

NetSuite Data Exporter

User Guide

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, runs specified saved searches, and exports the results into spreadsheets. It also supports additional filters on existing saved searches to further refine the results.

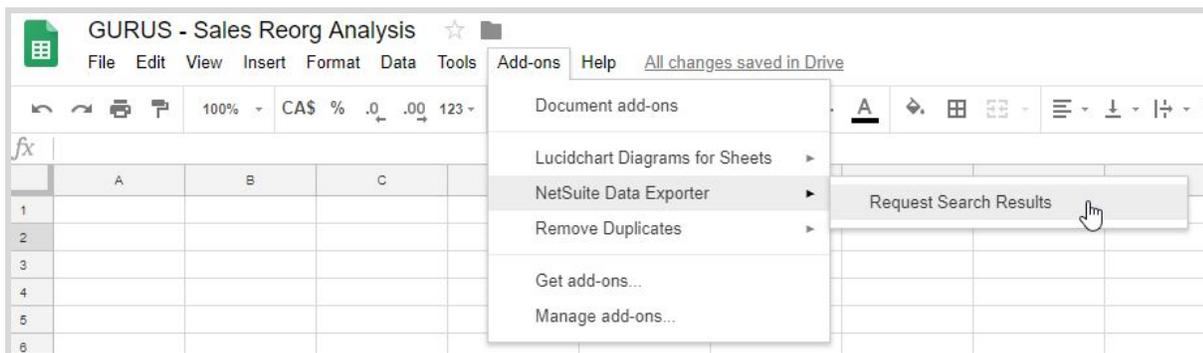
Prerequisite:

Follow the steps in the Installation Guide to have NetSuite Data Exporter installed in both your Google Sheets as an Add-on, and into NetSuite as a SuiteBundle. Make sure both components are installed.

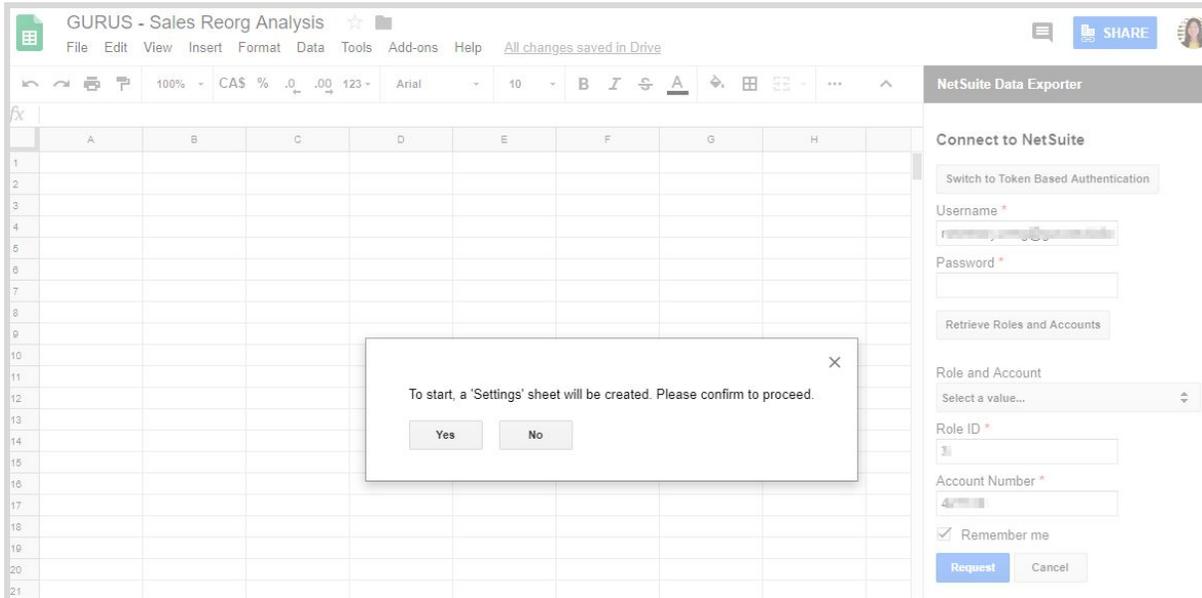
How to request a search:

If you already see the NetSuite Data Exporter sidebar and Settings tab in your sheet, skip to Step 3.

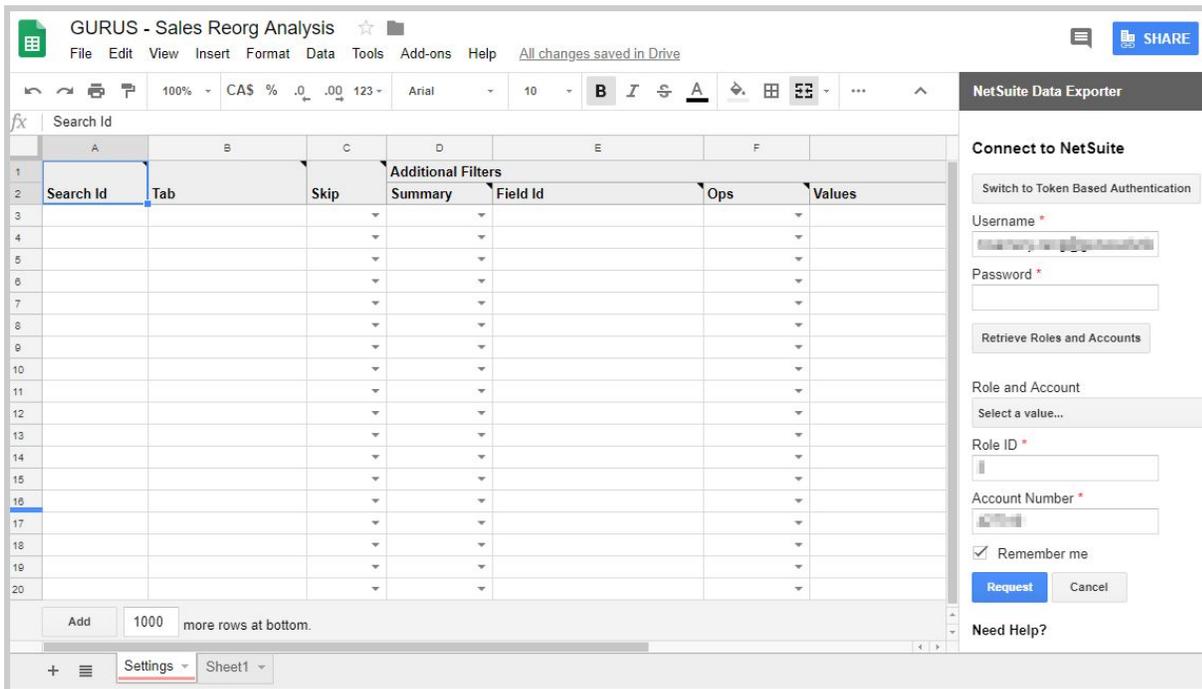
1. Open a Google sheet that you want to have the search results saved. Navigate to Add-ons > NetSuite Data Exporter > Request Search Results



- 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.



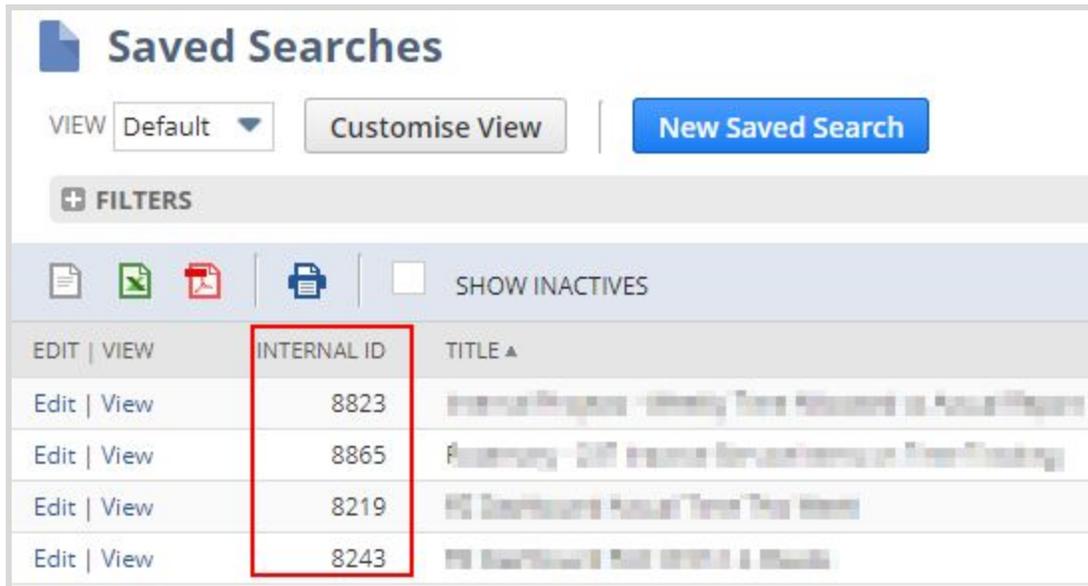
- The Settings tab is now created. Enter details for the searches that you want to retrieve.



- 3.1. **Search Id:** mandatory. In NetSuite, you may obtain the Search Id of your saved search from its URL



Or from the Saved Searches list view, once you have enabled the preference to Show Internal IDs



- 3.2. **Tab:** mandatory. Enter the name of the tab to place the search results in. If the specified tab does not exist, a new tab will be created. If the specified tab exists, it will be overwritten by the search results.
- 3.3. **Skip:** optional. Select Yes to skip this search from the next request. (ex: If you want to pull your list of customers once a month, but update your sales data weekly). Select No or leave it empty to include this search in the next request.
- 3.4. **Additional Filters:** optional. Multiple filters may be applied as long as you enter the filters on new rows before the next saved search.

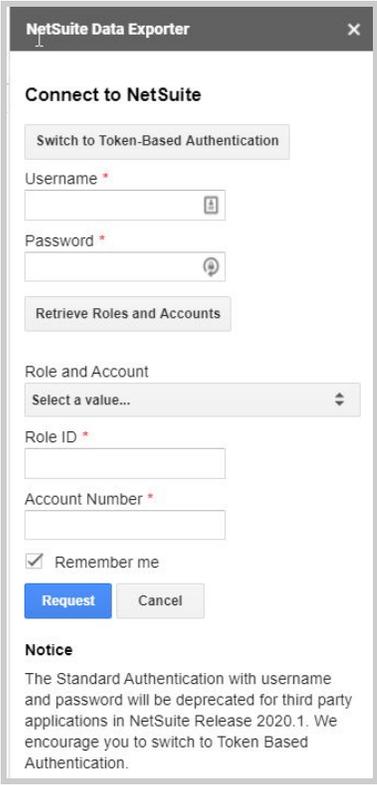
(example:)

Search Id	Tab	Skip	Filters			
			Summary	Field Id	Ops	Values
91	Search 1	no		datecreated	within	17/1/1, 17/2/2
191	Search 2	no		mainline	is	true
				salesrep	noneof	Riley
593	Search 3	no		account	anyof	125,56,120

4. In the NetSuite Data Exporter sidebar, enter required authentication credentials for your NetSuite instance.
 - 4.1. For standard login:
 - 4.1.1. Enter your NetSuite Username and Password
 - 4.1.2. Click button: Retrieve Roles and Accounts
 - 4.1.3. Select from dropdown list: Role and Account. The Role ID and Account Number will be populated.

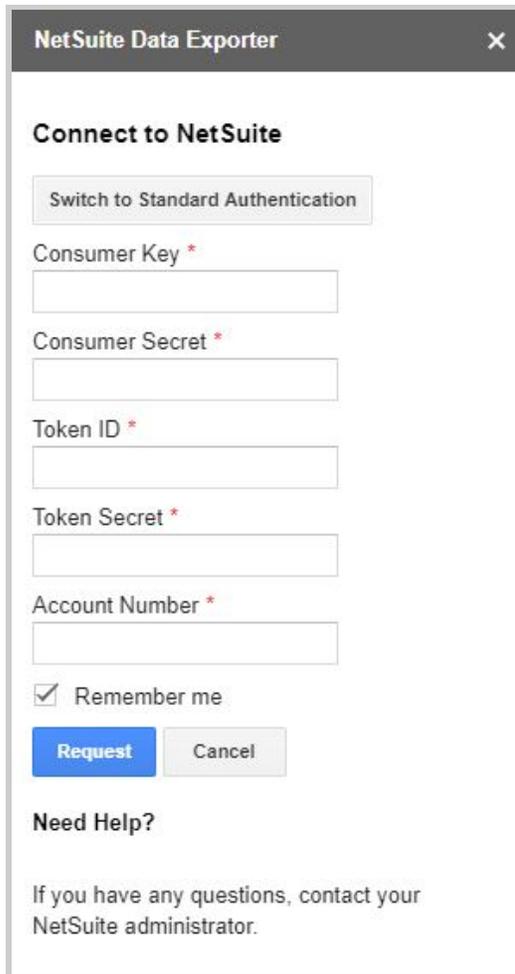
Note: if your account has two-factor authentication or SAML Single Sign On enabled, you need to use Token Based Authentication.

Note: Standard Authentication using Username and Password will be deprecated for third party applications in NetSuite Release 2021.1. We encourage you to migrate to Token Based Authentication.



The screenshot shows a dialog box titled "NetSuite Data Exporter" with a close button (X) in the top right corner. The main heading is "Connect to NetSuite". Below this heading is a button labeled "Switch to Token-Based Authentication". There are two input fields: "Username *" and "Password *", each with a small icon to its right. Below the password field is a button labeled "Retrieve Roles and Accounts". Underneath is a dropdown menu labeled "Role and Account" with the text "Select a value..." and a downward arrow. Below the dropdown are two more input fields: "Role ID *" and "Account Number *". At the bottom of the form is a checked checkbox labeled "Remember me". At the very bottom are two buttons: "Request" (in blue) and "Cancel" (in grey). Below the form is a "Notice" section with the following text: "The Standard Authentication with username and password will be deprecated for third party applications in NetSuite Release 2020.1. We encourage you to switch to Token Based Authentication."

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



The image shows a dialog box titled "NetSuite Data Exporter" with a close button (X) in the top right corner. The dialog is divided into several sections:

- Connect to NetSuite**: This section contains a button labeled "Switch to Standard Authentication".
- Consumer Key ***: A text input field.
- Consumer Secret ***: A text input field.
- Token ID ***: A text input field.
- Token Secret ***: A text input field.
- Account Number ***: A text input field.
- Remember me**: A checkbox that is checked.
- Request**: A blue button.
- Cancel**: A grey button.
- Need Help?**: A section with the text "If you have any questions, contact your NetSuite administrator."

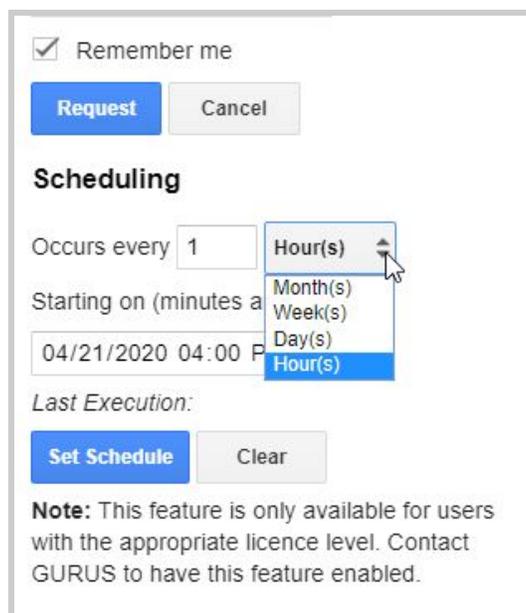
5. Click Request
6. Done! Search results are now exported to the specified tabs and a success message displays. If you entered an existing tab for your search, you will be prompted to confirm that the tab will be overwritten before the results are exported.



Scheduling a Searches (Optional)

This feature is only available to the customers who bought our Data Exporter Advanced Configuration Service. To learn more about this service, contact us at sales@gurussolutions.com.

1. Go to the Token Based Authentication screen.
2. Make sure you check the “Remember me” box as the scheduler functionality will need your credentials to run asynchronously.
3. In the Scheduling section, select a frequency type from the dropdown button. You can choose between “Hours”, “Days”, “Weeks” or “Months”.
4. You can then select the number of times per frequency type the request will execute. Ex: If you select Hour in the frequency type, and type “4” in the "Occurs every" field, the request will execute every 4 hours.
5. Select the start date for the first execution.
 - 5.1. Please Note that only the hour will be taken into account. The minutes will be ignored.
6. Click the “Set Schedule” button to confirm the schedule.
7. You can update the schedule by changing the values and clicking “Schedule” again.
8. You can cancel the scheduled execution by clicking “Clear Schedule”.
9. You can consult the Request Logs tab to see the status of the requests.



The screenshot shows a web interface for scheduling a request. At the top, there is a checked checkbox labeled "Remember me". Below it are two buttons: "Request" (in blue) and "Cancel" (in grey). The "Scheduling" section contains:

- "Occurs every" field with the value "1" and a dropdown menu currently showing "Hour(s)". Other options in the dropdown are "Month(s)", "Week(s)", "Day(s)", and "Hour(s)".
- "Starting on (minutes a" field with the value "04/21/2020 04:00 P".
- "Last Execution:" label.
- "Set Schedule" (blue button) and "Clear" (grey button) buttons.

 A note at the bottom states: "Note: This feature is only available for users with the appropriate licence level. Contact GURUS to have this feature enabled."

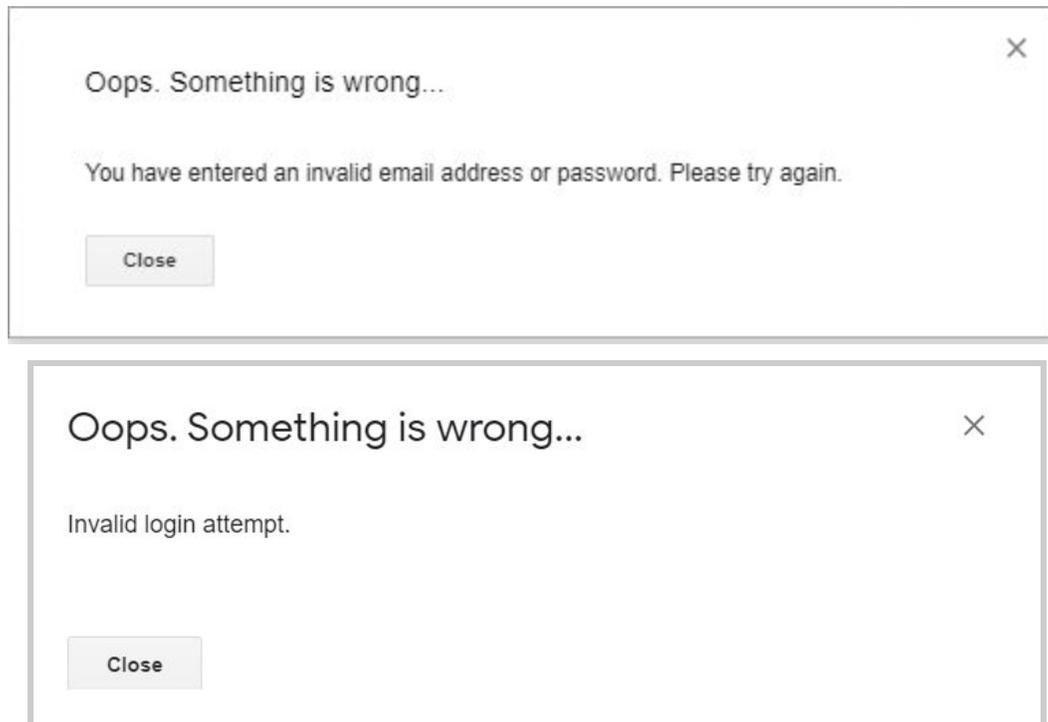
Note: In scheduled mode, every request will override the content of the targeted Tab. Appending the results to the end of the sheet is currently not supported.

Important Note Regarding Concurrency:

- A concurrency error may occur when multiple Google Sheets are scheduled within the same time
- To avoid concurrency errors, schedule the searches to run at different times so there are no conflicts ie) one Google sheet may be scheduled at 2:10PM, and the second would be scheduled at 2:40PM
- The Concurrency is a limitation imposed by Google

Frequently Asked Questions:

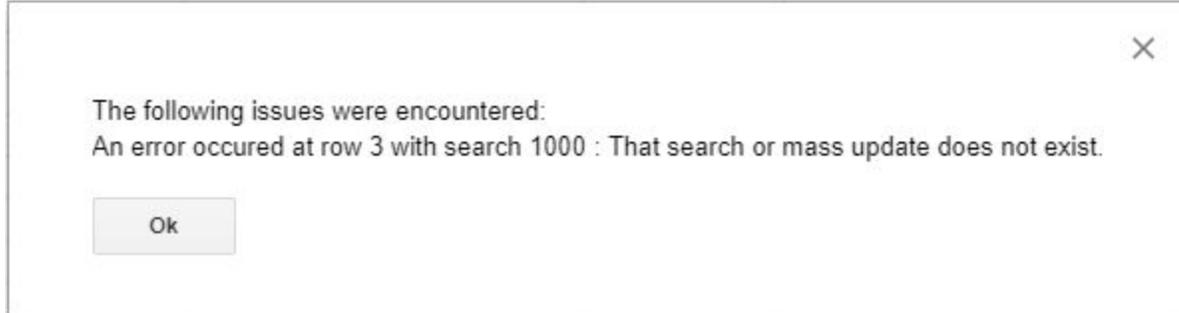
Q: I get an error saying that my email/password is invalid or "Invalid Login attempt". But I'm able to log in to NetSuite with the exact same credentials. Why?



A: This message also can mean multiple things:

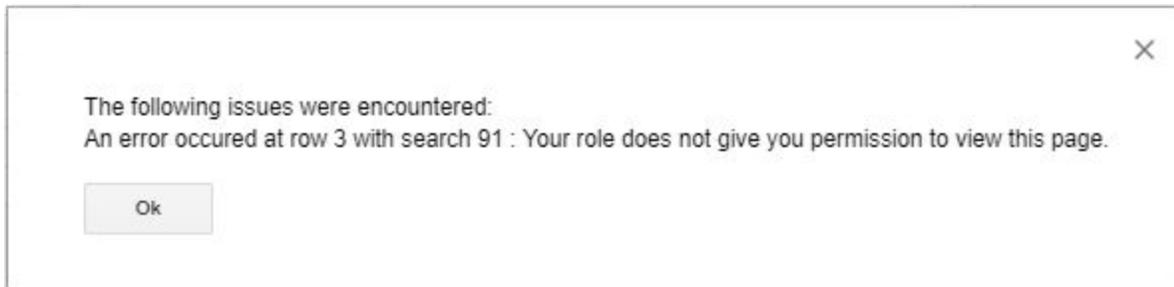
- This may occur to customers who log in to their sandbox using the separate sandbox domain: <https://system.sandbox.netsuite.com>. As all sandboxes are going away from it in their next refresh, there is no plan to support it. Nevertheless, you can always use NetSuite Data Exporter for your production instance.
- If you use User name/Password authentication, that could mean your user name, password, account number or role is incorrect.
- If you use Token Based Authentication that could mean one of the Tokens or the account number is incorrect.
- This could mean you try to access an account no longer active (ex: an expired Sandbox or demo account)

Q: I get the following error message. Why?



A: The search id entered does not exist in the NetSuite instance. Verify the search id in the specified row.

Q: I get the following error message. Why?



A: Verify the role selected:

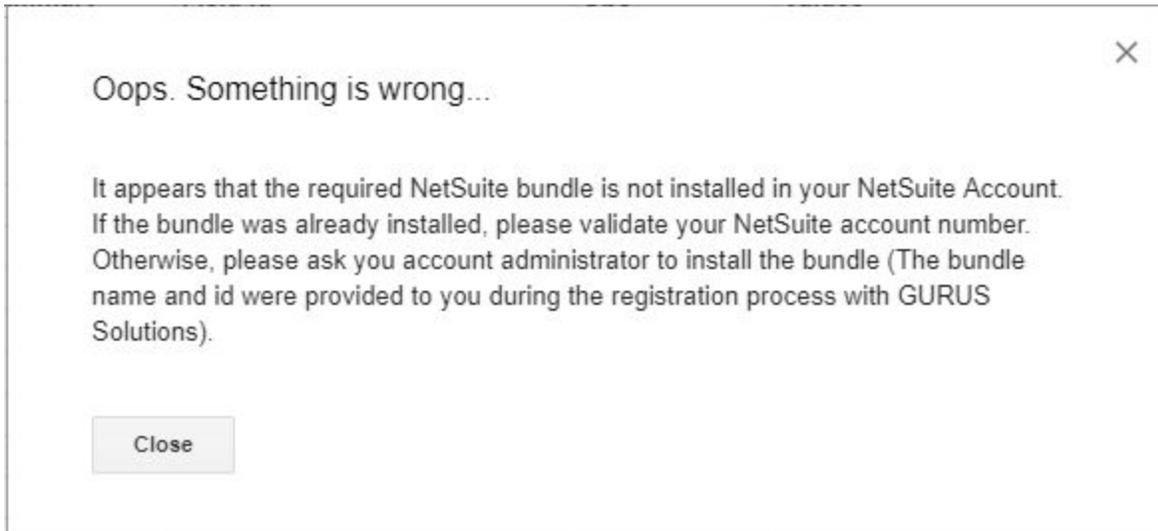
- The role associated with your user or your Token does not have access to the saved search you specified. If this is the case, make sure you set the search as public or that your role or employee record is part of the Audience of the search.
- The role associated with your user or your Token does not have access to the record type of the saved search you specified. If that is the case, make sure your role has access to the specified record type.
- The role associated with your user has Two Factor Authentication Activated. If this is the case, use Token Based Authentication instead.
- The role associated with your user is configured for SAML Single Sign On and cannot be accessed via your normal NetSuite user Name and Password. If that is the case, use Token Based Authentication instead.

Q: I get the following error message. Why?



A: The filter criteria added to the search is invalid. Refer to the NetSuite Record browser to know which fields are available for your search.

Q: I get the following error message. Why?

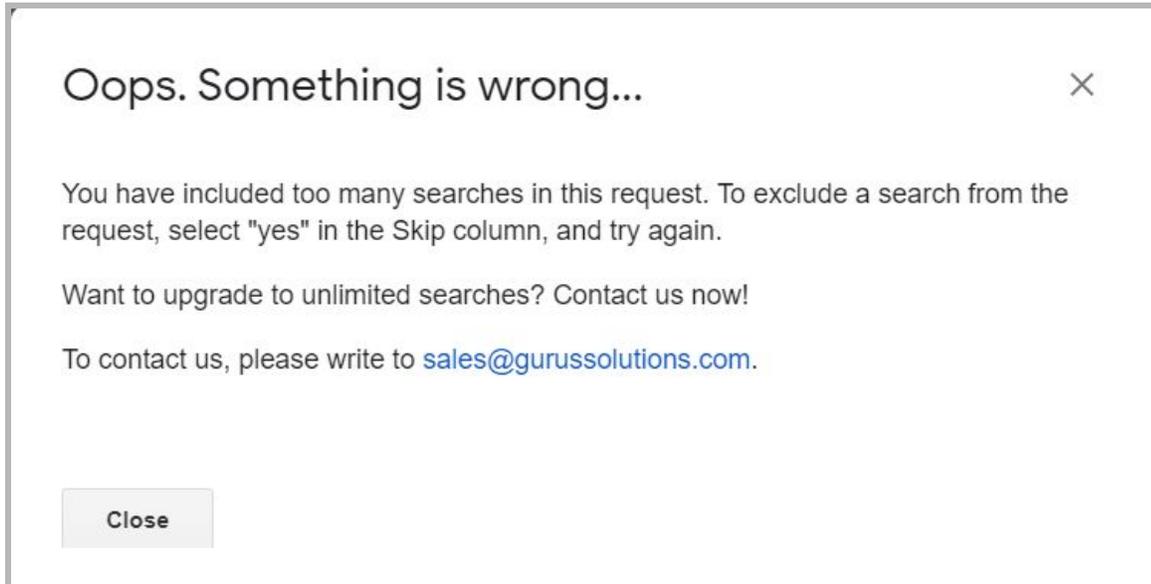


A:

- The required SuiteBundle has not been installed in the NetSuite instance. See section 3 in the Installation Guide for guidance.
- If you cannot install the bundle (you cannot find it or the Install button is not enabled or get the error message below), please contact GURUS Solution and ask that the bundle be shared with you. Make sure you have your NetSuite Account number as it will be necessary for this step.

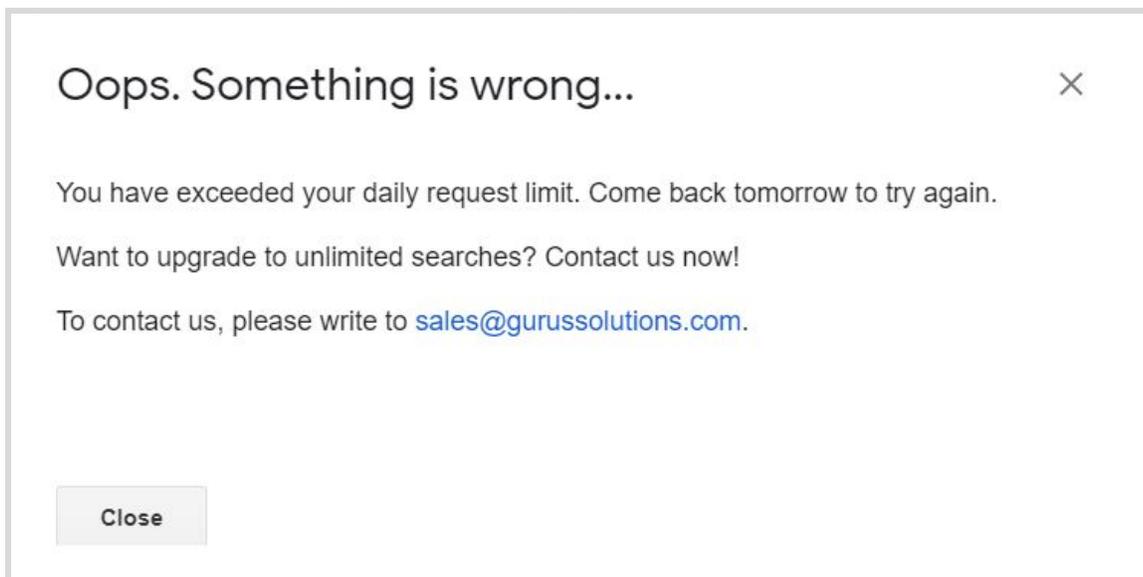


Q: I get the following error message. Why?



A: You are currently using NetSuite Data Exporter with the Limited License which allows you to request 2 saved searches at a time. You may easily exclude the extra searches from the list by selecting “yes” in the Skip column. You can have the unlimited version by purchasing our Data Exporter Advanced Configuration Service. Contact us at sales@gurussolutions.com to know more.

Q: I get the following error message. Why?

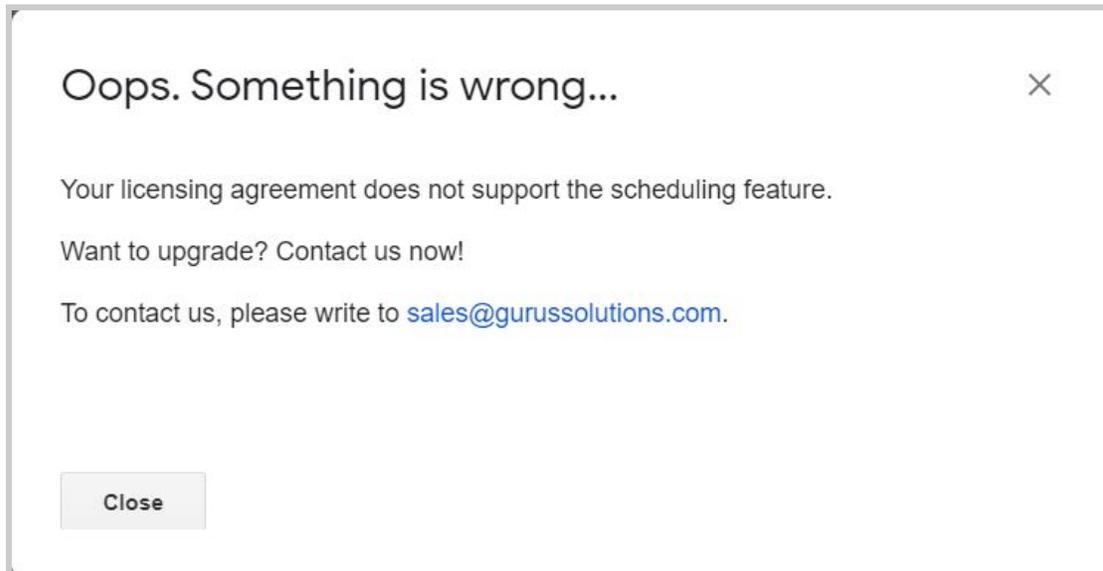


A: You are currently using NetSuite Data Exporter with the Limited License which allows 10 requests per day. You may continue using it on another day. You can have the unlimited version by purchasing our Data Exporter Advanced Configuration Service. Contact us at sales@gurussolutions.com to know more.

Q: I do not see the option to schedule my searches from the Standard Authentication page, is it normal?

A: Yes. This functionality is only available when using Token-Based Authentication.

Q: I get the following message when trying to Set the Schedule, what does it mean?



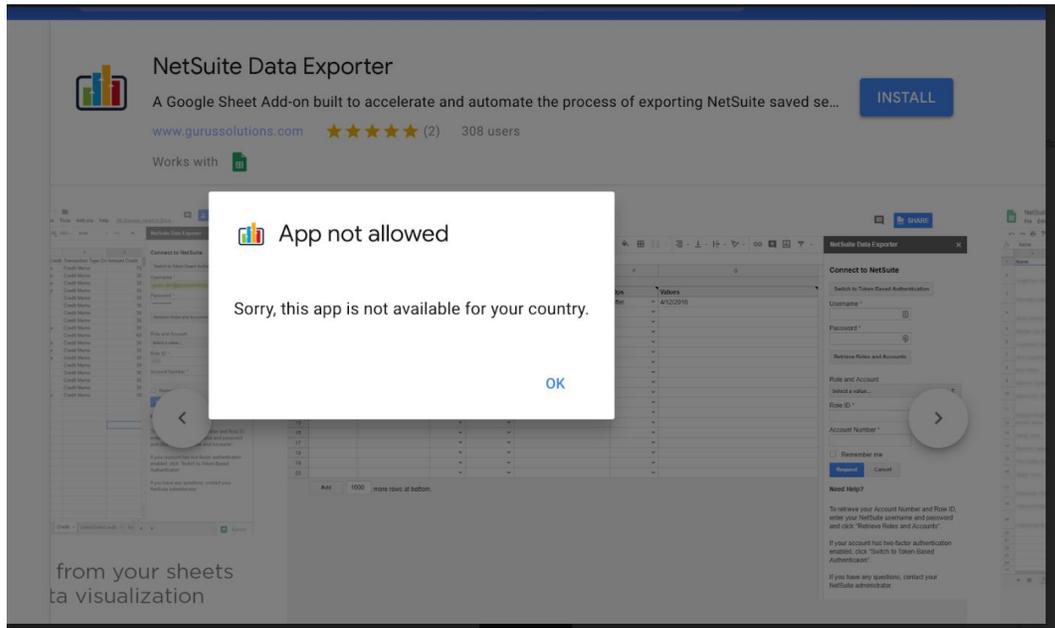
A: The scheduled feature is only available to customers who purchased on Data Exporter Advanced Configuration Service. For more information, contact us at sales@gurussolutions.com.

Q: I received an error message saying the company ID is invalid. What do I need to do?



A: This message indicates that the NetSuite Account number specified is invalid. This happens mostly when trying to use the Data Exporter with a Sandbox account. Make sure your account number is in the format : XXXXXX_SB1 (with an underscore).

Q: I received a message indicating that the app is not available in my country when installing the Data Exporter Add-on



A: The Data Exporter is currently only available in GSuite for customers in the United States and Canada.

Q: I set the schedule of the Data Exporter to run for 12:00 AM, but it ran at 12:26 AM. Is this normal?

A: Yes. Google does not guarantee the exact time the schedule will run. As per Google's documentation: "The time may be slightly randomized — for example, if you create a recurring 9 a.m. trigger, Apps Script chooses a time between 9 a.m. and 10 a.m., then keeps that timing consistent from day to day so that 24 hours elapse before the trigger fires again." You can read more on the Time Based Triggers of Google Apps Script [here](#).

Google and NetSuite Limitations

Even if you have the unlimited version of the Data Exporter, there are still some limitations imposed by the GSuite Quotas and Limitations as well as the NetSuite Governance and Concurrency. Here are some data points to help you calculate the limits.

Google GSuite Limitations

The Data Exporter is limited by the following limitations as documented by Google. They are different based on which Edition your company has. To know which Edition you have, please contact your GSuite Administrator.

<https://developers.google.com/apps-script/guides/services/quotas>

Here are the Features used by the Data Exporter.

- Triggers total runtime: This limitations affects the total processing time of the Data Exporter for the day
- URL Fetch calls: Each request by the Data Exporter will perform 2 URL Fetch calls
- Script runtime: This affects the processing time of the Data Exporter for each request. If you try to download 50 saved searches and each saved search takes 30 seconds to download, this will take approximately 25 minutes to run. If you have GSuite Basic, you will be limited to 6 minutes of execution. You will get an error message after 6 minutes.
- Simultaneous executions: If multiple users use the Data Exporter at the same time.
- URL Fetch response size: This is the maximum size of the response received by NetSuite. If the response size exceeds this limit, you will get an error message.
- Properties read/write: This is the maximum number of properties that can be set or read everyday. Properties are used to save the credentials and are updated and read at each request.

Also not documented here, but there is a connection timeout that will occur if the request takes more than 60 seconds.

This applies for each Saved Search individually. If you have 3 saved searches, and they each take 30 seconds, they will successfully execute.

There is also a limit in the total number of cells you can have in a Google Sheet. According to this support post, you can have a maximum of 5 millions cells and a maximum of 18 278 columns. This includes inside multiple tabs. Once this limit is reached, you will receive an error message:

<https://support.google.com/drive/answer/37603>

NetSuite Governance and Limitations

The Data Exporter is also limited to the governance imposed by SuiteScripts as well as the maximum number of concurrent connections allowed for RESTLets.

All NetSuite instances are limited to the number of concurrent connections external applications can perform. This depends on your NetSuite Tier and the number of SuiteCloud Plus Licenses. If no connection is available for the Data Exporter, you will receive an error message. Here is the SuiteAnswers Article explaining the concurrency limits:

https://netsuite.custhelp.com/app/answers/detail/a_id/86930

The Data Exporter relies on a RESTLet installed on your instance to perform the search. RESTLets have a maximum governance of 5000 units and each batch of 1000 lines of results of the search will cost 10 units. So there is a hard limit of 500 000 lines of results per saved search.

Take note though that a search with 500 000 lines of results will most likely time out on the Google Side before the results can be returned.

RESTLets also have a data size limit of 10 MB, so the total size of each search must be under 10 MBs, including the content of all the fields from the search.