

# NetSuite Data Exporter

## Installation Guide

This document explains in step-by-step fashion how to install the the NetSuite Data Exporter.

### 1. Install Google Sheet Add-on

1. Navigate to the NetSuite Data Exporter add-on listing page - or [click here](#).
2. Click the + FREE button on the top right corner of the page to install it.



Add-ons  
Check out [the store](#) for many more

**NetSuite Data Exporter**  
offered by [www.gurussolutions.com](#) 5 users

**+ FREE**

**Connect to NetSuite**

Switch to Token Based Authentication

Username \*

Password \*

Retrieve Roles and Accounts

Role and Account

Select a value...

Role ID \*

Account Number \*

Remember me

Request Cancel

**Need Help?**

To retrieve your Account Number and Role ID, enter your NetSuite username and password and click "Retrieve Roles and Accounts".

If your account has two-factor authentication enabled, click "Switch to Token-Based Authentication".

If you have any questions, contact your NetSuite administrator.

Search ID	Tab	Skip	Summary	Field ID	Ops	Values
31	Customer Search	no	MAX	transaction.transdate	after	4/1/2016
32	Prospect Search	no				
93	Leads Search	no				

**Sales Report**

Amount Invoiced: **\$75.00K**

1,452 (7%)

1. Jan 2018 - 31 Jun 2018

Custom... Amount

1. All On

2. Change On

3. Change On

Amount Invoiced

1.5K

1K

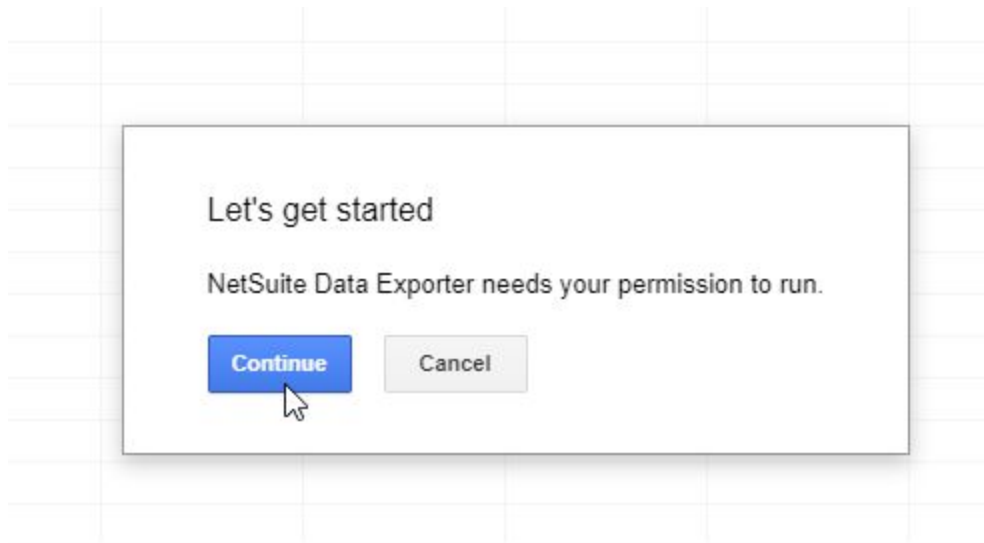
500

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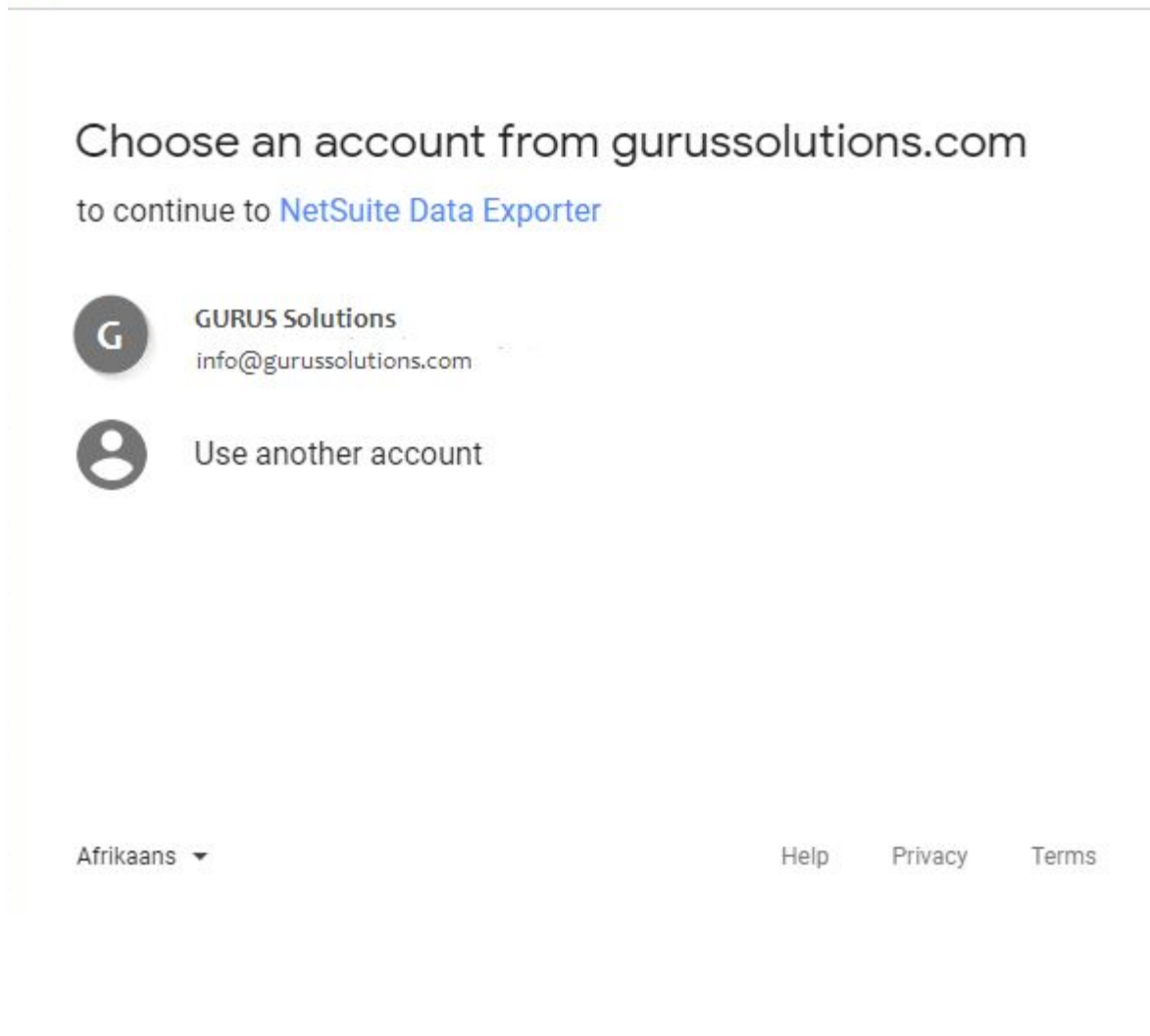
All On Change On

Leverage cu (powered


3. A new Google Sheet tab is launched. Click Continue on the pop up screen.



4. Sign in with your Google account




5. Click Allow to grant the permissions required by the add-on.







 Sign in with Google

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## NetSuite Data Exporter wants to access your Google Account

 info@gurussolutions.com

This will allow **NetSuite Data Exporter** to:

-  View and manage your spreadsheets in Google Drive 
-  Display and run third-party web content in prompts and sidebars inside Google applications 
-  Connect to an external service 

### Allow NetSuite Data Exporter to do this?

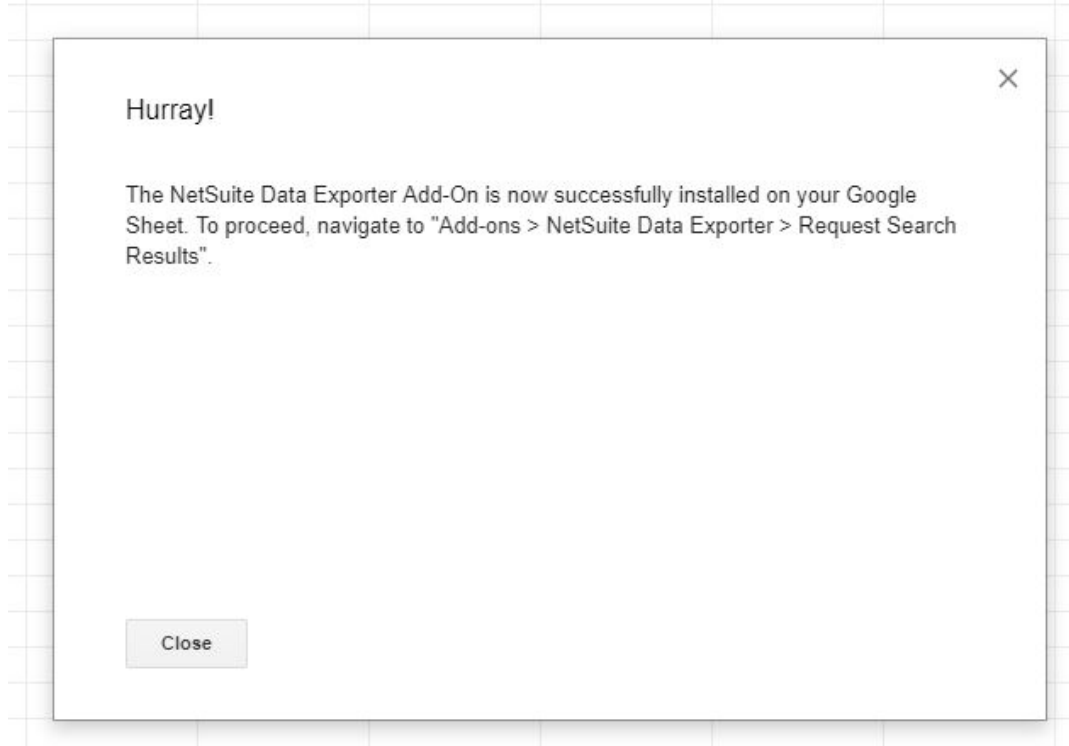
By clicking Allow, you allow this app to use your information in accordance with their terms of service and privacy policies. You can view or remove app access in your [Google Account](#)

CANCEL

ALLOW



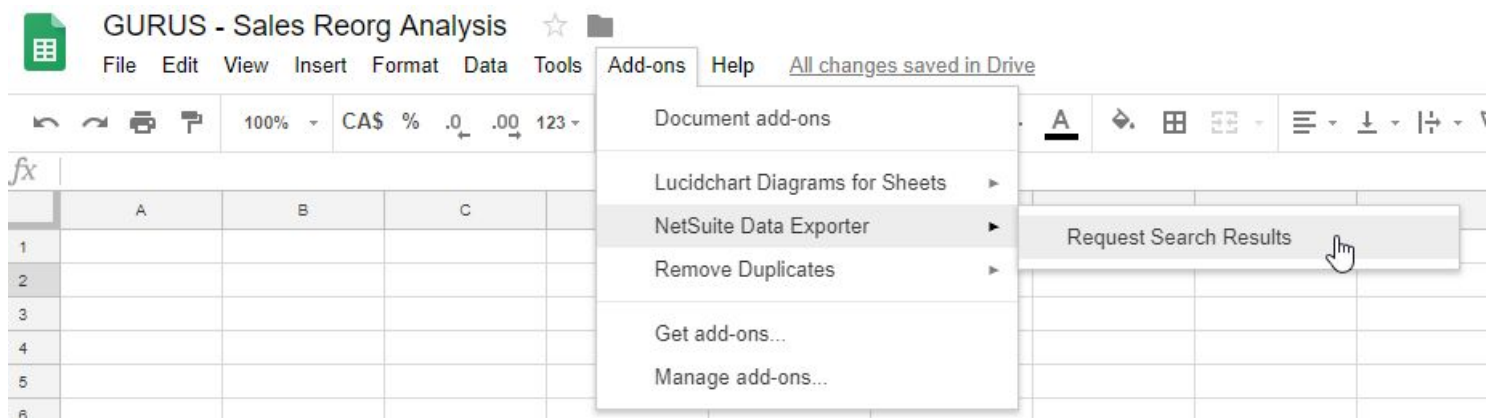
6. The add-on is installed.



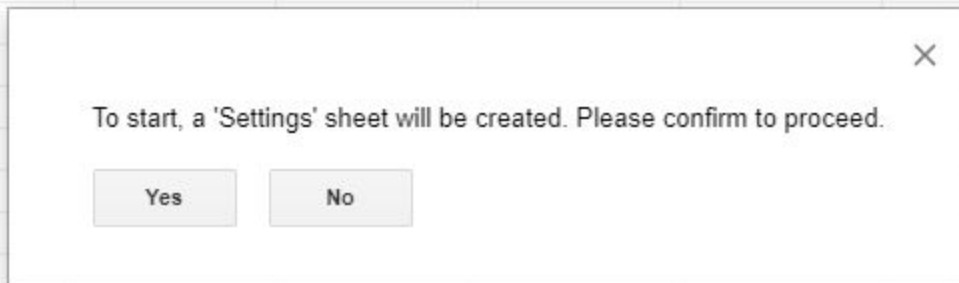
## 2. Registration (once per account)

To start the registration process and gain access to the add-ons functionality, please complete the following steps:

1. Navigate to Add-ons > NetSuite Data Exporter > Request Search Results



2. The NetSuite Data Exporter sidebar appears to the right and a pop-up message displays to request your confirmation to add the Settings tab. Click Yes.



3. The Settings tab is now created. In the NetSuite Data Exporter sidebar, enter required authentication credentials for your NetSuite instance.

- 3.1. For standard login:
  - 3.1.1. Enter your NetSuite Username and Password
  - 3.1.2. Click button: Retrieve Roles and Accounts
  - 3.1.3. Select from dropdown list: Role and Account. The Role ID and Account Number will be populated.

## NetSuite Data Exporter



### Connect to NetSuite

Switch to Token Based Authentication

Username \*

Password \*

Retrieve Roles and Accounts

Role and Account

Select a value...



Role ID \*

Account Number \*

Remember me

Request

Cancel

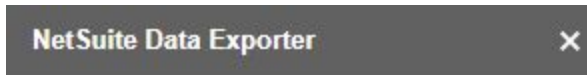
### Need Help?

To retrieve your Account Number and Role ID, enter your NetSuite username and password and click "Retrieve Roles and Accounts".

If your account has two-factor authentication enabled, click "Switch to Token-Based Authenticaion".

If you have any questions, contact your NetSuite administrator.

4. For Token Based Authentication:
  - 4.1. Click the button: Switch to Token Based Authentication
  - 4.2. Enter your TBA credentials and Account Number



## Connect to NetSuite

Consumer Key \*

Consumer Secret \*

Token ID \*

Token Secret \*

Account Number \*

Remember me

## Need Help?

If you have any questions, contact your NetSuite administrator.

5. Click Request.
6. You will then be prompt to register with Gurus Solutions. Click the Register button.

✕

**Almost Done!**

To complete the setup, you need to register with GURUS Solutions and then install a bundle in your NetSuite Account. We will reach out and provide more details once your registration is confirmed.

If we have confirmed your registration and you are still seeing this message, please reach out to us directly.

To contact us, please write to [info@gurussolutions.com](mailto:info@gurussolutions.com).

Register
Close

7. Fill-out the registration form and submit it.



NetSuite Data Exporter is a Google Sheet Add-on built to accelerate and automate the process of exporting NetSuite saved search results to Google Sheets. This app will allow you to connect to your NetSuite account with the provided credentials, run specified saved searches, and export the results into spreadsheets. From there, you can take advantage of powerful features within Google sheets, such as: colorful charts, custom filters & formulas, pivot tables, private sharing, and plenty of other features.



## Register Now and Start Exporting

*By continuing, I agree to the GURUS Solutions [Privacy Policy](#) and [End User Licence Agreement](#).*

**FIRST NAME \***

**LAST NAME \***

**COMPANY \***

**EMAIL \***

**PHONE \***

**NETSUITE ACCOUNT NUMBER \***

**YES! I WOULD LIKE TO RECEIVE COMMUNICATIONS AND INDUSTRY NEWS FROM GURUS SOLUTIONS. I CAN UNSUBSCRIBE AT ANY TIME.**

**GET MY LICENSE**

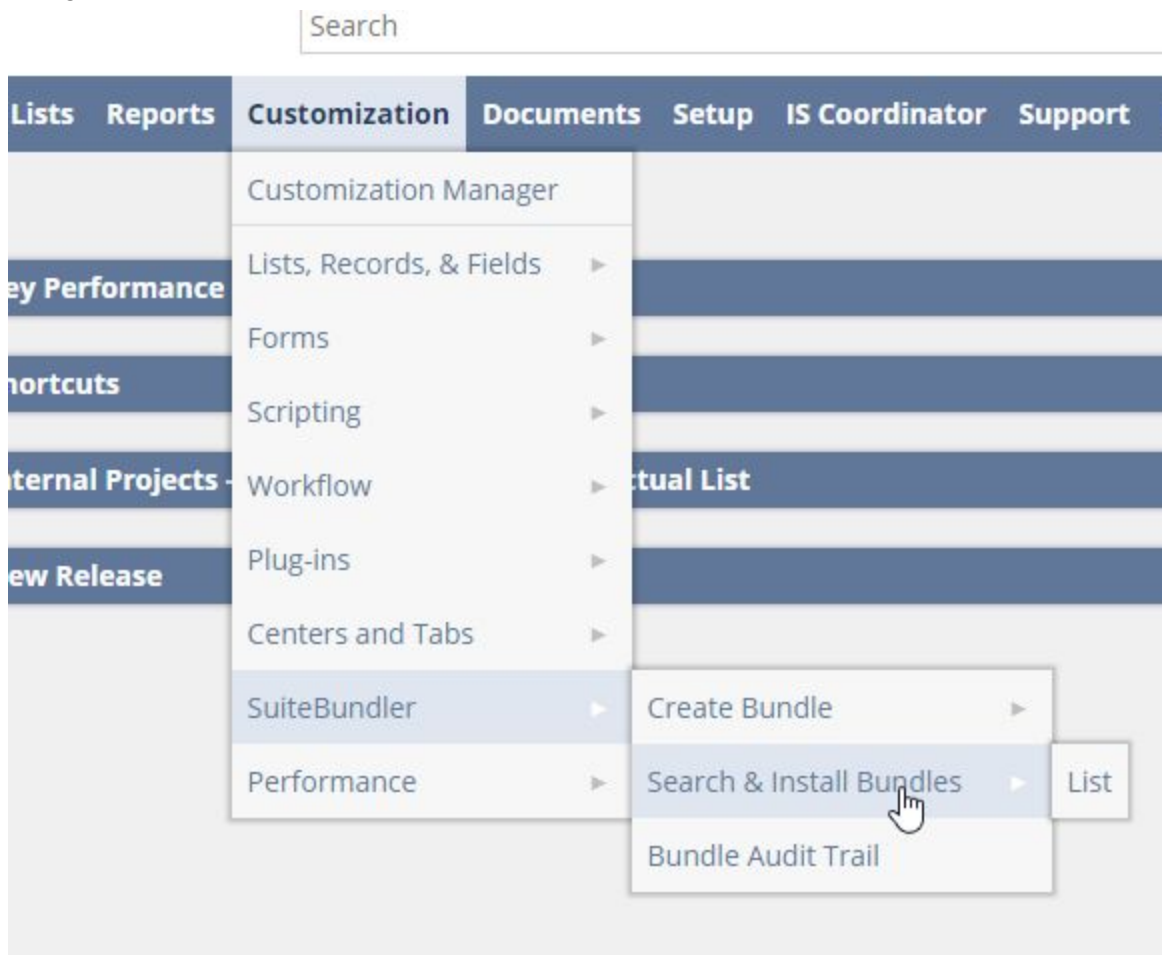


8. Please wait for us to confirm your registration.

### 3. Install the Netsuite SuiteBundle (once per account)

After you have received confirmation for your registration, complete the following steps to install the required SuiteBundle in your NetSuite account:

1. Log in into your NetSuite account as an administrator
2. Navigate to Customization -> SuiteBundler -> Search & Install Bundles



3. In the keywords field type in Netsuite Data Exporter or Bundle ID: 233251, then click Search
4. Find the Bundle that has the ID of 233251 and then click on the Bundle's name

## Search & Install Bundles

Search

Basic | Advanced

LEAVE THE KEYWORDS BOX BLANK AND CLICK SEARCH TO VIEW THE MOST POPULAR SUITEAPPS

KEYWORDS

NetSuite Data Exporter

### Installation Terms of Service

NAME	BUNDLE ID	VERSION	MANAGED	COMPANY NAME
<a href="#">NetSuite Data Exporter</a>	233251	1.0	Yes	Gurus Solutions SDN Production

5. Click the Install button.

## Bundle Details

### NetSuite Data Exporter

Back

Install

6. Read and accept the End User License Agreement.
7. Wait for the bundle to finish installing (this shouldn't take more than a few minutes).

*That's it! You are now all set for running your first search using NetSuite Data Exporter. Check out the User Guide for more support. To contact us, please write to [info@gurussolutions.com](mailto:info@gurussolutions.com)*

*Enjoy!*