Next >".

The screenshot shows the bottom portion of the Import Assistant interface. It includes a list of uploaded files with a '× REMOVE' link next to each. At the bottom, there are three buttons: 'Cancel', '< Back', and 'Next >'. The 'Next >' button is highlighted with a blue border and an orange circle.

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You will then be brought to the Field Mapping screen. Most items are hard coded into this Saved Search, and the rest will pull over automatically. Always double check to make sure all items you need are mapped. Once you have checked everything, click "Next >".

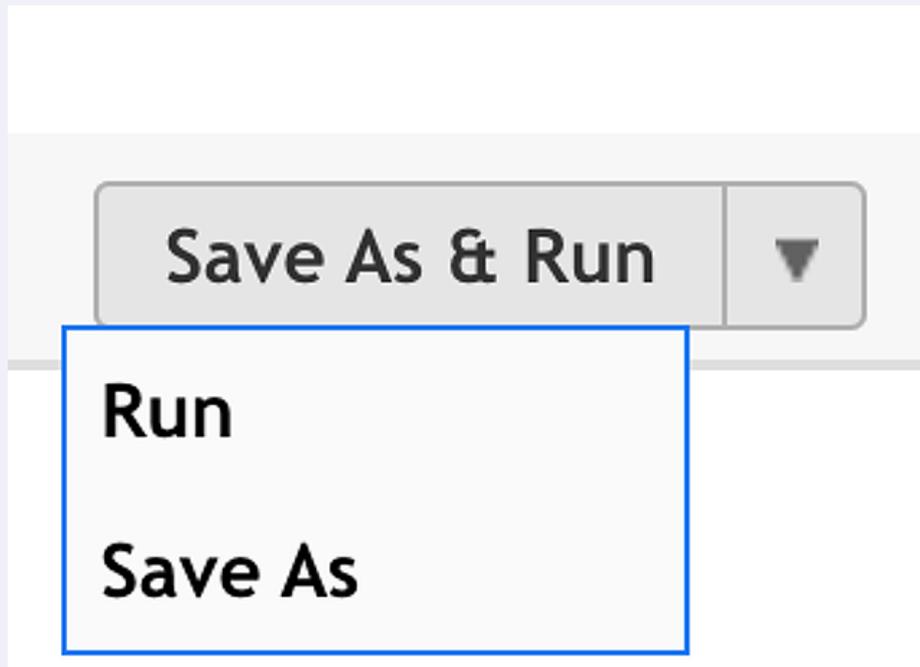
The screenshot shows the NetSuite Field Mapping interface. At the top, there is a navigation bar with tabs: Transactions, Lists, Reports, Analytics, Documents, Setup, Customization, Commerce, Implementation, SuiteApps, and Support. Below the navigation bar is a header area with the word "More" and a "Get help with creating Field Mapping" link. The main area is divided into two columns. The left column contains a list of source fields with checkboxes and arrows indicating mapping options. The right column contains a list of NetSuite fields, with a sub-section for "Item" fields. At the bottom of the screen, there are four buttons: "Reset", "Cancel", "< Back", and "Next >". The "Next >" button is highlighted with a yellow circle.

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You will then be brought to your final screen, the Save mapping & Start Import Screen. This is where the Import Assistant will tell you if there are any errors within your file.

The screenshot shows the NetSuite Import Assistant interface. On the left, there is a "STEPS" section with five steps: 1 Scan & Upload CSV File, 2 Import Options, 3 File Mapping, 4 Field Mapping, and 5 Save mapping & Start Import. The fifth step is highlighted. The main area is titled "Save mapping & Start Import" and contains the following fields: "IMPORT MAP NAME" (filled with "LAKE - Support Product Matrix Inventory Items"), "DESCRIPTION" (empty), and "ID" (filled with "_54_4816234_812_0_DE"). At the bottom right, there are three buttons: "Cancel", "< Back", and "Save As & Run". The "Save As & Run" button is highlighted.

16 Finally you will select "Run" or "Save As & Run" to import your CSV File.



17 Congratulations! You have successfully imported Matrix Items via CSV upload!