



ScaleNorth NetSuite MasterClass – Session 6 – Automate Processes with Saved Search and Scripts

March 21, 2025

Confidentiality Notice

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Objective

- ▲ We have started hosting these monthly NetSuite Master Classes, because we have found most common challenges people have with NetSuite
 - Lack of Training
 - Take advantage of saved search reporting
 - CSV Imports
 - Mass Updates
 - Simple workflows to automate processes
 - Custom Records, Forms, Fields
 - Advanced PDFs
 - Don't Know what I don't Know
- ▲ Our goal is to teach these things so companies and more importantly their employees can maximize the value and utility they get out of the NetSuite Platform/Ecosystem

Agenda

▲ Introductions

- ScaleNorth
 - Quick ScaleNorth Overview

▲ Examples and Use Cases

- Automate Creating Sales Rep Commission Payable Using
 - Saved Search to get results and formula field to calculate commission
 - Simple script to persist save search results csv to file cabinet
 - Simple script to import csv file using saved csv import template to create employee expense reports for commission due

▲ Live Q&A

▲ Next Steps

Introductions



Charles Stevenson

Vice President, Sales

- ▲ Managed Sales Teams for Two Fortune 500 Companies over two decades
- ▲ BS Accounting from USC



Dean Carazza, CPA

Sr. Business Development Manager

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714-350-6211

- ▲ 14 years of experience
- ▲ Public and Private Accounting
- ▲ 8 years NetSuite Experience
 - 2 Years Private/User - Assistant Controller for \$100M Distributor in Irvine
 - 6 years ScaleNorth
 - Led some of the largest and most complex implementations and integrations. Have done over 20 implementations.
 - Industry experience
 - Manufacturing, E-Commerce and Warehouse/Distribution SaaS, Professional Services

Meet The Team

“

We wanted a partner that could deliver fast solutions, communicate with us and keep us up to date on the status of our ERP project...ScaleNorth covered all of these bases while delivering world-class service. It's been fantastic.

Jerod Schoneman
General Manager, Total Energy Systems



275+
Team
Members



1,650+
Years of Collective
NetSuite ERP
Experience

ORACLE NETSUITE
BPO Partner



680+
NetSuite
Certifications
Held by Staff



8.5+
Avg Years of
NetSuite
Experience

ORACLE NETSUITE
Solution Provider



\$2.5B+
Annual Revenue
Transactions
Processed



57%
Percentage
of staff with
CPAs

ORACLE NETSUITE
SuiteCloud Developer Network

Services at a Glance



NetSuite
Implementation



Outsourced
Accounting



NetSuite
Consulting &
Managed Services



Technical
Services

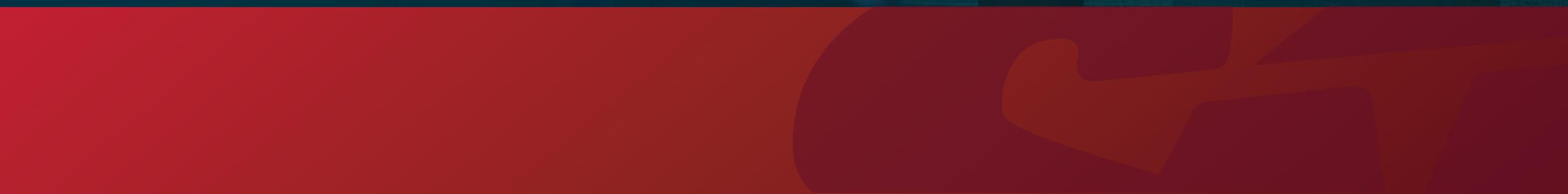
Technology Partners



Automate Creating Sales Rep Commission Payable



Configuration/Development



Configuration/Development

▲ Configuration

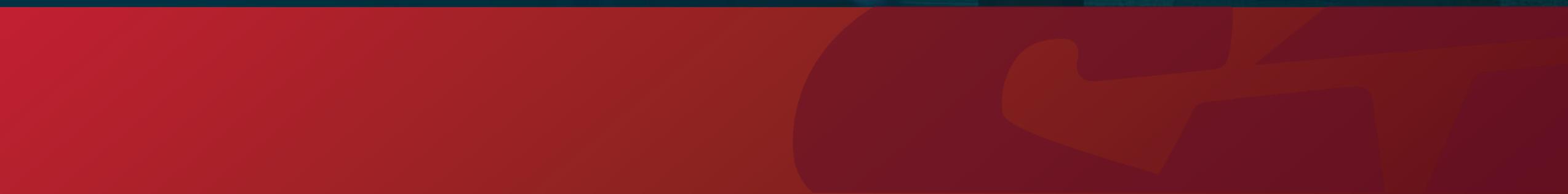
- We have identified the following Configuration components to setup/put in place for our desired solution
 1. Create Saved Search to Calculate Commission
 2. Create Custom Field , Customize Form, Create Saved Search Sublist
 - › Create a Transaction Body Line Field on Expense Reports so we can have a line and reference each invoice commission was calculated/due for
 - › Create a Saved Search that can be used as a related records subsist on Invoice Records so can view which expense report that invoice was referenced on for commission calculated/due
 3. Create a Saved CSV Import Template to take Saved Search Commission CSV results and import to create Expense Reports for commissions due
 4. Create a File Cabinet Location that we can drop the Saved Search CSV results in to be picked up by script and processed by saved csv import template

▲ Development

- We have identified the following two scripts needed to automate the manual/configured steps above
 1. Saved CSV Import Scheduled Script
 - › Picks up the file from the NetSuite File Cabinet File Path
 - › Runs the mapped Saved CSV Import Template to import results as Expense Reports for Commissions Due
 2. Persist Saved Search Scheduled Script
 - › Runs the Commission Search and saves the CSV results in the NetSuite File Cabinet File Path
 - › Fires next script

▲ What follows are the steps and screen shots to complete the configuration and Development

1. Configuration > Create Commission Saved Search



Create Commission Saved Search

1. Navigate to Reports>New Search>
2. Select Transaction Search
 - Below are the Criteria and Results Used
 - > Criteria

Saved Transaction Search

[Save & Run](#) [Actions](#)

SEARCH TITLE *

SN MC Commission Expense Search

ID

PUBLIC

AVAILABLE AS LIST VIEW

AVAILABLE AS DASHBOARD VIEW

AVAILABLE AS SUBLIST VIEW

AVAILABLE FOR REMINDERS

SHOW IN MENU

[Criteria](#) [Results](#) [Highlighting](#) [Available Filters](#) [Audience](#) [Roles](#) [Email](#) [Audit Trail](#) [Execution Log](#) [Search Title Translation](#)

 Use this tab to specify criteria that narrow down your search.

USE EXPRESSIONS

Standard	Summary
FILTER *	DESCRIPTION *
Type	is Invoice
Main Line	is true
Date	is within last month
Sales Rep	is not - Unassigned -

Create Commission Saved Search-Continued

1. Navigate to Reports>New Search>
2. Select Transaction Search
 - Below are the Criteria and Results Used
 - > Results

SEARCH TITLE *
SN MC Commission Expense Search

ID
customsearch2469

OWNER
Dean Carazza

PUBLIC

AVAILABLE AS LIST VIEW

Criteria **Results** Highlighting Available Filters Audience Roles Email Audit Trail Execution Log Search Title Translation

Use this tab to indicate columns to be included in the search results as well as sort order.

SORT BY
Formula (Text) DESCENDING

THEN BY
 DESCENDING

THEN BY
 DESCENDING

OUTPUT TYPE
Normal

CONSOLIDATED EXCHANGE RATE
Per-Account

SHOW TOTALS

RUN UNRESTRICTED DISALLOW DRILL DOWN

MY PREFERRED SEARCH RESULTS

Leave Show Totals blank because any total rows will fail when doing csv import

Columns • Drill Down Fields

Remove all Add Multiple

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL
Date					
Period					
Type					
Document Number	Group				
Name	Group				
Account					
Memo					
Amount	Maximum				
Formula (Text)	Group		{salesrep.id} ' ' TO_CHAR(trandate), 'MM-YYYY'		External ID
Sales Rep : Internal ID	Group				Sales Rep Internal ID
Internal ID	Group				Invoice Internal ID
Formula (Currency)	Maximum		sum({grossamount}* .03)		3% Commission

Maximum because if sum will include total on export and export/Total row will always fail when doing csv import

Want to create external ID that can be used to group break in transaction when importing expense reports

Maximum because if sum will include total on export and export/Total row will always fail when doing csv import

Create Commission Saved Search-Continued

3. Save and Run the Search

- Can spot check Commission Calculation
 - > Invoice 362 $\$13,600 \times 3\% = \408

SN MC Commission Expense Search: Results

[Learn about NetSuite Analytics Warehouse](#) [List](#) [Search](#) [Audit Trail](#)

[Edit this Search](#)

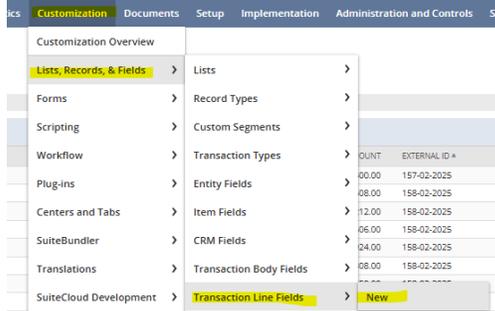
FILTERS

DOCUMENT NUMBER	NAME	MAXIMUM OF AMOUNT	EXTERNAL ID *	SALES REP INTERNAL ID	INVOICE INTERNAL ID	MAXIMUM OF 3% COMMISSION	TOTAL: 36
362	Global Information	13,600.00	157-02-2025	157	33093	408.00	
204	Global Information	1,608.00	158-02-2025	158	16577	48.24	
206	The Abbott Inc.	1,212.00	158-02-2025	158	16683	36.36	
200	Fernhill Solutions	606.00	158-02-2025	158	16265	18.18	
205	Machester Mfg	924.00	158-02-2025	158	16680	27.72	
248	Copper Software Copper Software	808.00	158-02-2025	158	19308	24.24	
254	Fernhill Solutions	1,650.00	158-02-2025	158	19526	49.50	
242	McGuire Systems	990.00	158-02-2025	158	18790	29.70	
203	Magna Tech Limited	1,212.00	158-02-2025	158	16574	36.36	

2. Configuration > Create Custom Field, Customize Form, and Saved Search Sublist

Create Custom Field and Customize Forms

1. Create a Transaction Line Field for Invoice # that can be used to reference the invoice calculated commission/amount due came from
 - Navigate to Customization>Lists, Records, & Fields>Transaction Line Fields>New



- Save and Apply to Forms

A screenshot of the 'Transaction Line Field' configuration form. The form has several fields: 'LABEL *' with the value 'Invoice #', 'ID' with the value '_sn_commission_exp_rpt_invoice', and 'OWNER' set to 'Dean Carazza'. There are buttons for 'Save & Apply to Forms', 'Cancel', and 'Apply to Forms'. On the right, there are dropdowns for 'TYPE' (set to 'List/Record') and 'LIST/RECORD' (set to 'Transaction'). There are also checkboxes for 'STORE VALUE' (checked), 'USE ENCRYPTED FORMAT', and 'INACTIVE'. At the bottom, there is a section 'Applies To' with various transaction types and checkboxes. 'EXPENSE REPORT' is checked. Other transaction types include EXPENSE, PURCHASE ITEM, SALE ITEM, OPPORTUNITY ITEM, JOURNAL, REVENUE ARRANGEMENT, TIME, TRANSFER ORDER, ITEM RECEIPT, INVENTORY ADJUSTMENTS, ITEM FULFILLMENT, PRINT ON STANDARD FORMS, PRINT ON PICKING TICKET, PRINT ON PACKING SLIP, and PRINT ON RETURN FORM. There are also checkboxes for 'STORE WITH ITEM GROUPS', 'GROUP ON INVOICES', and 'APPLY TO KIT/ASSEMBLY COMPONENTS'. A section 'CUSTOM TRANSACTIONS' lists 'Custom Journal', 'Custom Purchase', and 'Master Class 6'.

Create Custom Field and Customize Forms-Continued

- ▲ Make sure Save and Apply to Expense Report Forms

Apply Custom Field to Forms

Save Cancel

CUSTOM FIELD

Invoice #

FI

Co

Items • Expenses •

Mark All Unmark All Reset Labels

FORM NAME	FORM TYPE *	SHOW
SS SVCS PRM - Vendor Bill	Bill	<input type="checkbox"/>
SVCS PRM - Vendor Bill	Bill	<input type="checkbox"/>
SS SVCS PRM - Vendor Credit	Bill Credit	<input type="checkbox"/>
SVCS PRM - Vendor Credit	Bill Credit	<input type="checkbox"/>
SVCS PRM - Cash Refund	Cash Refund	<input type="checkbox"/>
SS SVCS PRM - Cash Refund	Cash Refund	<input type="checkbox"/>
Enhanced Cash Sale Form	Cash Sale	<input type="checkbox"/>
SVCS PRM - Cash Sale	Cash Sale	<input type="checkbox"/>
SS SVCS PRM - Cash Sale	Cash Sale	<input type="checkbox"/>
SVCS PRM - Check	Check	<input type="checkbox"/>
SS SVCS PRM - Check	Check	<input type="checkbox"/>
SS SVCS PRM - Credit Card Charge	Credit Card	<input type="checkbox"/>
SVCS PRM - Credit Card Charge	Credit Card	<input type="checkbox"/>
SVCS PRM - Credit Memo	Credit Memo	<input type="checkbox"/>
SS SVCS PRM - Credit Memo	Credit Memo	<input type="checkbox"/>
SS SVCS PRM - Estimate	Estimate	<input type="checkbox"/>
Enhanced Quote Form	Estimate	<input type="checkbox"/>
SVCS PRM - Estimate	Estimate	<input type="checkbox"/>
SS SVCS PRM - Expense Report	Expense Report	<input checked="" type="checkbox"/>
SVCS PRM - Expense Report	Expense Report	<input checked="" type="checkbox"/>

Create Custom Field and Customize Forms-Continued

2. View expense report form to see line item field added
 - Create a new expense report
 - Navigate to Transactions>Employees>Enter Expense Reports



Expense Report List Search C

Primary Information

EXP. REPT. # To Be Generated	PURPOSE	POSTING PERIOD *
DATE *	ACCOUNT	DATE DUE
03/20/2025	Unapproved Expense Reports	
EMPLOYEE *	ADVANCE TO APPLY	<input type="checkbox"/> SUPERVISOR APPROVAL
		<input type="checkbox"/> ACCOUNTING APPROVAL
SUBSIDIARY	ADVANCE TO APPLY ACCOUNT	CUSTOM FORM *
<input checked="" type="checkbox"/> COMPLETE	1460 Advances Paid	SS SVCS PRM - Expense Report
		ACCOUNT FOR CORPORATE CARD EXPENSES
		<input type="checkbox"/> CORPORATE CARD BY DEFAULT
		CURRENCY *
DIST. DEFAULT TEMPLATE	DIST. TYPE	DIST. RATE TYPE
<Type then tab>		
<input type="checkbox"/> DISABLE LINE DIST. RULE		

Summary

EXPENSES TOTAL	0.00
TOTAL IN BASE CURRENCY	\$0.00
REIMBURSABLE EXPENSES	0.00
CORPORATE CARD	0.00
ADVANCE TO APPLY	0.00
TOTAL REIMBURSABLE AMOUNT	0.00

Expenses Communication Custom Tax Reporting EFT

USE MULTI CURRENCY

REF. NO.	DATE *	CATEGORY	AMOUNT *	CUSTOMER-PROJECT	BILLING SUBSIDIARY	PROJECT TASK	MEMO	BILLABLE	CUSTOMER	DEPARTMENT	CLASS	LOCATION	ATTACH FILE	RECEIPT	CORPORATE CARD	LINE DIST. EXCLUDE	LINE DIST. QUICK RULE	LINE DIST. TEMPLATE	INVOICE #	
1	03/20/2025																			

Create Custom Field and Customize Forms-Continued

3. Create a Saved Search Sublist that can cross reference commission expense report on related records tab of customer invoice

- Navigate to Reports>New Search>Transaction Search
 - Put following Criteria and check the available as sublist view checkbox
 - Save and Run

Saved Transaction Search
MC SN Commission Exp Report Sublist

Save & Run | Cancel | Preview | New Template | Change ID | Actions

SEARCH TITLE *
MC SN Commission Exp Report Sublist

ID
customsearch2470

OWNER
Dean Carazza

PUBLIC

AVAILABLE AS LIST VIEW

AVAILABLE AS DASHBOARD VIEW
 AVAILABLE AS SUBLIST VIEW
 AVAILABLE FOR REMINDERS
 SHOW IN MENU

Criteria | Results | Highlighting | Available Filters | Audience | Roles | Email | Audit Trail | Execution Log | Search Title Translation

Use this tab to specify criteria that narrow down your search.

USE EXPRESSIONS

Standard	Summary
FILTER *	DESCRIPTION *
Type	Expense Report

- Add available filter for Invoice # since that is the line on the expense report we want to filter to/return when viewing related expense report on customer invoice record

Saved Transaction Search
MC SN Commission Exp Report Sublist

Save & Run | Cancel | Preview | New Template | Change ID | Actions

SEARCH TITLE *
MC SN Commission Exp Report Sublist

ID
customsearch2470

OWNER
Dean Carazza

PUBLIC

AVAILABLE AS LIST VIEW

AVAILABLE AS DASHBOARD VIEW
 AVAILABLE AS SUBLIST VIEW
 AVAILABLE FOR REMINDERS
 SHOW IN MENU

Criteria | Results | Highlighting | Available Filters | Audience | Roles | Email | Audit Trail | Execution Log | Search Title Translation

Limit the set of filters available on the form when you reuse this search, or to set filters for the results (such as when used as a list view). Remove all filters to use advanced search.

MY PREFERRED SEARCH FORM

HIDE FILTER DROPDOWNS

DEFAULT TEXT FIELD FILTER
Any

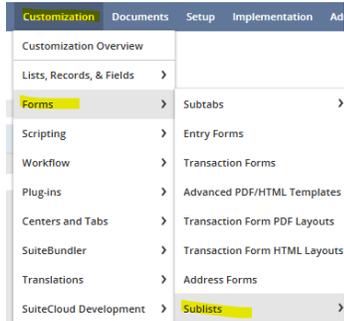
Remove all | Add Multiple

FILTER *	SHOW IN FILTER REGION	SHOW AS MULTI-SELECT	LABEL
Invoice # (Custom Column)	<input type="checkbox"/>		

Create Custom Field and Customize Forms-Continued

4. Create a Sublist and reference the Saved Search just created

- Navigate to Customization>Forms>Sublists



- Select search we created, label it, and put on related records tab

Custom Sublists

Save Cancel

Transaction	Entity	Item	CRM				
SEARCH*	LABEL*	TRANSLATION	TAB	PURCHASE	SALE		
MC-SN-Commission Exp Report Sublist	Expense Report		Related Records		Yes		

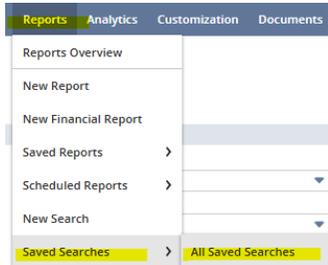
3. Configuration > Create a Saved CSV Import Template

A background image showing a group of people in a meeting room. A man in a suit is standing and presenting to a group of people seated around a table. The room has a brick wall and large windows. The image is overlaid with a dark teal color.

Create a Saved CSV Import Template

1. Persist our Saved Search so can get results to use as basis for our Saved CSV Import Template we will create

- Navigate to Reports>Saved Searches>All Saved Searches



- If sort by Internal ID Largest to smallest should see your search. Click on Persist results link.

Saved Searches

VIEW Default Customize View New Saved Search

FILTERS

EDIT VIEW	INTERNAL ID ▾	TITLE	FROM BUNDLE	ID	TYPE	OWNER	ACCESS	EXPORT RESULTS	PERSIST RESULTS
Edit View	2470	MC SN Commission Exp Report Sublist		customsearch2470	Transaction	Dean Carazza	Public	Export (CSV)	Persist (CSV)
Edit View	2469	SN MC Commission Expense Search		customsearch2469	Transaction	Dean Carazza	Public	Export (CSV)	Persist (CSV)

- Refresh page until see download link and click on download link so goes to your download folder so we can use later

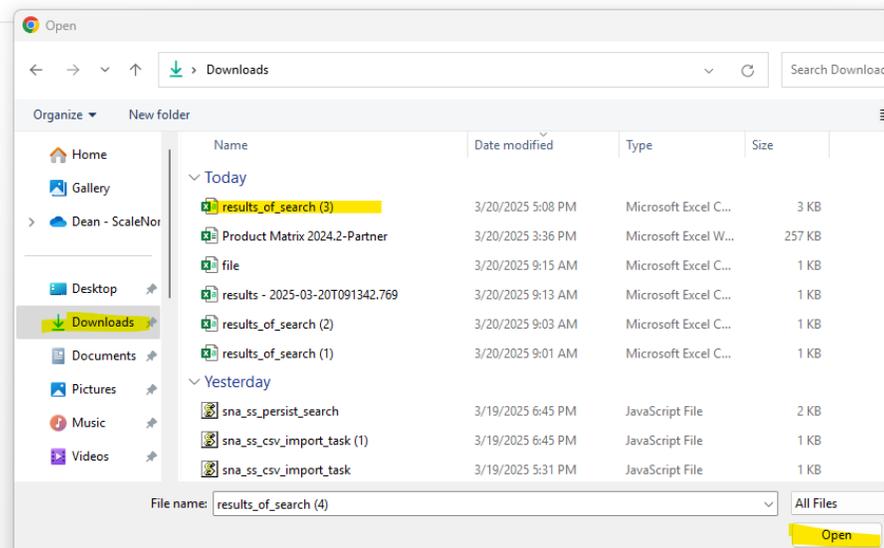
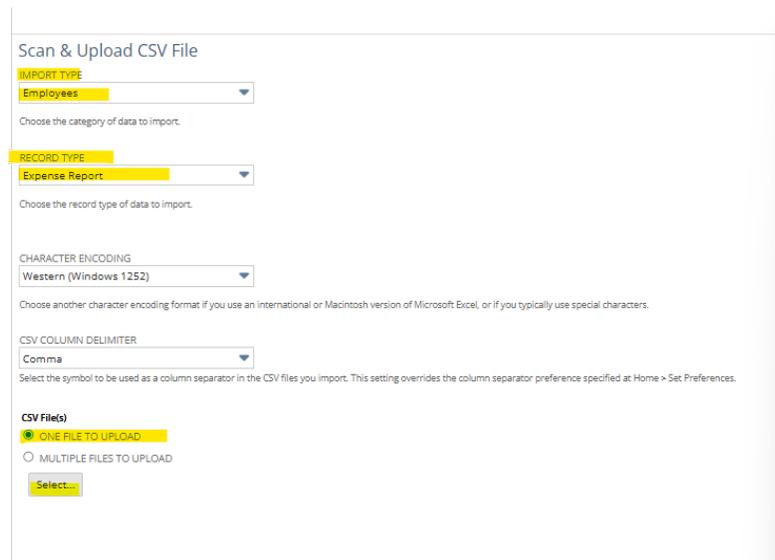
Search Results

INTERNAL ID	SEARCH	SEARCH TYPE	OWNER	FORMAT	RESULTS	CREATED BY	CREATED ON ▲
11	V2 SN Test Persist	Transaction	Dean Carazza	CSV	Download	Dean Carazza	2025-03-19 16:39:50
17	SN Test other Script Customer Search	Customer	Dean Carazza	CSV	Download	Dean Carazza	2025-03-20 09:01:05
18	SN Test other Script Customer Search	Customer	Dean Carazza	CSV	Download	Dean Carazza	2025-03-20 09:03:26
20	SN MC Commission Expense Search	Transaction	Dean Carazza	CSV	Download	Dean Carazza	2025-03-20 17:06:39

Create a Saved CSV Import Template-Continued

2. Create our Saved CSV Import Template

- Navigate to Setup>Import/Export>Import CSV Records



- After selecting file click Next

Create a Saved CSV Import Template-Continued

2. Create our Saved CSV Import Template

- Select Add or Update then hit next

Import Options

Data Handling

ADD

UPDATE

ADD OR UPDATE

▸ Advanced Options

Create a Saved CSV Import Template-Continued

2. Create our Saved CSV Import Template

- Complete Field Mapping from CSV file to NetSuite Expense Report Fields>Hit Next

Field Mapping

The screenshot displays the 'Field Mapping' interface in NetSuite. It is divided into three main sections: 'Your Fields', a central mapping table, and 'NetSuite Fields'.

Your Fields: A list of fields from the CSV file 'results_of_search (3).csv'. The fields are: Document Number, Name, Maximum of Amount, External ID, Sales Rep Internal ID, Invoice Internal ID, and Maximum of 3% Commission. Each field has a small icon to its left.

Mapping Table: A table with three columns: a checkbox, the source field name, a double-headed arrow, the target NetSuite field name, and a delete icon. The mappings are as follows:

Source Field	Target NetSuite Field
External ID	Expense Report : External ID
Sales Rep Internal ID	Expense Report : Employee
US Dollar	Expense Report : Currency
Maximum of 3% Commission	Expense Report - Expenses 1 : Amount
Commission Expense	Expense Report - Expenses 1 : Category
US Dollar	Expense Report - Expenses 1 : ***currency
Name	Expense Report - Expenses 1 : Memo
Invoice Internal ID	Expense Report - Expenses 1 : Invoice #

NetSuite Fields: A list of available NetSuite fields for mapping. The list is expanded to show 'Expense Report - Expenses' and 'Expense Report - Expenses 1'. The visible fields include: ***currency, ***exchangerate, ***foreignamount, ***id, Activity Code, Amount, Billable, Category, Class, Corporate Card, Customer, Customer:Project, Date, Department, Expense Account, Invoice #, Line Dist. Exclude, Line Dist. Quick Rule, Line Dist. Quick rule JSON key, Line Dist. Rule_Deprecate, Line Dist. Template, Line Id, Location, Memo, Quantity, Rate, Receipt, Ref No., Tax Amount, and Tax Code.

At the bottom right of the interface, there are four buttons: 'Reset', 'Cancel', '< Back', and 'Next >'. The 'Next >' button is highlighted in yellow.

Create a Saved CSV Import Template-Continued

2. Create our Saved CSV Import Template

- Name and give ID. Note ID Will be used later for reference when we create our script.
- ***Note make sure to only save not save and run***

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

MC SN Commission Exp Rpt CSV Import

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

DESCRIPTION

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

ID

_mc_sn_comm_exp_rpt_csv

(Optional) Provide a unique ID to identify this Import Map in SuiteScript.

Your entry here is prefixed with CUSTIMPORT.

Cancel

< Back

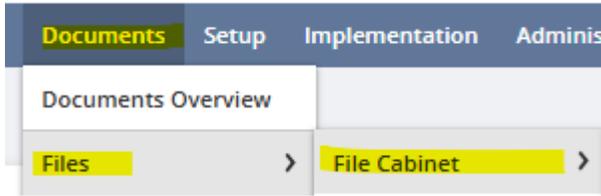
Save & Run

Save

4. Configuration > Create File Cabinet Folder Can Drop CSV File to be picked up by Script

Create File Cabinet Path to Drop CSV

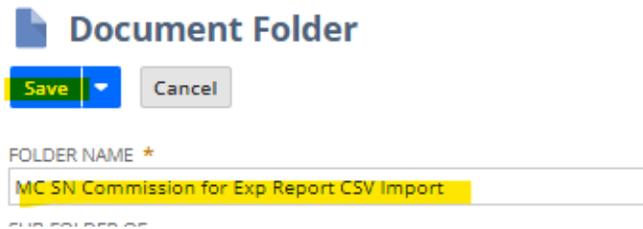
1. Create File Cabinet Path to Drop CSV
 - Navigate to Documents>Files>File Cabinet



- Click New Folder



- Name and Save the Folder



1. Development > Create Saved CSV Import Script

A background image showing a group of people in a meeting room. A man in a suit is standing and presenting to a group of people seated around a table. The room has a brick wall and large windows. The image is overlaid with a dark blue tint.

Create Saved CSV Import Script

1. Create Saved CSV Import Script

- Note we already have the Code/Java Script that can be used noted below. What follows are the steps to copy and paste the code to notepad so can upload .js script file into NetSuite to create the Script

```
/**
 * @NApiVersion 2.1
 * @NScriptType ScheduledScript
 */
define(['N/task', 'N/runtime', 'N/file'], (task, runtime, file) => {

  const execute = (context) => {
    const script = runtime.getCurrentScript();
    const csvimport = script.getParameter({name: 'custscript_sna_ci_csvimport'});
    const filepath = script.getParameter({name: 'custscript_sna_ci_csvpath'});
    const importname = script.getParameter({name: 'custscript_sna_ci_importname'});

    task.create({
      taskType: task.TaskType.CSV_IMPORT,
      mappingId: csvimport,
      importFile: file.load(filepath),
      name: importname
    }).submit();
  }

  return {
    execute: execute
  }

});
```

Create Saved CSV Import Script-Continued

1. Create Saved CSV Import Script File

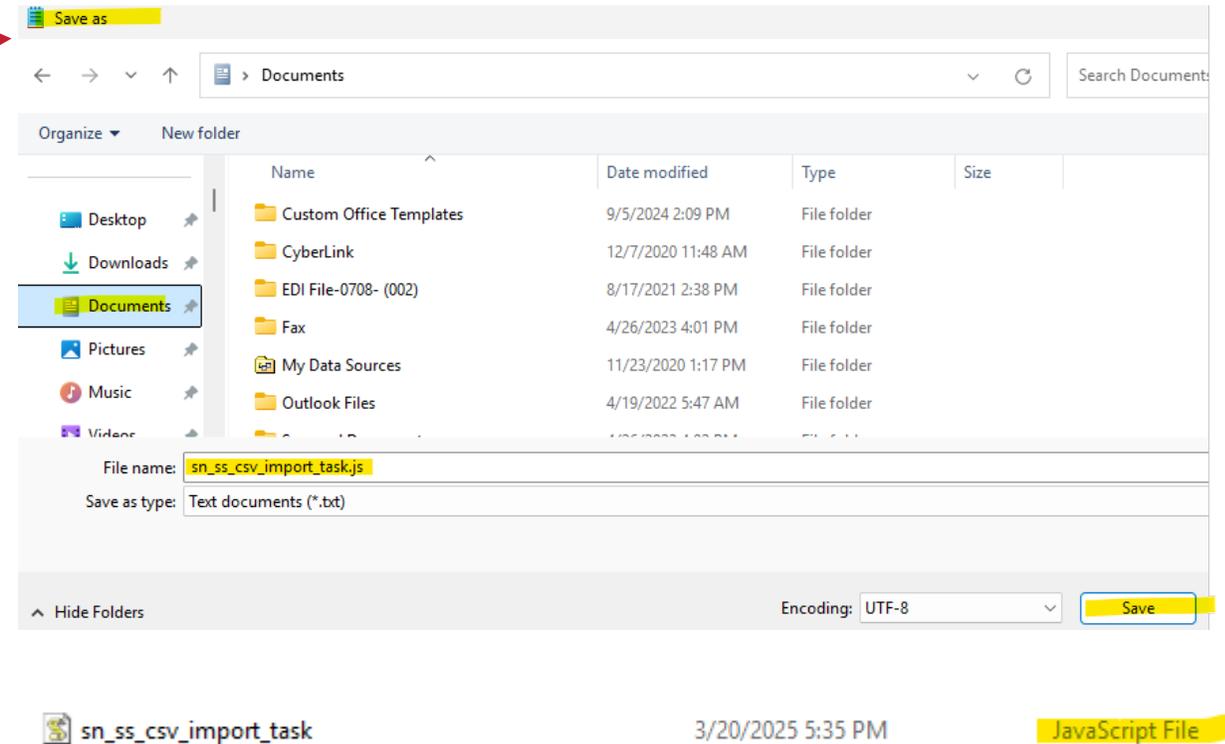
- Copy and paste the code from the last slide to a blank notepad file
 - File Save as
 - > sn_ss_csv_import_task.js
 - > Creates a Java Script File

```
/**
 * @NApiVersion 2.1
 * @NScriptType ScheduledScript
 */
define(['N/task', 'N/runtime', 'N/file'], (task, runtime, file) => {

  const execute = (context) => {
    const script = runtime.getCurrentScript();
    const csvimport = script.getParameter({name: 'custscript_sna_ci_csvimport'});
    const filepath = script.getParameter({name: 'custscript_sna_ci_csvpath'});
    const importname = script.getParameter({name: 'custscript_sna_ci_importname'});

    task.create({
      taskType: task.TaskType.CSV_IMPORT,
      mappingId: csvimport,
      importFile: file.load(filepath),
      name: importname
    }).submit();
  }

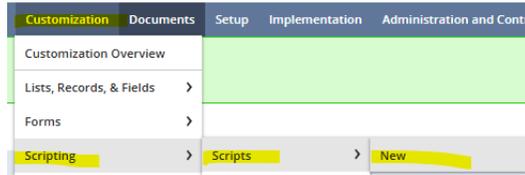
  return {
    execute: execute
  }
});
```



Create Saved CSV Import Script-Continued

2. Create Saved CSV Import Script in NetSuite

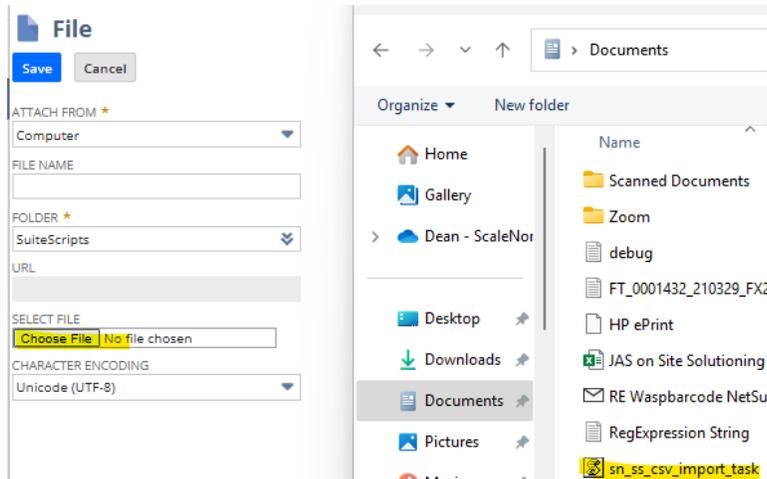
- Navigate to Customization>Scripting>Scripts>New



- Hit the + Sign to select java script file we just created and hit Save

Upload Script File

SCRIPT FILE *
<Type then tab>



Create Saved CSV Import Script-Continued

2. Create Saved CSV Import Script in NetSuite

- Once see Script File click on the Create Script Record Button

Upload Script File

Cancel | **Create Script Record**

SCRIPT FILE *
sn_ss_csv_import_task.js

- Next can Name and Give ID to the script and Save the Script

Script

Save | Cancel

TYPE
Scheduled

NAME *
IMC SN Saved CSV Import Script

ID
_mc_sn_saved_csv_imp_script

API VERSION
2.1

Scripts | Parameters | Unhandled Errors | Deployments

SCRIPT FILE
sn_ss_csv_import_task.js

Custom Plug-In Types

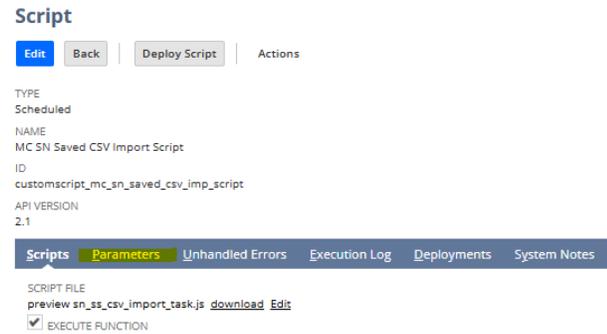
CUSTOM PLUG-IN TYPE *

▼

Add | Cancel | + Insert | Remove

Create Saved CSV Import Script-Continued

3. Next we need to Create Script Parameter Fields that can map to the Parameters in the Java Script
 - Click on the Parameters Tab of the Script



Script

[Edit](#) [Back](#) [Deploy Script](#) | [Actions](#)

TYPE
Scheduled

NAME
MC SN Saved CSV Import Script

ID
customscript_mc_sn_saved_csv_imp_script

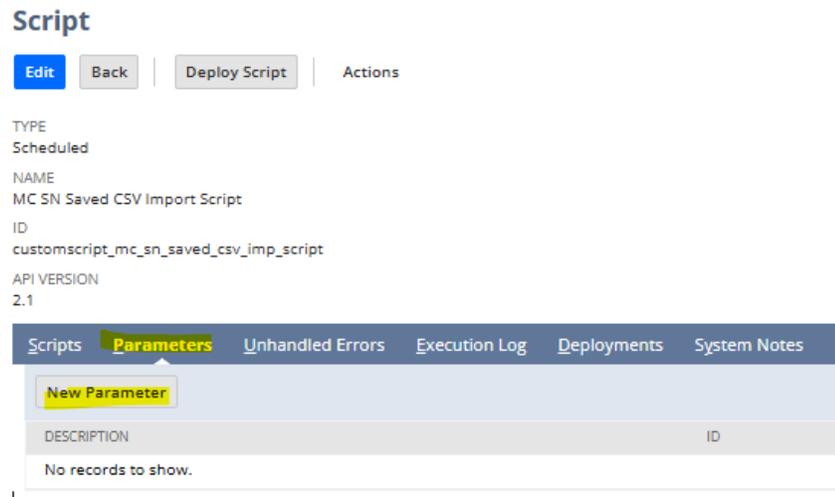
API VERSION
2.1

[Scripts](#) **[Parameters](#)** [Unhandled Errors](#) [Execution Log](#) [Deployments](#) [System Notes](#)

SCRIPT FILE
[preview_sn_ss_csv_import_task.js](#) [download](#) [Edit](#)

EXECUTE FUNCTION

- Then can hit New Parameter Button



Script

[Edit](#) [Back](#) [Deploy Script](#) | [Actions](#)

TYPE
Scheduled

NAME
MC SN Saved CSV Import Script

ID
customscript_mc_sn_saved_csv_imp_script

API VERSION
2.1

[Scripts](#) **[Parameters](#)** [Unhandled Errors](#) [Execution Log](#) [Deployments](#) [System Notes](#)

[New Parameter](#)

DESCRIPTION	ID
No records to show.	

Create Saved CSV Import Script-Continued

3. Next we need to Create Script Parameter Fields that can map to the Parameters in the Java Script
 - We need to add the following 3 parameter fields that can also see in the java script file if open back up with Notepad. Note we copy and paste the Parameter Name from the notepad file into the corresponding ID fields for the parameter fields we create below

Field Labels:

1. Saved CSV Import Template ID
2. CSV File Cabinet Path
3. Saved CSV Import Status Job Name

```
/**
 * @NApiVersion 2.1
 * @NScriptType ScheduledScript
 */
define(['N/task', 'N/runtime', 'N/file'], (task, runtime, file) => {

    const execute = (context) => {
        const script = runtime.getCurrentScript();
        const csvimport = script.getParameter({name: 'custscript_sna_ci_csvimport'});
        const filepath = script.getParameter({name: 'custscript_sna_ci_csvpath'});
        const importname = script.getParameter({name: 'custscript_sna_ci_importname'});

        task.create({
            taskType: task.TaskType.CSV_IMPORT,
            mappingId: csvimport,
            importFile: file.load(filepath),
            name: importname
        }).submit();
    }

    return {
        execute: execute
    }
});
```

Field IDs:

Create Saved CSV Import Script-Continued

3. Next we need to Create Script Parameter Fields that can map to the Parameters in the Java Script Field Labels:

1. Saved CSV Import Template ID

Script Field

Save Cancel

LABEL *
Saved CSV Import Template ID

ID
_sna_ci_csvimport

OWNER
Dean Carazza

DESCRIPTION

TYPE
Free-Form Text

LIST/RECORD

STORE VALUE

PREFERENCE

Display Validation & Defaulting Sourcing & Filtering Access Translation

MANDATORY

MAXIMUM LENGTH

Script

Save Cancel Change ID Actions

TYPE
Scheduled

NAME *
MC SN Saved CSV Import Script

ID
customscript_mc_sn_saved_csv_imp_script

API VERSION
2.1

DESCRIPTION

OWNER
Dean Carazza

INACTIVE

Scripts Parameters Unhandled Errors Execution Log Deployments System Notes

New Parameter

DESCRIPTION	ID	TYPE
Saved CSV Import Template ID	custscript_sna_ci_csvimport	Free-Form Text

Create Saved CSV Import Script-Continued

3. Next we need to Create Script Parameter Fields that can map to the Parameters in the Java Script Field Labels:

2. CSV File Cabinet Path

Script Field

Save Cancel

LABEL *
CSV File Cabinet Path

ID
_sna_ci_csvpath

OWNER
Dean Carazza

DESCRIPTION

TYPE
Free-Form Text

LIST/RECORD

STORE VALUE

PREFERENCE

Display Validation & Defaulting Sourcing & Filtering Access Translation

MANDATORY

MAXIMUM LENGTH

Script

Save Cancel Change ID Actions

TYPE
Scheduled

NAME *
MC SN Saved CSV Import Script

ID
customscript_mc_sn_saved_csv_imp_script

API VERSION
2.1

DESCRIPTION

OWNER
Dean Carazza

INACTIVE

Scripts Parameters Unhandled Errors Execution Log Deployments System Notes

New Parameter

DESCRIPTION	ID	TYPE
Saved CSV Import Template ID	custscript_sna_ci_csvimport	Free-Form Text
CSV File Cabinet Path	custscript_sna_ci_csvpath	Free-Form Text

Create Saved CSV Import Script-Continued

3. Next we need to Create Script Parameter Fields that can map to the Parameters in the Java Script Field Labels:

3. Saved CSV Import Status Job Name

Script Field

Save Cancel

LABEL *
Saved CSV Import Status Job Name

ID
_sna_ci_importname

OWNER
Dean Carazza

DESCRIPTION

TYPE
Free-Form Text

LIST/RECORD

STORE VALUE

PREFERENCE

Display Validation & Defaulting Sourcing & Filtering Access Translation

MANDATORY

MAXIMUM LENGTH

Script

Save Cancel Change ID Actions

TYPE
Scheduled

NAME *
MC SN Saved CSV Import Script

ID
customscript_mc_sn_saved_csv_imp_script

API VERSION
2.1

DESCRIPTION

OWNER
Dean Carazza

INACTIVE

Scripts Parameters Unhandled Errors Execution Log Deployments System Notes

New Parameter

DESCRIPTION	ID	TYPE
Saved CSV Import Template ID	custscript_sna_ci_csvimport	Free-Form Text
CSV File Cabinet Path	custscript_sna_ci_csvpath	Free-Form Text
Saved CSV Import Status Job Name	custscript_sna_ci_importname	Free-Form Text

- Save the Script

Create Saved CSV Import Script-Continued

4. Next we need to create the Script Deployment and now that we have our fields we can plug in the actual values to complete the mapping and script deployment
 - Click the Deploy Script Button

Script

[Edit](#) [Back](#) [Deploy Script](#) Actions

TYPE
Scheduled

NAME
MC SN Saved CSV Import Script

ID
customscript_mc_sn_saved_csv_imp_script

API VERSION
2.1

[Scripts](#) [Parameters](#) [Unhandled Errors](#) [Execution Log](#)

SCRIPT FILE
[preview sn_ss_csv_import_task.js](#) [download](#) [Edit](#)

EXECUTE FUNCTION

Custom Plug-In Types

CUSTOM PLUG-IN TYPE
No records to show.

- Go to the parameters tab. Can now see our fields that we have to populate with the actual values.

Script Deployment

[Save](#) [Cancel](#)

SCRIPT
MC SN Saved CSV Import Script

TITLE *
MC SN Saved CSV Import Script

ID

DEPLOYED

STATUS *
Not Scheduled

LOG LEVEL
Debug

EXECUTE AS ROLE
Administrator

PRIORITY *
Standard

[Schedule](#) [Parameters](#) [Execution Log](#)

SAVED CSV IMPORT TEMPLATE ID *

SAVED CSV IMPORT STATUS JOB NAME *

CSV FILE CABINET PATH *

Create Saved CSV Import Script-Continued

4. Next we need to create the Script Deployment and now that we have our fields we can plug in the actual values to complete the mapping and script deployment

- Saved CSV Import Template ID *

- To get this value navigate to our Saved CSV Import Template we created earlier and copy the script ID field and paste into this field

› Setup>Import/Export>Saved CSV Imports

ID	NAME	TRANSLATE	FIELD MAP	DESCRIPTION	TYPE	OWNER	CREATED	LAST MODIFIED	SCRIPT ID
262	expense import	Translate	View		Expense Report	Chris Koch	03/24/2025 3:01 pm	03/24/2025 3:25 pm	custimport_262_td2928790_285
265	MC SN Commission Exp Rpt CSV Import	Translate	View		Expense Report	Dean Carazza	03/20/2025 5:21 pm	03/20/2025 5:21 pm	custimport_mc_sn_comm_exp_rpt_csv
263	V2 SN Commission Exp Rpt Import	Translate	View		Expense Report	Dean Carazza	03/19/2025 4:55 pm	03/19/2025 6:34 pm	custimport_sn_commission_exp_rpt_import

Script Deployment

Save Cancel

SCRIPT

MC SN Saved CSV Import Script

TITLE *

MC SN Saved CSV Import Script

ID

DEPLOYED

STATUS *

Not Scheduled

LOG LEVEL

Debug

EXECUTE AS ROLE

Administrator

PRIORITY *

Standard

Schedule Parameters Execution Log

SAVED CSV IMPORT TEMPLATE ID *

custimport_mc_sn_comm_exp_rpt_csv

SAVED CSV IMPORT STATUS JOB NAME *

CSV FILE CABINET PATH *

Create Saved CSV Import Script-Continued

4. Next we need to create the Script Deployment and now that we have our fields we can plug in the actual values to complete the mapping and script deployment

- CSV File Cabinet Path *

- /FolderName/file.csv
- /MC SN Commission for Exp Report CSV Import/file.csv

File Cabinet

SHOW INACTIVES Add File Advanced Add

Search

EDIT	INTERNAL ID	NAME *
Edit	3082	V2 Commission Expense Report
Edit	-18	App Packages
Edit	-10	Attachments Received
Edit	-14	Attachments Sent
Edit	1015	Bank and Credit Card Recon
Edit	2881	Celigo
Edit	460	Demo Excellence
Edit	-4	Images
Edit	3183	MC SN Commission for Exp Report CSV Import

Script Deployment

Save Cancel

SCRIPT
MC SN Saved CSV Import Script

TITLE *
MC SN Saved CSV Import Script

ID

DEPLOYED

STATUS *
Not Scheduled

LOG LEVEL
Debug

EXECUTE AS ROLE
Administrator

PRIORITY *
Standard

Schedule • Parameters • Execution Log

SAVED CSV IMPORT TEMPLATE ID *
custimport_mc_sn_comm_exp_rpt_csv

CSV FILE CABINET PATH *
/MC SN Commission for Exp Report CSV Import/file.csv

SAVED CSV IMPORT STATUS JOB NAME *

Create Saved CSV Import Script-Continued

- Next we need to create the Script Deployment and now that we have our fields we can plug in the actual values to complete the mapping and script deployment
 - Saved CSV Import Status Job Name *
 - This we can just make up the name we want to display when viewing the CSV Job Import Status Page
 - Named it the following - Commission Expense Report Import

Script Deployment

SCRIPT
MC SN Saved CSV Import Script

TITLE *

ID

DEPLOYED

STATUS *

LOG LEVEL

EXECUTE AS ROLE
Administrator

PRIORITY *

Schedule • Parameters • Execution Log

SAVED CSV IMPORT TEMPLATE ID *

CSV FILE CABINET PATH *

SAVED CSV IMPORT STATUS JOB NAME *

Create Saved CSV Import Script-Continued

4. Next we need to create the Script Deployment and now that we have our fields we can plug in the actual values to complete the mapping and script deployment
 - Now that we have added all the mandatory field mapping can Save the Script Deployment

Script Deployment

SCRIPT
MC SN Saved CSV Import Script

TITLE *
MC SN Saved CSV Import Script

ID

DEPLOYED

Schedule • **Parameters** • Execution Log

SAVED CSV IMPORT TEMPLATE ID *
custimport_mc_sn_comm_exp_rpt_csv

SAVED CSV IMPORT STATUS JOB NAME *
Commission Expense Report Import

CSV FILE CABINET PATH *
/MC SN Commission for Exp Report CSV Import/file.csv

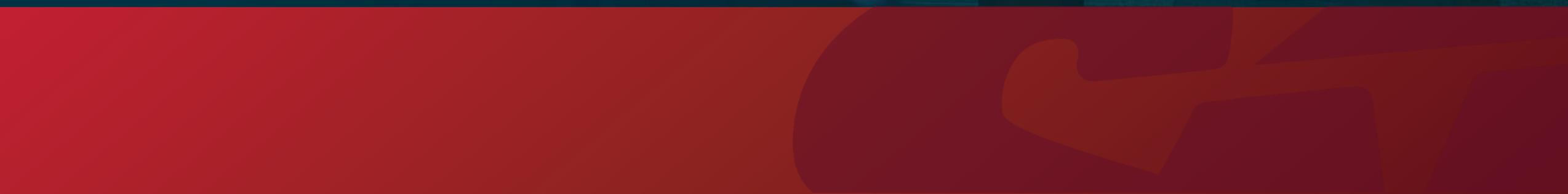
STATUS *
Not Scheduled

LOG LEVEL
Debug

EXECUTE AS ROLE
Administrator

PRIORITY *
Standard

2. Development > Persist Saved Search Script



Create Persist Saved Search Script

1. Create Persist Saved Search Script

- Note we already have the Code/Java Script that can be used noted below. What follows are the steps to copy and paste the code to notepad so can upload .js script file into NetSuite to create the Script

```
/**
 * @NApiVersion 2.1
 * @NScriptType ScheduledScript
 */
define(['N/task','N/runtime'], (task,runtime) => {

    const execute = (context) => {
        const script = runtime.getCurrentScript();
        const searchid = script.getParameter({name: 'custscript_sna_ps_search'});
        const filepath = script.getParameter({name: 'custscript_sna_ps_path'});
        const depscriptid = script.getParameter({name: 'custscript_sna_ps_scriptid'}) || null;
        const depdeployid = script.getParameter({name: 'custscript_sna_ps_deploymentid'}) || null;

        const searchtask = task.create({
            taskType: task.TaskType.SEARCH,
            savedSearchId: searchid,
            filePath: filepath
        });

        if (depscriptid != null && depdeployid != null) {
            searchtask.addInboundDependency(task.create({
                taskType: task.TaskType.SCHEDULED_SCRIPT,
                scriptId: depscriptid,
                deploymentId: depdeployid
            }));
        }

        searchtask.submit();
    }

    return {
        execute: execute
    }

});
```

Create Persist Saved Search Script - Continued

1. Create Persist Saved Search Script

- Copy and paste the code from the last slide to a blank notepad file
 - File Save as
 - > sna_ss_persist_search.js
 - > Creates a JavaScript File

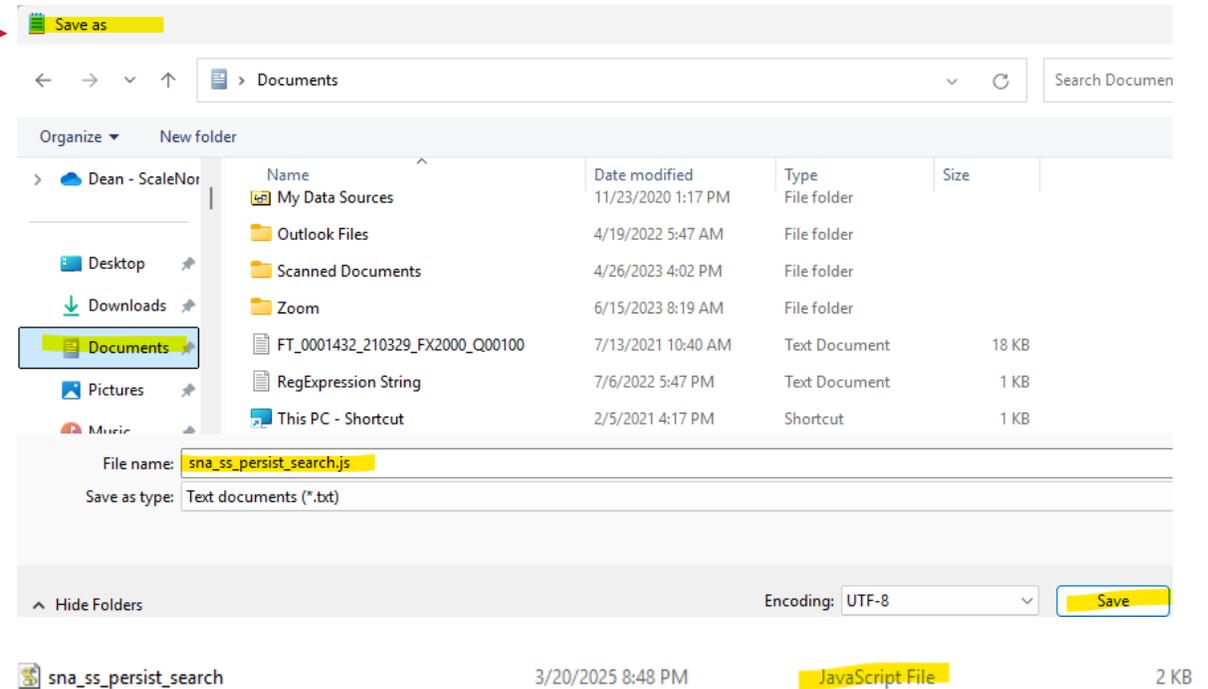
```
/**
 * @ApiVersion 2.1
 * @NScriptType ScheduledScript
 */
define(['N/task','N/runtime'], (task,runtime) => {

  const execute = (context) => {
    const script = runtime.getCurrentScript();
    const searchid = script.getParameter({name: 'custscript_sna_ps_search'});
    const filepath = script.getParameter({name: 'custscript_sna_ps_path'});
    const deptscripId = script.getParameter({name: 'custscript_sna_ps_scriptid'}) || null;
    const depdeployid = script.getParameter({name: 'custscript_sna_ps_deployementid'}) || null;

    const searchtask = task.create({
      taskType: task.TaskType.SEARCH,
      savedSearchId: searchid,
      filePath: filepath
    });

    if (deptscripId != null && depdeployid != null) {
      searchtask.addInboundDependency(task.create({
        taskType: task.TaskType.SCHEDULED_SCRIPT,
        scriptId: deptscripId,
        deploymentId: depdeployid
      }));
    }

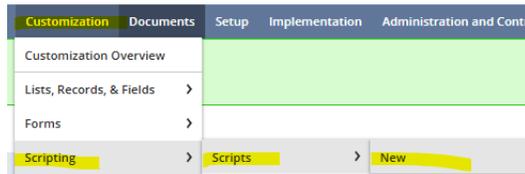
    searchtask.submit();
  }
});
```



Create Persist Saved Search Script - Continued

2. Create Persist Saved Search Script in NetSuite

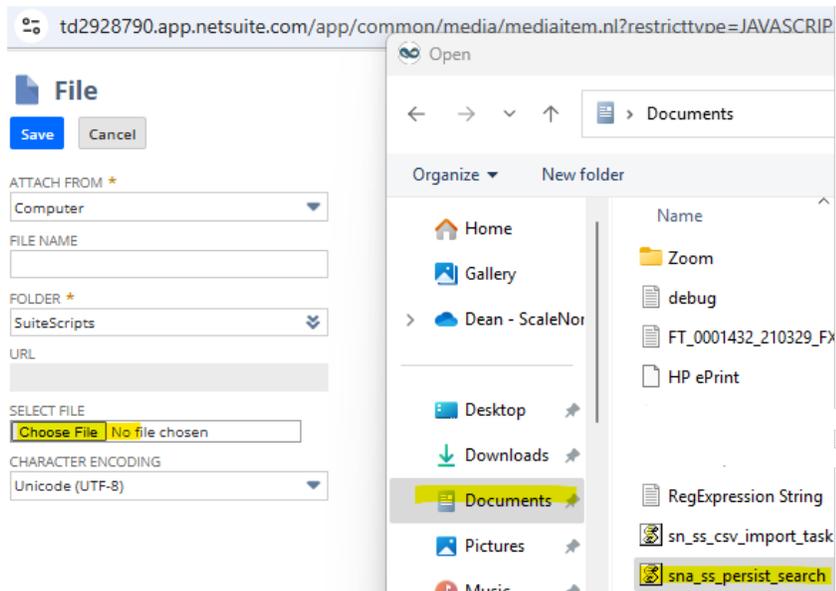
- Navigate to Customization>Scripting>Scripts>New



- Hit the + Sign to select java script file we just created and hit Save

Upload Script File

SCRIPT FILE *
<Type then tab>



Create Persist Saved Search Script - Continued

2. Create Persist Saved Search Script in NetSuite

- Once see Script File click on the Create Script Record Button

Upload Script File

Cancel | **Create Script Record**

SCRIPT FILE *
sna_ss_persist_search.js

- Next can Name and Give ID to the script and Save the Script

Script

Save | Cancel

TYPE
Scheduled

NAME *
MC SN Persist Saved Search Script

ID
_mc_sn_persist_saved_search_

API VERSION
2.1

Scripts | Parameters | Unhandled Errors | Deployments

SCRIPT FILE
sna_ss_persist_search.js

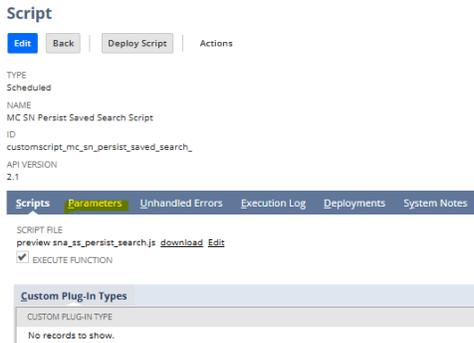
Custom Plug-In Types

CUSTOM PLUG-IN TYPE *
▼

✓ Add | **✕ Cancel** | **+ Insert** | **🗑 Remove**

Create Persist Saved Search Script - Continued

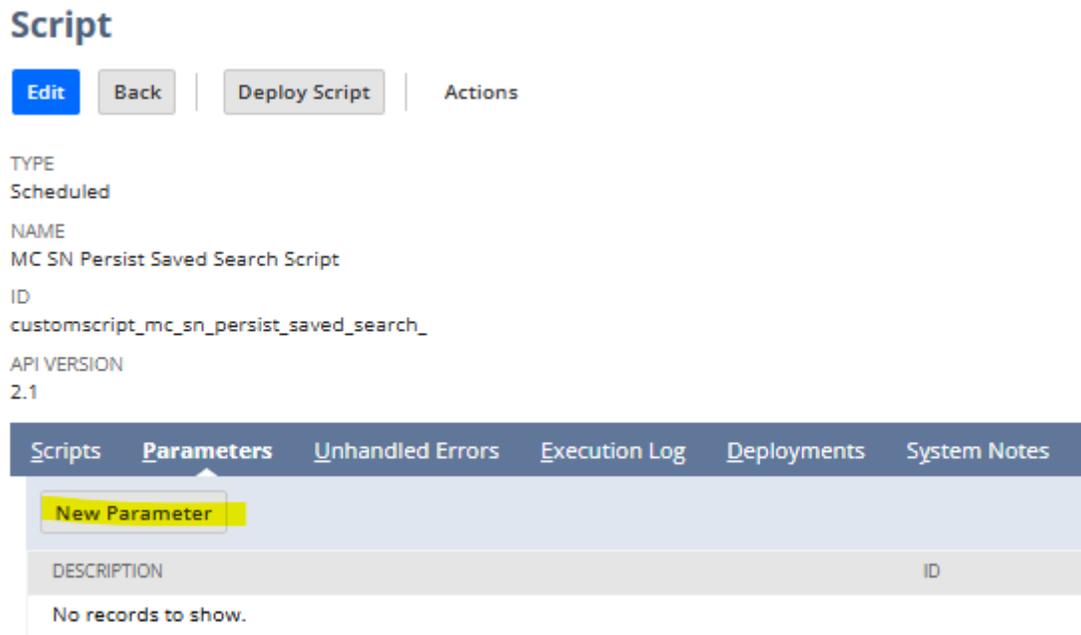
3. Next we need to Create Script Parameter Fields that can map to the Parameters in the Java Script
 - Click on the Parameters Tab of the Script



The screenshot shows the 'Script' configuration page with the 'Parameters' tab selected. The page displays the following information:

- Script:** Edit, Back, Deploy Script, Actions
- TYPE:** Scheduled
- NAME:** MC SN Persist Saved Search Script
- ID:** customscript_mc_sn_persist_saved_search_
- API VERSION:** 2.1
- SCRIPT FILE:** preview ssa_ss_persist_search.js download Edit
- EXECUTE FUNCTION
- Custom Plug-In Types:** CUSTOM PLUG-IN TYPE, No records to show.

- Then can hit New Parameter Button



The screenshot shows the 'Script' configuration page with the 'Parameters' tab selected. The page displays the following information:

- Script:** Edit, Back, Deploy Script, Actions
- TYPE:** Scheduled
- NAME:** MC SN Persist Saved Search Script
- ID:** customscript_mc_sn_persist_saved_search_
- API VERSION:** 2.1
- Parameters:** New Parameter, DESCRIPTION, ID, No records to show.

Create Persist Saved Search Script - Continued

- Next we need to Create Script Parameter Fields that can map to the Parameters in the Java Script
 - We need to add the following 4 parameter fields that can also see in the java script file if open back up with Notepad. Note we copy and paste the Parameter Name from the notepad file into the corresponding ID fields for the parameter fields we create below

```
sna_ss_persist_search.js
File Edit View

/**
 * @NApiVersion 2.1
 * @NScriptType ScheduledScript
 */
define(['N/task', 'N/runtime'], (task, runtime) => {

    const execute = (context) => {
        const script = runtime.getCurrentScript();
        const searchid = script.getParameter({name: 'custscript_sna_ps_search'});
        const filepath = script.getParameter({name: 'custscript_sna_ps_path'});
        const depscriptid = script.getParameter({name: 'custscript_sna_ps_scriptid'}) || null;
        const depdeployid = script.getParameter({name: 'custscript_sna_ps_deploymentid'}) || null;
    }
});
```

Field Labels:

1. Saved Search
2. Drop CSV File Cabinet Path
3. Saved CSV Import Script ID
4. Saved CSV Import Deployment ID

Field IDs:

Create Persist Saved Search Script - Continued

3. Next we need to Create Script Parameter Fields that can map to the Parameters in the Java Script Field Labels:

1. Saved Search

Script Field

Save Cancel

LABEL *
Saved Search

ID
_sna_ps_search

OWNER
Dean Carazza

DESCRIPTION

TYPE
List/Record

LIST/RECORD
Saved Search

STORE VALUE

PREFERENCE

Display Validation & Defaulting Sourcing & Filtering Access Translation

MANDATORY

CHECK SPELLING

DEFAULT SELECTION
<Type then tab>

Script

Save Cancel Change ID Actions

TYPE
Scheduled

NAME *
MC SN Persist Saved Search Script

ID
customscript_mc_sn_persist_saved_search_

API VERSION
2.1

DESCRIPTION

OWNER
Dean Carazza

INACTIVE

Scripts Parameters Unhandled Errors Execution Log Deployments System Notes

New Parameter

DESCRIPTION	ID	TYPE	LIST/RECORD
Saved Search	custscript_sna_ps_search	List/Record	Saved Search

Create Persist Saved Search Script - Continued

3. Next we need to Create Script Parameter Fields that can map to the Parameters in the Java Script Field Labels:

2. Drop CSV File Cabinet Path

Script Field

Save Cancel

LABEL *
Drop CSV File Cabinet Path

ID
_sna_ps_path

OWNER
Dean Carazza

DESCRIPTION

TYPE
Free-Form Text

LIST/RECORD

STORE VALUE

PREFERENCE

Display Validation & Defaulting Sourcing & Filtering Access Translation

MANDATORY MAXIMUM LENGTH

Create Persist Saved Search Script - Continued

- Next we need to Create Script Parameter Fields that can map to the Parameters in the Java Script Field Labels:
- Drop CSV File Cabinet Path

Script Field

Save Cancel

LABEL *
Drop CSV File Cabinet Path

ID
_sna_ps_path

OWNER
Dean Carazza

DESCRIPTION

TYPE
Free-Form Text

LIST/RECORD

STORE VALUE

PREFERENCE

Display Validation & Defaulting Sourcing & Filtering Access Translation

MANDATORY MAXIMUM LENGTH

Script

Save Cancel Change ID Actions

TYPE
Scheduled

NAME *
MC SN Persist Saved Search Script

ID
customscript_mc_sn_persist_saved_search_

API VERSION
2.1

DESCRIPTION

OWNER
Dean Carazza

INACTIVE

Scripts Parameters Unhandled Errors Execution Log Deployments System Notes

New Parameter

DESCRIPTION	ID	TYPE	LIST/RECORD
Saved Search	custscript_sna_ps_search	List/Record	Saved Search
Drop CSV File Cabinet Path	custscript_sna_ps_path	Free-Form Text	

Create Persist Saved Search Script - Continued

3. Next we need to Create Script Parameter Fields that can map to the Parameters in the Java Script Field Labels:

3. Saved CSV Import Script ID

Script Field

Save

LABEL *

ID

OWNER

DESCRIPTION

TYPE

LIST/RECORD

STORE VALUE

PREFERENCE

Display **Validation & Defaulting** Sourcing & Filtering Access Translation

MANDATORY

MAXIMUM LENGTH

Script

Save

TYPE
Scheduled

NAME *

ID
customscript_mc_sn_persist_saved_search_

API VERSION
2.1

DESCRIPTION

OWNER

INACTIVE

Scripts **Parameters** Unhandled Errors Execution Log Deployments System Notes

DESCRIPTION	ID	TYPE	LIST/RECORD
Saved Search	custscript_sna_ps_search	List/Record	Saved Search
Drop CSV File Cabinet Path	custscript_sna_ps_path	Free-Form Text	
Saved CSV Import Script ID	custscript_sna_ps_scriptid	Free-Form Text	

Create Persist Saved Search Script - Continued

- Next we need to Create Script Parameter Fields that can map to the Parameters in the Java Script Field Labels:
- Saved CSV Import Deployment ID

Script Field

Save Cancel

LABEL *
Saved CSV Import Deployment ID

ID
_sna_ps_deploymentid

OWNER
Dean Carazza

DESCRIPTION

TYPE
Free-Form Text

LIST/RECORD

STORE VALUE

PREFERENCE

Display Validation & Defaulting Sourcing & Filtering Access Translation

MANDATORY MAXIMUM LENGTH

Script

Save Cancel Change ID Actions

TYPE
Scheduled

NAME *
MC SN Persist Saved Search Script

ID
customscript_mc_sn_persist_saved_search_

API VERSION
2.1

DESCRIPTION

OWNER
Dean Carazza

INACTIVE

Scripts Parameters Unhandled Errors Execution Log Deployments System Notes

DESCRIPTION	ID	TYPE	LIST/RECORD
Saved Search	custscript_sna_ps_search	List/Record	Saved Search
Drop CSV File Cabinet Path	custscript_sna_ps_path	Free-Form Text	
Saved CSV Import Script ID	custscript_sna_ps_scriptid	Free-Form Text	
Saved CSV Import Deployment ID	custscript_sna_ps_deploymentid	Free-Form Text	

- Save the Script

Create Persist Saved Search Script - Continued

- Next we need to create the Script Deployment and now that we have our fields we can plug in the actual values to complete the mapping and script deployment
 - Click the Deploy Script Button

Script

Edit Back Deploy Script Actions

TYPE
Scheduled

NAME
MC SN Persist Saved Search Script

ID
customscript_mc_sn_persist_saved_search_

API VERSION
2.1

Scripts Parameters Unhandled Errors

SCRIPT FILE
preview sna_ss_persist_search.js download Edit

EXECUTE FUNCTION

Custom Plug-In Types

CUSTOM PLUG-IN TYPE
No records to show.

- Go to the parameters tab. Can now see our fields that we have to populate with the actual values.

Script Deployment

Save Cancel

SCRIPT
MC SN Persist Saved Search Script

TITLE *
MC SN Persist Saved Search Script

ID

DEPLOYED

STATUS *
Not Scheduled

LOG LEVEL
Debug

EXECUTE AS ROLE
Administrator

PRIORITY *
Standard

Schedule Parameters Execution Log

SAVED SEARCH *
<Type then tab>

DROP CSV FILE CABINET PATH *

SAVED CSV IMPORT SCRIPT ID *

SAVED CSV IMPORT DEPLOYMENT ID *

Create Persist Saved Search Script - Continued

- Next we need to create the Script Deployment and now that we have our fields we can plug in the actual values to complete the mapping and script deployment
 - Saved Search ^{*}
 - This should be our Commission Saved Search that we created

Script Deployment

Save  Cancel

SCRIPT

MC SN Persist Saved Search Script

TITLE ^{*}

MC SN Persist Saved Search Script

ID

DEPLOYED

Schedule • Parameters • Execution Log

SAVED SEARCH ^{*}

%mc

MC SN Commission Exp Report Sublist

SN MC Commission Expense Search

Create Persist Saved Search Script - Continued

- Next we need to create the Script Deployment and now that we have our fields we can plug in the actual values to complete the mapping and script deployment
 - Drop CSV File Cabinet Path *
 - Take this value directly from the Saved CSV Import Script Deployment Parameter we created/mapped and paste save value into this field

Script Deployment

Edit Back Actions

SCRIPT

MC SN Saved CSV Import Script

TITLE

MC SN Saved CSV Import Script

ID

customdeploy1

DEPLOYED

Script Deployment

Save Cancel

SCRIPT

MC SN Persist Saved Search Script

TITLE *

MC SN Persist Saved Search Script

ID

DEPLOYED

STATUS *

Not Scheduled

LOG LEVEL

Debug

EXECUTE AS ROLE

Administrator

PRIORITY *

Standard

Schedule Parameters Execution Log System Notes

SAVED CSV IMPORT TEMPLATE ID
custimport_mc_sn_comm_exp_rpt_csv

CSV FILE CABINET PATH

/MC SN Commission for Exp Report CSV Import/file.csv

Schedule Parameters Execution Log

SAVED SEARCH *

SN MC Commission Expense Search

DROP CSV FILE CABINET PATH *

/MC SN Commission for Exp Report CSV Import/file.csv

SAVED CSV IMPORT SCRIPT ID *

SAVED CSV IMPORT DEPLOYMENT ID *

Create Persist Saved Search Script - Continued

- Next we need to create the Script Deployment and now that we have our fields we can plug in the actual values to complete the mapping and script deployment
 - Saved CSV Import Script ID*
 - Copy and past the Saved CSV Import Script ID Into this field on our Persist Saved Search Script Deployment

The screenshot displays the 'Script' and 'Script Deployment' configuration pages in Microsoft Dynamics CRM. The 'Script' page on the left shows a script named 'MC SN Saved CSV Import Script' with ID 'customscript_mc_sn_saved_csv_imp_script'. The 'Script Deployment' page on the right shows the configuration for a deployment of this script. A red arrow points from the ID field in the 'Script' section to the 'SAVED CSV IMPORT SCRIPT ID' field in the 'Script Deployment' section, indicating that the ID value should be copied and pasted into this field.

Script

TYPE: Scheduled
NAME: MC SN Saved CSV Import Script
ID: customscript_mc_sn_saved_csv_imp_script
API VERSION: 2.1

Script File: preview sn_ss_csv_import_task.js download Edit
 EXECUTE FUNCTION

Script Deployment

SCRIPT: MC SN Persist Saved Search Script
TITLE: MC SN Persist Saved Search Script
ID:
 DEPLOYED

SAVED SEARCH: SN MC Commission Expense Search
DROP CSV FILE CABINET PATH: /MC SN Commission for Exp Report CSV Import/file.csv

SAVED CSV IMPORT SCRIPT ID: customscript_mc_sn_saved_csv_imp_script
SAVED CSV IMPORT DEPLOYMENT ID:
STATUS: Not Scheduled
LOG LEVEL: Debug
EXECUTE AS ROLE: Administrator
PRIORITY: Standard

Create Persist Saved Search Script - Continued

- Next we need to create the Script Deployment and now that we have our fields we can plug in the actual values to complete the mapping and script deployment
 - Saved CSV Import Deployment ID*
 - Copy and past the Saved CSV Import Script Deployment ID Into this field on our Persist Saved Search Script Deployment

Script

[Edit](#) [Back](#) [Deploy Script](#) [Actions](#)

TYPE
Scheduled
NAME
MC SN Saved CSV Import Script
ID
customscript_mc_sn_saved_csv_imp_script
API VERSION
2.1

TITLE	ID	STATUS
MC SN Saved CSV Import Script	customdeploy1	Not Scheduled

Script Deployment

[Save](#) [Cancel](#)

SCRIPT
MC SN Persist Saved Search Script

TITLE *
MC SN Persist Saved Search Script

ID

DEPLOYED

STATUS *
Not Scheduled

LOG LEVEL
Debug

EXECUTE AS ROLE
Administrator

PRIORITY *
Standard

[Schedule](#) [Parameters](#) [Execution Log](#)

SAVED SEARCH *
SN MC Commission Expense Search

DROP CSV FILE CABINET PATH *
/MC SN Commission for Exp Report CSV Import/file.csv

SAVED CSV IMPORT SCRIPT ID *
customscript_mc_sn_saved_csv_imp_script

SAVED CSV IMPORT DEPLOYMENT ID *
customdeploy1

- Save the Script Deployment

Script Deployment

[Save](#) [Cancel](#)

SCRIPT
MC SN Persist Saved Search Script

TITLE *
MC SN Persist Saved Search Script

ID

DEPLOYED

STATUS *
Not Scheduled

LOG LEVEL
Debug

EXECUTE AS ROLE
Administrator

PRIORITY *
Standard

[Schedule](#) [Parameters](#) [Execution Log](#)

SAVED SEARCH *
SN MC Commission Expense Search

DROP CSV FILE CABINET PATH *
/MC SN Commission for Exp Report CSV Import/file.csv

SAVED CSV IMPORT SCRIPT ID *
customscript_mc_sn_saved_csv_imp_script

SAVED CSV IMPORT DEPLOYMENT ID *
customdeploy1

Testing The Solution



Testing the Solution

1. Testing the Solution

- Now that we have completed our configuration and development tasks. We can try testing the solution. One thing to note about these scripts is they are 1 time setup scripts. It is the script deployments that create the potential to handle multiple use cases leveraging different saved searches, file cabinet paths, and saved CSV Import templates that you can map together and leverage these 2 scripts to deploy various automations using these concepts.
- Additionally, we created the Persist Saved Search Script to trigger the next CSV Import Script, so to run both scripts you only have to open/Edit and save and execute the Persist Saved Search Script
- To test our process we Open/Edit and save and execute the Persist Saved Search Script

Script Deployment

Save & New | Cancel | Change ID | Actions

Save & New
Save & Copy | Search Script
Save and Execute
mc_sav_mcr_saved Search Script

ID
customdeploy1
 DEPLOYED

STATUS *
Not Scheduled

SEE INSTANCES
Status Page

LOG LEVEL
Debug

EXECUTE AS ROLE
Administrator

PRIORITY *
Standard

Schedule • Parameters • Execution Log • System Notes

SAVED SEARCH *
SN MC Commission Expense Search

DROP CSV FILE CABINET PATH *
/MC SN Commission for Exp Report CSV Import/file.csv

SAVED CSV IMPORT SCRIPT ID *
customscript_mc_sn_saved_csv_imp_script

SAVED CSV IMPORT DEPLOYMENT ID *
customdeploy1

Testing the Solution

1. Testing the Solution

- After hitting save and execute it will take you to the Scheduled Script Status Page for that Script and that deployment. Hit the Refresh Button until the status = Complete

Scheduled Script Status

[Refresh](#)

FILTERS

DATE: today FROM: 03/20/2025 TO: 03/20/2025 SCRIPT: MC SN Persist Saved Search Script DEPLOYMENT ID: CUSTOMDEPLOY1 QUEUE: - All - STATUS: - All - API VERSION: - All -

API VERSION	DEPLOYMENT ID	DATE CREATED	STATUS	START	END	PRIORITY
2.1	customdeploy1	03/20/2025 9:36:23 pm	Complete	9:36:23 pm	9:36:24 pm	Standard

- Once status is complete should have dropped our commission saved search to the file cabinet location we setup

File Cabinet

SHOW INACTIVES [Add File](#) [Advanced Add](#)

[Search](#)

/2 Commission Expense Report
no Darkener

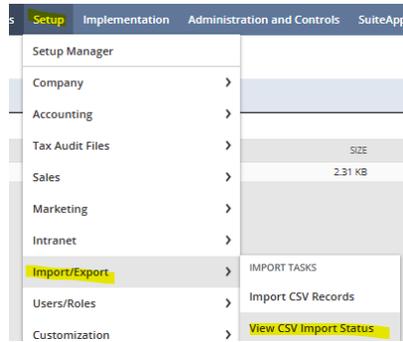
MC SN Commission for Exp Report CSV Import

EDIT	INTERNAL ID	NAME	SIZE	LAST MODIFIED	TYPE
Edit	8610	file.csv	2.31 KB	03/20/2025 9:36 pm	CSV File

Testing the Solution

1. Testing the Solution

- After confirming that Commission Expense Saved Search CVS File was dropped would have triggered the CSV Import Script to run and trigger importing our expense reports with search results in the file cabinet using the Saved CSV Import Template we mapped it to.
- To check can go to the CSV Import Status Page to see if ran
 - Navigate to Setup>Import/Export>View CSV Import Status



Job Status

New Refresh

FILTERS

DATE FROM TO
All

DATE	JOB NAME	STATUS	PERCENT COMPLETE	MESSAGE	CSV RESPONSE
03/20/2025 9:36 pm	Commission Expense Report Import	Complete	100.0%	36 of 36 records imported successfully	CSV Response

Testing the Solution

1. Testing the Solution

- To see which records got created, could go download the csv file in the file cabinet and grab the external ID to search for that expense report that was created
 - Per Review of the file there was only two unique external IDs which means two expense reports were created for Sales Rep with internal ID 157 and 158

Document Name	Maximum External ID	Sales Rep Internal ID	Invoice Internal ID	Maximum of 3% Commission
362 Global Information	13600 157-02-2025	157	33093	408
350 The Altima Technology The Altima Technology	7794 158-02-2025	158	31523	233.82
200 Fernhill Solutions	606 158-02-2025	158	16265	18.18
205 Macherster Mfg	924 158-02-2025	158	16680	27.72
248 Copper Software Copper Software	808 158-02-2025	158	19308	24.24
254 Fernhill Solutions	1650 158-02-2025	158	19526	49.5
242 McGuire Systems	990 158-02-2025	158	18790	29.7
203 Magna Tech Limited	1212 158-02-2025	158	16574	36.36
211 Finch Computing	808 158-02-2025	158	16998	24.24
247 Demizz Consulting Demizz Consulting	1320 158-02-2025	158	19205	39.6
209 Davidson Supplies Davidson Supplies	1072 158-02-2025	158	16892	32.16
249 Entenmanns LLC	1320 158-02-2025	158	19411	39.6
221 Finch Computing	770 158-02-2025	158	17628	23.1
347 McGuire Systems	3897 158-02-2025	158	31520	116.91
245 Jasper and Associates	1980 158-02-2025	158	18999	59.4
210 Fernhill Solutions	616 158-02-2025	158	16995	18.48
219 Davidson Supplies Davidson Supplies	1010 158-02-2025	158	17522	30.3
244 Davis Supplies Davis Supplies	990 158-02-2025	158	18996	29.7
199 Entenmanns LLC	462 158-02-2025	158	16162	13.86
198 Falcon Systems	606 158-02-2025	158	16059	18.18
374 Finch Computing	46000 158-02-2025	158	35042	1380
202 Global Information	924 158-02-2025	158	16371	27.72
345 Finch Computing	50.85 158-02-2025	158	31518	1.526
346 Demizz Consulting Demizz Consulting	987 158-02-2025	158	31519	29.61
197 Demizz Consulting Demizz Consulting	462 158-02-2025	158	15956	13.86
207 Magneto Services	1608 158-02-2025	158	16786	48.24
356 Godric Motors	15354.38 158-02-2025	158	32466	460.631
201 Finch Computing	804 158-02-2025	158	16268	24.12
208 Falcon Systems	616 158-02-2025	158	16889	18.48
252 Falcon Systems	1650 158-02-2025	158	19420	49.5
214 Global Information	1414 158-02-2025	158	17207	42.42
243 Copper Software Copper Software	804 158-02-2025	158	18893	24.12
246 The Altima Technology The Altima Technology	1980 158-02-2025	158	19102	59.4
220 Davis Supplies Davis Supplies	1340 158-02-2025	158	17525	40.2
204 Global Information	1608 158-02-2025	158	16577	48.24
206 The Abbott Inc.	1212 158-02-2025	158	16683	36.36

Transaction Search

Submit Export Personalize Search Create Saved Search

USE ADVANCED SEARCH

Criteria Results

Use this tab to specify criteria that narrow down your search.

USE EXPRESSIONS

Standard Summary

FILTER * DESCRIPTION *

Type is Expense Report

Main Line is true

External ID is any of 157-02-2025, 158-02-2025

Transaction Search: Results

Return To Criteria Save This Search

STYLE Normal

NEW	EDIT VIEW	INTERNAL ID	ORDER TYPE *	DATE	AS-OF DATE	PERIOD	TAX PERIOD	TYPE	DOCUMENT NUMBER	NAME	ACCOUNT	MEMO	AMOUNT
	Edt View	37145	*	03/20/2025		Mar 2025		Expense Report	25	Joel Williams	9008 Unapproved Expense Reports		426.99
	Edt View	37146	*	03/20/2025		Mar 2025		Expense Report	26	Will Clark	9008 Unapproved Expense Reports		3,146.48

TOTAL: 2

Testing the Solution

1. Testing the Solution

- Can View the Expense Report Created

Expense Report 🔍
← → List Search Customize More

26 Will Clark PENDING SUPERVISOR APPROVAL

Actions

Primary Information

EXP. REPT. # 26	PURPOSE	POSTING PERIOD Mar 2025
DATE 03/20/2025	ADVANCE TO APPLY	DATE DUE
EMPLOYEE Will Clark	ADVANCE TO APPLY ACCOUNT	<input type="checkbox"/> SUPERVISOR APPROVAL
SUBSIDIARY US West		<input type="checkbox"/> ACCOUNTING APPROVAL
<input checked="" type="checkbox"/> COMPLETE		ACCOUNT FOR CORPORATE CARD EXPENSES
		<input type="checkbox"/> CORPORATE CARD BY DEFAULT
		CURRENCY US Dollar
DIST. DEFAULT TEMPLATE	DIST. TYPE	DIST. RATE TYPE
<input type="checkbox"/> DISABLE LINE DIST. RULE		
DIST. RELATED JOURNAL		

Summary	
EXPENSES TOTAL	3,169.48
TOTAL IN BASE CURRENCY	\$3,169.48
REIMBURSABLE EXPENSES	3,169.48
CORPORATE CARD	0.00
ADVANCE TO APPLY	
TOTAL REIMBURSABLE AMOUNT	3,169.48

Expenses
Communication
Related Records
System Information
Custom
Tax Reporting
EFT
Distribution List
☰

USE MULTI CURRENCY

REF NO.	DATE	CATEGORY	AMOUNT	CUSTOMER-PROJECT	BILLING SUBSIDIARY	PROJECT TASK	MEMO	BILLABLE	DEPARTMENT	CLASS	LOCATION	ATTACH FILE	RECEIPT	CORPORATE CARD	LINE DIST. EXCLUDE	INVOICE #	ACTIVITY CODE	LINE DIST. RULE
1	03/20/2025	Commission Expense	233.82				The Altima Technology The Altima Technology		Sales	Class D	US West					Invoice #350		
2	03/20/2025	Commission Expense	18.18				Fernhill Solutions		Sales	Class D	US West					Invoice #200		
3	03/20/2025	Commission Expense	27.72				Machester Mfg		Sales	Class D	US West					Invoice #205		
4	03/20/2025	Commission Expense	24.24				Copper Software Copper Software		Sales	Class D	US West					Invoice #248		
5	03/20/2025	Commission Expense	49.50				Fernhill Solutions		Sales	Class D	US West					Invoice #254		
6	03/20/2025	Commission Expense	29.70				McGuire Systems		Sales	Class D	US West					Invoice #242		
7	03/20/2025	Commission Expense	36.36				Magna Tech Limited		Sales	Class D	US West					Invoice #203		
8	03/20/2025	Commission Expense	24.24				Finch Computing		Sales	Class D	US West					Invoice #211		
9	03/20/2025	Commission Expense	39.60				Demitz Consulting Demitz Consulting		Sales	Class D	US West					Invoice #247		
10	03/20/2025	Commission Expense	32.16				Davidson Supplies Davidson Supplies		Sales	Class D	US West					Invoice #209		
11	03/20/2025	Commission Expense	39.60				Entenmanns LLC		Sales	Class D	US West					Invoice #249		
12	03/20/2025	Commission Expense	23.10				Finch Computing		Sales	Class D	US West					Invoice #221		
13	03/20/2025	Commission Expense	116.91				McGuire Systems		Sales	Class D	US West					Invoice #347		
14	03/20/2025	Commission Expense	59.40				Jasper and Associates		Sales	Class D	US West					Invoice #245		
15	03/20/2025	Commission Expense	18.48				Fernhill Solutions		Sales	Class D	US West					Invoice #210		

Testing the Solution

1. Testing the Solution

- Can click on the invoice link to go to invoice and check the related records sublist we created to double check the amount of commission calculated for that invoice and referenced on the expense report
 - Invoice Amount $\$7,794 \times 3\% = \233.82 which matches below and what was on expense report

Invoice 350 The Altima Technology The Altima Technology OPEN

Edit Back Authorize Return Accept Payment Credit Renew Generate PDF Print Refresh Actions

Primary Information

INVOICE # 350	SUBSIDIARY US West	DUE DATE 03/14/2025
DATE 02/12/2025	CURRENCY US Dollar	MEMO
CUSTOMER The Altima Technology The Altima Technology	EXCHANGE RATE 1.00	TERMS Net 30
PROJECT	DISCOUNT ITEM	AMOUNT DUE 7,794.00
POSTING PERIOD Feb 2025	RATE	CREATED FROM Sales Order #422
OPPORTUNITY	PO #	AS-OF DATE 03/09/2025
SALES REP Will Clark		CREATED DATE 03/09/2025
		LAST MODIFIED DATE 03/20/2025

Summary

SUBTOTAL	7,794.00
DISCOUNT ITEM	
TAX TOTAL	0.00
TOTAL	7,794.00
AMOUNT DUE	7,794.00

Intercompany Management

PAIRED INTERCOMPANY TRANSACTION INTERCOMPANY STATUS

ORDER TYPE

Items Shipping Billing Accounting Relationships Communication **Related Records** System Information Custom EET France Tax Reporting Charges

Transactions **Expense Report** Payments Support Cases Revenue Arrangements Transformations

EDIT	ORDER TYPE *	DATE	AS-OF DATE	PERIOD	TAX PERIOD	TYPE	DOCUMENT NUMBER	NAME	ACCOUNT	MEMO	AMOUNT	PREFERRED ENTITY BANK	VENDOR BANK FEES	BANK FEE	MX OPERATION TYPE	IMPORT PERMIT NO.	IMPORT DECLARATION NO.	DISABLE TRANSACTION DIST.
<a>Edit		03/20/2025		Mar 2025		Expense Report	26		6070 Expenses : Selling Expenses : Commission Expense	Commission Expense: The Altima Technology The Altima Technology	233.82							No

Testing the Solution

1. Testing the Solution

- Once Expense Report has been approved, Can Run AP Aging to See Commission Expense Report Due and Payable to Sales Rep

A/P Aging Summary [View Detail](#)

VENDOR	CURRENT Open Balance	02/18/2025 - 03/19/2025 (30) Open Balance	01/19/2025 - 02/17/2025 (60) Open Balance	12/20/2024 - 01/18/2025 (90) Open Balance	BEFORE 12/20/2024 (>90) Open Balance	TOTAL Open Balance
Larry Nelson						
Carol Morgan						
Marc Collins						
Abby Kwan	\$0.00	\$100.00	\$649.00	\$0.00	\$0.00	\$749.00
Adam Minister	\$0.00	\$620.00	\$240.00	\$0.00	\$0.00	\$860.00
Andrew West	\$0.00	\$100.00	\$0.00	\$0.00	\$0.00	\$100.00
Francis Murphy	\$0.00	\$2,525.00	\$0.00	\$0.00	\$0.00	\$2,525.00
Henry York	\$0.00	\$293.50	\$850.00	\$0.00	\$0.00	\$1,143.50
Joan Kelly	\$0.00	\$1,225.00	\$0.00	\$0.00	\$0.00	\$1,225.00
Total - Marc Collins	\$0.00	\$4,863.50	\$1,739.00	\$0.00	\$0.00	\$6,602.50
Total - Carol Morgan	\$0.00	\$4,863.50	\$1,739.00	\$0.00	\$0.00	\$6,602.50
Joel Williams						
Will Clark	\$3,169.48	\$0.00	\$0.00	\$0.00	\$0.00	\$3,169.48
Total - Joel Williams	\$3,169.48	\$0.00	\$0.00	\$0.00	\$0.00	\$3,169.48
Total - Larry Nelson	\$3,169.48	\$4,863.50	\$1,739.00	\$0.00	\$0.00	\$9,771.98
Vendor						
Adirondack Networking	\$8,149.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,149.00
Cable Plus Distributors	\$0.00	\$6,613.00	\$0.00	(\$152.55)	\$0.00	\$6,460.45
Cables R Us	\$2,267.49	\$0.00	\$0.00	\$0.00	\$0.00	\$2,267.49
CDW	\$1,678.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,678.00
Davidson Box	\$8,675.24	\$0.00	\$0.00	\$0.00	\$0.00	\$8,675.24
Emerald Computer Systems Inc.	\$10,938.59	\$0.00	\$0.00	\$0.00	\$0.00	\$10,938.59
First Mutal	\$0.00	\$12,000.00	\$0.00	\$0.00	\$0.00	\$12,000.00
Harris Technology	\$167,895.00	\$0.00	\$0.00	\$0.00	\$0.00	\$167,895.00
Intercompany - US West (VEN)	\$0.00	\$1,200.00	\$0.00	\$0.00	\$0.00	\$1,200.00
License Manufacturing	\$619.61	\$0.00	\$0.00	\$0.00	\$0.00	\$619.61
Micro Shop	\$50,830.00	\$10,880.00	\$0.00	\$0.00	\$0.00	\$61,710.00
Staples - US West	\$87,135.00	\$0.00	\$0.00	\$0.00	\$0.00	\$87,135.00
Timmy Hillshape - US East	\$2,747.14	\$0.00	\$0.00	\$0.00	\$0.00	\$2,747.14
US East	\$0.00	\$3,460.00	\$0.00	\$0.00	\$0.00	\$3,460.00
Witt & Anderson	\$943.00	\$202.00	(\$40.00)	\$0.00	\$0.00	\$1,105.00
XCOM	\$4,760.00	\$1,456.00	\$0.00	\$0.00	\$0.00	\$6,216.00
Total - Vendor	\$346,638.07	\$35,811.00	(\$40.00)	(\$152.55)	\$0.00	\$382,256.52
total	\$349,807.55	\$40,674.50	\$1,699.00	(\$152.55)	\$0.00	\$392,028.50

A/P Aging Detail [Back to Summary](#)

VENDOR	TRANSACTION TYPE	DATE	DOCUMENT NUMBER	DUE DATE	AGE	OPEN BALANCE
Larry Nelson						
Joel Williams						
Will Clark	Expense Report	03/20/2025	26	03/20/2025	0	\$3,169.48
Total - Will Clark						\$3,169.48
Total - Joel Williams						\$3,169.48
Total - Larry Nelson						\$3,169.48
total						\$3,169.48

Questions?

Next Steps

- ▲ Follow me and ScaleNorth on LinkedIn. Will be posting the materials from today on our LinkedIn Group “NetSuite Made Easy”. Material from prior classes are posted out there as well. Can request to join group using link below
 - <https://www.linkedin.com/groups/14571179/>
- ▲ Will be hosting monthly with next one targeted to be Friday 04/25/25 12–1PM PST
 - Target Agenda:
 - Creating a Portlet Script so can display iframe to other applications like Lucid Chart and put directly on your home dashboard
- ▲ If you have any NetSuite pain points, enhancements, integrations or any questions we would be happy to setup a quick chat and see how we can help
 - Send me an email or give me a call or grab time on my calendar
 - dcarazza@scalenorth.com
 - 714–350–6211
 - <https://calendly.com/dcarazza-1>



NetSuite Consulting, Implementation and
Outsourced Accounting Services

THANK YOU!

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