



smbXML Developer's Guide

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smbXML Developer's Guide

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Chapter 1 Introduction

smbXML

Small and Medium Business eXtensible Markup Language (smbXML) was developed to exchange business information between third-party, XML-enabled, small and medium business applications and NetSuite, Inc.

NetSuite integration technologies open the door for integration projects with business applications, both on and offline. Data can be exchanged freely between applications giving businesses access to up-to-date information from all aspects of their operations.

smbXML enables NetSuite customers to export business data from other business applications to their accounts. The customers' accounting and business information is then added to and updated based on the imported documents.



Important: NetSuite's service fees are based upon the volume of activity that a company's users can manually generate, as well as a provision for automated functions. However, automated functions that generate excessive levels of activity may require additional fees to be paid to NetSuite. Please check with your Sales Representative for more information.

Using this technology only requires that customers generate properly formatted smbXML documents.

This guide explains smbXML uploads and should be used as roadmap for creating smbXML documents. Before using NetSuite integration technologies, you should have a basic understanding of XML and your NetSuite product.

In this Guide

In the **smbXML Developer's Guide**, you will find these chapters:

- [Introduction](#) – This chapter is an overview of this book that gives useful information about using this book.
- [smbXML Basics](#) – This chapter introduces the basic concept and terms of smbXML.
- [smbXML Documents](#) – This chapter offers complete instructions for constructing your own smbXML documents.
- [smbXML Examples](#) – This chapter offers some key examples of smbXML documents.
- [Supported Objects](#) – This chapter contains a full list of supported fields for each object and information specific to each field.
- [Appendix](#) – The appendix contains reference information to help you with creating and importing your smbXML documents.

Roles & Permissions

A role is a set of permissions that lets customers, vendors, partners and employees access specific areas of your data.

For example, you can assign the Payroll Manager role to the person who does your payroll. Then, your payroll manager has access to set up and run payroll.

smbXML permissions are only available to users with the Administrator role. Administrators for your account have permission to set XML import preferences and upload XML documents.

You can also choose to customize roles. To create a custom role, an administrator must go to Setup > Manage Roles. With a custom role, you can assign XML permissions to any of your employees without allowing them full administrator access.



Note: Custom roles with XML permissions can upload all records and transactions, even if they can't access the object in your account.

Chapter 2 smbXML Basics

To improve the flow of information across multiple applications, NetSuite offers several integration technologies. These integration technologies are extensible, standards-based, robust, reliable and support data-rich integration.

Third-party developers can use these technologies to integrate their application with NetSuite, allowing them to seamlessly exchange business information.

Utilizing integrated, complementary applications, businesses significantly increase their efficiency by streamlining their business processes and integrating separate islands of information. This saves time and money by minimizing data entry and inaccuracies.

Types of Integration

NetSuite offers two types of integration that utilize smbXML technology.

- **smbXML** – This technology is a straightforward way to utilize the power of smbXML documents. Using smbXML, you can create documents to import multiple records and transactions through the UI.
- **System-to-System** – This technology utilizes smbXML by integrating systems with NetSuite. This automates the data transfer process.

This book focuses on the smbXML aspect of integration technologies. For more information about other forms of integration, see the NetSuite Web Site.

smbXML

smbXML is the standard format for describing business information when performing data exchange with NetSuite.

It was developed to facilitate the exchange of business information between third-party, XML-enabled, small and medium business applications and NetSuite.

XML is the eXtensible Markup Language. It is designed to improve the functionality of the Web by providing more flexible and adaptable information identification.

It is called extensible because it is not a fixed format like HTML (a single, predefined markup language). Instead, XML is actually a metalanguage—a language for describing other languages—which lets you design your own customized markup languages for limitless different types of documents.

smbXML supports both transactional and list-based information, allowing partners to build data-rich, bi-directionally integrated applications.

There are no additional costs to import smbXML documents into NetSuite via the standard user interface. We currently do not provide any tools to assist in debugging the upload process,

with the exception of error messages generated during the import process. Users may setup upload test data, and verify results by examining their accounting data through the standard browser interface.

Currently, you can use smbXML to export and import entity, CRM and item records, and sales and purchase transactions. Future releases of smbXML will expand XML integration with NetSuite.

The data types supported by smbXML, and their use, are defined in the Document Type Definition (DTD) on the NetSuite Web site. Click [here](#) to view the current DTD.

At this time, smbXML technology does not support all features and data sets in NetSuite.

System-to-System

smbXML was originally implemented as an exchange of XML data between NetSuite and customers using flat-file export and import.

System-to-System enables NetSuite integration partners to add, update and query data directly to an integrated account in real time, or in batches, with or without the customer's intervention.

System-to-system integration supports the same data and transactions as the smbXML integration technology. This currently includes entities, items, transactions and CRM records.

Complete details regarding System-to-System data exchange may be found in the *smbXML System-to-System Developer's Guide* and *Single Signon Developer's Guide*.

There are additional costs associated with System-to-System integration. For additional information regarding System-to-System integration with NetSuite, please contact your account manager.

smbXML Terms

Before you begin creating XML documents for NetSuite, there are a few terms you must be familiar with.

DTD

The Document Type Definition, DTD, acts as your blueprint for importing data into your account.

The DTD contains the elements, attributes, entities, and notations used in your XML document. These terms are defined in more depth in the remainder of this section.



Note: The current DTD can be seen on the NetSuite Web site at Partners > Developer's Documentation > Technical Documentation. Click [here](#) to see the current DTD.



Objects

Note: An object is any record that you can import using smbXML.

The list below contains the objects supported for import with smbXML. For more information on the fields supported for import, see [“Supported Objects” on page 45](#).

LIST RECORDS

- Customers
- Employees
- Vendors
- Contacts
- Notes
- Partners
- Accounts
- Vendor Categories
- Customer Categories
- Store Categories
- Job Types
- Payment Methods
- Inventory Items
- Sales Tax Items
- Tax Codes
- Non-inventory Items
 - for Resale
 - for Purchase
 - for Sale
 - Other Charge Items
 - for Resale
 - for Purchase
 - for Sale
- Service Items
 - for Resale
 - for Purchase
 - for Sale
- Discount Items
- Markup Items

- Subtotal Items
- Description Items

CRM RECORDS

- Cases
- Messages
- Events
- Tasks
- Topics
- Solutions

TRANSACTIONS

- Sales Orders
- Cash Sales
- Invoices
- Estimates
- Credit Memos
- Return Authorizations
- Customer Payments
- Journal Entries
- Purchase Orders
- Bills
- Opportunities
- Timecards
- Commissions

Elements



Note: An element is used to enter information for the object you are importing. Each element corresponds to a field on the record or transaction you are importing. If the corresponding field has formatting and size limitations, these limitations also apply to information entered for the element.

For more information on elements and their corresponding field, see [“Supported Objects”](#) on page 45.

Attributes



Note: Attributes are used to apply behaviors or characteristics to individual elements. For example, you can tell NetSuite to overwrite missing fields by setting that attribute at the request element.

For more information about the missing field overwrite attribute, see [“Updating Objects”](#) on page 12.

There are different available attributes for each element. However, not all elements have available attributes. The most common attribute is a handle. A handle attribute is used to assign a handle to an object.

Handles

Handles are unique names you can assign to each object and request. By assigning handles to requests, you can easily track the status of specific imports by handles. Without handles, it would be more difficult to determine which result matches each request.



Note: Assigning handles to objects allows you to easily reference these objects in other records or transactions and in queries. Handles are assigned by adding the handle attribute to the request or object element.

References

References are used to point to an existing NetSuite record in a new import. When you create an object, such as a customer record, you give it a name. Later, you make references to the object using that same name.

You can also use handles to reference objects. A handle is an unique key for a specific object or request. Handles work similarly to name references.

You assign handles when you create objects. Later, you use handles to identify an object of a particular type, regardless of its parent relationship.

In general, we recommend you use handles when integrating with NetSuite. Handles are more precise and robust because they do not rely on any parent hierarchy.

Name reference elements generally end with “Ref”. Handle references end with “Handle”.

For more information on references, see [“smbXML Documents” on page 8](#).

Now that you are familiar with smbXML terms, see [Chapter 3 “smbXML Documents”](#) to learn how to construct smbXML documents.

smbXML Queuing

- **Small Queue:** adds or updates ≤ 1000 or queries with result set ≤ 3000

You can control the order jobs are processed by the order they are imported.

- **Large Queue:** adds or updates > 1000 or queries with result set > 3000 Elapsed time since the last activity for a given company
- Time of the submission
- Size of the import

Chapter 3 smbXML Documents

This chapter offers guidelines for creating your own smbXML documents. The information in the following sections will help you to format your documents properly thus minimizing the s you receive.

Setting Import Preferences



Important: Before you begin importing smbXML documents into your account, you set default values for aspects of your data in the user interface (UI).

When you import smbXML documents into your account, NetSuite respects the preferences and options that you select prior to importing.

For example, when importing an smbXML document that contains sales order information, the import process will create the sales order with the status you selected on the Set Up Accounting page in your account.

To set up your XML import preferences, go to Setup > Integration > Set Up XML Import. Set your import preferences, and click Save.

When smbXML documents contradict an account preference or option, the smbXML upload files override the preferences in the Set Up XML Import screen. If the information is not included in your imports, your records and transactions are imported with the defaults you set in your account. If you change your default preferences, your changes are only applied to new smbXML documents imported into your account. You cannot retroactively adjust your previously imported data.

You can set the following seven importing preferences:

ITEMS

- **Item Income Account** – defines the income account used when an item is sold, for both Income and Other Income account types
- **Assets Accounts** – defines the Inventory Asset account used to record the value of inventory on hand for an item
- **Cost of Goods Sold Account** – defines the Cost of Goods Sold account used when an item is sold
- **Store Tax Item** – defines the default sales tax item used when orders are imported

CASH SALES

- **Cash Sales Account** – defines the bank account used to record the receipt of cash on cash sale transactions

TRANSACTIONS

- **Custom Form** – defines the form used when creating sales orders or cash sales

QUERIES

- **Return Handles in Query** – returns handles in query results if handles are available for the object queried

This preference can be overridden at the query element level.

Data Format

An smbXML document must conform to the up-to-date specifications set by the current DTD. The current DTD can be found on the NetSuite Web site at Partners > Developer's Documentation > Technical Documentation.

The root element must be <smbXML>. It must be followed by one or more <request> elements. A <request> element can have exactly one command element.

Supported Commands



Note: There are three supported commands that can be used with smbXML. These commands are listed below.

- <add> – can be used with any supported objects
If a named item or entity already exists, the import fails because of a unique constraint violation.
- <addOrUpdate> – can be used with items, entities, CRM records, opportunities and timecards
Important: Currently, you cannot update transactions. If a named item or entity already exists, the import replaces or updates the object.
- <query> – all supported objects can be queried with either standard or advanced queries, allowing for the bi-directional flow of information into and out of your account
 - You can search for matches or for records containing a certain string or hierarchy.
 - You can return all records in a specific range.
 - You can search active versus inactive records.
 - You can search for custom field values.For more information on queries, see [“Queries” on page 22](#).
- <get> – can only be used with item availability queries

Add vs. Add or Update

The business logic surrounding the **add** and **addOrUpdate** commands should be studied carefully before constructing smbXML documents. When writing your smbXML documents, consider the following examples when deciding which command you should use. These

examples introduce the concept of name versus handle references. For more information on name and handle references, see page 16.

<add> Command

Case 1 – Adding object by name reference, without conflict

- **Action:** Add object by name ref—name is unique across record type and parent tree.
- **Result:** Adds new record to your account.
- **Reason:** NetSuite assumes that by using name references (as opposed to handles), you are asserting the name is unique. Therefore, an add action by name reference without name conflict succeeds.

Case 2 – Adding object by name reference, with conflict

- **Action:** Add object by name ref—name conflicts across record type and parent tree.
- **Result:** Fails with error.
- **Reason:** NetSuite assumes that by using name references (as opposed to handles), you are asserting that the name is unique. Therefore, NetSuite enforces the name uniqueness and throws an error, instead of adding the record.

Case 3 – Adding object by handle, without conflict

- **Action:** Add object by handle—handle is unique, name is unique across record type and parent tree.
- **Result:** Adds new record.
- **Reason:** Because the handle and name are unique, the add succeeds in creating a new record.

Case 4 – Adding object by handle, with name conflict

- **Action:** Add object by handle—handle is unique, name conflicts across record type and parent tree.
- **Result:** Adds new record with numeric suffix added to the name. One is added to every subsequent record when handles are unique and names conflict.
- **Reason:** NetSuite assumes that by using handle references you are asserting that only the handle is the unique identifier. NetSuite does not assume that the name is unique. Instead, NetSuite adds the record. Then, it adds a suffix to the name to make it unique within NetSuite. Names must be unique in NetSuite.

Case 5 – Adding object by handle, with handle conflict

- **Action:** Add object by handle—handle has conflict.
- **Result:** Fails with error.
- **Reason:** NetSuite assumes that by using handle references you are asserting that the handle is a unique identifier within a record type. NetSuite does not add the record, and throws a unique, constraint violation error.

<addOrUpdate> Command



Important: When using an addOrUpdate command for a Case, Task, Solution or Event record, you must provide either an existing handle or a valid <id> block in order to uniquely specify the record. Otherwise, the following error is thrown:

There is insufficient information to uniquely identify a single record to update.
You may use the add operation to create a new record or the addOrUpdate operation with a reference id block to uniquely identify the record for update.

Case 1 – addOrUpdate object by name reference, without conflict

- **Action:** addOrUpdate object by name ref—name is unique across record type and parent tree.
- **Result:** Adds new record.
- **Reason:** NetSuite assumes that by using name references (as opposed to handles) you are asserting the name is an unique key. Therefore, an addOrUpdate action by name reference without name conflict creates a new record because a match was not found to update.

Case 2 – addOrUpdate object by name reference, with conflict

- **Action:** addOrUpdate object by name ref—name conflicts across record type and parent tree.
- **Result:** Updates existing record.
- **Reason:** NetSuite assumes that by using name references (as opposed to handles) you are asserting the name is an unique key. Therefore, NetSuite assumes the name conflict is a match for the existing record, and updates the existing record. If you were trying to add a transaction, NetSuite would throw a unique constraint violation error.

Case 3 – addOrUpdate object by handle, without conflict

- **Action:** addOrUpdate object by handle—handle is unique, name is unique across record type and parent tree.
- **Result:** Adds new record.
- **Reason:** Because the handle and name are unique, the add succeeds in creating a new record.

Case 4 – addOrUpdate object by handle, with name conflict

- **Action:** addOrUpdate object by handle—handle is unique, name conflicts across record type and parent tree.
- **Result:** Adds new record with numeric suffix added to the name. One is added to every subsequent record when handles are unique and names conflict.
- **Reason:** NetSuite assumes that by using handle references you are asserting that only the handle is the unique identifier. NetSuite does not assume that the name is unique. Instead, NetSuite adds the record. Then, it adds a suffix to the name to make it unique within NetSuite Names must be unique in NetSuite.

Case 5 – addOrUpdate object by handle, with handle conflict

- **Action:** addOrUpdate object by handle—handle has conflict.

- **Result:** Updates existing record.
- **Reason:** NetSuite assumes that by using handle references you are asserting that the handle is a unique identifier within a record type. NetSuite assumes the handle conflict matches an existing record, and then updates the record. If this was an add action for a transaction, NetSuite would throw a unique, constraint violation error.

Updating Objects

Previously, to update objects you had to include all fields in an import—even fields you did not change. Now, the DTD and supporting parser code allow you to update objects by providing just enough information to accurately identify the record and fields to update.

In order to maintain backward compatibility, updating objects by default still require all object fields. However, this can be overridden globally for the import by attribute settings at the <smbxml> element level, or at the individual <request> level.



Note: The attribute is `missingFieldOverwrite`. The default value of this attribute is “true”. When this attribute is **true**, fields omitted during an update **will** be cleared in the NetSuite database.

For example, you update a customer record and include a name reference, e-mail address and phone number. You do not include any other fields. When you import this object, any other fields on the customer’s record are cleared.

When this attribute is **false**, fields omitted during an update **will not** be altered in the database. For example, you update a vendor record and include a name reference, e-mail address and phone number. You do not include any other fields. When you import this object, any fields you did not specify in the import are left as they are on the vendor’s record.

If the attribute is set at the <smbxml> and the <request> level, the <request> level overrides the global setting.

The following example is an `addOrUpdate` request on a customer record using a name reference.

```
<request missingFieldOverwrite=("true" | "false")>
  <addOrUpdate>
    <customer handle="CUST2516">
      <name>Bob Roberts</name>
      <field1></field1>
      <field3></field3>
    </customer>
  </addOrUpdate>
</request>
```

For the above example, the following describes which fields would be overwritten based upon the value of the `missingFieldOverwrite` attribute.

If `missingFieldOverwrite` = “true”:

- <name> – unchanged because this element specifies the record to update
- <field1> – deletes field because empty field tag specifically declared
- <field2> – deletes field because <field2> is omitted and `missingFieldOverwrite` is true
- <field3> – deletes field because empty field tag specifically declared

If missingFieldOverwrite = "false":

- <name> – unchanged because this element specifies the record to update
- <field1> – deletes field because empty field tag specifically declared
- <field2> – unchanged because <field2> omitted and missingFieldOverwrite is false
- <field3> – deletes field because empty field tag specifically declared

The missingFieldOverwrite attribute can be set at the <smbxml> element level or at the individual <request> level.

For example, the following sample uses different missingFieldOverwrite attributes on addOrUpdate requests for two contact records using handle references.

```
<smbxml missingFieldOverwrite="true">
  <request handle="add1">
    <addOrUpdate>
      <contact handle="EN">
        <name>Ellen Nix</name>
        <email>enix@nixandflesock.com</email>
        <phone>(555) 256-7548</phone>
        <notes>Not in office on Mondays</notes>
      </contact>
    </addOrUpdate>
  </request>
  <request handle="add2" missingFieldOverwrite="false">
    <addOrUpdate>
      <contact handle="LM">
        <name>Lucia Marquez</name>
        <email>lmarquez@yahoo.com</email>
        <phone>(888) 555-1234</phone>
        <notes></notes>
      </contact>
    </addOrUpdate>
  </request>
</smbxml>
```

Here, the <smbxml> element defines the missingFieldOverwrite attribute as true for all records that do not specifically contradict the setting.

After this smbXML import, the record assigned to the EN handle appears as follows:

- **Name:** Ellen Nix
- **E-mail:** enix@nixandflesock.com
- **Phone:** (555) 256-7548
- **Notes:** Not in office on Mondays

The other fields on this record are deleted. Because the missingFieldOverwrite attribute is true, any field on the record not included in the import are cleared.

When adding the second record, the missingFieldOverwrite attribute is defined as false. This contradicts the <smbxml> element setting.

The record assigned to the LM handle appears as follows:

- **Name:** Lucia Marquez
- **E-mail:** lmarquez@yahoo.com

- **Phone:** (888) 555-1234
- **Notes:** explicitly deleted by empty tag

The other fields on this record are not changed. Because the `missingFieldOverwrite` attribute is false, any field on the record not included in the import is not changed.

In this example, the `missingFieldOverwrite` attribute values are reversed:

```
<smbxml missingFieldOverwrite="false">
  <request handle="add1">
    <addOrUpdate>
      <contact handle="EN">
        <name>Ellen Nix</name>
        <email>enix@nixandflesock.com</email>
        <phone>(555) 256-7548</phone>
        <notes>Not in office on Mondays</notes>
      </contact>
    </addOrUpdate>
  </request>
  <request handle="add2">
    <addOrUpdate>
      <contact handle="LM" missingFieldOverwrite="true">
        <name>Lucia Marquez</name>
        <email>lmarquez@yahoo.com</email>
        <phone>(888) 555-1234</phone>
        <notes></notes>
      </contact>
    </addOrUpdate>
  </request>
</smbxml>
```

Here, the `<smbxml>` element defines the `missingFieldOverwrite` attribute as false for all records that do not specifically contradict the setting.

After this smbXML import, the record assigned to the EN handle appears as follows:

- **Name:** Ellen Nix
- **E-mail:** enix@nixandflesock.com
- **Phone:** (555) 256-7548
- **Notes:** Not in office on Mondays

The other fields on this record are not changed. Because the `missingFieldOverwrite` attribute is false, any field on the record not included in the import is not changed.

When adding the second record, the `missingFieldOverwrite` attribute is defined as true. This overrides the `<smbxml>` element setting.

The record assigned to the LM handle appears as follows:

- **Name:** Lucia Marquez
- **E-mail:** lmarquez@yahoo.com
- **Phone:** (888) 555-1234
- **Notes:** explicitly deleted by empty tag

The other fields on this record are deleted. Because the `missingFieldOverwrite` attribute is true, any field on the record not included in the import are cleared.



Important: Understanding the implications of the `missingFieldOverwrite` attribute is very important in maintaining your data. When creating your smbXML documents, please be sure the `missingFieldOverwrite` attribute is not set to delete any information that you do not want deleted.

For most operations, NetSuite strongly recommends setting the `missingFieldOverwrite` attribute to false at the `<smbxml>` level. You may then explicitly delete data using empty tags on a case by case basis.

id Block

For CRM records, notes, opportunities and timecards it is important to use the id block feature when updating. Because these records do not require that the title be unique, it may not be possible for NetSuite to uniquely identify the record you want to change.



Important: By using id block, you can identify a record during an update or as an object reference from within another record. If an id block does not point to a single unique object, an error is thrown.

You can use handles or other constraints in the id block. If the handle is known for the record you want to update, you can simply enter the handle because handles are required to be unique.

If you do not know the handle of the object you want to update, you can enter a set of id constraints to point to a single object. The constraints you enter are fields on the record and their values to help identify the record.

An example for a case update is shown below.

Example id Block Using Handle (use when the handle is known):

```
<id>
  <handle>case1274</handle>
</id>
```

Example id Block Using Constraints:

```
<id>
  <idConstraint>
    <name>subject</name>
    <value>The sweater I ordered is the wrong size.</value>
  </idConstraint>
  <idConstraint>
    <name>incidentDate</name>
    <value>10/31/2002</value>
  </idConstraint>
  <idConstraint>
    <name>email</name>
    <value>john.doe@e-mail.com</value>
  </idConstraint>
</id>
```

References



Note: A reference is an object you refer to.

In smbXML, you use references when:

- searching for objects
- making links between objects—for example, listing items on a sales order, associating a customer, vendor or contact with its parent record, specifying a COGS account for an item
- identifying objects as part of a request
- identifying requests—references that uniquely identify requests you’ve made via smbXML (<add>, <addOrUpdate>, <query> and <get>)

With smbXML, you can use two methods for referencing objects—**name** and **handle**.

Name References

Name references identify the name of the target object as one sees it in your account. For example, the name reference for an inventory item would be the same value that was entered in the Item Name/Number field on the item record in your account.

A name reference is referred to in your account as the **sname** of the object. The term **sname** is used because the identifier comes from the field name and the identifier is a string. Throughout the remainder of this book, the name reference for an object will often be referred to as **sname**.

When you create an object, such as a customer record, you give it a name. Later, you make references to the object using that same name. This introduces the concept of uniqueness.

If you want to change the price of an existing item and you use the **sname** to indicate which object to update, the code must be able to uniquely identify the correct inventory item to update based on the **sname**.

Unfortunately, the **sname** is not always enough to identify an object uniquely. You can create objects in your account of the same type, with the same name. However, these objects must have different parent trees.

In the following example, Blue Jeans have different parent trees:

```
Inventory List
Men's Pants
  Levis
  Blue Jeans
  High Sierra
  Blue Jeans
```

In the example, Blue Jeans are two items that share the same **sname**. You can reference the **sname**, Blue Jeans, by providing more information. This is called a hierarchical reference.

Remember that name references are case and space sensitive. For example, **Blue jeans** could not reference an item called **Blue Jeans**. It would refer to a different item.

When you specify a hierarchical reference, you must give all the parents for the referenced object. For example, you have two items called **Blue Jeans** with different parent trees. You want to reference **Blue Jeans** in the parent tree, Men's Jeans > Levis > Blue Jeans.



Important: You cannot reference the correct object without its parent information.

Incorrectly Formed Reference

```
<request>
  <addOrUpdate>
    <inventoryItem>
      <name>Blue Jeans</name>
    </inventoryItem>
  </addOrUpdate>
</request>
```

You must reference the object with its parent information.

Correctly Formed Reference

```
<request>
  <addOrUpdate>
    <inventoryItem>
      <name>Blue Jeans</name>
      <parentRef>
        <parentName>Men's Jeans</parentName>
        <name>Levis</name>
      </parentRef>
    </inventoryItem>
  </addOrUpdate>
</request>
```

To use a name reference to uniquely identify an object in your account, you must know the following pieces of information:

- object type (entity, item, transaction)
- hierarchy or parent tree
- object name

There are some instances in name references where the type of record being referenced also needs to be indicated. For example, when adding a case, you can reference a contact including a parent hierarchy.

It is possible to have both partner and customer records with the same name. In this instance the entity type would also need to be referenced in the parent hierarchy to be sure of the parent record associated with the contact.

The following code illustrates the example above.

Incorrectly Formed Reference

```
<contactRef>
  <parentName>XYZ Manufacturing</parentName>
  <name>Scott Partner</name>
</contactRef>
```

You must reference the object with its parent information.

Correctly Formed Reference

```
<contactRef>
  <parentName type="customer">XYZ Manufacturing</parentName>
  <name>Scott Partner</name>
</contactRef>
```

Name references were implemented in the first phases of smbXML development. These references have some limitations, such as the need to list a references parent records.

Handle References

You can also use handles to reference objects. A handle is an unique key into a specific object or request. Handles work similarly to name references.

You assign handles when you create objects. Later, you use handles to identify an object of a particular type, regardless of its parent relationship.



Note: Handles are available for all supported objects. If you do not assign a handle to an object when you create it, a handle is assigned automatically. Handles are also automatically assigned to all supported objects created through the UI.

You can use a query to determine the handle of an object automatically assigned a handle. For more information on queries, see [“Queries” on page 22](#).

In the following example, an inventory item with the sname **Blue Jeans** is added and given the handle, **bj001**.

To place the item under the parent **Levis**, you specify the parent handle, **levi001**.

```
<request>
  <addOrUpdate>
    <inventoryItem handle="bj001">
      <name>Blue Jeans</name>
      <parentHandle handle="levi001"/>
    </inventoryItem>
  </addOrUpdate>
</request>
```

With handles, you can also add two objects of the same type and parent tree with the same sname.

Consider the following add requests and results:

Using Name References (sname)

- **Request:** Add first item—Men’s Pants > Levis > Blue Jeans using sname, **Blue Jeans**.
Result: Success—Men’s Pants > Levis tree did not have a child item with sname, **Blue Jeans**.
- **Request:** Add second item—Men’s Pants > Levis > Blue Jeans using sname, **Blue Jeans**.
Result: Failure—Men’s Pants > Levis tree already has a child item with sname, **Blue Jeans**.

In this example, two requests were made using name references. The second request failed because the smbXML import engine cannot determine whether its sname is an attempt to add a new, different item than the first, an improperly formed update to the previous object or an unintentional second add. An error is given and the add is not performed.

Using Handle References (sname)

- **Request:** Add first item—Men's Pants > High Sierra > Blue Jeans using handle="bj001".
Result: Success—Men's Pants > High Sierra tree did not have a child item, **Blue Jeans**.
- **Request:** Add second item—Men's Pants > High Sierra > **Blue Jeans** using handle="bj002".
Result: Success—Men's Pants > High Sierra tree already has a child with sname of Blue Jeans.
However, the add was made with a distinct handle. A new child item of High Sierra, **Blue Jeans 1**, will be created with handle="bj002".

In this example, two requests were made using name handle references. The second request was a success because the smbXML import engine could determine that the second add with the same sname was an attempt to add a new, different item than the first. It determined this because a new handle was provided. Subsequent references to High Sierra > Blue Jeans items should be made using handles because all references using the sname Blue Jeans will now refer to the item with handle **bj001**.

Handles must be unique within object types, such as entities, transactions and items. For example, a customer record and a vendor record could not share the same handle because they are both entities. But, a customer record and a cash sale could share the same handle because the customer record is an entity and the cash sale is a transaction.



Note: To use a handle reference to uniquely identify an object in your account, you must know the following pieces of information:

object type (entity, item, transaction)
object handle

In general, we recommend you use handles when integrating with NetSuite. Handles are more precise and robust.

Name reference elements generally end with "Ref". Handle references end with "Handle". For example, the element entityRef is a name reference for an entity record and entityHandle is a handle reference for an entity record.

Object References

Some smbXML elements are references to data that already exists in your account. References may be made with either an object handle or a name reference. If the reference is not found, that particular object fails but all further object processing continues.

Many of the objects described by smbXML have fields that reference other objects. Reference fields differ from data fields. Reference fields act as pointers to other objects in your account, rather than containing independent data themselves.

For example, some data fields are:

- <quantity>100</quantity>
- <amount>20</amount>

- `<name>Lucia Marquez</name>`
- `<email>lmarquez@yahoo.com</email>`
- `<phone>(888) 555-1234</phone>`

These fields store data that is owned by the object that defines them. Reference fields, however, act as pointers from one object to another. An example would be a field on a job record that points to the job's parent customer record.



Important: If you attempt to assign value to a reference field that does not have a corresponding object, an error is generated.

For example, the following cash sale references Clark Koozer's customer record.

```
<request>
  <add>
    <cashSale>
      <tranId>2008</tranId>
      <customerRef>
        <name>Clark Koozer, DDS</name>
      </customerRef>
      ...
    </cashSale>
  </add>
</request>
```

In this example, a cash sale is being added to your account. The customer for this cash sale is Clark Koozer, DDS. A customer record must already exist to add this transaction or the system will generate an error. This cash sale is linked to Koozer's customer record using a reference field, `customerRef`, and a name reference.

Now, here is the same cash sale import. This time it uses handles.

```
<request>
  <add>
    <cashSale handle="S01">
      <tranId>2008</tranId>
      <customerHandle handle="ckoozer001"/>
      ...
    </cashSale>
  </add>
</request>
```

In this example, a cash sale is being added to your account using handles. A customer record with **handle="ckoozer001"** must already exist to add this transaction. If not, the system generates an error.

Making an object reference to a nonexistent object generates an error. If you are certain the object exists, the reference can be made safely.



Note: You can also add an item within the same smbXML document that needs to reference an object prior to using it. In that case, the smbXML document supplies the reference value.

For example, the following portion adds the item **Baseball Bats** to the item database. Then, the item is referenced by a cash sale.

```
<request>
  <addOrUpdate>
    <inventoryItem>
      <name>Baseball Bats</name>
```

```

        <cost>10.95</cost>
        <cogsAccountRef>
          <name>Cost of Goods Sold</name>
        </cogsAccountRef>
        <salesDescription>Cincinnati Slugger</salesDescription>
        <incomeAccountRef>
          <name>Sales</name>
        </incomeAccountRef>
        <salesPrice>17.95</salesPrice>
        <assetAccountRef>
          <name>Inventory Asset</name>
        </assetAccountRef>
        <quantityOnHand>100</quantityOnHand>
        <totalValue>1095.00</totalValue>
        <reorderPoint>48</reorderPoint>
        <isTaxable>true</isTaxable>
      </inventoryItem>
    </addOrUpdate>
  </request>

  <request>
    <add>
      <cashSale>
        ...
        <itemLine>
          <itemRef>Baseball Bats</itemRef>
          <quantity>10</quantity>
          <description>Boston slugger</description>
          <salesPrice>7.95</salesPrice>
          <amount>79.50</amount>
          <isTaxable>true</isTaxable>
        </itemLine>
        ...
      </cashSale>
    </add>
  </request>

```

When an item is defined within an smbXML document and referenced in a cashSale request, the information provided at the time of import overwrites fields that default from the item record.

For a table that lists the available references and the objects they apply to, see page X in the Appendix.

Adding Custom Fields

When importing records and transactions, you can also include information for your custom fields. There is a specific way to format this information to ensure that your custom fields are filled in properly.

The element <customFieldValue> is used to populate your custom fields with data. In addition to this element you must also include the name attribute to identify which custom field the information is intended for.



Note: If you are entering information for a Multiple Select field, you can also include a delimiter attribute to specify how your selections will be separated. If you do not include a delimiter, a comma is used by default.

Below are examples of adding custom field information to your records and transactions.

```
<customFieldValue name="Delivery Notes">Please leave all packages at the back door.</customFieldValue>  
<customFieldValue name="Authorized Signers" delimiter=";">Michael Flanagan;Tamara Burch;Samantha Puckett</customFieldValue>
```

Queries

Queries allow you to quickly search for the records and transaction you need to work with. There are two kinds of queries—standard and advanced. Standard queries are used for list records and advanced queries are used for transactions, items. You can also use queries to check item availability, determine object handles and apply specific constraints to your searches. When performing a query, the response file contains the results of your query.

Preferences

You can add a list of preferences to the beginning of your query requests to affect how the results of your queries look when they are returned. All of these elements are optional.

The following elements can be used in individual query requests:

- **preferences** – This element is used to begin a list of preferences to be applied to an individual query request.
- **returnHandles** – This element records a true or false value only. When this preference is set to true, all record handles are returned.
- **addressFormat** – This records a freeFormText or separateFields value only. When this preference is set to freeFormText, the address information is returned in a single text field. When it is set to separateFields, each part of the address is returned in a separate field.

Standard Queries

You can use a standard query to find the list records you need.

When querying records, you can search for objects by type and name. You can also set constraints to limit the responses you get to your search.

For example:

```
<listQuery>  
  <listType>vendor</listType>  
  <constraints>  
    <match exact="true">John's Business</match>  
  </constraints>  
</listQuery>
```

The `<query>` command returns all records and fields available for import with smbXML, including all custom field values for the records that match the name, hierarchy and constraints provided.

Standard queries are available for transactions only to return handles.

Below is a list of the object types available for standard queries and the valid listType values associated with each object.

Object	listType Value
Customers	customer
Accounts	account
Vendors	vendor
Employees	employee
Contacts	contact
Partners	partner
Tasks	task
Events	event
Cases	case
Topics	topic
Solutions	solution
Inventory Items	inventoryItem
Non-inventory Items	nonInventoryResaleItem nonInventorySaleItem nonInventoryPurchaseItem
Other Charge Items	otherChargeResaleItem otherChargeSaleItem otherChargePurchaseItem
Service Items	serviceResaleItem serviceSaleItem servicePurchaseItem
Sales Tax Items	salesTaxItem
Discount Items	discountItem
Markup Items	markupItem
Subtotal Items	subtotalItem
Description Items	descriptionItem
Store Categories	storeCategory
Media Items	mediaItem
Transaction handles	salesOrder cashSale invoice estimate creditMemo returnAuthorization customerPayment journalEntry purchaseOrder bill

There are three attributes that can be used when querying records.

- **exact** – This attribute can be set to true or false and tells the system if an exact match to the search criteria is required.
- **first** – This attribute is used in conjunction with the exact and last attributes. You can enter a value for the first attribute and the system will query for names that occur after the value entered. Depending on the setting of the exact attribute, the system will match the name exactly or match the name partially.
- **last** – This attribute is used in conjunction with the exact and first attributes. You can enter a value for the last attribute and the system will query for names that occur before the value entered. Depending on the setting of the exact attribute, the system will match the name exactly or match the name partially.

The examples below help to explain using these attributes.

Case 1– exactly match a customer named Lina's Dance Studio

```
<smbxml>
  <request>
    <query>
      <listType>customer</listType>
      <constraints>
        <match exact="true">
          <name>Lina's Dance Studio</name>
        </match>
      </constraints>
    </query>
  </request>
</smbxml>
```

Case 2 – all customers with a name in between two values

```
<smbxml>
  <request>
    <query>
      <listType>customer</listType>
      <constraints>
        <match exact="false" first="Lina's Dance Studio" last="XYZ Company">
          <name/>
        </match>
      </constraints>
    </query>
  </request>
</smbxml>
```

Case 3 – all customers with a name containing Dance

```
<smbxml>
  <request>
    <query>
      <listType>customer</listType>
      <constraints>
        <match exact="false">
          <name>Dance</name>
        </match>
      </constraints>
    </query>
  </request>
</smbxml>
```

Advanced Queries

Advanced queries allow you to search some records and transactions by multiple fields. This allows you to return more precise search results from queries.



Note: Advanced queries should return all of the information regarding the object that is available for import with smbXML. You can use advanced queries to query objects by type. You can also add constraints to search multiple fields. The fields available to query are determined by the type of object you are searching.

You can use advanced queries for the following objects only:

- Customers
- Vendors
- Employees
- Contacts
- Partners
- Items
- Cash Sales
- Sales Orders
- Invoices
- Customer Payments
- Return Authorizations
- Credit Memos
- Estimates
- Journal Entries
- Purchase Orders
- Opportunities
- Bills
- Cases
- Events
- Tasks



Note: Each object has certain constraints that can be used to limit your query. These constraints typically refer to a field on the transaction or record. However, they can also refer to other aspects of the object, such as a date range.

For tables of the available constraints for advanced queries, see [“Advanced Query Constraints” on page 136](#).

For an example of an advanced query, see [“Advanced Query” on page 44](#).

Querying Item Availability

By specifying a name or handle, item availability queries return the quantity of that item available to sell.

Querying item availability is defined as:

$[\text{quantity available}] = [\text{quantity on hand}] - [\text{quantity committed on approved sales orders}]$

This is the default definition for smbXML. However, the quantity available may be modified to take into account:

- quantities committed on **unapproved** sales orders
- quantities on order, both **approved** (purchase orders) and **unapproved** (purchase requests)
- multi-location inventory

This is accomplished through the inclusion of the following optional tags in the item availability query:

- deductUnapprovedSalesOrders?
- addPurchaseOrders?
- addPurchaseRequests?
- locationRef?

Item availability is fully defined, with the optional elements in italics, as:

$[\text{quantity available (at a given location)}] = [\text{quantity on hand}] +$
 $[\text{quantity on purchase requests}] + [\text{quantity on purchase orders}] -$
 $[\text{quantity committed on approved sales orders}] - [\text{quantity committed on unapproved sales orders}]$

Including the <location> element restricts all other quantity definitions to that location.

Item Availability Request Example

```
<smbxml>
  <request handle="8/10 get query">
    <get>
      <itemAvailabilityRequest>
        <itemRef>
          <parentName>Beverages</parentName>
          <parentName>Juice</parentName>
          <name>Apple</name>
        </itemRef>
        <addPurchaseOrders>true</addPurchaseOrders>
        <addPurchaseRequests>true</addPurchaseRequests>
        <deductUnapprovedSalesOrders>true</deductUnapprovedSalesOrders>
        <location>2955 Campus Drive, San Mateo</location>
      </itemAvailabilityRequest>
    </get>
  </request>
</smbxml>
```

Item Availability Response Example



Note: Item availability queries can be very helpful in determining your available stock through integration, giving you accurate information more frequently.

```
<smbxml>
  <response requestHandle="8/10 get query" requestType="get">
    <itemAvailabilityResponse>
      <itemRef>
        <parentName>Beverages</parentName>
        <parentName>Juice</parentName>
        <name>Apple</name>
      </itemRef>
      <quantity>10</quantity>
    </itemAvailabilityResponse>
  </response>
</smbxml>
```

Transaction Status Queries

Transaction status queries return all transactions that fit the transaction type and status specified.

The tranStatus element in transaction imports is only used for querying transactions. This element cannot be imported with new transactions. The following transactions are available for status queries:

- salesOrder
- cashSale
- invoice
- estimate
- returnAuthorization
- customerPayment
- journalEntry
- purchaseOrder
- bill

The example listed below shows a query for sales orders pending fulfillment.

```
<smbxml>
  <request>
    <query>
      <listType>salesOrder</listType>
      <constraints>
        <constraint>
          <name>tranStatus</name>
          <operator>equals</operator>
          <value>pendingFulfillment</value>
        </constraint>
      </constraints>
    </query>
  </request>
</smbxml>
```

The table below lists the available values for the tranStatus element and their corresponding statuses.

Transaction Type	Value	Status
Sales Order	pendingApproval	Pending Approval
	pendingFulfillment	Pending Fulfillment
	cancelled	Cancelled
	partiallyFulfilled	Partially Fulfilled
	pendingBillingPartFulfilled	Pending Billing/Partially Fulfilled
	pendingBilling	Pending Billing
	fullyBilled	Billed
	closed	Closed
Return Authorization	pendingApproval	Pending Approval
	pendingReceipt	Pending Receipt
	cancelled	Cancelled
	partiallyReceived	Partially Received
	pendingRefundPartReceived	Pending Refund/Partially Received
	pendingRefund	Pending Refund
	refunded	Refunded
	closed	Closed
Purchase Order	pendingSupApproval	Pending Supervisor Approval
	pendingReceipt	Pending Receipt
	rejectedBySup	Rejected by Supervisor
	partiallyReceived	Partially Received
	pendingBillPartReceived	Pending Billing/Partially Received
	pendingBilling	Pending Bill
	fullyBilled	Fully Billed
Journal Entry	pendingApproval	Pending Approval
	approved	Approved for Posting
Cash Sale	unapprovedPayment	Unapproved Payment
	notDeposited	Not Deposited
	deposited	Deposited
Customer Payment	unapprovedPayment	Unapproved Payment
	notDeposited	Not Deposited
	deposited	Deposited
Estimate	open	Open
	processed	Processed
	expired	Expired
Invoice	open	Open
	paidInFull	Paid In Full
Bill	open	Open
	paidInFull	Paid In Full

Uploading an smbXML Document

In addition to integrating other programs with NetSuite, you can also manually upload smbXML documents through the user interface. This allows you to upload records and transactions in bulk without integrating a system with NetSuite.



Note: To import smbXML information, set any preferences for the import at Setup > Import/Export > Set Up XML Import. If your smbXML document contradicts one of the default properties, the smbXML document overrides the default properties for that import.

Then, prepare an smbXML document according to the current DTD. The current DTD can be seen on the NetSuite Web site at Partners > Developer's Documentation > Technical Documentation. Click [here](#) to see the current DTD.

To upload an smbXML document:

1. Click the Transactions tab.
2. On the Transactions tab, under the Other heading, click Submit XML Document.
3. Click the Browse button.
4. Locate and select your XML file.
5. Click Open.
6. In the XML Upload Name field, enter a name to identify this import. This name appears on the smbXML Import status page.
7. Click Submit.

Your file will now begin to import and the status page appears.

Home Transactions Lists Reports Setup Support Q&A Transactions > SmbXml Imports > Wolfe Electronics - B Wolfe (Administrator)						
SmbXml Imports Add To Shortcuts						
Job Id	Date	Name	Status	Percent Complete	Message	smbXml Response
27	09/19/2003 09:20 AM	SmbXML Import	FINISHED	100%	Import complete with 1 error	Xml Response
28	09/19/2003 09:22 AM	SmbXML Import	FINISHED	100%	Import complete with 0 error	Xml Response
29	09/19/2003 09:29 AM	SmbXML Import	FINISHED	100%	Import complete with 0 error	Xml Response
30	09/19/2003 09:39 AM	SmbXML Import	FINISHED	100%	Import complete with 1 error	Xml Response
31	09/19/2003 09:40 AM	SmbXML Import	FINISHED	100%	Import complete with 0 error	Xml Response
32	09/19/2003 09:41 AM	SmbXML Import	FINISHED	100%	Import complete with 0 error	Xml Response
From 9/19/2003 To 9/19/2003 Total Found: 6 Refresh						

The status page lists all of your current and previous smbXML imports for the selected date range. Click Refresh to update the statuses of each import. When the import is complete, a message appears in the message column that indicates the import is complete and if it contained any errors.

Once your import is complete, click XML Response in the smbXML Response column to download the response file. You can choose to open or save the response file. When you decide to open the file, we suggest you use a simple text editor, such as WordPad, to view this file.

Reading the Response File

The response file downloaded after an smbXML import is a useful tool for verifying your import and determining the source of any errors.



Note: When importing a query, the response file is used to return the results of your query.

Below is an example of a query response file for a customer query:

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE smbxml SYSTEM "http://www.netledger.com/xml/dtd/smb_4_05.dtd">
<smbxml>
  <response requestHandle="query1" requestType="query">
    <customer>
      <entityId>Chess Art Gallery</entityId>
      <categoryRef>
        <name>Corporate</name>
      </categoryRef>
      <salesRepRef>
        <name>Mark Grogan</name>
      </salesRepRef>
      <contactRef>
        <parentName>Chess Art Gallery</parentName>
        <name>Baron Chess</name>
      </contactRef>
      <email>chess@chessart.com</email>
      <isEmailPDF>false</isEmailPDF>
      <isEmailHTML>false</isEmailHTML>
      <phone>831-555-5229</phone>
      <fax>831-555-5230</fax>
      <termsRef>
        <name>Net 30</name>
      </termsRef>
      <priceLevelRef>
        <name>Corporate Discount Price</name>
      </priceLevelRef>
      <currencyRef>
        <name>U.S. dollar</name>
      </currencyRef>
      <isTaxable>true</isTaxable>
      <isInactive>false</isInactive>
      <status>CUSTOMER-Closed Won</status>
      <openingBalance>0</openingBalance>
      <loginAccess>false</loginAccess>
      <unsubscribe>false</unsubscribe>
      <addressList>
        <addressLine>
          <addressName>Shipping Address</addressName>
          <defaultShipping>true</defaultShipping>
          <addressText>Chess Art Gallery 150 N Ocean Dr Monterey CA 93940</addressText>
        </addressLine>
        <addressLine>
          <addressName>Billing Address</addressName>
          <line1>150 N Ocean Dr</line1>
          <city>Monterey</city>
          <state>CA</state>
          <zipCode>93940</zipCode>
          <phone>831-555-5229</phone>
          <defaultBilling>true</defaultBilling>
          <addressText>Chess Art Gallery 150 N Ocean Dr Monterey CA 93940</addressText>
        </addressLine>
      </addressList>
    </customer>
  </response>
</smbxml>
```

```

        </addressLine>
    </addressList>
</customer>
</response>
</smbxml>

```

As you can see, the query response lists all fields available for import with smbXML for the records that match the query constraints. If there had been multiple records that matched this query, the response file would show all matching records and their corresponding fields.



Note: When adding or updating records and transactions, the response file is used to indicate a successful import and list any errors that may have occurred.

Below is an example of an add response file for a transaction:

```

<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE smbxml SYSTEM "http://www.netleger.com/xml/dtd/smb_4_05.dtd">
<smbxml>
  <response requestHandle="REQ1" requestType="addOrUpdate">
    <ack>successful</ack>
  </response>
  <response requestHandle="REQ2" requestType="addOrUpdate">
    <ack>successful</ack>
  </response>
  <response requestHandle="REQ3" requestType="addOrUpdate">
    <ack>successful</ack>
  </response>
  <response requestHandle="REQ4" requestType="addOrUpdate">
    <ack>successful</ack>
  </response>
  <response requestHandle="REQ5" requestType="addOrUpdate">
    <ack>successful</ack>
  </response>
  <response requestHandle="REQ6" requestType="add">
    <error>Non-existent or invalid reference <postingPeriodRef>
    <name>
      Nov 2002</name> </postingPeriodRef>
    </error>
  </response>
</smbxml>

```

As you can see, the addOrUpdate response file lists each request in order. Assigning handles to each request makes reading the response file easier.

Now that you can create and upload smbXML documents, click [Chapter 4](#) to see some smbXML import examples.

Chapter 4 smbXML Examples

This chapter includes a sample of some smbXML imports that you can try in your account. Each import is as self-contained as possible. The smbXML documents contain all referenced objects available for smbXML import. The objects that are not available for smbXML import are noted.

For objects that are not available for import, you must create the referenced object through the UI prior to importing. If this is not done, you will receive an error.

The examples presented here, are intended to be a simple representation of all available elements. For more thorough examples, including an explanation for each element, see our Web Site at www.netsuite.com. Click [here](#) to see a list of the available detailed examples.

Inventory Item

Inventory items are items that you purchase, sell and maintain a stock of. The example below represents an inventory item record import. The example lists all available elements with the assumption that optional features are being utilized.

Depending on the NetSuite product you subscribe to and the features you have enabled, you may or may not receive an error when importing this particular example as it appears here.



Important: This example is intended only as a guide for creating your own smbXML documents. To test this example, highlight the XML below and copy the text into a text or XML editor. Save this file on your computer. Then, upload the file into your account at Transactions > Other > Import XML Document.

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE smbxml SYSTEM "http://www.netledger.com/xml/dtd/smb_4_11.dtd">
<smbxml missingFieldOverwrite="false">
  <request>
    <addOrUpdate>
      <inventoryItem handle="INVT1325">
        <name>Blank Media</name>
      </inventoryItem>
    </addOrUpdate>
  </request>
  <request>
    <addOrUpdate>
      <account handle="COGS4">
        <accountTypeRef>
          <name>Cost of Goods Sold</name>
        </accountTypeRef>
        <name>COGS</name>
      </account>
    </addOrUpdate>
  </request>
  <request>
    <addOrUpdate>
      <account handle="INCM05">
        <accountTypeRef>
```

```

        <name>Income</name>
      </accountTypeRef>
      <name>Blank Media Sales</name>
    </account>
  </addOrUpdate>
</request>
<request>
  <addOrUpdate>
    <account handle="ASST06">
      <accountTypeRef>
        <name>Other Asset</name>
      </accountTypeRef>
      <name>Blank Media Asset</name>
    </account>
  </addOrUpdate>
</request>
<request>
  <addOrUpdate>
    <vendor handle="VEND1212">
      <entityId>American Media</entityId>
    </vendor>
  </addOrUpdate>
</request>
<request>
  <addOrUpdate>
    <storeCategory handle="CAT1565">
      <name>Peripherals</name>
      <parentRef>
        <name>Catalog</name>
      </parentRef>
    </storeCategory>
  </addOrUpdate>
</request>
<request>
  <addOrUpdate>
    <storeCategory handle="CAT4786">
      <name>Drives and Storage Media</name>
      <parentRef>
        <parentName>Catalog</parentName>
        <name>Peripherals</name>
      </parentRef>
    </storeCategory>
  </addOrUpdate>
</request>
<request>
  <addOrUpdate>
    <inventoryItem handle="INVT1444">
      <name>CD-R 100-pack</name>
      <displayName>CD-R 100-pack Bundle</displayName>
      <vendorName>CDRW0000-100</vendorName>
      <parentHandle handle="INVT1325"/>
      <isOnline>true</isOnline>
      <purchaseDescription>80 min 700 MB CD-R, Pack of 100</
purchaseDescription>
      <cost>9.95</cost>
      <cogsAccountRef>
        <name>COGS</name>
      </cogsAccountRef>
      <vendorHandle handle="VEND1212"/>
      <salesDescription>80 minute 700 MB CD-R, Pack of 100</salesDescription>
      <incomeAccountRef>
        <name>Blank Media Sales</name>
      </incomeAccountRef>
      <itemPriceList>

```

```
<itemPriceLine>
  <itemPriceTypeRef>
    <name>Base Price</name>
    This price level must be created in the UI.
  </itemPriceTypeRef>
  <currencyRef>
    <name>U.S. dollar</name>
    This currency record must be created in the UI.
  </currencyRef>
  <itemPrice>25.95</itemPrice>
</itemPriceLine>
<itemPriceLine>
  <itemPriceTypeRef>
    <name>Alternate Price 1</name>
    This price level must be created in the UI.
  </itemPriceTypeRef>
  <currencyRef>
    <name>British pound</name>
    This currency record must be created in the UI.
  </currencyRef>
  <itemPrice>35.25</itemPrice>
</itemPriceLine>
</itemPriceList>
<assetAccountRef>
  <name>Blank Media Asset</name>
</assetAccountRef>
<itemLocationList>
  <itemLocationLine>
    <locationRef>
      <name>Warehouse 1</name>
      This location record must be created in the UI.
    </locationRef>
    <quantityOnHand>50</quantityOnHand>
    <reorderPoint>10</reorderPoint>
  </itemLocationLine>
  <itemLocationLine>
    <locationRef>
      <name>Warehouse 2</name>
      This location record must be created in the UI.
    </locationRef>
    <quantityOnHand>75</quantityOnHand>
    <reorderPoint>10</reorderPoint>
  </itemLocationLine>
</itemLocationList>
<shippingCost>3.95</shippingCost>
<weight>16.5</weight>
<weightUnitRef>
  <name>oz</name>
  These are standard measurements and cannot be created in the UI
  or via smbXML.
</weightUnitRef>
<isTaxable>true</isTaxable>
<isInactive>false</isInactive>
<offerSupport>true</offerSupport>
<storeDisplayName>CD-R 100 Bundle</storeDisplayName>
<storeCategoryList>
  <storeCategoryRef>
    <parentName>Catalog</parentName>
    <parentName>Peripherals</parentName>
    <name>Drives and Storage Media</name>
  </storeCategoryRef>
</storeCategoryList>
<storeDescription>80 minute 700 MB CD-R, Pack of 100</storeDescription>
<storeDisplayThumbnailRef>
```

```

        <name>cd08.jpg</name>
        This media item must be uploaded through the UI.
    </storeDisplayThumbnailRef>
    <storeDetailedDescription>80 minute 700 MB CD-R, Pack of 100&#xD;
    Includes cases!
    </storeDetailedDescription>
    <storeDisplayImageRef>
        <name>cd08a.jpg</name>
        This media item must be uploaded through the UI.
    </storeDisplayImageRef>
    <onSpecial>false</onSpecial>
    <specialsDescription>On Sale! Free Shipping!</specialsDescription>
    <isFeatured>false</isFeatured>
    <featuredDescription>Item of the Week!</featuredDescription>
</inventoryItem>
</addOrUpdate>
</request>
</smbxml>

```

Customer

Customer are people or companies that purchase goods and services from your business. The example below represents a customer record import. The example lists all available elements with the assumption that optional features are being utilized.

Depending on the NetSuite product you subscribe to and the features you have enabled, you may or may not receive an error when importing this particular example as it appears here.



Important: This example is intended only as a guide for creating your own smbXML documents. To test this example, highlight the XML below and copy the text into a text or XML editor. Save this file on your computer. Then, upload the file into your account at Transactions > Other > Import XML Document.

```

<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE smbxml SYSTEM "http://www.netledger.com/xml/dtd/smb_4_11.dtd">
<smbxml missingFieldOverwrite="false">
    <request>
        <addOrUpdate>
            <employee handle="EMP0001">
                <entityId>Tom Barker</entityId>
                <isSalesRep>true</isSalesRep>
            </employee>
        </addOrUpdate>
    </request>
    <request>
        <addOrUpdate>
            <contact handle="CONT0001">
                <entityId>Jane Hamill</entityId>
            </contact>
        </addOrUpdate>
    </request>
    <request>
        <addOrUpdate>
            <contact handle="CONT0002">
                <entityId>Campbell Smith</entityId>
            </contact>
        </addOrUpdate>
    </request>
    <request>
        <addOrUpdate>
            <vendor handle="VEND0001">

```



```
        <entityId>CA Department of Revenue</entityId>
    </vendor>
</addOrUpdate>
</request>
<request>
    <addOrUpdate>
        <salesTaxItem handle="TAX0001">
            <name>Ocala County</name>
            <taxAgencyHandle handle="VEND0001"/>
        </salesTaxItem>
    </addOrUpdate>
</request>
<request>
    <add>
        <otherList>
            <type>customer category</type>
            <name>Corporate</name>
        </otherList>
    </add>
</request>
<request>
    <addOrUpdate>
        <partner handle="PART0001">
            <entityId>Sam's Bait</entityId>
            <partnerCode>SABAIT</partnerCode>
        </partner>
    </addOrUpdate>
</request>
<request>
    <addOrUpdate>
        <customer handle="CUST0001">
            <entityId>John Doe</entityId>
            <companyName>John's Handy Mart</companyName>
            <categoryRef>
                <name>Corporate</name>
            </categoryRef>
            <salesRepHandle handle="EMP0001"/>
            <contactHandle handle="CONT0001"/>
            <email>jdoe@handymart.com</email>
            <isEmailPDF>false</isEmailPDF>
            <isEmailHTML>true</isEmailHTML>
            <phone>555-555-1111</phone>
            <fax>555-555-1212</fax>
            <altPhone>555-555-1313</altPhone>
            <altContactHandle handle="CONT0002"/>
            <comments>This is an example of a comment.&#xD;This sentence will be on a
                new line.
            </comments>
            <accountNumber>12345798</accountNumber>
            <termsRef>
                <name>Net 15</name>
                Terms must be created in the UI.
            </termsRef>
            <creditLimit>15000</creditLimit>
            <resaleNumber>FG1245</resaleNumber>
            <priceLevelRef>
                <name>Corporate</name>
                This price level must be created in the UI.
            </priceLevelRef>
            <currencyRef>
                <name>U.S. dollar</name>
                This currency record must be created in the UI.
            </currencyRef>
            <isTaxable>true</isTaxable>
        </customer>
    </addOrUpdate>
</request>
</request>
```

```
<taxItemHandle handle="TAX0001"/>
<isInactive>false</isInactive>
<status>CUSTOMER-Closed Won</status>
<territoryRef>
  <name>Default Round-Robin</name>
  This sales territory must be created in the UI.
</territoryRef>
<leadSourceRef>
  <name>Ad</name>
  This lead source must be created in the UI.
</leadSourceRef>
<partnerRef>
  <name>Sam's Bait</name>
</partnerRef>
<startDate>06/03/97</startDate>
<endDate>04/25/10</endDate>
<reminderDays>5</reminderDays>
<openingBalance>2500</openingBalance>
<openingBalanceDate>07/25/97</openingBalanceDate>
<loginAccess>true</loginAccess>
<sendEmail>false</sendEmail>
<password>jdoe01</password>
<unsubscribe>false</unsubscribe>
<addressList>
  <addressLine>
    <addressName>Work</addressName>
    <attention>J. Doe</attention>
    <addressee>John's Handy Mart</addressee>
    <line1>123 Main Street</line1>
    <line2>Box 423</line2>
    <city>Palo Alto</city>
    <state>CA</state>
    <zipCode>94404</zipCode>
    <country>US</country>
    <phone>555-555-1111</phone>
    <defaultBilling>true</defaultBilling>
    <defaultShipping>false</defaultShipping>
  </addressLine>
  <addressLine>
    <addressName>Warehouse 1</addressName>
    <attention>J. Doe Jr.</attention>
    <addressee>John's Handy Mart</addressee>
    <line1>47 Foundry Street</line1>
    <line2>Warehouse 1</line2>
    <city>Palo Alto</city>
    <state>CA</state>
    <zipCode>94403</zipCode>
    <country>US</country>
    <phone>555-555-1313</phone>
    <defaultBilling>false</defaultBilling>
    <defaultShipping>true</defaultShipping>
  </addressLine>
</addressList>
</customer>
</addOrUpdate>
</request>
</smbxml>
```

Invoice

Invoices are used to collect funds for goods and services from your customers. The example below represents an invoice import. The example lists all available elements with the assumption that optional features are being utilized.

Depending on the NetSuite product you subscribe to and the features you have enabled, you may or may not receive an error when importing this particular example as it appears here.



Important: This example is intended only as a guide for creating your own smbXML documents. To test this example, highlight the XML below and copy the text into a text or XML editor. Save this file on your computer. Then, upload the file into your account at Transactions > Other > Import XML Document.

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE smbxml SYSTEM "http://www.netledger.com/xml/dtd/smb_4_11.dtd">
<smbxml missingFieldOverwrite="false">
  <request>
    <addOrUpdate>
      <customer handle="CUST25">
        <entityId>Thomas Satchel</entityId>
        <currencyRef>
          <name>U.S. dollar</name>
        </currencyRef>
        <addressList>
          <addressLine>
            <addressName>Home</addressName>
            <addressee>T. Satchel</addressee>
            <line1>1475 Partridge Dr.</line1>
            <line2>Apt. 47</line2>
            <city>San Jose</city>
            <state>CA</state>
            <zipCode>94478</zipCode>
            <country>US</country>
            <phone>555-254-7845</phone>
            <defaultBilling>true</defaultBilling>
            <defaultShipping>true</defaultShipping>
          </addressLine>
        </addressList>
      </customer>
    </addOrUpdate>
  </request>
  <request>
    <addOrUpdate>
      <account handle="RECE2587">
        <accountTypeRef>
          <name>Accounts Receivable</name>
        </accountTypeRef>
        <name>Telephone Sales</name>
      </account>
    </addOrUpdate>
  </request>
  <request>
    <addOrUpdate>
      <employee handle="EMP7896">
        <entityId>Jeff Clarkson</entityId>
        <isSalesRep>true</isSalesRep>
      </employee>
    </addOrUpdate>
  </request>
</request>
```

```
<addOrUpdate>
  <discountItem handle="DISC0002">
    <name>$5 Coupon</name>
    <rate>5.00</rate>
    <isPercent>false</isPercent>
    <isPreTax>false</isPreTax>
  </discountItem>
</addOrUpdate>
</request>
<request>
  <addOrUpdate>
    <vendor handle="VEND4578">
      <entityId>Department of Revenue</entityId>
    </vendor>
  </addOrUpdate>
</request>
<request>
  <addOrUpdate>
    <salesTaxItem handle="TAX825">
      <name>Gordon County</name>
      <taxAgencyHandle handle="VEND4578"/>
      <taxRate>8.25</taxRate>
    </salesTaxItem>
  </addOrUpdate>
</request>
<request>
  <addOrUpdate>
    <account handle="INCM1278">
      <accountTypeRef>
        <name>Income</name>
      </accountTypeRef>
      <name>Inside Sales</name>
    </account>
  </addOrUpdate>
</request>
<request>
  <addOrUpdate>
    <nonInventorySaleItem handle="NONS896">
      <name>Small Plastic Pot, gray</name>
      <incomeAccountRef>
        <name>Inside Sales</name>
      </incomeAccountRef>
      <salesPrice>5.95</salesPrice>
    </nonInventorySaleItem>
  </addOrUpdate>
</request>
<request>
  <addOrUpdate>
    <nonInventorySaleItem handle="NONS689">
      <name>Large Ceramic Pot, Purple Swirls</name>
      <incomeAccountRef>
        <name>Inside Sales</name>
      </incomeAccountRef>
      <salesPrice>27.95</salesPrice>
    </nonInventorySaleItem>
  </addOrUpdate>
</request>
<request>
  <add>
    <invoice handle="INV1523">
      <customForm>Standard Product Invoice</customForm>
      <tranId>1523</tranId>
      <customerHandle handle="CUST25"/>
      <tranDate>4/30/03</tranDate>
    </invoice>
  </add>
</request>
```

```
<currencyRef>
  <name>U.S. dollar</name>
</currencyRef>
<exchangeRate>1</exchangeRate>
<receivableAccountRef>
  <name>Telephone Sales</name>
</receivableAccountRef>
<toBePrinted>true</toBePrinted>
<toBeEmailed>false</toBeEmailed>
<email>satchel@mail.com</email>
<toBeFaxed>false</toBeFaxed>
<fax>555.645-9800</fax>
<memo>Regular monthly order</memo>
<billAddress>Home</billAddress>
<shipAddress>Home</shipAddress>
<shipMethodRef>
  <name>FedEx Next Day</name>
</shipMethodRef>
<shipDate>5/9/03</shipDate>
<trackingNumbers>CGD567866BGHNZ</trackingNumbers>
<shipCost>15.00</shipCost>
<FOB>Warehouse 2</FOB>
<customerMessageRef>
  <name>Thank you for your business.</name>
</customerMessageRef>
<salesRepHandle handle="EMP7896"/>
<termsRef>
  <name>Net 15</name>
</termsRef>
<otherRefNum>1534</otherRefNum>
<departmentRef>
  <name>Retail</name>
</departmentRef>
<classRef>
  <name>Telephone Order</name>
</classRef>
<locationRef>
  <name>San Jose</name>
</locationRef>
<isTaxable>true</isTaxable>
<discount>
  <discountItemHandle handle="DISC0002"/>
  <discountRate>-5.00</discountRate>
  <discountIsTaxable>true</discountIsTaxable>
</discount>
<tax>
  <taxItemRef>
    <name>Gordon County</name>
  </taxItemRef>
  <taxRate>8.25</taxRate>
</tax>
<orderTotal>198.24</orderTotal>
<itemList>
  <itemLine>
    <itemHandle handle="NONS896"/>
    <quantity>25</quantity>
    <salesPrice>5.95</salesPrice>
    <description>Plastic Pot, 7", gray</description>
    <isTaxable>true</isTaxable>
    <priceLevelRef>
      <name>Base Price</name>
    </priceLevelRef>
    <departmentRef>
      <name>Retail</name>
    </departmentRef>
  </itemLine>
</itemList>
```

```

        </departmentRef>
        <classRef>
          <name>Telephone Order</name>
        </classRef>
        <locationRef>
          <name>San Jose</name>
        </locationRef>
      </itemLine>
      <itemLine>
        <itemHandle handle="NONS689"/>
        <quantity>5</quantity>
        <salesPrice>24.95</salesPrice>
        <description>Ceramic Pot, 15", Purple Swirl Design</description>
        <isTaxable>true</isTaxable>
        <priceLevelRef>
          <name>Base Price</name>
        </priceLevelRef>
        <departmentRef>
          <name>Retail</name>
        </departmentRef>
        <classRef>
          <name>Telephone Order</name>
        </classRef>
        <locationRef>
          <name>San Jose</name>
        </locationRef>
      </itemLine>
    </itemList>
  </invoice>
</add>
</request>
</smbxml>

```

Custom Record Type

Custom record types are used to create a database of records specific to your business. The example below represents a custom record type import. The example lists all available elements with the assumption that optional features are being utilized.

Depending on the NetSuite product you subscribe to and the features you have enabled, you may or may not receive an error when importing this particular example as it appears here.



Important: This example is intended only as a guide for creating your own smbXML documents. To test this example, highlight the XML below and copy the text into a text or XML editor. Save this file on your computer. Then, upload the file into your account at Transactions > Other > Import XML Document.

```

<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE smbxml SYSTEM "http://www.netledger.com/xml/dtd/smb_4_11.dtd">
<smbxml missingFieldOverwrite="false">
  <request>
    <addOrUpdate>
      <customRecordType>
        <name>Warranties</name>
        <includeNameField>false</includeNameField>
        <showId>true</showId>
        <showRecordCreateDate>true</showRecordCreateDate>
        <showListCreateDate>false</showListCreateDate>
        <showRecordLastModified>true</showRecordLastModified>
        <showListLastModified>true</showListLastModified>
        <showOwnerOnRecord>false</showOwnerOnRecord>
      </customRecordType>
    </addOrUpdate>
  </request>
</smbxml>

```

```

        <showOwnerOnList>false</showOwnerOnList>
        <showOwnerAllowChange>false</showOwnerAllowChange>
        <usePermissions>false</usePermissions>
        <allowAttachments>true</allowAttachments>
        <recordsAreOrdered>true</recordsAreOrdered>
        <isInactive>false</isInactive>
    </customRecordType>
</addOrUpdate>
</request>
</smbxml>

```

Once you have created your custom record type, you must import fields for your records. The example below adds fields to the record type above.

```

<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE smbxml SYSTEM "http://www.netledger.com/xml/dtd/smb_4_11.dtd">
<smbxml missingFieldOverwrite="false">
    <request>
        <addOrUpdate>
            <customField>
                <name>Customer</name>
                <type>RECORD</type>
                <fieldType>Free-Form Text</fieldType>
                <customListName>Warranties</customListName>
            </customField>
        </addOrUpdate>
    </request>
    <request>
        <addOrUpdate>
            <customField>
                <name>Item Purchased</name>
                <type>RECORD</type>
                <fieldType>Free-Form Text</fieldType>
                <customListName>Warranties</customListName>
            </customField>
        </addOrUpdate>
    </request>
    <request>
        <addOrUpdate>
            <customField>
                <name>Item Serial Number</name>
                <type>RECORD</type>
                <fieldType>Free-Form Text</fieldType>
                <customListName>Warranties</customListName>
            </customField>
        </addOrUpdate>
    </request>
    <request>
        <addOrUpdate>
            <customField>
                <name>Start Date</name>
                <type>RECORD</type>
                <fieldType>Date</fieldType>
                <customListName>Warranties</customListName>
            </customField>
        </addOrUpdate>
    </request>
    <request>
        <addOrUpdate>
            <customField>
                <name>End Date</name>
                <type>RECORD</type>
                <customRecordTypeRef>
                    <fieldType>Date</fieldType>

```

```

        <customListName>Warranties</customListName>
      </customField>
    </addOrUpdate>
  </request>
</smbxml>

```

Custom Record

Custom records are the records created for your custom record types. The example below represents a custom record import for the record type example listed above.

Depending on the NetSuite product you subscribe to and the features you have enabled, you may or may not receive an error when importing this particular example as it appears here.



Important: This example is intended only as a guide for creating your own smbXML documents. To test this example, highlight the XML below and copy the text into a text or XML editor. Save this file on your computer. Then, upload the file into your account at Transactions > Other > Import XML Document.

```

<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE smbxml SYSTEM "http://www.netledger.com/xml/dtd/smb_4_11.dtd">
<smbxml missingFieldOverwrite="false">
  <request>
    <addOrUpdate>
      <name>1 Year Electronics Warranty</name>
      <customRecord>
        <customRecordTypeRef>
          <name>Warranties</name>
        </customRecordTypeRef>
        <customFieldList>
          <customFieldLine>
            <customFieldRef>
              <name>Customer</name>
            </customFieldRef>
            <customFieldValue>Annie Paxton</customFieldValue>
          </customFieldLine>
          <customFieldLine>
            <customFieldRef>
              <name>Item Purchased</name>
            </customFieldRef>
            <customFieldValue>Impressivo 1500</customFieldValue>
          </customFieldLine>
          <customFieldLine>
            <customFieldRef>
              <name>Item Serial Number</name>
            </customFieldRef>
            <customFieldValue>14D1452SFD</customFieldValue>
          </customFieldLine>
          <customFieldLine>
            <customFieldRef>
              <name>Start Date</name>
            </customFieldRef>
            <customFieldValue>04/15/03</customFieldValue>
          </customFieldLine>
          <customFieldLine>
            <customFieldRef>
              <name>End Date</name>
            </customFieldRef>
            <customFieldValue>04/15/06</customFieldValue>
          </customFieldLine>
        </customFieldList>
      </customRecord>
    </addOrUpdate>
  </request>
</smbxml>

```



```

        </addOrUpdate>
    </request>
</smbxml>

```

Advanced Query

Advanced queries are used to search for transactions and records by a set of constraints. The example below represents an advanced query for customer payments between a set of dates and above a certain amount.

Depending on the NetSuite product you subscribe to and the features you have enabled, you may or may not receive an error when importing this particular example as it appears here.



Important: This example is intended only as a guide for creating your own smbXML documents. To test this example, highlight the XML below and copy the text into a text or XML editor. Save this file on your computer. Then, upload the file into your account at Transactions > Other > Import XML Document.

```

<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE smbxml SYSTEM "http://www.netledger.com/xml/dtd/smb_4_11.dtd">
<smbxml>
  <request>
    <query returnHandles="true">
      <listType>customerPayment</listType>
      <constraints>
        <constraint>
          <name>tranDate</name>
          <operator>between</operator>
          <value>05/06/03</value>
          <value2>06/06/03</value2>
        </constraint>
        <constraint>
          <name>paymentAmount</name>
          <operator>greater than or equal to</operator>
          <value>550</value>
        </constraint>
      </constraints>
    </query>
  </request>
</smbxml>

```

Now that you are more familiar with constructing smbXML documents, see Chapter 5 for a full list of all supported objects and their elements.

Chapter 5 Supported Objects

List Records

your account supports many list records for import via smbXML. The following section lists the records and their corresponding elements. Click the record names below to see a table of elements for that record type.

- [Customers](#)
- [Employees](#)
- [Vendors](#)
- [Contacts](#)
- [Notes](#)
- [Partners](#)
- [Accounts](#)
- [Items](#)
- [Vendor Categories](#)
- [Customer Categories](#)
- [Store Categories](#)
- [Job Types](#)
- [Payment Methods](#)

Customers

Customer records are used to track information about the people and companies that you sell items and services to. Using smbXML, you can import, update and query customer records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
entityID	Y	Customer	This element is not required if you use Auto-Generated Numbers.
isPerson	N	Individual	If True, this record is entered as an individual. If False, this record is entered as a company.
salutation	N	Mr./Ms...	
firstName	Y/N	Name	Required when isPerson is set to True.
middleName	N	Name	
lastName	Y/N	Name	Required when isPerson is set to True.

Element	Req.	Mapping	Notes
title	N	Job Title	
homePhone	N	Home Phone	See phone.
mobilePhone	N	Mobile Phone	See phone.
altEmail	N	Alt. E-mail	The information entered for this element must conform to the standard e-mail address format. i.e. user@domain.com
parentHandle parentRef	Y	Child Of	One of these elements is only required if the customer is a child of another customer.
companyName	Y/N	Company Name	Required if isPerson is set to False.
categoryRef	N	Category	This element is a reference to a category that must exist in your account prior to importing.
salesRepHandle salesRepRef	N	Sales Rep	This element is a reference to an employee record that must exist in your account prior to importing.
contactHandle contactRef	N	Primary Contact	This element is a reference to a contact record that must exist in your account prior to importing.
email	N	E-Mail	The information entered for this element must conform to the standard e-mail address format. i.e. user@domain.com
isEmailPDF	N	Type	This element records a true or false value only and cannot record the same value as isEmailHTML.
isEmailHTML	N	Type	This element records a true or false value only and cannot record the same value as isEmailPDF.
phone	N	Phone	The information entered for this element must be in one of the following formats: 999-999-9999 (999) 999-9999 1-999-999-9999 1 (999) 999-9999 999-999-9999 ext 999
fax	N	Fax	See phone.
altPhone	N	Alt. Phone	See phone.
altContactHandle altContactRef	N	Alt. Contact	See contactHandle contactRef.
comments	N	Comments	
accountNumber	N	Account	
termsRef	N	Terms	This element is a reference to terms that must exist in your account prior to importing.
creditLimit	N	Credit Limit	
resaleNumber	N	Resale Number	

Element	Req.	Mapping	Notes
taxID	N	Registration N?	This element is used in our international products only.
priceLevelRef	N	Price Level	This element is a reference to a price level that must exist in your account prior to importing.
currencyRef	Y	Currency	This element is only required if you use Multiple Currencies. It is a reference to a currency record that must exist in your account prior to importing.
isTaxable	N	Taxable	This element records a true or false value only.
taxItemHandle taxItemsRef	N	Tax Item	This element is a reference to a sales tax item that must exist in your account prior to importing.
isInactive	N	Customer is Inactive	This element records a true or false value only.
status	N	Status	This element is a reference to customer statuses that must exist in your account prior to importing. The status tag should be of the following format: <status>CUSTOMER-Closed Won</status> where Closed-Won is the status.
territoryRef	N	Territory	This element is a reference to a sales territory record that must exist in your account prior to importing.
leadSourceRef	N	Lead Source	This element is a reference to a marketing campaign that must exist in your account prior to importing.
partnerRef	N	Partner	This element is a reference to a partner record that must exist in your account prior to importing.
startDate	N	Start Date	
endDate	N	End Date	
reminderDays	N	Reminder Days	
openingBalance	N	Opening Balance	
openingBalanceDate	N	Opening Balance Date	
loginAccess	N	Give Access	This element records a true or false value only.
sendEmail	N	Send Notification E-mail	This element records a true or false value only.
password	N	Password	
unsubscribe	N		This element can only record a false value.
addressList	N		This element indicates the beginning of a list of addresses. It requires additional element to complete the list of addresses.
addressLine	Y		This element is only required if you use the addressList element. This element indicates the beginning of an individual address.

Element	Req.	Mapping	Notes
addressName	Y	Label	This element is only used if you also use the addressList element.
attention	N	Attention	This element is only used if you also use the addressList element.
addressee	N	Addressee	This element is only used if you also use the addressList element.
line1	N	Address 1	This element is only used if you also use the addressList element.
line2	N	Address 2	This element is only used if you also use the addressList element.
city	N	City	This element is only used if you also use the addressList element.
state	N	Province/State	This element is only used if you also use the addressList element. You may enter the standard abbreviation or the full state or province name.
zipCode	N	Zip	This element is only used if you also use the addressList element.
country	N	Country	This element is only used if you also use the addressList element. The information entered for this element must conform to the standard abbreviations for countries.
phone	N	Phone	This element is only used if you also use the addressList element.
defaultBilling	N	Default Billing	This element is only used if you also use the addressList element. This element records a true or false value only.
defaultShipping	N	Default Shipping	This element is only used if you also use the addressList element. This element records a true or false value only.
addressText	N	Address	This element is only used if you use the addressList element.
overrideAddressFields	N		This element records a true or false value only.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
url	N	Web Address	This is your customer's Web site address.

Employees

Employee records are used to track information about the people that work for you. Using smbXML, you can import, update and query employee records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
entityID	Y	Employee	This element is not required if you use Auto-Generated Numbers.
salutation	N	Mr./Ms...	
firstName	N	First Name	
middleName	N	Middle Name	
lastName	N	Last Name	
initials	N	Initials	The information entered for this element can only be three characters in length and cannot contain periods.
socialSecurityNumber	N	Social Security	
departmentRef	N	Department	This element is a reference to a department record that must exist in your account prior to importing.
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
isSalesRep	N	Location	This element records a true or false value only.
email	N	E-mail	The information entered for this element this element must conform to the standard e-mail address format. i.e. user@domain.com
phone	N	Phone	The information entered for this element must be in one of the following formats: 999-999-9999 (999) 999-9999 1-999-999-9999 1 (999) 999-9999 999-999-9999 ext 999
officePhone	N	Office Phone	See phone.
homePhone	N	Home Phone	See phone.
mobilePhone	N	Mobile Phone	See phone.
fax	N	Fax	See phone.
comments	N	Notes	
imageRef	N	Image	This element is a reference to an image file that must exist in your account prior to importing.
accountNimber	N	Account	
hireDate	N	Hire Date	

Element	Req.	Mapping	Notes
isInactive	N	Employee is Inactive	This element records a true or false value only.
supervisorHandle supervisorRef	N	Supervisor	This element is a reference to an employee record that must exist in your account prior to importing.
approverHandle approverRef	N	Approver	This element is a reference to an employee record that must exist in your account prior to importing.
employeeTypeRef	N	Type	This element is a reference to an employee type that must exist in your account prior to importing.
isSupportRep	N	Support Rep	This element records a true or false value only.
birthDate	N	Birth Date	
releaseDate	N	Release Date	
lastReviewDate	N	Last Review Date	
nextReviewDate	N	Next Review Date	
approvalLimit	N	Approval Limit	
title	N	Job Title	
unsubscribe	N		This element can only record a false value.
addressList	N		This element indicates the beginning of a list of addresses. It requires additional element to complete the list of addresses.
addressLine	Y		This element is only required if you use the addressList element. This element indicates the beginning of an individual address.
addressName	Y	Label	This element is only used if you also use the addressList element.
attention	N	Attention	This element is only used if you also use the addressList element.
addressee	N	Addressee	This element is only used if you also use the addressList element.
line1	N	Address 1	This element is only used if you also use the addressList element.
line2	N	Address 2	This element is only used if you also use the addressList element.
city	N	City	This element is only used if you also use the addressList element.
state	N	Province/State	This element is only used if you also use the addressList element. You may enter the standard abbreviation or the full state or province name.
zipCode	N	Zip	This element is only used if you also use the addressList element.

Element	Req.	Mapping	Notes
country	N	Country	This element is only used if you also use the addressList element. The information entered for this element must conform to the standard abbreviations for countries.
phone	N	Phone	This element is only used if you also use the addressList element.
defaultBilling	N	Default Billing	This element is only used if you also use the addressList element. This element records a true or false value only.
defaultShipping	N	Default Shipping	This element is only used if you also use the addressList element. This element records a true or false value only.
addressText	N	Address	This element is only used if you use the addressList element.
overrideAddressFields	N		This element records a true or false value only.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.

Vendors

Vendor records are used to track information about the people that you purchase goods and services from. Using smbXML, you can import, update and query vendor records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
entityID	Y	Vendor	This element is not required if you use Auto-Generated Numbers.
isPerson	N	Individual	If True, this record is entered as an individual. If False, this record is entered as a company.
salutation	N	Mr./Ms...	
firstName	Y/N	Name	Required when isPerson is set to True.
middleName	N	Name	
lastName	Y/N	Name	Required when isPerson is set to True.
title	N	Job Title	
homePhone	N	Home Phone	See phone.
mobilePhone	N	Mobile Phone	See phone.
altEmail	N	Alt. E-mail	The information entered for this element must conform to the standard e-mail address format. i.e. user@domain.com

Element	Req.	Mapping	Notes
companyName	N	Company Name	
legalName	N	Legal Name	
categoryRef	N	Category	This element is a reference to a category that must exist in your account prior to importing.
contactHandle contactRef	N	Primary Contact	This element is a reference to a contact record that must exist in your account prior to importing.
email	N	E-Mail	The information entered for this element this element must conform to the standard e-mail address format. i.e. user@domain.com
isEmailPDF	N	Type	This element records a true or false value only and cannot record the same value as isEmailHTML.
isEmailHTML	N	Type	This element records a true or false value only and cannot record the same value as isEmailPDF.
phone	N	Phone	The information entered for this element must be in one of the following formats: 999-999-9999 (999) 999-9999 1-999-999-9999 1 (999) 999-9999 999-999-9999 ext 999
fax	N	Fax	See phone.
altPhone	N	Alt. Phone	See phone.
altContactHandle altContactRef	N	Alt. Contact	See contactHandle contactRef.
comments	N	Comments	
printOnCheckAs	N	Print on Check As	
accountNumber	N	Account	
expenseAccountRef	N	Default Expense Account	This element is a reference to an expense account that must exist in your account prior to importing.
termsRef	N	Terms	This element is a reference to terms that must exist in your account prior to importing.
creditLimit	N	Credit Limit	
currencyRef	Y	Currency	This element is only required if you use Multiple Currencies. It is a reference to a currency record that must exist in your account prior to importing.
is1099Eligible	N	1099 Eligible	This element records a true or false value only.
isInactive	N	Vendor is Inactive	This element records a true or false value only.
openingBalance	N	Opening Balance	

Element	Req.	Mapping	Notes
openingBalanceDate	N	Opening Balance Date	
taxID	N	Tax ID Registration N?	This element maps to the Registration N? field in our international products only.
unsubscribe	N		This element records a false value only.
addressList	N		This element indicates the beginning of a list of addresses. It requires additional element to complete the list of addresses.
addressLine	Y		This element is only required if you use the addressList element. This element indicates the beginning of an individual address.
addressName	Y	Label	This element is only used if you also use the addressList element.
attention	N	Attention	This element is only used if you also use the addressList element.
addressee	N	Addressee	This element is only used if you also use the addressList element.
line1	N	Address 1	This element is only used if you also use the addressList element.
line2	N	Address 2	This element is only used if you also use the addressList element.
city	N	City	This element is only used if you also use the addressList element.
state	N	Province/State	This element is only used if you also use the addressList element. You may enter the standard abbreviation or the full state or province name.
zipCode	N	Zip	This element is only used if you also use the addressList element.
country	N	Country	This element is only used if you also use the addressList element. The information entered for this element must conform to the standard abbreviations for countries.
phone	N	Phone	This element is only used if you also use the addressList element.
defaultBilling	N	Default Billing	This element is only used if you also use the addressList element. This element records a true or false value only.
defaultShipping	N	Default Shipping	This element is only used if you also use the addressList element. This element records a true or false value only.
addressText	N	Address	This element is only used if you use the addressList element.
overrideAddressFields	N		This element records a true or false value only.

Element	Req.	Mapping	Notes
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.

Contacts

Contact records are used to track information about the people you deal with in the daily activity of your business. Using smbXML, you can import, update and query contact records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
entityId	Y	Contact	
title	N	Job Title	
salutation	N	Mr./Mrs...	
firstName	N	First Name	
middleName	N	Middle Name	
lastName	N	Last Name	
companyHandle companyRef	N	Company	To uniquely identify a company by name using companyRef, the type of the company referred must be provided. The valid types are customer and vendor.
isPrivate	N	Private	This element records a true or false value only.
contactCategoryList	N	Category	
contactCategoryRef	N		This element is a reference to a contact category that must exist in your account prior to importing.
email	N	E-mail	The information entered for this element this element must conform to the standard e-mail address format. i.e. user@domain.com
altEmail	N	Alt. E-mail	See email.
phone	N	Main Phone	The information entered for this element must be in one of the following formats: 999-999-9999 (999) 999-9999 1-999-999-9999 1 (999) 999-9999 999-999-9999 ext 999
officePhone	N	Office Phone	See phone.
homePhone	N	Home Phone	See phone.

Element	Req.	Mapping	Notes
mobilePhone	N	Mobile Phone	See phone.
fax	N	Fax	See phone.
supervisorHandle supervisorRef	N	Supervisor	This element is a reference to a contact record that must exist in your account prior to importing.
supervisorPhone	N	Sup. Phone	See phone.
assistantHandle assistantRef	N	Assistant	This element is a reference to a contact record that must exist in your account prior to importing.
assistantPhone	N	Assist. Phone	See phone.
comments	N	Comments	
isInactive	N	Contact is Inactive	This element records a true or false value only.
imageRef	N	Image	This element is a reference to an image file that must exist in your account prior to importing.
unsubscribe	N		This element records a false value only.
addressList	N		This element indicates the beginning of a list of addresses. It requires additional element to complete the list of addresses.
addressLine	Y		This element is only required if you use the addressList element. This element indicates the beginning of an individual address.
addressName	Y	Label	This element is only used if you also use the addressList element.
attention	N	Attention	This element is only used if you also use the addressList element.
addressee	N	Addressee	This element is only used if you also use the addressList element.
line1	N	Address 1	This element is only used if you also use the addressList element.
line2	N	Address 2	This element is only used if you also use the addressList element.
city	N	City	This element is only used if you also use the addressList element.
state	N	Province/State	This element is only used if you also use the addressList element. You may enter the standard abbreviation or the full state or province name.
zipCode	N	Zip	This element is only used if you also use the addressList element.
country	N	Country	This element is only used if you also use the addressList element. The information entered for this element must conform to the standard abbreviations for countries.

Element	Req.	Mapping	Notes
phone	N	Phone	This element is only used if you also use the addressList element.
defaultBilling	N	Default Billing	This element is only used if you also use the addressList element. This element records a true or false value only.
defaultShipping	N	Default Shipping	This element is only used if you also use the addressList element. This element records a true or false value only.
addressText	N	Address	This element is only used if you use the addressList element.
overrideAddressFields	N		This element records a true or false value only.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.

Notes

Notes are used to add information to opportunities, contact, customer, employee, vendor, case, task or event records. Using smbXML, you can import notes. Notes are not available for updating and querying.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
id	N		
noteEntityHandle noteEntityRef	Y		This element is a reference to an entity record that must exist in your account prior to importing. This element is only required when adding a note to an entity record.
caseNumberRef crmHandle crmRecordID	Y		This element is a reference to a CRM record that must exist in your account prior to importing. This element is only required when adding a note to a CRM record.
transactionHandle transactionRecordId	Y		This element is a reference to an opportunity record that must exist in your account prior to importing. This element is only required when adding a note to an opportunity record.
title	Y	Title	
typeRef	N	Type	The element is a reference to a note type that must exist in your account prior to importing.
directionRef	N	Direction	The element is a reference to a note direction that must exist in your account prior to importing.
tranDate	N	Date	
noteText	Y	Memo	

Partners

Partner records are used to track information about the people and companies that refer business to your company. Using smbXML, you can import, update and query partner records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
entityID	Y	Partner	This element is not required if you use Auto-Generated Numbers.
isPerson	N	Individual	If True, this record is entered as an individual. If False, this record is entered as a company.
salutation	N	Mr./Ms...	
firstName	Y/N	Name	Required when isPerson is set to True.
middleName	N	Name	
lastName	Y/N	Name	Required when isPerson is set to True.
title	N	Job Title	
homePhone	N	Home Phone	See phone.
mobilePhone	N	Mobile Phone	See phone.
altEmail	N	Alt. E-mail	The information entered for this element must conform to the standard e-mail address format. i.e. user@domain.com
partnerCode	Y	Partner Code	
parentHandle parentRef	Y		One of these elements is only required if the partner is a child of another partner.
companyName	N	Company Name	
categoryRef	N	Category	This element is a reference to a category that must exist in your account prior to importing.
email	N	E-Mail	The information entered for this element this element must conform to the standard e-mail address format. i.e. user@domain.com
isEmailPDF	N	Type	This element records a true or false value only and cannot record the same value as isEmailHTML.
isEmailHTML	N	Type	This element records a true or false value only and cannot record the same value as isEmailPDF.

Element	Req.	Mapping	Notes
phone	N	Phone	The information entered for this element must be in one of the following formats: 999-999-9999 (999) 999-9999 1-999-999-9999 1 (999) 999-9999 999-999-9999 ext 999
fax	N	Fax	See phone.
comments	N	Comments	
taxID	N	Tax ID Registration N?	This element maps to the Registration N? field in our international products only.
imageRef	N	Image	This element is a reference to an image file that must exist in your account prior to importing.
isInactive	N	Partner is Inactive	This element records a true or false value only.
promotionCodeRef	N	Promotion code	This element is a reference to a promotion code that must exist in your account prior to importing.
loginAccess	N	Give Access	This element records a true or false value only.
loginAccessSubpartners	N	Can give login access To Subpartners	This element records a true or false value only.
sendEmail	N	Send Notification E-mail	This element records a true or false value only.
password	N	Password	
addressList	N		This element indicates the beginning of a list of addresses. It requires additional element to complete the list of addresses.
addressLine	Y		This element is only required if you use the addressList element. This element indicates the beginning of an individual address.
addressName	Y	Label	This element is only used if you also use the addressList element.
attention	N	Attention	This element is only used if you also use the addressList element.
addressee	N	Addressee	This element is only used if you also use the addressList element.
line1	N	Address 1	This element is only used if you also use the addressList element.
line2	N	Address 2	This element is only used if you also use the addressList element.

Element	Req.	Mapping	Notes
city	N	City	This element is only used if you also use the addressList element.
state	N	Province/State	This element is only used if you also use the addressList element. You may enter the standard abbreviation or the full state or province name.
zipCode	N	Zip	This element is only used if you also use the addressList element.
country	N	Country	This element is only used if you also use the addressList element. The information entered for this element must conform to the standard abbreviations for countries.
phone	N	Phone	This element is only used if you also use the addressList element.
defaultBilling	N	Default Billing	This element is only used if you also use the addressList element. This element records a true or false value only.
defaultShipping	N	Default Shipping	This element is only used if you also use the addressList element. This element records a true or false value only.
addressText	N	Address	This element is only used if you use the addressList element.
overrideAddressFields	N		This element records a true or false value only.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.

Accounts

Account records are used to create accounts for you to track funds coming in and out of your business. Using smbXML, you can import, update and query account records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
accountTypeRef	Y	Type	This element is a reference to an account type that must exist in your account prior to importing.
name	Y	Name	
accountNumber	N	Number	
parentHandle parentRef	Y	Subaccount of	One of these elements is only required if the account is a child of another account.
description	N	Description	

Element	Req.	Mapping	Notes
openingBalance	N	Opening Balance	This element is only available when creating a new account.
openingBalanceDate	N	Date	This element is only available when creating a new account.
isInactive	N	Account is Inactive	This element records a true or false value only.

The name and accountNumber elements are not available for updating with smbXML for the accounts listed below.

Attempting to update these fields results in an error message. The message states which account is not available for update with smbXML. The table below lists the account names and their corresponding abbreviation in the error message. These accounts can be changed in the UI.

User Interface Account Name	smbXML Account Name
Accounts Payable	AcctPay
Accounts Receivable	AcctRec
Advances Paid	AdvPaid
Cost of Goods Sold	COGS
Estimates	Estimate
Inventory Asset	InvAsset
Opening Balance	OpeningBalEquity
Opportunities	Opprtnty
Payroll Adjustments	PayAdjst
Payroll Wages	PayWage
Payroll Expenses	PayrollExp
Payroll Liabilities	PayrollLiab
Purchase Orders	PurchOrd
Refunds Payable	RefundPay
Retained Earnings	RetEarnings
Sales Orders	SalesOrd
Sales Taxes Payable	SalesTaxPay
Unapproved Expense Reports	UnappvExpRept
Unapproved Customer Payments	UnappvPymt
Undeposited Funds	UndepFunds

Items

Item records come in many different types in your account. The item types listed below are available for import via smbXML. Click any of the links below to see the table for that item type.

- [Inventory Items](#)
- [Sales Tax Items](#)
- [Tax Codes](#)
- [Non-inventory Items for Resale](#)
- [Non-inventory Items for Purchase](#)
- [Non-inventory Items for Sale](#)
- [Service Items for Resale](#)
- [Service Items for Purchase](#)
- [Service Items for Sale](#)
- [Other Charge Items for Resale](#)
- [Other Charge Items for Purchase](#)
- [Other Charge Items for Sale](#)
- [Discount Items](#)
- [Markup Items](#)
- [Subtotal Items](#)
- [Description Items](#)
- [Media Items](#)

Inventory Items

Inventory item records are used to track information about items which you maintain a stock of. Using smbXML, you can import, update and query inventory item records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Item Name/ Number	
displayName	N	Display Name/ Code	
vendorName	N	Vendor Name/ Code	
parentHandle parentRef	Y	Subitem of	One of these elements is only required if the item is a child of another item.
isOnline	N	Display in Web Site	This element records a true or false value only.

Element	Req.	Mapping	Notes
purchaseDescription	N	Purchase Description	
cost	N	Purchase Price	
cogsAccountRef	N	COGS Account	This element is a reference to a COGS account that must exist in your account prior to importing.
vendorHandle vendorRef	N	Preferred Vendor	This element is a reference to vendor record that must exist in your account prior to importing.
salesDescription	N	Sales Description	
incomeAccountRef	N	Income Account	This element is a reference to vendor record that must exist in your account prior to importing.
taxCodeRef	N	Sales Tax Code	
purchaseTaxCodeRef	N	Purchase Tax Code	This element is a reference to a tax code that must exist in your account prior to importing. It is used for international versions only.
salesPrice itemPriceList	N	Sales Price	If you use Multiple Prices, you can use the itemPriceList element to import a list of price levels.
itemPriceLine	Y		This element is only required if the itemPriceList element is used.
itemPriceTypeRef	N	Price Level	This element is a reference to a price level that must exist in your account prior to importing.
currencyRef	N	Currency	This element is only used if the itemPriceList element is also used. It is a reference to a currency record that must exist in your account prior to importing.
itemPrice	Y	Amount	This element is only required if the itemPriceList element is used.
assetAccountRef	N	Asset Account	This element is a reference to an asset account that must exist in your account prior to importing.
totalValue	N	Total Value	This element is only available when importing a new inventory item.
quantityOnHand	N	Quantity On Hand	
serialNumbers	N	Serial Numbers	You can enter multiple serial numbers using commas and white space as delimiters.
reorderPoint	N	Reorder Point	
itemLocationList	Y		This element is only required if you use Multi-Location Inventory. It indicates the beginning of a locations list.

Element	Req.	Mapping	Notes
itemLocationLine	Y		This element is only required if the itemLocationList element is used.
locationRef	Y	Location	This element is only required if the itemLocationList element is used. It is a reference to a location record that must exist in your account prior to importing.
quantityOnHand	N	Quantity On Hand	This element is only used if the itemLocationList element is also used.
serialNumbers	N	Serial Numbers	You can enter multiple serial numbers using commas and white space as delimiters.
reorderPoint	N	Reorder Point	This element is only used if the itemLocationList element is also used.
shippingCost	N	Shipping Cost	
handlingCost	N	Handling Cost	
weight	N	Item weight	
weightUnitRef	N		This element is a reference to units of measurement that already exist in your account. The valid entries for this element are g, kg, lb or oz.
costingMethodRef	N	Costing Method	The information entered for this element must match the costing method set in the UI.
isTaxable	N	Taxable	This element records a true or false value only.
isInactive	N	Item is Inactive	This element records a true or false value only.
offerSupport	N	Offer Support	This element records a true or false value only.
storeDisplayName	N	Store Display Name	
storeCategoryList	N		This element begins a list of references to store categories that must exist in your account prior to importing.
storeCategoryRef	Y	Site Category	This element is only required if you use the storeCategoryList element. It is a reference to a store category that must exist in your account prior to importing.
storeDescription	N	Store Description	
storeDisplayThumbnailRef	N	Item Display Thumbnail	This element is a reference to an image file that must exist in your account prior to importing.
storeDetailedDescription	N	Detailed Description	
storeDisplayImageRef	N	Item Display Image	This element is a reference to an image file that must exist in your account prior to importing.

Element	Req.	Mapping	Notes
storeDisplayImageUrl	N		This element is used in queries only.
storePageTitle	N	Page Title	Sets the text you want to appear in the upper-left corner of an Internet browser when customers view this item in your Web store.
storeMetaTagHTML	N	Meta Tag HTML	Sets the Meta Tag HTML you want to appear in the < head > section of this item page. Meta tags enable your Web site to be found by search engines.
onSpecial	N	On Special	This element records a true or false value only.
specialsDescription	N	Specials Description	
isFeatured	N	Featured Item	This element records a true or false value only.
featuredDescription	N	Featured Description	
isDropShipItem	N	Drop Ship Item	This element records a true or false value only. The isDropShipOrderItem and isSpecialOrderItem fields are mutually exclusive. If both isDropShipOrderItem and isSpecialOrderItem fields are false, the export returns the FALSE value for isSpecialOrderItem.
unitsTypeRef	N	Units Type	This element is a reference to a unit type that must exist in your account prior to importing.
stockUnitRef	N	Stock Units	This element is a reference to a unit type that must exist in your account prior to importing.
saleUnitRef	N	Sale Units	This element is a reference to a unit type that must exist in your account prior to importing.
purchaseUnitRef	N	Purchase Units	This element is a reference to a unit type that must exist in your account prior to importing.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
itemDrilldownTemplateRef	N	Item Drilldown Template	This element is a reference to an item template that must exist in your account prior to importing.
isUpc	N	Is UPC	This element records a true or false value only.

Element	Req.	Mapping	Notes
preferredStockLevel	N	Preferred Stock Level	This element records a numerical value. If you use Multi-Location Inventory, you must add this element to Item Location Lines.
isSpecialOrderItem	N	Special Order Item	This element records a true or false value only. The isDropShipOrderItem and isSpecialOrderItem fields are mutually exclusive. If both isDropShipOrderItem and isSpecialOrderItem fields are false, the export returns the FALSE value for isSpecialOrderItem.

Sales Tax Items

Sales tax item records are used to create sales tax rates you can charge to your customers. Using smbXML, you can import, update and query sales tax item records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Tax Name	
displayName	N	Display Name/ Code	
taxAgencyHandle taxAgencyRef	Y	Tax Agency	This element is a reference to a vendor record that must exist in your account prior to importing.
description	N	Description	
taxRate	N	Rate	
taxAccountRef	Y	Tax Account	This element is a reference to a tax account that must exist in your account prior to importing.
taxTypeRef	N	Tax Type	
county	N	County	
city	N	City	
state	N	State	You may enter the standard abbreviation or the full state or province name.
zipCodeList	N	Zip Code	You can enter multiple zip codes separated by commas for this element.
isInactive	N	Tax Item is Inactive	This element records a true or false value only.

Tax Codes

Tax code records are used in NetSuite's international products to create sales tax rates. Using smbXML, you can import, update and query tax code records. For more information on international versions, contact your sales representative.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Tax Code	
description	N	Description	
taxRate taxRateList	Y	Rate	The information entered for this element must be in the form of a percentage.
taxRateLine	Y		This element is only required when using the taxRateList element.
taxType	Y		This element is only required when using the taxRateList element.
taxRate	Y		This element is only required when using the taxRateList element.
isExempt	N		This element records a true or false value only. It is only required when using the taxRateList element.
effectiveDate	N	Effective From	
expirationDate	N	Valid Until	
isExempt	N	Exempt	This element records a true or false value only.
isEcCode	N	EC Code	This element records a true or false value only.
isDefaultCode	N	Default Code	This element records a true or false value only.
excludeTaxReport	N	Exclude From Reports	This element records a true or false value only.
isInactive	N	Tax Code is Inactive	This element records a true or false value only.
notionalRateDerivedFromRef	N	Notional Rate Derived From	This element is a reference to a tax code that must exist in your account prior to importing.
taxTypeRef	N	Tax Type	This element is a reference to a tax type that must exist in your account prior to importing. This element is required for international versions.
piggyBack	N	Piggy Back	This element records a true or false value only.

Non-inventory Items for Resale

Non-inventory item for resale records are used to track information about items you purchase and sell, but do not maintain a stock of. Using smbXML, you can import, update and query non-inventory item for resale records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Item Name/ Number	
displayName	N	Display Name/Code	
vendorName	N	Vendor Name/Code	
parentHandle parentRef	Y	Subitem of	One of these elements is only required if the item is a child of another item.
isOnline	N	Display in Web Site	This element records a true or false value only.
purchaseDescription	N	Purchase Description	
cost	N	Purchase Price	
expenseAccountRef	N	Expense Account	This element is a reference to an expense account that must exist in your account prior to importing.
vendorHandle vendorRef	N	Preferred Vendor	This element is a reference to a vendor record that must exist in your account prior to importing.
salesDescription	N	Sales Description	
incomeAccountRef	N	Income Account	This element is a reference to an income account that must exist in your account prior to importing.
taxCodeRef	N	Sales Tax Code	This element is used in our international products only.
purchaseTaxCodeRef	N	Purchase Tax Code	This element is a reference to a tax code that must exist in your account prior to importing. It is used for international versions only.
salesPrice itemPriceList	N	Sales Price	If you use Multiple Prices, you can use the itemPriceList element to import a list of price levels.
itemPriceLine	Y		This element is only required if the itemPriceList element is used.
itemPriceTypeRef	N	Price Level	This element is a reference to a price level that must exist in your account prior to importing.
currencyRef	N	Currency	This element is only used if the itemPriceList element is also used. It is a reference to a currency record that must exist in your account prior to importing.

Element	Req.	Mapping	Notes
itemPrice	Y	Amount	This element is only required if the itemPriceList element is used.
shippingCost	N	Shipping Cost	
handlingCost	N	Handling Cost	
weight	N	Item weight	
weightUnitRef	N		This element is a reference to units of measurement that already exist in your account. The valid entries for this element are g, kg, lb or oz.
isTaxable	N	Taxable	This element records a true or false value only.
isInactive	N	Item is Inactive	This element records a true or false value only.
offerSupport	N	Offer Support	This element records a true or false value only.
storeDisplayName	N	Store Display Name	
storeCategoryList	N		This element begins a list of references to store categories that must exist in your account prior to importing.
storeCategoryRef	Y	Site Category	This element is only required if you use the storeCategoryList element. It is a reference to a store category that must exist in your account prior to importing.
storeDescription	N	Store Description	
storeDisplayThumbnailRef	N	Item Display Thumbnail	This element is a reference to an image file that must exist in your account prior to importing.
storeDetailedDescription	N	Detailed Description	
storeDisplayImageRef	N	Item Display Image	This element is a reference to an image file that must exist in your account prior to importing.
storeDisplayImageURL	N		This element is used in queries only.
storePageTitle	N	Page Title	Sets the text you want to appear in the upper-left corner of an Internet browser when customers view this item in your Web store.
storeMetaTagHTML	N	Meta Tag HTML	Sets the Meta Tag HTML you want to appear in the < head > section of this item page. Meta tags enable your Web site to be found by search engines.
onSpecial	N	On Special	This element records a true or false value only.
specialsDescription	N	Specials Description	
isFeatured	N	Featured Item	This element records a true or false value only.

Element	Req.	Mapping	Notes
featuredDescription	N	Featured Description	
isDropShipItem	N	Drop Ship Item	This element records a true or false value only. The isDropShipOrderItem and isSpecialOrderItem fields are mutually exclusive. If both isDropShipOrderItem and isSpecialOrderItem fields are false, the export returns the FALSE value for isDropShipOrderItem.
unitsTypeRef	N	Units Type	This element is a reference to a unit type that must exist in your account prior to importing.
saleUnitRef	N	Sale Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
purchaseUnitRef	N	Purchase Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
itemDrilldownTemplateRef	N	Item Drilldown Template	This element is a reference to an item template that must exist in your account prior to importing.
isUpc	N	Is UPC	This element records a true or false value only.
isSpecialOrderItem	N	Special Order Item	This element records a true or false value only. The isDropShipOrderItem and isSpecialOrderItem fields are mutually exclusive. If both isDropShipOrderItem and isSpecialOrderItem fields are false, the export returns the FALSE value for isDropShipOrderItem.

Non-inventory Items for Purchase

Non-inventory item for purchase records are used to track information about items you purchase, do not sell and do not maintain a stock of. Using smbXML, you can import, update and query non-inventory item for purchase records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Item Name/ Number	
displayName	N	Display Name/ Code	
vendorName	N	Vendor Name/ Code	
parentHandle parentRef	Y	Subitem of	One of these elements is only required if the item is a child of another item.
purchaseDescription	N	Purchase Description	
cost	N	Purchase Price	
purchaseTaxCodeRef	N	Purchase Tax Code	This element is a reference to a tax code that must exist in your account prior to importing. It is used for international versions only.
expenseAccountRef	N	Expense Account	This element is a reference to an expense account that must exist in your account prior to importing.
vendorHandle vendorRef	N	Preferred Vendor	This element is a reference to a vendor record that must exist in your account prior to importing.
shippingCost	N	Shipping Cost	
handlingCost	N	Handling Cost	
weight	N	Item weight	
weightUnitRef	N		This element is a reference to units of measurement that already exist in your account. The valid entries for this element are g, kg, lb or oz.
unitsTypeRef	N	Units Type	This element is a reference to a unit type that must exist in your account prior to importing.
stockUnitRef	N	Stock Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
saleUnitRef	N	Sale Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
purchaseUnitRef	N	Purchase Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
isTaxable	N	Taxable	This element records a true or false value only.
isInactive	N	Item is Inactive	This element records a true or false value only.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.

Element	Req.	Mapping	Notes
isUpc	N	Is UPC	This element records a true or false value only.
isSpecialOrderItem	N	Special Order Item	This element records a true or false value only. The isDropShipOrderItem and isSpecialOrderItem fields are mutually exclusive. If both isDropShipOrderItem and isSpecialOrderItem fields are false, the export returns the FALSE value for isDropShipOrderItem.

Non-inventory Items for Sale

Non-inventory item for sale records are used to track information about items you sell, but do not purchase and do not maintain a stock of. Using smbXML, you can import, update and query non-inventory item for sale records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Item Name/ Number	
displayName	N	Display Name/ Code	
parentHandle parentRef	Y	Subitem of	One of these elements is only required if the item is a child of another item.
isOnline	N	Display in Web Site	This element records a true or false value only.
salesDescription	N	Sales Description	
incomeAccountRef	N	Income Account	This element is a reference to an income account that must exist in your account prior to importing.
taxCodeRef	N	Sales Tax Code	This element is used in our international products only.
salesPrice itemPriceList	N	Sales Price	If you use Multiple Prices, you can use the itemPriceList element to import a list of price levels.
itemPriceLine	Y		This element is only required if the itemPriceList element is used.
itemPriceTypeRef	N	Price Level	This element is a reference to a price level that must exist in your account prior to importing.
currencyRef	N	Currency	This element is only used if the itemPriceList element is also used. It is a reference to a currency record that must exist in your account prior to importing.

Element	Req.	Mapping	Notes
itemPrice	Y	Amount	This element is only required if the itemPriceList element is used.
shippingCost	N	Shipping Cost	
handlingCost	N	Handling Cost	
weight	N	Item weight	
weightUnitRef	N		This element is a reference to units of measurement that already exist in your account. The valid entries for this element are g, kg, lb or oz.
isParentOnly	N		This element records a true or false value only.
isTaxable	N	Taxable	This element records a true or false value only.
isInactive	N	Item is Inactive	This element records a true or false value only.
offerSupport	N	Offer Support	This element records a true or false value only.
storeDisplayName	N	Store Display Name	
storeCategoryList	N		This element begins a list of references to store categories that must exist in your account prior to importing.
storeCategoryRef	Y	Site Category	This element is only required if you use the storeCategoryList element. It is a reference to a store category that must exist in your account prior to importing.
storeDescription	N	Store Description	
storeDisplayThumbnailRef	N	Item Display Thumbnail	This element is a reference to an image file that must exist in your account prior to importing.
storeDetailedDescription	N	Detailed Description	
storeDisplayImageRef	N	Item Display Image	This element is a reference to an image file that must exist in your account prior to importing.
storeDisplayImageURL	N		This element is used in queries only.
storePageTitle	N	Page Title	Sets the text you want to appear in the upper-left corner of an Internet browser when customers view this item in your Web store.
storeMetaTagHTML	N	Meta Tag HTML	Sets the Meta Tag HTML you want to appear in the < head > section of this item page. Meta tags enable your Web site to be found by search engines.
onSpecial	N	On Special	This element records a true or false value only.
specialsDescription	N	Specials Description	
isFeatured	N	Featured Item	This element records a true or false value only.

Element	Req.	Mapping	Notes
featuredDescription	N	Featured Description	
unitsTypeRef	N	Units Type	This element is a reference to a unit type that must exist in your account prior to importing.
stockUnitRef	N	Stock Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
saleUnitRef	N	Sale Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
purchaseUnitRef	N	Purchase Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
itemDrilldownTemplateRef	N	Item Drilldown Template	This element is a reference to an item template that must exist in your account prior to importing.
isUpc	N	Is UPC	This element records a true or false value only.
isSpecialOrderItem	N	Special Order Item	This element records a true or false value only. The isDropShipOrderItem and isSpecialOrderItem fields are mutually exclusive. If both isDropShipOrderItem and isSpecialOrderItem fields are false, the export returns the FALSE value for isDropShipOrderItem.

Service Items for Resale

Service item for resale records are used to track information about services you purchase and sell. Using smbXML, you can import, update and query service item for resale records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Item Name/ Number	
displayName	N	Display Name/Code	
vendorName	N	Vendor Name/Code	
parentHandle parentRef	Y	Subitem of	One of these elements is only required if the item is a child of another item.

Element	Req.	Mapping	Notes
isOnline	N	Display in Web Site	This element records a true or false value only.
purchaseDescription	N	Purchase Description	
cost	N	Purchase Price	
expenseAccountRef	N	Expense Account	This element is a reference to an expense account that must exist in your account prior to importing.
vendorHandle vendorRef	N	Preferred Vendor	This element is a reference to a vendor record that must exist in your account prior to importing.
salesDescription	N	Sales Description	
incomeAccountRef	N	Income Account	This element is a reference to an income account that must exist in your account prior to importing.
taxCodeRef	N	Sales Tax Code	This element is used in our international products only.
purchaseTaxCodeRef	N	Purchase Tax Code	This element is a reference to a tax code that must exist in your account prior to importing. It is used for international versions only.
rate itemPriceList	N	Rate	If you use Multiple Prices, you can use the itemPriceList element to import a list of price levels.
itemPriceLine	Y		This element is only required if the itemPriceList element is used.
itemPriceTypeRef	N	Price Level	This element a reference to a price level that must exist in your account prior to importing.
currencyRef	N	Currency	This element is only used if the itemPriceList element is also used. It is a reference to a currency record that must exist in your account prior to importing.
itemPrice	Y	Amount	This element is only required if the itemPriceList element is used.
isTaxable	N	Taxable	This element records a true or false value only.
isInactive	N	Item is Inactive	This element records a true or false value only.
offerSupport	N	Offer Support	This element records a true or false value only.
storeDisplayName	N	Store Display Name	
storeCategoryList	N		This element begins a list of references to store categories that must exist in your account prior to importing.

Element	Req.	Mapping	Notes
storeCategoryRef	Y	Site Category	This element is only required if you use the storeCategoryList element. It is a reference to a store category that must exist in your account prior to importing.
storeDescription	N	Store Description	
storeDisplayThumbnailRef	N	Item Display Thumbnail	This element is a reference to an image file that must exist in your account prior to importing.
storeDetailedDescription	N	Detailed Description	
storeDisplayImageRef	N	Item Display Image	This element is a reference to an image file that must exist in your account prior to importing.
storeDisplayImageURL	N		This element is used in queries only.
storePageTitle	N	Page Title	Sets the text you want to appear in the upper-left corner of an Internet browser when customers view this item in your Web store.
storeMetaTagHTML	N	Meta Tag HTML	Sets the Meta Tag HTML you want to appear in the < head > section of this item page. Meta tags enable your Web site to be found by search engines.
onSpecial	N	On Special	This element records a true or false value only.
specialsDescription	N	Specials Description	
isFeatured	N	Featured Item	This element records a true or false value only.
featuredDescription	N	Featured Description	
unitsTypeRef	N	Units Type	This element is a reference to a unit type that must exist in your account prior to importing.
stockUnitRef	N	Stock Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
saleUnitRef	N	Sale Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
purchaseUnitRef	N	Purchase Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.

Element	Req.	Mapping	Notes
itemDrilldownTemplateRef	N	Item Drilldown Template	This element is a reference to an item template that must exist in your account prior to importing.
isUpc	N	Is UPC	This element records a true or false value only.

Service Items for Purchase

Service item for purchase records are used to track information about services you purchase, but do not sell. Using smbXML, you can import, update and query service item for purchase records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Item Name/ Number	
displayName	N	Display Name/ Code	
vendorName	N	Vendor Name/ Code	
parentHandle parentRef	Y	Subitem of	One of these elements is only required if the item is a child of another item.
purchaseDescription	N	Purchase Description	
cost	N	Purchase Price	
purchaseTaxCodeRef	N	Purchase Tax Code	This element is a reference to a tax code that must exist in your account prior to importing. It is used for international versions only.
expenseAccountRef	N	Expense Account	This element is a reference to an expense account that must exist in your account prior to importing.
vendorHandle vendorRef	N	Preferred Vendor	This element is a reference to a vendor record that must exist in your account prior to importing.
unitsTypeRef	N	Units Type	This element is a reference to a unit type that must exist in your account prior to importing.
stockUnitRef	N	Stock Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
saleUnitRef	N	Sale Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
purchaseUnitRef	N	Purchase Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
isTaxable	N	Taxable	This element records a true or false value only.

Element	Req.	Mapping	Notes
isInactive	N	Item is Inactive	This element records a true or false value only.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
isUpc	N	Is UPC	This element records a true or false value only.

Service Items for Sale

Service item for sale records are used to track information about services you sell, but do not purchase. Using smbXML, you can import, update and query service item for sale records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Item Name/ Number	
displayName	N	Display Name/Code	
parentHandle parentRef	Y	Subitem of	One of these elements is only required if the item is a child of another item.
isOnline	N	Display in Web Site	This element records a true or false value only.
salesDescription	N	Sales Description	
incomeAccountRef	N	Income Account	This element is a reference to an income account that must exist in your account prior to importing.
taxCodeRef	N	Sales Tax Code	This element is used in our international products only.
rate itemPriceList	N	Rate	If you use Multiple Prices, you can use the itemPriceList element to import a list of price levels.
itemPriceLine	Y		This element is only required if the itemPriceList element is used.
itemPriceTypeRef	N	Price Level	This element is a reference to a price level that must exist in your account prior to importing.
currencyRef	N	Currency	This element is only used if the itemPriceList element is also used. It is a reference to a currency record that must exist in your account prior to importing.
itemPrice	Y	Amount	This element is only required if the itemPriceList element is used.
isParentOnly	N		This element records a true or false value only.

Element	Req.	Mapping	Notes
isTaxable	N	Taxable	This element records a true or false value only.
isInactive	N	Item is Inactive	This element records a true or false value only.
offerSupport	N	Offer Support	This element records a true or false value only.
storeDisplayName	N	Store Display Name	
storeCategoryList	N		This element begins a list of references to store categories that must exist in your account prior to importing.
storeCategoryRef	Y	Site Category	This element is only required if you use the storeCategoryList element. It is a reference to a store category that must exist in your account prior to importing.
storeDescription	N	Store Description	
storeDisplayThumbnailRef	N	Item Display Thumbnail	This element is a reference to an image file that must exist in your account prior to importing.
storeDetailedDescription	N	Detailed Description	
storeDisplayImageRef	N	Item Display Image	This element is a reference to an image file that must exist in your account prior to importing.
storeDisplayImageURL	N		This element is used in queries only.
storePageTitle	N	Page Title	Sets the text you want to appear in the upper-left corner of an Internet browser when customers view this item in your Web store.
storeMetaTagHTML	N	Meta Tag HTML	Sets the Meta Tag HTML you want to appear in the < head > section of this item page. Meta tags enable your Web site to be found by search engines.
onSpecial	N	On Special	This element records a true or false value only.
specialsDescription	N	Specials Description	
isFeatured	N	Featured Item	This element records a true or false value only.
featuredDescription	N	Featured Description	
unitsTypeRef	N	Units Type	This element is a reference to a unit type that must exist in your account prior to importing.
stockUnitRef	N	Stock Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
saleUnitRef	N	Sale Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.

Element	Req.	Mapping	Notes
purchaseUnitRef	N	Purchase Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
itemDrilldownTemplateRef	N	Item Drilldown Template	This element is a reference to an item template that must exist in your account prior to importing.

Other Charge Items for Resale

Other charge item for resale records are used to track information about other charges you are billed and charges you invoice your customers for. Using smbXML, you can import, update and query other charge item for resale records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Item Name/ Number	
displayName	N	Display Name/ Code	
vendorName	N	Vendor Name/ Code	
parentHandle parentRef	Y	Subitem of	One of these elements is only required if the item is a child of another item.
isOnline	N	Display in Web Site	This element records a true or false value only.
purchaseDescription	N	Purchase Description	
cost	N	Purchase Price	
expenseAccountRef	N	Expense Account	This element is a reference to an expense account that must exist in your account prior to importing.
vendorHandle vendorRef	N	Preferred Vendor	This element is a reference to a vendor record that must exist in your account prior to importing.
salesDescription	N	Sales Description	
incomeAccountRef	N	Income Account	This element is a reference to an income account that must exist in your account prior to importing.
taxCodeRef	N	Sales Tax Code	This element is used in our international products only.

Element	Req.	Mapping	Notes
purchaseTaxCodeRef	N	Purchase Tax Code	This element is a reference to a tax code that must exist in your account prior to importing. It is used for international versions only.
rate itemPriceList	N	Rate	If you use Multiple Prices, you can use the itemPriceList element to import a list of price levels.
itemPriceLine	Y		This element is only required if the itemPriceList element is used.
itemPriceTypeRef	N	Price Level	This element is a reference to a price level that must exist in your account prior to importing.
currencyRef	N	Currency	This element is only used if the itemPriceList element is also used. It is a reference to a currency record that must exist in your account prior to importing.
itemPrice	Y	Amount	This element is only required if the itemPriceList element is used.
unitsTypeRef	N	Units Type	This element is a reference to a unit type that must exist in your account prior to importing.
stockUnitRef	N	Stock Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
saleUnitRef	N	Sale Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
purchaseUnitRef	N	Purchase Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
isTaxable	N	Taxable	This element records a true or false value only.
isInactive	N	Item is Inactive	This element records a true or false value only.
offerSupport	N	Offer Support	This element records a true or false value only.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
isUpc	N	Is UPC	This element records a true or false value only.

Other Charge Items for Purchase

Other charge item for purchase records are used to track information about other charges you are billed, but do not charge your customers. Using smbXML, you can import, update and query other charge item for purchase records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Item Name/ Number	
displayName	N	Display Name/ Code	
vendorName	N	Vendor Name/ Code	
parentHandle parentRef	Y	Subitem of	One of these elements is only required if the item is a child of another item.
purchaseDescription	N	Purchase Description	
cost	N	Purchase Price	
purchaseTaxCodeRef	N	Purchase Tax Code	This element is a reference to a tax code that must exist in your account prior to importing. It is used for international versions only.
expenseAccountRef	N	Expense Account	This element is a reference to an expense account that must exist in your account prior to importing.
vendorHandle vendorRef	N	Preferred Vendor	This element is a reference to a vendor record that must exist in your account prior to importing.
unitsTypeRef	N	Units Type	This element is a reference to a unit type that must exist in your account prior to importing.
stockUnitRef	N	Stock Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
saleUnitRef	N	Sale Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
purchaseUnitRef	N	Purchase Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
isTaxable	N	Taxable	This element records a true or false value only.
isInactive	N	Item is Inactive	This element records a true or false value only.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
isUpc	N	Is UPC	This element records a true or false value only.

Other Charge Items for Sale

Other charge item for sale records are used to track information about other charges you bill to you customers. Using smbXML, you can import, update and query other charge item for sale records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Item Name/ Number	
displayName	N	Display Name/Code	
parentHandle parentRef	Y	Subitem of	One of these elements is only required if the item is a child of another item.
isOnline	N	Display in Web Site	This element records a true or false value only.
salesDescription	N	Sales Description	
incomeAccountRef	N	Income Account	This element is a reference to an income account that must exist in your account prior to importing.
taxCodeRef	N	Sales Tax Code	This element is used in our international products only.
rate itemPriceList	N	Rate	If you use Multiple Prices, you can use the itemPriceList element to import a list of price levels.
itemPriceLine	Y		This element is only required if the itemPriceList element is used.
itemPriceTypeRef	N	Price Level	This element is a reference to a price level that must exist in your account prior to importing.
currencyRef	N	Currency	This element is only used if the itemPriceList element is also used. It is a reference to a currency record that must exist in your account prior to importing.
itemPrice	Y	Amount	This element is only required if the itemPriceList element is used.
unitsTypeRef	N	Units Type	This element is a reference to a unit type that must exist in your account prior to importing.
stockUnitRef	N	Stock Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
saleUnitRef	N	Sale Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
purchaseUnitRef	N	Purchase Units	This element is a reference to a unit of measure that must exist in your account prior to importing. It is only used with the unitsTypeRef.
isParentOnly	N		This element records a true or false value only.
isTaxable	N	Taxable	This element records a true or false value only.
isInactive	N	Item is Inactive	This element records a true or false value only.

Element	Req.	Mapping	Notes
offerSupport	N	Offer Support	This element records a true or false value only.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.

Discount Items

Discount item records are used to create discounts you can apply to your transactions. Using smbXML, you can import, update and query discount item records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Item Name/ Number	
displayName	N	Display Name/ Code	
vendorName	N	Vendor Name/ Code	
parentHandle parentRef	Y	Subitem of	One of these elements is only required if the item is a child of another item.
description	N	Description	
accountRef	N	Account	This element is a reference to an account that must exist in your account prior to importing.
rate	Y	Rate	
isPercent	N		This element records a true or false value only.
isPreTax	N	Apply Before Sales Tax	This element records a true or false value only.
isInactive	N	Item is Inactive	This element records a true or false value only.
isUpc	N	Is UPC	This element records a true or false value only.

Markup Items

Markup item records are used to create markups you can apply to your transactions. Using smbXML, you can import, update and query markup item records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Item Name/Number	
displayName	N	Display Name/Code	
vendorName	N	Vendor Name/Code	
parentHandle parentRef	Y	Subitem of	One of these elements is only required if the item is a child of another item.
description	N	Description	
accountRef	N	Account	This element is a reference to an account that must exist in your account prior to importing.
rate	Y	Rate	
isPreTax	N	Apply Before Sales Tax	This element records a true or false value only.
isInactive	N	Item is Inactive	This element records a true or false value only.
isUpc	N	Is UPC	This element records a true or false value only.

Subtotal Items

Subtotal item records are used to create a subtotal line you can add to your transactions. Using smbXML, you can import, update and query subtotal item records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Item Name/Number	
displayName	N	Display Name/Code	
vendorName	N		
description	N	Description	
detailedDescription	N		
isInactive	N	Item is Inactive	This element records a true or false value only.

Description Items

Description item records are used to create a description line you can add to your transactions. Using smbXML, you can import, update and query description item records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Item Name/ Number	
description	N	Description	
isInactive	N	Item is Inactive	This element records a true or false value only.

Media Items

Media items are uploaded to your account and can then be attached to records. Using smbXML, you can import, update and query media item records. However, you can only use smbXML for adding or updating media items that are attached from the Internet.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	File Name	
description	N	Description	
URL	Y	URL	You must include the full Internet address for your image. i.e. http://www.images.com/sampleimage1.jpg
isInactive	N	File is Inactive	This element records a true or false value only.

Vendor Categories

Vendor category records are used to create categories that you can select on vendor records. Using smbXML, you can import vendor category records. Vendor categories are not available for updating and querying.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
type	Y		The type is vendor category.
name	Y	Vendor	
isInactive	N	Item is Inactive	This element records a true or false value only.

Customer Categories

Customer category records are used to create categories that you can select on customer records. Using smbXML, you can import customer category records. Customer categories are not available for updating and querying.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
type	Y		The type is customer category.
name	Y	Customer	
isInactive	N	Item is Inactive	This element records a true or false value only.

Store Categories

Store category records are used to separate items in your Web store. Using smbXML, you can import, update and query store category records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Category	
parentRef	Y	Subcategory of	All store categories will have parent categories. The parent category for a top-level category is the store tab.
description	N	Brief Description	
detailedDescription	N	Detailed Description	
isOnline	N	Display in Web Site	This element records a true or false value only.
isInactive	N	Category is Inactive	This element records a true or false value only.

Job Types

Job type records are used to create types that you can select on job records. Using smbXML, you can import job type records. Job types are not available for updating and querying.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
type	Y		The type is job type.
name	Y	Job Type	
parentRef	Y	Subtype of	This element is only required if this job type is a child of another job type.
isInactive	N	Item is Inactive	This element records a true or false value only.

Payment Methods

Payment method records are used to create records for the types of payment methods you accept from your customers. Using smbXML, you can import payment method records. Payment methods are not available for updating and querying.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
type	Y		The type is job type.
name	Y	Payment Method	
isCreditCard	N	Credit Card	This element records a true or false value only.
isInactive	N	Item is Inactive	This element records a true or false value only.

CRM Records

your account supports many CRM records for import via smbXML. The following section lists the records and their corresponding elements. Click the record names below to see a table of elements for that record type.

- [Cases](#)
- [Messages](#)
- [Events](#)
- [Tasks](#)
- [Topics](#)
- [Solutions](#)

Cases

Case records are used to record information concerning customer support issues. Using smbXML, you can import, update and query case records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
id	N		This element is used to identify a case for updating.
subject	Y	Subject	This element is required for new cases.
caseNumber	N	Case Number	Case numbers may be imported, for legacy system data, or may be omitted and NetSuite will assign the next case number.
incidentDate	Y	Incident Date	This element is required for new cases.
incidentTime	Y	Incident Time	This element is required for new cases.

Element	Req.	Mapping	Notes
createdDate	N	Created Date	This element is read only and automatically set for the current date when creating a new record.
lastMessageDate	N	Last Message Date	
caseEntityHandle caseEntityRef	Y	Company	This element is a reference to a customer record that must exist in your account prior to importing. This element is required for new cases.
contactHandle contactRef	N	Contact	This element is a reference to a contact record that must exist in your account prior to importing. Note: If the case contact is associated with multiple companies, then the parentName element for the contact should NOT be specified during the import.
email	N	E-mail(s)	The information entered for this element this element must conform to the standard e-mail address format. i.e. user@domain.com
phone	N	Phone	The information entered for this element must be in one of the following formats: 999-999-9999 (999) 999-9999 1-999-999-9999 1 (999) 999-9999 999-999-9999 ext 999
itemRef	N	Item	This element is a reference to an item record that must exist in your account prior to importing.
issueRef	N	Issue	This element is a reference to an issue type that must exist in your account prior to importing.
statusRef	Y	Status	This element is a reference to a case status that must exist in your account prior to importing.
priorityRef	N	Priority	This element is a reference to a priority that must exist in your account prior to importing.
originRef	N	Origin	This element is a reference to a case origin that must exist in your account prior to importing.
caseTypeRef	N	Case Type	This element is a reference to a case type that must exist in your account prior to importing.
assignedHandle assignedRef	N	Assigned To	This element is a reference to an employee record that must exist in your account prior to importing.
escalateList	N		This element indicates the beginning of a list.
escalateRef	Y	Escalate To	This element is only required if you use the escalateRef element. It is a reference to an employee record that must exist in your account prior to importing.

Element	Req.	Mapping	Notes
escalationMessage	N	Escalation Message	
messageNew	N	New Message	This element records a true or false value only.
incomingMessage	N	Message from Customer	
sendEmail	N	E-mail Reply	This element records a true or false value only.
outgoingMessage	N	Reply to Customer	
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.

Messages

Messages are used to record information concerning entities, cases, tasks, events and opportunities. Using smbXML, you can import and query messages. Messages are not available for updating. Query is only available for case messages.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
caseNumberRef crmHandle crmRecordId	Y		This element is a reference to a CRM record that must exist in your account prior to importing. This element is only required when adding a message to a CRM record.
entityRecordId entityHandle	Y		This element is a reference to an entity record that must exist in your account prior to importing. This element is only required when adding a message to an entity record.
transactionHandle transactionRecordId	Y		This element is a reference to an opportunity record that must exist in your account prior to importing. This element is only required when adding a message to an opportunity record.
isIncoming	N		This element records a true or false value only.
createdDate	N	Date	
fromRef	Y	Origin	This element is a reference to an entity record that must exist in your account prior to importing.
toRef	N	To	This element is a reference to an entity record that must exist in your account prior to importing.
messageText	N	Message	
emailed	N	E-mail sent	This element records a true or false value only.

Events

Event records are used to record information for meetings and events. Using smbXML, you can import, update and query event records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
id	N		This element is used to identify an event for updating.
title	Y	Subject	This element is only required for new events.
transactionHandle transactionRecordId	N	Opportunity	This element is only used to attach an event record to an opportunity.
location	N	Location	
allDayEvent	N	All day event	This element records a true or false value only.
startDate	N	Date	
startTime	N	Start Time	
endTime	N	End Time	
reminderMinutes	N	Reminder	The information entered for this element may only be one of the following: 0, 5, 10, 15, 30, 60, 120, 180, 240, 300, 480, 720 and 1440.
reminderType	N	Reminder Type	The information entered for this element may only be one of the following: Popup Window or E-mail.
statusRef	Y	Status	This element is a reference to an event status that must exist in your account prior to importing. This element is only required for new events.
accessLevel	Y	Event Access	The information entered for this element may only be one of the following: Public, Private or Show as Busy. This element is only required for new events.
eventOwnerHandle eventOwnerRef	Y		This element is a reference to an entity record that must exist in your account prior to importing. This element is only required when adding a new event.
organizerHandle organizerRef	N	Organizer	This element is a reference to an entity record that must exist in your account prior to importing.
showOnHomePage	N	Show event on home page	This element records a true or false value only.
sendEmail	N	Send E-mail	This element records a true or false value only.
ccMyself	N	CC myself	This element records a true or false value only.
messageText	N	Message	
recurrence	N	Repeat Event	This element allows you to enter information about a recurring event. Additional elements are required to add recurrence information.

Element	Req.	Mapping	Notes
frequencyRef	Y		The information entered for this element may only be one of the following: every, ever other, every third or every fourth. This element is only required if you use the recurrence element.
everySelect	Y		The information entered for this element may only be one of the following: Day' Month; Mon, Wed, Fri; Tue, Thu; Week; Mon thru Fri; Sat, Sun or Year. This element is only required if you use the recurrence element.
durationUntil	Y	End By	This element is only required if you use the recurrence element. This element can only be included with a false entry for the noEndDate element.
noEndDate	Y	No End Date	This element is only required if you use the recurrence element. This element records a true or false value only. It cannot contain a true value if you have set a date for the durationUntil element.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
inviteeList	N		This element allows you to enter a list of entities to invite to this event. Additional elements are required to add invitees to this event.
inviteeLine	Y		This element is only required if you use the inviteeList element.
entityHandle entityRef	Y	Send Invitation to	This element is only required if you use the inviteeList element. It is a reference to an entity record that must exist in your account prior to importing.
responseRef	Y	Response	This element is only required if you use the inviteeList element. The information entered for this element may only be on of the following: Accepted, Declined, No Response or Tentative.
attendance	Y	Attendance	This element is only required if you use the inviteeList element. The information entered for this element may only be on of the following: Required or Optional.

Tasks

Task records are used to record information for assignments and tasks. Using smbXML, you can import, update and query task records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
id	N		This element is used to identify a task for updating.
title	Y	Title	This element is required for a new task.
transactionHandle transactionRecordId	N	Opportunity	This element is a reference to an opportunity that must exist in your account prior to importing.
assignedHandle assignedRef	Y	Assigned To	This element is required for new tasks. It is a reference to an employee record that must exist in your account prior to importing.
startDate	Y	Start Date	This element is required for new tasks.
dueDate	Y	Due Date	This element is required for new tasks.
priorityRef	Y	Priority	This element is required for new tasks. The information entered for this element may only be one of the following: Low, Medium or High.
statusRef	Y	Status	This element is required for new tasks. The information entered for this element may only be one of the following: In Progress, Completed or Not Started.
accessLevel	N	Private Task	This element records a true or false value only. True for a private task and false for a public task.
taskOwnerHandle taskOwnerRef	N		This element is a reference to an entity record that must exist in your account prior to importing.
sendEmail	N	Send E-mail	This element records a true or false value only.
messageText	N	Notes	
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
companyList	N		This element indicates the beginning of a company list.
companyLine	Y		This element is required only if you use the companyList element.
companyHandle	Y	Company	This element is required only if you use the companyList element. It is a reference to a company record that must exist in your account prior to importing.
contactHandle	N	Contact	This element is used only if you also use the companyList element. It is a reference to a contact record that must exist in your account prior to importing.

Topics

Topic records are used to organize a knowledge base. Using smbXML, you can import, update and query topic records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
id	N		This element is used to identify a topic record for updating.
title	Y	Title	This element is required for new topics.
parentRef	Y	Subtopic of	This element is only required if this record is a child of another topic record.
briefDescription	N	Brief Description	
detailedDescription	N	Detailed Description	
isInactive	N	Inactive	This element records a true or false value only.

Solutions

Solution records are used to add information to a knowledge base. Using smbXML, you can import, update and query solution records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
id	N		This element is used to identify a solution record for updating.
code	Y	Code	This element is required for new solution records.
title	Y	Title	This element is required for new solution records.
abstract	Y	Abstract	This element is required for new solution records.
description	Y	Description	This element is required for new solution records.
statusRef	N	Status	The information entered for this element may only be one of the following: Approved or Unapproved.
displayOnline	N	Display Online	This element records a true or false value only.
isInactive	N	Inactive	This element records a true or false value only.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
topicList	Y		This element is required for new solution records. It indicates the beginning of a list of topics.

Element	Req.	Mapping	Notes
topicLine	Y		This element is only required if you use the topicList element. It indicates the beginning of an individual topic line.
topicRef	Y	Topic	This element is only required if you use the topicList element. It is a reference to a topic record that must exist in your account prior to importing.

Transactions

your account supports many transactions for import via smbXML. The following section lists the transactions and their corresponding elements. Click the transaction names below to see a table of elements for that transaction type.

- [Estimates](#)
- [Opportunities](#)
- [Sales Orders](#)
- [Cash Sales](#)
- [Invoices](#)
- [Customer Payments](#)
- [Return Authorizations](#)
- [Credit Memos](#)
- [Journal Entries](#)
- [Purchase Orders](#)
- [Bills](#)
- [Timecards](#)

Estimates

Estimates are used to give your customers an idea of the cost of a transaction. Using smbXML, you can import and query estimates. Estimates are not available for updating.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
customForm customFormRef	N	Custom Form	This element is a reference to a custom form that must exist in your account prior to importing.
tranStatus	N		This element is used only for queries.
statusRef	Y	Status	This element is a reference to a transaction status that must exist in your account prior to importing.
probability	N	Probability	
includeInForecast	N	Include in Forecast	This element records a true or false value only.

Element	Req.	Mapping	Notes
tranId	N	Estimate #	
customerHandle customerRef	Y	Customer:Job	This element is a reference to a customer record that must exist in your account prior to importing.
transactionHandle transactionRecordId	N	Opportunity	This element is a reference to an opportunity that must exist in your account prior to importing.
tranDate	Y	Date	
currencyRef	N	Currency	This element is a reference to a currency record that must exist in your account prior to importing. The currency used must match the currency selected on the customer's record.
exchangeRate	N	Exchange Rate	
toBePrinted	N	To Be Printed	This element records a true or false value only.
toBeEmailed	N	To Be Emailed	This element records a true or false value only.
email	N		
toBeFaxed	N	To Be Faxed	This element records a true or false value only.
fax	N		
memo	N	Memo	
billAddressRef customBillAddress	N	Bill To Select	The billAddressRef element refers to the label of an address that already exists on the entity record. To enter a custom address, use the customBillAddress element.
billAttention	N	Attention	This element is only used with the customBillAddress element.
billAddressee	N	Addressee	This element is only used with the customBillAddress element.
billAddr1	N	Address 1	This element is only used with the customBillAddress element.
billAddr2	N	Address 2	This element is only used with the customBillAddress element.
billCity	N	City	This element is only used with the customBillAddress element.
billState	N	State/Province	This element is only used with the customBillAddress element. You may enter the standard abbreviation or the full state or province name.
billZip	N	Zip	This element is only used with the customBillAddress element.
billCountry	N	Country	This element is only used with the customBillAddress element.
billPhone	N	Phone	This element is only used with the customBillAddress element.

Element	Req.	Mapping	Notes
shipAddressRef customShipAddress	N	Ship To Select	The shipAddressRef element refers to the label of an address that already exists on the entity record. To enter a custom address, use the customShipAddress element.
shipAttention	N	Attention	This element is only used with the customShipAddress element.
shipAddressee	N	Addressee	This element is only used with the customShipAddress element.
shipAddr1	N	Address 1	This element is only used with the customShipAddress element.
shipAddr2	N	Address 2	This element is only used with the customShipAddress element.
shipCity	N	City	This element is only used with the customShipAddress element.
shipState	N	State/Province	This element is only used with the customShipAddress element. You may enter the standard abbreviation or the full state or province name.
shipZip	N	Zip	This element is only used with the customShipAddress element.
shipCountry	N	Country	This element is only used with the customShipAddress element.
shipPhone	N	Phone	This element is only used with the customShipAddress element.
shipMethodRef	N	Ship Via	This element is a reference to a shipping method that must exist in your account prior to importing.
shipDate	N	Ship Date	
shipCost	N	Shipping Cost	
FOB	N	FOB	
customerMessageRef	N	Select Message	This element is a reference to a customer message that must exist in your account prior to importing.
customerMessage	N	Customer Message	
expectedCloseDate	N	Exp. Close	
startDate	N		
dueDate	N	Expires	
salesRepHandle salesRepRef	N	Sales Rep	This element is a reference to an employee record that must exist in your account prior to importing.
termsRef	N	Terms	This element is a reference to terms that must exist in your account prior to importing.
otherRefNum	N	PO #	

Element	Req.	Mapping	Notes
departmentRef	N	Department	This element is a reference to a department record that must exist in your account prior to importing.
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
isTaxable	N	Taxable	This element records a true or false value only.
discount	N		
discountItemHandle discountItemRef	Y	Transaction Discount	This element is only required if the discount element is used. It is a reference to a discount item that must exist in your account prior to importing.
discountRate discountTotal	Y	Rate	This element is only required if the discount element is used.
discountIsTaxable	Y		This element is only required if the discount element is used. It only records a true or false value.
tax	N		
taxItemHandle taxItemRef	Y	Tax	This element is only required if the tax element is used. It references a sales tax item that must exist in your account prior to importing.
taxRate taxTotal	Y	Tax % or Tax Total	This element is only required if the tax element is used.
orderTotal	N	Total	This element is the total cost of all items, plus sales tax and minus discounts. If you do not include this element, it is calculated automatically.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
itemList	Y		This element indicates the beginning of an item list.
itemLine	Y		This element indicates the beginning of an individual item line.
jobRef	N	Job	This element is a reference to a job record that must exist in your account prior to importing.
itemHandle itemRef	Y	Item	This element is a reference to an item record that must exist in your account prior to importing. If you use the itemRef element, the item must be identified by item type and name.
quantity	N	Quantity	
serialNumbers	N	Serial Numbers	You can enter multiple serial numbers using commas and white space as delimiters.
unitsRef	N	Units	This element is a reference to a unit of measure that must exist in your account prior to importing.

Element	Req.	Mapping	Notes
salesPrice	N	Rate	
amount	N	Amount	
description	N	Description	
isTaxable	N	Tax	This element records a true or false value only.
priceLevelRef	N	Price Level	This element is a reference to a price level that must exist in your account prior to importing.
departmentRef	N	Department	This element is a reference to a department record that must exist in your account prior to importing.
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
taxCodeRef	N	Tax Code	This element is only used in international versions.
taxCodeAmount	N	VAT Amt	This element is only used in international versions. This element is not available for Canadian imports.
grossAmount	N	Gross Amt	This element is only used in international versions. This element is not available for Canadian imports.

Opportunities

Opportunities are used to record information about negotiations with customers. Using smbXML, you can import, update and query opportunities.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
id	N		This element is used to identify an opportunity for updating.
entityRef entityHandle	Y	Company	This element is required for new opportunities. It is a reference to a company record that must exist in your account prior to importing.
title	Y	Title	This element is required for new opportunities.
tranId	N	Opportunity #	
salesRepRef salesRepHandle	N	Sales Rep	This element is a reference to an employee record that must exist in your account prior to importing.
leadSourceRef	N	Lead Source	This element is a reference to a lead source that must exist in your account prior to importing.

Element	Req.	Mapping	Notes
departmentRef	N	Department	This element is a reference to a department record that must exist in your account prior to importing.
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
entityStatusRef	Y	Status	This element is required for new opportunities. It is a reference to an entity status that must exist in your account prior to importing.
probability	Y	Probability	This element is required for new opportunities.
tranDate	Y	Date Created	This element is required for new opportunities.
expectedCloseDate	Y	Expected Close	This element is required for new opportunities.
projectedTotal	Y	Projected Total	This element is required for new opportunities.
decisionMakerHandle decisionMakerRef	N	Decision Maker	This element is a reference to a contact record that must exist in your account prior to importing.
actionItem	N	Action Item	
winLossReasonRef	N	Win/Loss Reason	This element is a reference to a win-loss reason that must exist in your account prior to importing.
memo	N		
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
itemList	N		This element indicates the beginning of an item list.
itemLine	Y		This element indicates the beginning of an individual item line.
jobRef	N	Job	This element is a reference to a job record that must exist in your account prior to importing. This element is only available for adding. You cannot update opportunity fields for line items.
itemHandle itemRef	Y	Item	This element is a reference to an item record that must exist in your account prior to importing. If you use the itemRef element, the item must be identified by item type and name. This element is only available for adding. You cannot update opportunity fields for line items.
quantity	N	Quantity	This element is only available for adding. You cannot update opportunity fields for line items.
serialNumbers	N	Serial Numbers	You can enter multiple serial numbers using commas and white space as delimiters. This element is only available for adding. You cannot update opportunity fields for line items.

Element	Req.	Mapping	Notes
unitsRef	N	Units	This element is a reference to a unit of measure that must exist in your account prior to importing. This element is only available for adding. You cannot update opportunity fields for line items.
salesPrice	N	Rate	This element is only available for adding. You cannot update opportunity fields for line items.
amount	N	Amount	This element is only available for adding. You cannot update opportunity fields for line items.
description	N	Description	This element is only available for adding. You cannot update opportunity fields for line items.
isTaxable	N	Tax	This element records a true or false value only. This element is only available for adding. You cannot update opportunity fields for line items.
priceLevelRef	N	Price Level	This element is a reference to a price level that must exist in your account prior to importing. This element is only available for adding. You cannot update opportunity fields for line items.
departmentRef	N	Department	This element is a reference to a department record that must exist in your account prior to importing.
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
contactList	N		This element indicates the beginning of a list of contact records.
contactLine	Y		This element indicates the beginning of an individual contact line. It is only required if you use the contactList element.
contactRef	Y	Name	This element is only required if you use the contactList element. It is a reference to a contact record that must exist in your account prior to importing.

Sales Orders

Sales orders are used as a commitment to ship items or provide services. Using smbXML, you can import and query sales orders. Sales orders are not available for updating.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
customForm customFormRef	N	Custom Form	This element is a reference to a custom form that must exist in your account prior to importing.
tranStatus	N	Status	This element is used only for queries.

Element	Req.	Mapping	Notes
tranId	N	Order #	
customerHandle customerRef	Y	Customer:Job	This element is a reference to a customer record that must exist in your account prior to importing.
transactionHandle transactionRecordId	N	Opportunity	This element is a reference to an opportunity record that must exist in your account prior to importing.
tranDate	Y	Date	
currencyRef	N	Currency	This element is a reference to a currency record that must exist in your account prior to importing. The currency used must match the currency selected on the customer's record.
toBePrinted	N	To Be Printed	This element records a true or false value only.
toBeEmailed	N	To Be E-mailed	This element records a true or false value only.
email	N		
toBeFaxed	N	To Be Faxed	This element records a true or false value only.
fax	N		
memo	N	Memo	
billAddressRef customBillAddress	N	Bill To Select	The billAddressRef element refers to the label of an address that already exists on the entity record. To enter a custom address, use the customBillAddress element.
billAttention	N	Attention	This element is only used with the customBillAddress element.
billAddressee	N	Addressee	This element is only used with the customBillAddress element.
billAddr1	N	Address 1	This element is only used with the customBillAddress element.
billAddr2	N	Address 2	This element is only used with the customBillAddress element.
billCity	N	City	This element is only used with the customBillAddress element.
billState	N	State/Province	This element is only used with the customBillAddress element. You may enter the standard abbreviation or the full state or province name.
billZip	N	Zip	This element is only used with the customBillAddress element.
billCountry	N	Country	This element is only used with the customBillAddress element.
billPhone	N	Phone	This element is only used with the customBillAddress element.

Element	Req.	Mapping	Notes
shipAddressRef customShipAddress	N	Ship To Select	The shipAddressRef element refers to the label of an address that already exists on the entity record. To enter a custom address, use the customShipAddress element.
shipAttention	N	Attention	This element is only used with the customShipAddress element.
shipAddressee	N	Addressee	This element is only used with the customShipAddress element.
shipAddr1	N	Address 1	This element is only used with the customShipAddress element.
shipAddr2	N	Address 2	This element is only used with the customShipAddress element.
shipCity	N	City	This element is only used with the customShipAddress element.
shipState	N	State/Province	This element is only used with the customShipAddress element. You may enter the standard abbreviation or the full state or province name.
shipZip	N	Zip	This element is only used with the customShipAddress element.
shipCountry	N	Country	This element is only used with the customShipAddress element.
shipPhone	N	Phone	This element is only used with the customShipAddress element.
cashPayment checkPayment creditCardPayment	N	Payment Method	
checkNumber	Y		This element is only required if you use the checkPayment element.
ccType	Y		This element is only required if you use the creditCardPayment element. It is a reference to a payment method that must exist in your account prior to importing.
ccNumber	Y	Credit Card #	This element is only required if you use the creditCardPayment element.
ccExpireDate	Y	Expires (MM/YYYY)	This element is only required if you use the creditCardPayment element.
ccName	Y	Name on Card	This element is only required if you use the creditCardPayment element.
ccStreet	Y	Card Street	This element is only required if you use the creditCardPayment element.
ccZipCode	Y	Card Zip Code	The element is only required if you use the creditCardPayment element.

Element	Req.	Mapping	Notes
ccApproved	Y	Credit Card Approved	This element is only required if you use the creditCardPayment element.
ccAuthCode	N	Auth. Code	This element is only used if you also use the creditCardPayment element.
ccPNRefNumber	N	CSC	This element is only used if you also use the creditCardPayment element.
ccAvsStreetMatch	N	AVS Street Match	This element is only used if you also use the creditCardPayment element.
ccAvsZipMatch	N	AVS Zip Match	This element is only used if you also use the creditCardPayment element.
ccSecurityCodeMatch	N	CSC Match	This element is only used if you also use the creditCardPayment element.
shipMethodRef	N	Ship Via	This element is a reference to a shipping item that must exist in your account prior to importing.
shipDate	N	Ship Date	
contractStartDate	N	Start Date	
renewalDate	N	End Date	
shipCost	N	Shipping Cost	
FOB	N	FOB	
customerMessageRef	N	Select Message	This element is a reference to a customer message that must exist in your account prior to importing.
customerMessage	N	Customer Message	
salesRepHandle salesRepRef	N	Sales Rep	This element is a reference to an employee record that must exist in your account prior to importing.
termsRef	N	Terms	This element is a reference to terms that must exist in your account prior to importing.
otherRefNum	N	PO #	
departmentRef	N	Department	This element is a reference to a department record that must exist in your account prior to importing.
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
isTaxable	N	Taxable	This element records a true or false value only.
discount	N		
discountItemHandle discountItemRef	Y	Transaction Discount	This element is only required if the discount element is used. It is a reference to a discount item that must exist in your account prior to importing.

Element	Req.	Mapping	Notes
discountRate discountTotal	Y	Rate	This element is only required if the discount element is used.
discountIsTaxable	Y		This element is only required if the discount element is used. It only records a true or false value.
tax	N		
taxItemHandle taxItemRef	Y	Tax	This element is only required if the tax element is used. It references a sales tax item that must exist in your account prior to importing.
taxRate taxTotal	Y	Tax % or Tax Total	This element is only required if the tax element is used.
orderTotal	N	Total	This element is the total cost of all items, plus sales tax and minus discounts. If you do not include this element, it is calculated automatically.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
itemList	Y		This element indicates the beginning of an item list.
itemLine	Y		This element indicates the beginning of an individual item line.
jobRef	N	Job	This element is a reference to a job record that must exist in your account prior to importing.
itemHandle itemRef	Y	Item	This element is a reference to an item record that must exist in your account prior to importing. If you use the itemRef element, the item must be identified by item type and name.
quantity	N	Quantity	
serialNumbers	N	Serial Numbers	You can enter multiple serial numbers using commas and white space as delimiters.
unitsRef	N	Units	This element is a reference to a unit of measure that must exist in your account prior to importing.
salesPrice	N	Rate	
amount	N	Amount	
description	N	Description	
isTaxable	N	Tax	This element records a true or false value only.
priceLevelRef	N	Price Level	This element is a reference to a price level that must exist in your account prior to importing.
departmentRef	N	Department	This element is a reference to a department record that must exist in your account prior to importing.

Element	Req.	Mapping	Notes
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
createPO	N		This element dictates whether an item is for Drop Shipment, Special Order or neither. It defaults to blank. Enter Drop Shipment for items that are being drop shipped. Enter Special Order for special order items.
POVendorHandle POVendorRef	N		This element is a reference to a vendor record that must exist in your NetSuite account prior to importing. If no value is specified for drop-ship items, it defaults to the preferred vendor selected on the item record.
PORate	N		If no value is specified for drop-ship items, this element defaults to the purchase price listed on the item record.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
taxCodeRef	N	Tax Code	This element is only used in international versions.
taxCodeAmount	N	VAT Amt	This element is only used in international versions. This element is not available for Canadian imports.
grossAmount	N	Gross Amt	This element is only used in international versions. This element is not available for Canadian imports.
revRecScheduleRef	N	Rev. Rec. Schedule	This element describes the revenue recognition schedule assigned to this transaction.
revRecStartDate	N	Rev. Rec. Start Date	This element states the revenue recognition schedule's start date.
revRecEndDate	N	Rev. Rec. End Date	This element states the revenue recognition schedule's end date.

Cash Sales

Cash sales are used to record a sale that you receive payment for at the time of the sale. Using smbXML, you can import and query cash sales. Cash sales are not available for updating.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
customForm customFormRef	N	Custom Form	This element is a reference to a custom form that must exist in your account prior to importing.
tranStatus	N	Status	This element is used only for queries.
tranId	N	Sale #	
customerHandle customerRef	Y	Customer:Job	This element is a reference to a customer record that must exist in your account prior to importing.
transactionHandle transactionRecordId	N	Opportunity	This element is a reference to an opportunity record that must exist in your account prior to importing.
tranDate	Y	Date	
currencyRef	N	Currency	This element is a reference to a currency record that must exist in your account prior to importing. The currency used must match the currency selected on the customer's record.
exchangeRate	N	Exchange Rate	
toBePrinted	N	To Be Printed	This element records a true or false value only.
toBeEmailed	N	To Be E-mailed	This element records a true or false value only.
email	N		
toBeFaxed	N	To Be Faxed	This element records a true or false value only.
fax	N		
memo	N	Memo	
billAddressRef customBillAddress	N	Bill To Select	The billAddressRef element refers to the label of an address that already exists on the entity record. To enter a custom address, use the customBillAddress element.
billAttention	N	Attention	This element is only used with the customBillAddress element.
billAddressee	N	Addressee	This element is only used with the customBillAddress element.
billAddr1	N	Address 1	This element is only used with the customBillAddress element.
billAddr2	N	Address 2	This element is only used with the customBillAddress element.
billCity	N	City	This element is only used with the customBillAddress element.
billState	N	State/Province	This element is only used with the customBillAddress element. You may enter the standard abbreviation or the full state or province name.
billZip	N	Zip	This element is only used with the customBillAddress element.

Element	Req.	Mapping	Notes
billCountry	N	Country	This element is only used with the customBillAddress element.
billPhone	N	Phone	This element is only used with the customBillAddress element.
shipAddressRef customShipAddress	N	Ship To Select	The shipAddressRef element refers to the label of an address that already exists on the entity record. To enter a custom address, use the customShipAddress element.
shipAttention	N	Attention	This element is only used with the customShipAddress element.
shipAddressee	N	Addressee	This element is only used with the customShipAddress element.
shipAddr1	N	Address 1	This element is only used with the customShipAddress element.
shipAddr2	N	Address 2	This element is only used with the customShipAddress element.
shipCity	N	City	This element is only used with the customShipAddress element.
shipState	N	State/Province	This element is only used with the customShipAddress element. You may enter the standard abbreviation or the full state or province name.
shipZip	N	Zip	This element is only used with the customShipAddress element.
shipCountry	N	Country	This element is only used with the customShipAddress element.
shipPhone	N	Phone	This element is only used with the customShipAddress element.
isUndeposited depositAccountRef	N	Undep. Funds or Account	The isUndeposited element is used to specify the profits from this sale are not deposited and it can only record a true or false value. The depositAccountRef element is a reference to an account that must exist in your account prior to importing.
cashPayment checkPayment creditCardPayment	N	Payment Method	
checkNumber	Y	Check #	This element is only required if you use the checkPayment element.
ccType	Y		This element is only required if you use the creditCardPayment element. It is a reference to a payment method that must exist in your account prior to importing.
ccNumber	Y	Credit Card #	This element is only required if you use the creditCardPayment element.

Element	Req.	Mapping	Notes
ccExpireDate	Y	Expires (MM/YYYY)	This element is only required if you use the creditCardPayment element.
ccName	Y	Name on Card	This element is only required if you use the creditCardPayment element.
ccStreet	Y	Card Street	This element is only required if you use the creditCardPayment element.
ccZipCode	Y	Card Zip Code	This element is only required if you use the creditCardPayment element.
ccApproved	Y	Credit Card Approved	This element is only required if you use the creditCardPayment element.
ccAuthCode	N	Auth. Code	This element is only used if you also use the creditCardPayment element.
ccPNRefNumber	N	CSC	This element is only used if you also use the creditCardPayment element.
ccAvsStreetMatch	N	AVS Street Match	This element is only used if you also use the creditCardPayment element.
ccAvsZipMatch	N	AVS Zip Match	This element is only used if you also use the creditCardPayment element.
ccSecurityCodeMatch	N	CSC Match	This element is only used if you also use the creditCardPayment element.
shipMethodRef	N	Ship Via	This element is a reference to a shipping item that must exist in your account prior to importing.
shipDate	N	Ship Date	
contractStartDate	N	Start Date	
renewalDate	N	End Date	
trackingNumbers	N	Tracking Numbers	
shipCost	N	Shipping Cost	
FOB	N	FOB	
customerMessageRef	N	Select Message	This element is a reference to a customer message that must exist in your account prior to importing.
customerMessage	N	Customer Message	
salesRepHandle salesRepRef	N	Sales Rep	This element is a reference to an employee record that must exist in your account prior to importing.
departmentRef	N	Department	This element is a reference to a department record that must exist in your account prior to importing.
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.

Element	Req.	Mapping	Notes
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
isTaxable	N	Taxable	This element records a true or false value only.
discount	N		
discountItemHandle discountItemRef	Y	Transaction Discount	This element is only required if the discount element is used. It is a reference to a discount item that must exist in your account prior to importing.
discountRate discountTotal	Y	Rate	This element is only required if the discount element is used.
discountIsTaxable	Y		This element is only required if the discount element is used. It only records a true or false value.
tax	N		
taxItemHandle taxItemRef	Y	Tax	This element is only required if the tax element is used. It references a sales tax item that must exist in your account prior to importing.
taxRate taxTotal	Y	Tax % or Tax Total	This element is only required if the tax element is used.
orderTotal	N	Total	This element is the total cost of all items, plus sales tax and minus discounts. If you do not include this element, it is calculated automatically.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
itemList	Y		This element indicates the beginning of an item list.
itemLine	Y		This element indicates the beginning of an individual item line.
jobRef	N	Job	This element is a reference to a job record that must exist in your account prior to importing.
itemHandle itemRef	Y	Item	This element is a reference to an item record that must exist in your account prior to importing. If you use the itemRef element, the item must be identified by item type and name.
quantity	N	Quantity	
serialNumbers	N	Serial Numbers	You can enter multiple serial numbers using commas and white space as delimiters.
unitsRef	N	Units	This element is a reference to a unit of measure that must exist in your account prior to importing.

Element	Req.	Mapping	Notes
salesPrice	N	Rate	
amount	N	Amount	
description	N	Description	
isTaxable	N	Tax	This element records a true or false value only.
priceLevelRef	N	Price Level	This element is a reference to a price level that must exist in your account prior to importing.
departmentRef	N	Department	This element is a reference to a department record that must exist in your account prior to importing.
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
taxCodeRef	N	Tax Code	This element is only used in international versions.
taxCodeAmount	N	VAT Amt	This element is only used in international versions. This element is not available for Canadian imports.
grossAmount	N	Gross Amt	This element is only used in international versions. This element is not available for Canadian imports.
createdFrom	N		This element allows you to associate a sales order with this cash sale.
revRecScheduleRef	N	Rev. Rec. Schedule	This element describes the revenue recognition schedule assigned to this transaction.
revRecStartDate	N	Rev. Rec. Start Date	This element states the revenue recognition schedule's start date.
revRecEndDate	N	Rev. Rec. End Date	This element states the revenue recognition schedule's end date.

Invoices

Invoices are used to record a sale that you have not yet received payment for. Using smbXML, you can import and query invoices. Invoices are not available for updating.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
customForm customFormRef	N	Custom Form	This element is a reference to a custom form that must exist in your account prior to importing.
tranStatus	N	Status	This element is used only for queries.
tranId	N	Invoice #	
customerHandle customerRef	Y	Customer:Job	This element is a reference to a customer record that must exist in your account prior to importing.
transactionHandle transactionRecordId	N	Opportunity	This element is a reference to an opportunity record that must exist in your account prior to importing.
tranDate	Y	Date	
currencyRef	N	Currency	This element is a reference to a currency record that must exist in your account prior to importing. The currency used must match the currency selected on the customer's record.
exchangeRate	N	Exchange Rate	
receivableAccountRef	N	Account	This element is a reference to an account that must exist in your account prior to import.
toBePrinted	N	To Be Printed	This element records a true or false value only.
toBeEmailed	N	To Be E-mailed	This element records a true or false value only.
email	N		
toBeFaxed	N	To Be Faxed	This element records a true or false value only.
fax	N		
memo	N	Memo	
billAddressRef customBillAddress	N	Bill To Select	The billAddressRef element refers to the label of an address that already exists on the entity record. To enter a custom address, use the customBillAddress element.
billAttention	N	Attention	This element is only used with the customBillAddress element.
billAddressee	N	Addressee	This element is only used with the customBillAddress element.
billAddr1	N	Address 1	This element is only used with the customBillAddress element.
billAddr2	N	Address 2	This element is only used with the customBillAddress element.
billCity	N	City	This element is only used with the customBillAddress element.
billState	N	State/Province	This element is only used with the customBillAddress element. You may enter the standard abbreviation or the full state or province name.

Element	Req.	Mapping	Notes
billZip	N	Zip	This element is only used with the customBillAddress element.
billCountry	N	Country	This element is only used with the customBillAddress element.
billPhone	N	Phone	This element is only used with the customBillAddress element.
shipAddressRef customShipAddress	N	Ship To Select	The shipAddressRef element refers to the label of an address that already exists on the entity record. To enter a custom address, use the customShipAddress element.
shipAttention	N	Attention	This element is only used with the customShipAddress element.
shipAddressee	N	Addressee	This element is only used with the customShipAddress element.
shipAddr1	N	Address 1	This element is only used with the customShipAddress element.
shipAddr2	N	Address 2	This element is only used with the customShipAddress element.
shipCity	N	City	This element is only used with the customShipAddress element.
shipState	N	State/Province	This element is only used with the customShipAddress element. You may enter the standard abbreviation or the full state or province name.
shipZip	N	Zip	This element is only used with the customShipAddress element.
shipCountry	N	Country	This element is only used with the customShipAddress element.
shipPhone	N	Phone	This element is only used with the customShipAddress element.
shipMethodRef	N	Ship Via	This element is a reference to a shipping item that must exist in your account prior to importing.
shipDate	N	Ship Date	
contractStartDate	N	Start Date	
renewalDate	N	End Date	
trackingNumbers	N	Tracking Numbers	
shipCost	N	Shipping Cost	
FOB	N	FOB	
customerMessageRef	N	Select Message	This element is a reference to a customer message that must exist in your account prior to importing.
customerMessage	N	Customer Message	

Element	Req.	Mapping	Notes
salesRepHandle salesRepRef	N	Sales Rep	This element is a reference to an employee record that must exist in your account prior to importing.
termsRef	N	Terms	This element is a reference to terms that must exist in your account prior to importing.
otherRefNum	N	PO #	
departmentRef	N	Department	This element is a reference to a department record that must exist in your account prior to importing.
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
isTaxable	N	Taxable	This element records a true or false value only.
discount	N		
discountItemHandle discountItemRef	Y	Transaction Discount	This element is only required if the discount element is used. It is a reference to a discount item that must exist in your account prior to importing.
discountRate discountTotal	Y	Rate	This element is only required if the discount element is used.
discountIsTaxable	Y		This element is only required if the discount element is used. It only records a true or false value.
tax	N		
taxItemHandle taxItemRef	Y	Tax	This element is only required if the tax element is used. It references a sales tax item that must exist in your account prior to importing.
taxRate taxTotal	Y	Tax % or Tax Total	This element is only required if the tax element is used.
orderTotal	N	Total	This element is the total cost of all items, plus sales tax and minus discounts. If you do not include this element, it is calculated automatically.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
itemList	Y		This element indicates the beginning of an item list.
itemLine	Y		This element indicates the beginning of an individual item line.

Element	Req.	Mapping	Notes
jobRef	N	Job	This element is a reference to a job record that must exist in your account prior to importing.
itemHandle itemRef	Y	Item	This element is a reference to an item record that must exist in your account prior to importing. If you use the itemRef element, the item must be identified by item type and name.
quantity	N	Quantity	
serialNumbers	N	Serial Numbers	You can enter multiple serial numbers using commas and white space as delimiters.
unitsRef	N	Units	This element is a reference to a unit of measure that must exist in your account prior to importing.
salesPrice	N	Rate	
amount	N	Amount	
description	N	Description	
isTaxable	N	Tax	This element records a true or false value only.
priceLevelRef	N	Price Level	This element is a reference to a price level that must exist in your account prior to importing.
departmentRef	N	Department	This element is a reference to a department record that must exist in your account prior to importing.
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
taxCodeRef	N	Tax Code	This element is only used in international versions.
taxCodeAmount	N	VAT Amt	This element is only used in international versions. This element is not available for Canadian imports.
grossAmount	N	Gross Amt	This element is only used in international versions. This element is not available for Canadian imports.
createdFrom	N		This element allows you to associate a sales order with this cash sale.
revRecScheduleRef	N	Rev. Rec. Schedule	This element describes the revenue recognition schedule assigned to this transaction.

Element	Req.	Mapping	Notes
revRecStartDate	N	Rev. Rec. Start Date	This element states the revenue recognition schedule's start date.
revRecEndDate	N	Rev. Rec. End Date	This element states the revenue recognition schedule's end date.

Customer Payments

Customer payments are used to record payments made on invoices. Using smbXML, you can import and query customer payments. Customer payments are not available for updating.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
customerHandle customerRef	Y	Customer:Job	This element is a reference to a customer record that must exist in your account prior to importing.
tranStatus	N	Status	This element is used only for queries.
tranDate	Y	Date	
receivableAccountRef	N	A/R Account	This element is a reference to an account that must exist in your account prior to importing. The account entered must match the account chosen for the invoices being paid.
currencyRef	N	Currency	This element is a reference to a currency record that must exist in your account prior to importing. The currency used must match the currency selected on the customer's record.
exchangeRate	N	Exchange Rate	
paymentAmount	Y	Payment Amount	
cashPayment checkPayment creditCardPayment	N	Payment Method	
checkNumber	Y	Check #	This element is only required if you use the checkPayment element.
ccType	Y		This element is only required if you use the creditCardPayment element. It is a reference to a payment method that must exist in your account prior to importing.
ccNumber	Y	Credit Card #	This element is only required if you use the creditCardPayment element.
ccExpireDate	Y	Expires (MM/YYYY)	This element is only required if you use the creditCardPayment element.
ccName	Y	Name on Card	This element is only required if you use the creditCardPayment element.

Element	Req.	Mapping	Notes
ccStreet	Y	Card Street	This element is only required if you use the creditCardPayment element.
ccZipCode	Y	Card Zip Code	This element is only required if you use the creditCardPayment element.
ccApproved	Y	Credit Card Approved	This element is only required if you use the creditCardPayment element.
ccAuthCode	N	Auth. Code	This element is only used if you also use the creditCardPayment element.
ccPNRefNumber	N	CSC	This element is only used if you also use the creditCardPayment element.
ccAvsStreetMatch	N	AVS Street Match	This element is only used if you also use the creditCardPayment element.
ccAvsZipMatch	N	AVS Zip Match	This element is only used if you also use the creditCardPayment element.
ccSecurityCodeMatch	N	CSC Match	This element is only used if you also use the creditCardPayment element.
memo	N	Memo	
isUndeposited	N	Unde Funds or Deposit To	This element records a true or false value only. True selects unde funds, false selects Deposit To.
depositAccountRef	N	Account	This element is used to reference an account only if the isUndeposited element is false. The account must exist in your account prior to importing.
applyExistingCredits	N	Apply Existing Credits	This element records a true or false value only.
appliedAmount	Y	To Apply	
applyList	N		This element indicates the beginning of a list of invoices that this payment should be applied to.
applyLine	Y		This element is only required if the applyList element is used.
tranIdRef	Y	Ref No.	This element is only required if the applyList element is used. It references a transaction for this customer that must exist in your account prior to importing.
discountAmount	N	Disc. Taken	This element is only used if the applyList element is also used.
paymentAmount	Y	Payment	This element is only required if the applyList element is used.

Return Authorizations

Return authorizations are used to track customer returns. Using smbXML, you can import and query return authorizations. Return authorizations are not available for updating.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
customForm customFormRef	N	Custom Form	This element is a reference to a custom form that must exist in your account prior to importing.
tranStatus	N	Status	This element is used only for queries.
statusRef	N	Default Status	The information entered for this element may only be one of the following: Pending Approval or Pending Receipt.
tranId	N	Rtn. Auth. #	
customerHandle customerRef	Y	Customer:Job	This element is a reference to a customer record that must exist in your account prior to importing.
tranDate	Y	Date	
currencyRef	N	Currency	This element is a reference to a currency record that must exist in your account prior to importing. The currency used must match the currency selected on the customer's record.
exchangeRate	N	Exchange Rate	
toBePrinted	N	To Be Printed	This element records a true or false value only.
toBeEmailed	N	To Be E-mailed	This element records a true or false value only.
email	N		
toBeFaxed	N	To Be Faxed	This element records a true or false value only.
fax	N		
memo	N	Memo	
billAddressRef customBillAddress	N	Bill To Select	The billAddressRef element refers to the label of an address that already exists on the entity record. To enter a custom address, use the customBillAddress element.
billAttention	N	Attention	This element is only used with the customBillAddress element.
billAddressee	N	Addressee	This element is only used with the customBillAddress element.
billAddr1	N	Address 1	This element is only used with the customBillAddress element.
billAddr2	N	Address 2	This element is only used with the customBillAddress element.
billCity	N	City	This element is only used with the customBillAddress element.
billState	N	State/Province	This element is only used with the customBillAddress element. You may enter the standard abbreviation or the full state or province name.

Element	Req.	Mapping	Notes
billZip	N	Zip	This element is only used with the customBillAddress element.
billCountry	N	Country	This element is only used with the customBillAddress element.
billPhone	N	Phone	This element is only used with the customBillAddress element.
shipAddressRef customShipAddress	N	Ship To Select	The shipAddressRef element refers to the label of an address that already exists on the entity record. To enter a custom address, use the customShipAddress element.
shipAttention	N	Attention	This element is only used with the customShipAddress element.
shipAddressee	N	Addressee	This element is only used with the customShipAddress element.
shipAddr1	N	Address 1	This element is only used with the customShipAddress element.
shipAddr2	N	Address 2	This element is only used with the customShipAddress element.
shipCity	N	City	This element is only used with the customShipAddress element.
shipState	N	State/Province	This element is only used with the customShipAddress element. You may enter the standard abbreviation or the full state or province name.
shipZip	N	Zip	This element is only used with the customShipAddress element.
shipCountry	N	Country	This element is only used with the customShipAddress element.
shipPhone	N	Phone	This element is only used with the customShipAddress element.
cashPayment checkPayment creditCardPayment	N	Payment Method	
checkNumber	Y		This element is only required if you use the checkPayment element.
ccType	Y		This element is only required if you use the creditCardPayment element. It is a reference to a payment method that must exist in your account prior to importing.
ccNumber	Y	Credit Card #	This element is only required if you use the creditCardPayment element.
ccExpireDate	Y	Expires (MM/YYYY)	This element is only required if you use the creditCardPayment element.

Element	Req.	Mapping	Notes
ccName	Y	Name on Card	This element is only required if you use the creditCardPayment element.
ccStreet	Y	Card Street	This element is only required if you use the creditCardPayment element.
ccZipCode	Y	Card Zip Code	This element is only required if you use the creditCardPayment element.
ccApproved	Y	Credit Card Approved	This element is only required if you use the creditCardPayment element.
ccAuthCode	N	Auth. Code	This element is only used if you also use the creditCardPayment element.
ccPNRefNumber	N	CSC	This element is only used if you also use the creditCardPayment element.
ccAvsStreetMatch	N	AVS Street Match	This element is only used if you also use the creditCardPayment element.
ccAvsZipMatch	N	AVS Zip Match	This element is only used if you also use the creditCardPayment element.
ccSecurityCodeMatch	N	CSC Match	This element is only used if you also use the creditCardPayment element.
customerMessageRef	N	Select Message	This element is a reference to a customer message that must exist in your account prior to importing.
customerMessage	N	Customer Message	
salesRepHandle salesRepRef	N	Sales Rep	This element is a reference to an employee record that must exist in your account prior to importing.
otherRefNum	N	PO #	
departmentRef	N	Department	This element is a reference to a department record that must exist in your account prior to importing.
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
isTaxable	N	Taxable	This element records a true or false value only.
discount	N		
discountItemHandle discountItemRef	Y	Transaction Discount	This element is only required if the discount element is used. It is a reference to a discount item that must exist in your account prior to importing.
discountRate discountTotal	Y	Rate	This element is only required if the discount element is used.
discountIsTaxable	Y		This element is only required if the discount element is used. It only records a true or false value.
tax	N		

Element	Req.	Mapping	Notes
taxItemHandle taxItemRef	Y	Tax	This element is only required if the tax element is used. It references a sales tax item that must exist in your account prior to importing.
taxRate taxTotal	Y	Tax % or Tax Total	This element is only required if the tax element is used.
orderTotal	N	Total	This element is the total cost of all items, plus sales tax and minus discounts. If you do not include this element, it is calculated automatically.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
itemList	Y		This element indicates the beginning of an item list.
itemLine	Y		This element indicates the beginning of an individual item line.
jobRef	N	Job	This element is a reference to a job record that must exist in your account prior to importing.
itemHandle itemRef	Y	Item	This element is a reference to an item record that must exist in your account prior to importing. If you use the itemRef element, the item must be identified by item type and name.
quantity	N	Quantity	
serialNumbers	N	Serial Numbers	You can enter multiple serial numbers using commas and white space as delimiters.
unitsRef	N	Units	This element is a reference to a unit of measure that must exist in your account prior to importing.
salesPrice	N	Rate	
amount	N	Amount	
description	N	Description	
isTaxable	N	Tax	This element records a true or false value only.
priceLevelRef	N	Price Level	This element is a reference to a price level that must exist in your account prior to importing.
departmentRef	N	Department	This element is a reference to a department record that must exist in your account prior to importing.
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
revRecScheduleRef	N	Rev. Rec. Schedule	This element describes the revenue recognition schedule assigned to this transaction.

Element	Req.	Mapping	Notes
revRecStartDate	N	Rev. Rec. Start Date	This element states the revenue recognition schedule's start date.
revRecEndDate	N	Rev. Rec. End Date	This element states the revenue recognition schedule's end date.

Credit Memos

Credit memos are used to decrease the amount a customer owes your business. Using smbXML, you can import and query credit memos. Credit memos are not available for updating.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
customForm customFormRef	N	Custom Form	This element is a reference to a custom form that must exist in your account prior to importing.
tranId	N	Credit #	
customerHandle customerRef	Y	Customer:Job	This element is a reference to a customer record that must exist in your account prior to importing.
tranDate	Y	Date	
currencyRef	N	Currency	This element is a reference to a currency record that must exist in your account prior to importing. The currency used must match the currency selected on the customer's record.
exchangeRate	N	Exchange Rate	
toBePrinted	N	To Be Printed	This element records a true or false value only.
toBeEmailed	N	To Be E-mailed	This element records a true or false value only.
email	N		
toBeFaxed	N	To Be Faxed	This element records a true or false value only.
fax	N		
memo	N	Memo	
billAddressRef customBillAddress	N	Bill To Select	The billAddressRef element refers to the label of an address that already exists on the entity record. To enter a custom address, use the customBillAddress element.
billAttention	N	Attention	This element is only used with the customBillAddress element.
billAddressee	N	Addressee	This element is only used with the customBillAddress element.
billAddr1	N	Address 1	This element is only used with the customBillAddress element.

Element	Req.	Mapping	Notes
billAddr2	N	Address 2	This element is only used with the customBillAddress element.
billCity	N	City	This element is only used with the customBillAddress element.
billState	N	State/Province	This element is only used with the customBillAddress element. You may enter the standard abbreviation or the full state or province name.
billZip	N	Zip	This element is only used with the customBillAddress element.
billCountry	N	Country	This element is only used with the customBillAddress element.
billPhone	N	Phone	This element is only used with the customBillAddress element.
shipAddressRef customShipAddress	N	Ship To Select	The shipAddressRef element refers to the label of an address that already exists on the entity record. To enter a custom address, use the customShipAddress element.
shipAttention	N	Attention	This element is only used with the customShipAddress element.
shipAddressee	N	Addressee	This element is only used with the customShipAddress element.
shipAddr1	N	Address 1	This element is only used with the customShipAddress element.
shipAddr2	N	Address 2	This element is only used with the customShipAddress element.
shipCity	N	City	This element is only used with the customShipAddress element.
shipState	N	State/Province	This element is only used with the customShipAddress element.
shipZip	N	Zip	This element is only used with the customShipAddress element.
shipCountry	N	Country	This element is only used with the customShipAddress element.
shipPhone	N	Phone	This element is only used with the customShipAddress element.
customerMessageRef	N	Select Message	This element is a reference to a customer message that must exist in your account prior to importing.
customerMessage	N	Customer Message	
salesRepHandle salesRepRef	N	Sales Rep	This element is a reference to an employee record that must exist in your account prior to importing.
otherRefNum	N	PO #	

Element	Req.	Mapping	Notes
departmentRef	N	Department	This element is a reference to a department record that must exist in your account prior to importing.
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
isTaxable	N	Taxable	This element records a true or false value only.
discount	N		
discountItemHandle discountItemRef	Y	Transaction Discount	This element is only required if the discount element is used. It is a reference to a discount item that must exist in your account prior to importing.
discountRate discountTotal	Y	Rate	This element is only required if the discount element is used.
discountIsTaxable	Y		This element is only required if the discount element is used. It only records a true or false value.
tax	N		
taxItemHandle taxItemRef	Y	Tax	This element is only required if the tax element is used. It references a sales tax item that must exist in your account prior to importing.
taxRate taxTotal	Y	Tax % or Tax Total	This element is only required if the tax element is used.
orderTotal	N	Total	This element is the total cost of all items, plus sales tax and minus discounts. If you do not include this element, it is calculated automatically.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
itemList	Y		This element indicates the beginning of an item list.
itemLine	Y		This element indicates the beginning of an individual item line.
jobRef	N	Job	This element is a reference to a job record that must exist in your account prior to importing.
itemHandle itemRef	Y	Item	This element is a reference to an item record that must exist in your account prior to importing. If you use the itemRef element, the item must be identified by item type and name.
quantity	N	Quantity	
serialNumbers	N	Serial Numbers	You can enter multiple serial numbers using commas and white space as delimiters.

Element	Req.	Mapping	Notes
unitsRef	N	Units	This element is a reference to a unit of measure that must exist in your account prior to importing.
salesPrice	N	Rate	
amount	N	Amount	
description	N	Description	
isTaxable	N	Tax	This element records a true or false value only.
priceLevelRef	N	Price Level	This element is a reference to a price level that must exist in your account prior to importing.
departmentRef	N	Department	This element is a reference to a department record that must exist in your account prior to importing.
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
revRecScheduleRef	N	Rev. Rec. Schedule	This element describes the revenue recognition schedule assigned to this transaction.
revRecStartDate	N	Rev. Rec. Start Date	This element states the revenue recognition schedule's start date.
revRecEndDate	N	Rev. Rec. End Date	This element states the revenue recognition schedule's end date.

Journal Entries

Journal entries are used to adjust the value of accounts without entering transactions. Using smbXML, you can import and query journal entries. Journal entries are not available for updating.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
tranStatus	N	Status	This element is used only for queries.
tranId	N	Entry No.	
tranDate	Y	Date	
reversalDate	N	Reversal Date	
isDeferred	N	Defer Entry	This element records a true or false value only.
journalItemList	Y		This element indicates the beginning of a list of journal entry items.
accountRef	Y	Account	This element references an account that must exist in your account prior to importing.

Element	Req.	Mapping	Notes
debitAmount creditAmount	Y	Debit or Credit	
memo	N	Memo	
entityHandle entityRef	N	Name	This element is a reference to an entity record that must exist in your account prior to importing.
departmentRef	N	Department	This element is a reference to a department record that must exist in your account prior to importing.
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
taxCodeRef	N	Sales Tax Code	This element is used in our international products only.
taxCodeAmount	N	Amt	This element is used in our international products only.
grossAmount	N	Gross Amt	This element is used in our international products only.
taxCodeAccountRef	N	Tax Account	This element is used in our international products only. It is a reference to an account that must exist in your account prior to importing.

Purchase Orders

Purchase orders are used to purchase items or services from vendors. Using smbXML, you can import and query purchase orders. Purchase orders are not available for updating.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
customForm customFormRef	N	Custom Form	This element is a reference to a custom form that must exist in your account prior to importing.
tranStatus	N	Status	This element is used only for queries.
tranId	N	PO #	
vendorHandle vendorRef	Y	Vendor	This element is a reference to a vendor record that must exist in your account prior to importing.
employeeHandle employeeRef	N	Employee	This element is a reference to a employee record that must exist in your account prior to importing.
customerHandle customerRef	N	Ship To	This element is a reference to a customer record that must exist in your account prior to importing.
currencyRef	N	Currency	This element is a reference to a currency record that must exist in your account prior to importing. The currency used must match the currency selected on the customer's record.
exchangeRate	N	Exchange Rate	

Element	Req.	Mapping	Notes
trandDate	Y	Date	
toBePrinted	N	To Be Printed	This element records a true or false value only.
toBeEmailed	N	To Be E-mailed	This element records a true or false value only.
email	N		
toBeFaxed	N	To Be Faxed	This element records a true or false value only.
fax	N		
memo	N	Memo	
billAddressRef customBillAddress	N	Bill To Select	The billAddressRef element refers to the label of an address that already exists on the entity record. To enter a custom address, use the customBillAddress element.
billAttention	N	Attention	This element is only used with the customBillAddress element.
billAddressee	N	Addressee	This element is only used with the customBillAddress element.
billAddr1	N	Address 1	This element is only used with the customBillAddress element.
billAddr2	N	Address 2	This element is only used with the customBillAddress element.
billCity	N	City	This element is only used with the customBillAddress element.
billState	N	State/Province	This element is only used with the customBillAddress element. You may enter the standard abbreviation or the full state or province name.
billZip	N	Zip	This element is only used with the customBillAddress element.
billCountry	N	Country	This element is only used with the customBillAddress element.
billPhone	N	Phone	This element is only used with the customBillAddress element.
shipAddressRef customShipAddress	N	Ship To Select	The shipAddressRef element refers to the label of an address that already exists on the entity record. To enter a custom address, use the customShipAddress element.
shipAttention	N	Attention	This element is only used with the customShipAddress element.
shipAddressee	N	Addressee	This element is only used with the customShipAddress element.
shipAddr1	N	Address 1	This element is only used with the customShipAddress element.
shipAddr2	N	Address 2	This element is only used with the customShipAddress element.

Element	Req.	Mapping	Notes
shipCity	N	City	This element is only used with the customShipAddress element.
shipState	N	State/Province	This element is only used with the customShipAddress element. You may enter the standard abbreviation or the full state or province name.
shipZip	N	Zip	This element is only used with the customShipAddress element.
shipCountry	N	Country	This element is only used with the customShipAddress element.
shipPhone	N	Phone	This element is only used with the customShipAddress element.
receiveByDate	N	Receive By	
shipMethodRef	N	Ship Via	This element is a reference to a shipping item that must exist in your account prior to importing.
shipDate	N	Ship Date	
trackingNumbers	N	Tracking Numbers	
FOB	N	FOB	
vendorMessage	N	Vendor Message	
termsRef	N	Terms	This element is a reference to terms that must exist in your account prior to importing.
otherRefNum	N	Vendor #	
departmentRef	N	Department	This element is a reference to a department record that must exist in your account prior to importing.
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
orderTotal	N	Total	This element is the total cost of all items, plus sales tax and minus discounts. If you do not include this element, it is calculated automatically.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
purchaseItemList	Y		This element indicates the beginning of a list of items.
purchaseItemLine	Y		This element indicates the beginning of an individual item line.
itemHandle itemRef	Y	Item	This element is a reference to an item record that must exist in your account prior to importing. If you use the itemRef element, the item must be identified by type and name.

Element	Req.	Mapping	Notes
quantity	N	Quantity	
serialNumbers	N	Serial Numbers	You can enter multiple serial numbers using commas and white space as delimiters.
unitsRef	N	Units	This element is a reference to a unit of measure that must exist in your account prior to importing.
rate amount	Y	Amount	
description	N	Description	
departmentRef	N	Department	This element is a reference to a department record that must exist in your account prior to importing.
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
customerHandle customerRef	N	Customer:Job	This element is a reference to a customer record that must exist in your account prior to importing.
isBillable	N	Billable	This element records a true or false value only.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
taxCodeRef	N	Tax Code	This element is only used in international versions.
taxCodeAmount	N	VAT Amt	This element is only used in international versions. This element is not available for Canadian imports.
grossAmount	N	Gross Amt	This element is only used in international versions. This element is not available for Canadian imports.
createdFrom	N	Ref. No.	

Bills

Bills are used to record invoices that you have received from vendors for items or services. Using smbXML, you can import and query bills. Bills are not available for updating.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
postingPeriodRef	N	Posting Period	This element is a reference to a posting period that must exist in your account prior to importing. When entering a posting period, you must include parentName references for both the fiscal year and quarter the period occurs in.
tranStatus	N	Status	This element is used only for queries.
tranId	N	Reference No.	

Element	Req.	Mapping	Notes
vendorHandle vendorRef	Y	Vendor	This element is a reference to a vendor record that must exist in your account prior to importing.
tranDate	Y	Date	
termsRef	N	Terms	This element is a reference to terms that must exist in your account prior to importing.
memo	N	Memo	
orderTotal	N	Total	This element is the total cost of all items, plus sales tax and minus discounts. If you do not include this element, it is calculated automatically.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
purchaseItemList	Y		This element indicates the beginning of a list of items.
purchaseItemLine	Y		This element indicates the beginning of an individual item line.
itemHandle itemRef	Y	Item	This element is a reference to an item record that must exist in your account prior to importing. If you use the itemRef element, the item must be identified by type and name.
quantity	N	Quantity	
serialNumbers	N	Serial Numbers	You can enter multiple serial numbers using commas and white space as delimiters.
unitsRef	N	Units	This element is a reference to a unit of measure that must exist in your account prior to importing.
rate amount	Y	Amount	
description	N	Description	
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
customerHandle customerRef	N	Customer:Job	This element is a reference to a customer record that must exist in your account prior to importing.
isBillable	N	Billable	This element records a true or false value only.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.
taxCodeRef	N	Tax Code	This element is only used in international versions.
taxCodeAmount	N	VAT Amt	This element is only used in international versions. This element is not available for Canadian imports.

Element	Req.	Mapping	Notes
grossAmount	N	Gross Amt	This element is only used in international versions. This element is not available for Canadian imports.
createdFrom	N		This element allows you to associate a sales order with this cash sale.

Timecards

Timecards are used to record time your employees have spent working for your business. Using smbXML, you can import, update and query timecards.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
id	N		This element is used to identify a timecard for updating.
employeeHandle employeeRef	Y	Employee	This element is a reference to an employee record that must exist in your account prior to importing. This element is required for new timecards.
tranDate	Y	Date	This element is required for new timecards.
customerHandle customerRef	Y	Customer:Job	This element is required for new timecards.
isBillable	N	Billable	This element records a true or false value only.
itemHandle itemRef	N	Service Item	This element is a reference to a service item record that must exist in your account prior to importing.
payrollItemRef	N	Payroll Item	This element is a reference to a payroll item record that must exist in your account prior to importing.
departmentRef	N	Department	This element is a reference to a department record that must exist in your account prior to importing.
locationRef	N	Location	This element is a reference to a location record that must exist in your account prior to importing.
classRef	N	Class	This element is a reference to a class record that must exist in your account prior to importing.
hours	Y	Duration	This element is required for new timecards.
rate	N	Rate	
lockRate	N	Lock this Rate	This element records a true or false value only.
memo	N	Memo	
supervisorApproval	N	Supervisor Approval	This element records a true or false value only.
customFieldValues	N		
customFieldValue	Y		This element is only required if you use the customFieldValues element. You can enter multiple custom fields.

Customization

Your account supports many customization records for import via smbXML. The following section lists the records and their corresponding elements. Click the record names below to see a table of elements for that record type.

- [Custom Lists](#)
- [Custom Fields](#)
- [Custom Record Types](#)
- [Custom Records](#)

Disabling System Notes

When importing data from Custom Fields, you have the option to disable the creation of system notes during the import for those fields. Depending on the size of your import, this may significantly increase performance.

You can disable system notes in one of two ways:

- By checking the Disable System Notes for Custom Fields option on the Submit XML Document page.
- By setting the disableSystemNotesForCustomFields attribute to true the SML data level.

```
<smbxml disableSystemNotesForCustomFields="true">
```

The default setting for disableSystemNotesForCustomFields is **false**.



Important: System generated notes are used in NetSuite to track changes to a record including what action was taken, when the record was modified and the user that was responsible for the change. This is important for maintaining a complete audit trail. If you turn off system generated notes for custom fields, specific changes related to custom fields within the imported record are NOT recorded in NetSuite. All changes for standard fields are logged as usual. Therefore, if a custom field contains sensitive information that is critical for audit purposes, you should NOT disable system generated notes.

Custom Lists

Custom lists are used to create lists of values that can be used elsewhere in your account. Using smbXML, you can import, update and query custom lists.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Name	
isInactive	N	List is Inactive	This element records a true or false value only.
customListValues	Y		This element indicates the beginning of a list of values.
customListValue	Y	Value	

Custom Fields

Custom fields are used to collect specific information on records and transactions. Using smbXML, you can import, update and query custom fields.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Description	
type	Y		The information entered for this element may only be one of the following: BODY,COLUMN, ENTITY, EVENT, ITEM or RECORD.
customRecordTypeRef	Y		This element is only required if the field is being added to a custom record. If this is so, the type element must reference the custom record using <type>RECORD</type>.
fieldType	Y	Type	The information entered for this element may only be one of the available custom field types for the kind of field you are creating.
customListName	Y	List/Record	This element is only required if the field type is List/Record or Multiple Select. It is a reference to a list that must exist in your account prior to importing.
sourceList	N	Source List	This element is used to select a record type for this custom field to use for sourcing. This information entered for this element may only be one of the available source lists for the kind of field you are creating.
parentField	N	Source From	This element is used to select the field that this custom field should source information from.
addToExpense	N	Expense	This element records a true or false value only. It is available for column fields.
addToPurchase	N	Purchase or Purchase Item	This element records a true or false value only. It is available for body and column fields.
addToSale	N	Sale or Sale Item	This element records a true or false value only. It is available for body and column fields.
addToJournal	N	Journal	This element records a true or false value only. It is available for body and column fields.
addToOpportunity	N	Opportunity or Opportunity Item	This element records a true or false value only. It is available for body and column fields.
addToExpenseReport	N	Expense Report	This element records a true or false value only. It is available for body and column fields.
addToTime	N	Time	This element records a true or false value only. It is available for column fields.

Element	Req.	Mapping	Notes
addToStore	N	Web Store or Store Item	This element records a true or false value only. It is available for body, entity and column fields.
addToCustomer	N	Customer:Job	This element records a true or false value only. It is available for entity fields.
addToVendor	N	Vendor	This element records a true or false value only. It is available for entity fields.
addToEmployee	N	Employee	This element records a true or false value only. It is available for entity fields.
addToOtherName	N	Other Name	This element records a true or false value only. It is available for entity fields.
addToInventoryPart	N	Inventory Item	This element records a true or false value only. It is available for item fields.
addToNonInventoryPart	N	Non-inventory Item	This element records a true or false value only. It is available for item fields.
addToService	N	Service	This element records a true or false value only. It is available for item fields.
addToOtherCharge	N	Other Charge	This element records a true or false value only. It is available for item fields.
addToGroup	N	Group	This element records a true or false value only. It is available for item fields.
addToKit	N	Kit/Package	This element records a true or false value only. It is available for item fields.
addToAssembly	N	Assembly/Bill of Materials	This element records a true or false value only. It is available for item fields.
addToContact	N	Contact	This element records a true or false value only. It is available for entity fields.
addToPartner	N	Partner	This element records a true or false value only. It is available for entity fields.
addToCase	N	Case	This element records a true or false value only. It is available for CRM fields.
addToEvent	N	Event	This element records a true or false value only. It is available for CRM fields.
addToTask	N	Task	This element records a true or false value only. It is available for CRM fields.
addToSolution	N	Solution	This element records a true or false value only. It is available for CRM fields.
addToPickingTicket	N	Print on Picking Ticket	This element records a true or false value only. It is available for body and column fields.
addToPackingSlip	N	Print on Packing Slip	This element records a true or false value only. It is available for body and column fields.

Element	Req.	Mapping	Notes
addToStandardForms	N	Print on Standard Forms	This element records a true or false value only. It is available for body and column fields.
addToCRMGroup	N	Group	This element records a true or false value only. It is available for entity fields.

Custom Record Types

Custom record types are used to create records tailored to your business. Using smbXML, you can import, update and query custom record types.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	Y	Name	
includeNameField	N	Include Name Field	This element records a true or false value only.
showId	N	Show ID	This element records a true or false value only.
showRecordCreateDate	N	Show Creation Date On Record	This element records a true or false value only.
showListCreateDate	N	On List	This element records a true or false value only.
showRecordLastModified	N	Show Last Modified On Record	This element records a true or false value only.
showListLastModified	N	On List	This element records a true or false value only.
showOwnerOnRecord	N	Show Owner On Record	This element records a true or false value only.
showOwnerOnList	N	On List	This element records a true or false value only.
showOwnerAllowChange	N	Allow Change	This element records a true or false value only.
usePermissions	N	Use Permissions	This element records a true or false value only.
allowAttachments	N	Allow Attachments	This element records a true or false value only.
recordsAreOrdered	N	Records are Ordered	This element records a true or false value only.
isInactive	N	Record is Inactive	This element records a true or false value only.

Custom Records

Custom records are used to record information for your custom record types. Using smbXML, you can import, update and query custom records.



Note: The table below lists the elements available for smbXML import, if they are required, any special information and the field each element maps to in your account.

Element	Req.	Mapping	Notes
name	N	Name	This element is used when the Include Name Field box is checked on the custom record type.
customRecordTypeRef	Y		This element is a reference to the type of record you are creating. The record type must exist in your account prior to importing.
ownerRef	N	Owner	This element is a reference to an employee record that must exist in your account prior to importing.
customFieldList	N		This element indicates the beginning of a list of fields for this record.
customFieldLine customFieldValueRefList	Y		This element is only required if you use the customFieldList element. The customFieldValueRefList can be used to manage multi-select custom fields.
customFieldRef	Y		This element is only required if you use the customFieldList element. It is a reference to a custom field that must exist in your account for this record type prior to importing.
customFieldValue customFieldRef	Y		This element is only required if you use the customFieldList element.

Chapter 6 Appendix

Advanced Query Constraints

Advanced queries are available for transactions, CRM, entity and item objects.

Click the links below to see a table of constraints for that record type.

- [Transactions](#)
- [CRM Records](#)
- [Entity Records](#)
- [Item Records](#)

Transactions

Constraints	Cash Sale	Sales Order	Inv	Customer Payment	Return Auth.	Credit Memo	Estimate	Journal Entry	Opportunity	PO	Bill
account								x			
all	x	x	x	x	x	x	x	x	x	x	x
Billable										x	x
Check Number				x							
classRef	x	x	x		x	x	x	x		x	x
Company									x		
customerRef customerHandle	x	x	x	x	x	x	x			x	x
customFieldValues	x	x	x	x	x	x	x	x		x	x
tranDate	x	x	x	x	x	x	x	x	x	x	x
departmentRef	x	x	x		x	x	x	x		x	x
dueDate			x				x				x
employeeRef employeeHandle										x	
entityStatusRef									x		
expectedCloseDate							x		x		
itemRef					x	x					
handle	x	x	x	x	x	x	x	x	x	x	x
locationRef	x	x	x		x	x	x	x			x
entityRef entityHandle								x			

Constraints	Cash Sale	Sales Order	Inv	Customer Payment	Return Auth.	Credit Mem o	Estimate	Journal Entry	Opportunit y	PO	Bill
paymentAmount				x							
postingPeriodRef								x			x
probability							x		x		
otherRefNum				x	x	x					
salesRepRef salesRepHandle	x		x		x	x	x				
statusRef					x		x				
tranId	x	x	x		x	x	x	x	x	x	x
tranStatus	x	x	x	x	x		x	x		x	x
vendorRef vendorHandle										x	x

CRM Records

Constraints	Cases	Tasks	Events
all	x	x	x
assignedRef assignedHandle	x	x	
entityRef entityHandle			x
caseTypeRef	x		
caseEntityRef caseEntityHandle	x		
contactRef contactHandle	x		
createdDate	x		
dueDate		x	
email	x		
escalateList	x		
escalationMessage	x		
handle	x	x	x
issueRef	x		
itemRef	x		
lastMessageDate	x		
originRef	x		
phone	x		
priorityRef	x	x	
startDate			x

Constraints	Cases	Tasks	Events
startTime	x		
statusRef	x	x	
subject	x		
title		x	x

Entity Records

Constraints	Customer	Vendor	Employee	Contact	Partner
all	x	x	x	x	x
parentHandle parentRef	x				
city	x	x	x	x	x
companyHandle companyRef				x	
companyName	x	x			
contactHandle contactRef				x	
customFieldValues	x	x	x	x	x
customer	x				
email	x	x	x	x	x
employee			x		
handle	x	x	x	x	x
homePhone				x	
isInactive	x	x	x	x	x
lastModified	x	x	x	x	x
lastName			x	x	
phone				x	
mobilePhone				x	
officePhone				x	
partner					x
partnerCode					x
phone	x	x	x		x
socialSecurityNum ber			x		
state	x	x	x	x	x
contactTypeList				x	
vendor		x			

Item Records

Click the links below to see advanced query constraints for each type of item record.

- [Non-inventory Items](#)
- [Other Charge Items](#)
- [Service Items](#)
- [Inventory, Sales Tax, Discount and Markup Items](#)
- [Subtotal, Description, Store Category and Media Items](#)

Non-inventory Items

Constraints	for Sale	for Purchase	for Resale
all	×	×	×
customFieldValues	×	×	×
isOnline	×		×
storeDisplayName	×	×	×
isInactive	×	×	×
name	×	×	×
handle	×	×	×
lastModified	×	×	×
vendorHandle vendorRef		×	×
storeCategoryList	×		×
storeDisplayName	×		×
parentHandle parentRef	×	×	×
vendorName		×	×

Other Charge Items

Constraints	for Sale	for Purchase	for Resale
all	×	×	×
customFieldValues	×	×	×
isOnline	×		
displayName	×	×	×
handle	×	×	×
isInactive	×	×	×
name	×	×	×
lastModified	×	×	×
vendorName		×	

Constraints	for Sale	for Purchase	for Resale
Subitem of	×	×	×
vendorHandle vendorRef		×	

Service Items

Constraints	for Sale	for Purchase	for Resale
all	×	×	×
customFieldValues	×	×	×
isOnline	×		×
displayName	×	×	×
handle	×	×	×
isInactive	×	×	×
name	×	×	×
lastModified	×	×	×
vendorName		×	×
storeCategoryList	×		×
storeDisplayName	×		×
vendorHandle vendorRef		×	×

Inventory, Sales Tax, Discount and Markup Items

Constraints	Inventory	Sales Tax	Discount	Markup
accountRef			×	×
all	×	×	×	×
city		×		
customFieldValues	×	×	×	×
isOnline	×			
displayName	×	×	×	×
handle	×	×	×	×
isInactive	×	×	×	×
name	×		×	×
lastModified	×	×	×	×
vendorName	×			
storeCategoryList	×			
state		×		
storeDisplayName	×			
taxAgencyHandle taxAgencyRef		×		

Constraints	Inventory	Sales Tax	Discount	Markup
taxRate		x		
vendorHandle vendorRef			x	x
zipCodeList		x		

Subtotal, Description, Store Category and Media Items

Constraints	Subtotal	Description	Store Category	Media Item
all	x	x	x	x
storeCategoryList			x	
customFieldValues	x	x	x	x
isOnline			x	
displayName	x			
handle	x	x	x	x
isInactive	x	x	x	x
name	x	x		
lastModified	x	x	x	x
url				x

Object References

Reference elements point to other objects that must exist in your account prior to importing. For example, the `cogsAccountRef` reference element is used in inventory item imports. Some referenced objects can be created via smbXML import.

In the table below, the Defined By column describes where the reference element can be defined. The Object column lists the smbXML records where the element is used.

In the cases where Defined By is UI, the item being referenced must be created in your account through the UI prior to importing. If you reference something that does not currently exist in your account, it throws a nonexistent reference error.

Reference Element	Object	Defined By
accountRef	discountItem markupItem journalEntry	account
accountTypeRef	account	UI
altContactRef altContactHandle	customer vendor	contact
approverRef approverHandle	employee	employee
assetAccountRef	inventoryItem	account

Reference Element	Object	Defined By
assignedRef assignedHandle	case task	employee
assistantRef assistantHandle	contact	contact
billAddressRef	cashSale creditMemo estimate invoice returnAuthorization purchaseOrder salesOrder	addressList
caseEntityRef caseEntityHandle	case	customer
caseNumberRef crmHandle crmRecordId	note message	cases tasks events
caseTypeRef	case	UI
categoryRef	customer vendor partner	otherList (customer or vendor category) UI
ccType	salesOrder cashSale customerPayment returnAuthorization	otherList (payment method)
classRef	employee estimate opportunity salesOrder cashSale invoice returnAuthorization creditMemo journalEntry purchaseOrder bill	UI
cogsAccountRef	inventoryItem	account
companyRef companyHandle	contact task	customer otherName partner vendor
contactRef contactHandle	customer vendor case task opportunity	contact
contactTypeRef	contact	UI
costingMethodRef	inventoryItem	UI

Reference Element	Object	Defined By
currencyRef	customer vendor inventoryItem nonInventoryResaleItem nonInventorySaleItem serviceResaleItem serviceSaleItem otherChargeResaleItem otherChargeSaleItem estimate salesOrder cashSale invoice customerPayment returnAuthorization creditMemo purchaseOrder	UI
customerMessageRef	estimate salesOrder cashSale invoice returnAuthorization creditMemo	UI
customerRef customerHandle	estimate salesOrder cashSale invoice customerPayment returnAuthorization creditMemo purchaseOrder bill	customer
customFieldRef	customFieldLine customRecord	customField
customFormRef	estimate salesOrder cashSale invoice returnAuthorization creditMemo purchaseOrder	UI
customRecordTypeRef	customField customRecord	customRecordType
decisionMakerRef decisionMakerHandle	opportunity	contact

Reference Element	Object	Defined By
departmentRef	employee estimate opportunity salesOrder cashSale invoice returnAuthorization creditMemo journalEntry purchaseOrder bill	UI
depositAccountRef	cashSale customerPayment	account
directionRef	note	Must be one of the following: Incoming Outgoing
discountItemRef discountItemHandle	estimate salesOrder cashSale invoice returnAuthorization creditMemo	discountItem
employeeRef employeeHandle	purchaseOrder	employee
employeeTypeRef	employee	UI
entityRef entityHandle	event opportunity journalEntry	customer employee contact otherName vendor
entityStatusRef	opportunity	UI
escalateRef	case	employee
eventOwnerHandle eventOwnerRef	event	employee
expenseAccountRef	vendor nonInventoryResaleItem nonInventoryPurchItem serviceResaleItem servicePurchItem otherChargeResaleItem otherChargePurchItem	account
frequencyRef	event	Must be one of the following: every every other every third every fourth
fromRef	message	customer employee

Reference Element	Object	Defined By
imageRef	contact customer employee partner vendor	UI
incomeAccountRef	inventoryItem nonInventoryResaleItem nonInventorySaleItem serviceResaleItem serviceSaleItem otherChargeResaleItem otherChargeSaleItem	account
issueRef	case	UI
itemPriceTypeRef	inventoryItem nonInventoryResaleItem nonInventorySaleItem serviceResaleItem serviceSaleItem otherChargeResaleItem otherChargeSaleItem	UI
itemRef itemHandle	case estimate opportunity salesOrder cashSale invoice returnAuthorization creditMemo purchaseOrder bill	inventoryItem nonInventoryResaleItem nonInventoryPurchaseItem nonInventorySaleItem serviceResaleItem servicePurchaseItem serviceSaleItem otherChargeResaleItem otherChargePurchaseItem otherChargeSaleItem discountItem markupItem UI
jobRef	estimate opportunity salesOrder cashSale invoice returnAuthorization creditMemo	UI
leadSourceRef	customer opportunity	UI

Reference Element	Object	Defined By
locationRef	inventoryItem employee estimate opportunity salesOrder cashSale invoice returnAuthorization creditMemo journalEntry purchaseOrder bill	UI
noteEntityRef noteEntityHandle	note	customer contact employee vendor
organizerHandle organizerRef	event	employee
originRef	case	UI
ownerRef	customRecord	employee
parentRef parentHandle	customer partner account inventoryItem nonInventoryResaleItem nonInventoryPurchItem nonInventorySaleItem serviceResaleItem servicePurchItem serviceSaleItem otherChargeResaleItem otherChargePurchItem otherChargeSaleItem discountItem markupItem storeCategory otherList (job type) topic	customer partner account inventoryItem nonInventoryResaleItem nonInventoryPurchItem nonInventorySaleItem serviceResaleItem servicePurchItem serviceSaleItem otherChargeResaleItem otherChargePurchItem otherChargeSaleItem discountItem markupItem storeCategory otherList (job type) topic
partnerRef	customer	partner
postingPeriodRef	bill	UI
priceLevelRef	customer estimate opportunity salesOrder cashSale invoice returnAuthorization creditMemo	UI

Reference Element	Object	Defined By
priorityRef	case task	Must be one of the following: High Medium Low
promotionCodeRef	partner	UI
purchaseTaxCodeRef (International Only)	inventoryItem nonInventoryResaleItem nonInventoryPurchaseItem otherChargeResaleItem otherChargePurchaseItem serviceResaleItem servicePurchaseItem	taxCode
purchaseUnitRef	inventoryItem nonInventoryResaleItem nonInventoryPurchaseItem nonInventorySaleItem otherChargeResaleItem otherChargePurchaseItem otherChargeSaleItems serviceResaleItem servicePurchaseItem serviceSaleItem	UI
receivableAccountRef	invoice customerPayment	account
responseRef	event	Must be one of the following: Accepted Declined No Response Tentative
salesRepRef salesRepHandle	customer estimate opportunity salesOrder cashSale invoice returnAuthorization creditMemo	employee
saleUnitRef	inventoryItem nonInventoryResaleItem nonInventoryPurchaseItem nonInventorySaleItem otherChargeResaleItem otherChargePurchaseItem otherChargeSaleItems serviceResaleItem servicePurchaseItem serviceSaleItem	UI

Reference Element	Object	Defined By
shipAddressRef	cashSale creditMemo estimate invoice returnAuthorization purchaseOrder salesOrder	addressList
shipMethodRef	estimate salesOrder cashSale invoice purchaseOrder	UI
statusRef	case event task solution estimate returnAuthorization	for cases : Not Started In Progress Escalated Closed for events : Confirmed Tentative for tasks : Not Started In Progress Completed for solutions : Approved Unapproved for estimates : UI for return authorizations : Pending Approval Pending Receipt
stockUnitRef	inventoryItem nonInventoryResaleItem nonInventoryPurchaseItem nonInventorySaleItem otherChargeResaleItem otherChargePurchaseItem otherChargeSaleItems serviceResaleItem servicePurchaseItem serviceSaleItem	UI
storeCategoryRef	inventoryItem nonInventoryResaleItem serviceResaleItem serviceSaleItem	storeCategory
storeDisplayImageRef	inventoryItem nonInventoryResaleItem nonInventorySaleItem serviceResaleItem serviceSaleItem	UI

Reference Element	Object	Defined By
storeDisplayThumbnailRef	inventoryItem nonInventoryResaleItem nonInventorySaleItem serviceResaleItem serviceSaleItem	UI
supervisorRef supervisorHandle	employee contact	employee contact
taskOwnerHandle taskOwnerRef	task	employee
taxAgencyRef taxAgencyHandle	salesTaxItem	vendor
taxCodeRef (International Only)	inventoryItem nonInventoryResaleItem nonInventorySaleItem otherChargeResaleItem otherChargeSaleItem serviceResaleItem serviceSaleItem salesOrder cashSale invoice estimate journalEntry purchaseOrder bill	taxCode
taxItemRef taxItemHandle	customer estimate salesOrder cashSale invoice returnAuthorization creditMemo	salesTaxItem
termsRef	customer vendor estimate invoice purchaseOrder bill	UI
territoryRef	customer	UI
topicRef	solution	topic
toRef	message	customer
tranIdRef	customerPayment	invoice
transactionRecordId transactionHandle	note message event task estimate	opportunity
typeRef	note	UI

Reference Element	Object	Defined By
unitsRef	bill cashSale creditMemo estimate invoice opportunity purchaseOrder returnAuthorization salesOrder	UI
unitsTypeRef	inventoryItem nonInventoryResaleItem nonInventoryPurchaseItem nonInventorySaleItem otherChargeResaleItem otherChargePurchaseItem otherChargeSaleItems serviceResaleItem servicePurchaseItem serviceSaleItem	UI
vendorRef vendorHandle	inventoryItem nonInventoryResaleItem nonInventoryPurchaseItem serviceResaleItem servicePurchaseItem otherChargeResaleItem otherChargePurchaseItem purchaseOrder bill	vendor
weightUnitRef	inventoryItem nonInventoryResaleItem nonInventoryPurchaseItem nonInventorySaleItem	Must be one of the following: g kg lb. oz.
winLossReasonRef	opportunity	UI

Error Handling

The table below lists some possible error messages that you may encounter while importing your smbXML documents. This list is not meant to be all-inclusive, but merely a reference for the most commonly encountered errors.

Message	Meaning	Resolution
An unexpected error has occurred while importing the record.	NetSuite has experienced an error while importing your record and was unable to complete the import.	Try importing your file again. If you continue to receive the same error, contact Support.
Need to provide an amount or a quantity.	An amount or quantity for items on the transaction was not specified.	Correct the smbXML file by checking the items and adding any missing amounts or quantities. Then, import your file again.

Message	Meaning	Resolution
Need to provide price.	A price for items on the transaction was not specified.	Correct the smbXML file by checking the items and adding any missing prices. Then, import your file again.
Invalid data provided.	The data entered for an element does not conform to the requirements for that element.	Consult the DTD, Developer's Guide and XML Examples to ensure that all formatting options are followed. Then, import your file again.
You may only select PDF or HTML format for your emails or do nothing which will default you emails to text format.	True was entered for both the isEmailPDF and isEmailHTML elements.	Remove one or both elements from your file or change one element's value to false. Then, import your file again.
There is already a record with the same name in this account. You may use a different name to add this record or use the same name to addOrUpdate this record.	Names in NetSuite must be unique for each record of the same type. The record being imported already exists in NetSuite.	To create a new record, rename the record to be unique or change the command to addOrUpdate to update the existing record. Then, import your file again. You can also use handles to import your file.
There is already a record with the same handle in this account.	Handles in NetSuite must be unique for each record. The record being imported has the same handle as an existing record.	Change the record's handle to be unique to create a new record or change the command to addOrUpdate to update the existing record. Then, import your file again.
Before you can send faxes, you need to go to the Company Preferences page and set up the fax service.	Fax service must be set up in NetSuite before you can send faxes directly from your account.	Go to Setup > Company > Set Up Printing, Fax & E-mail > Fax. Follow the instructions for setting up fax service through NetSuite. Then, import your file again.
You must enter a fax number.	A fax number was not entered for a transaction when the toBeFaxed element was recorded as true.	Enter a fax number for this transactions, and import your file again.
You must enter an email address.	An e-mail address was not entered for a transaction when the toBeEmailed element was recorded as true.	Enter an e-mail address for this transaction, and import your file again.
isTaxable flag is not declared while tax item exists.	The isTaxable element is marked false or not included and a tax item has been selected for the transaction.	Set the isTaxable element to true or remove the tax item from the transaction. Then, import your file again.
You are charging for shipping and you need to set your Charge for Shipping accounting feature and resubmit.	A shipping charge has been added to this transaction, but the Charge for Shipping preference is not on in you account.	Go to Setup > Accounting > Set Up Accounting > Ordering/Shipping. Check the Charge for Shipping box, and click Save. Or, remove the shipping cost from the transaction. Then, import your file again.
You have a shipping cost and you need to provide a shipping method and resubmit.	A shipping charge has been added to this transaction, but a shipping method was not chosen.	Select a shipping method for this transaction or remove the shipping charge. Then, import your file again.

Message	Meaning	Resolution
Not supported query or reference.	A reference or constraint is not supported in the query you are importing.	Consult the DTD, Developer's Guide and Examples to ensure that all references and queries are supported. Then, import your file again.
You must provide a title, subject, or name.	A required element for the record you are importing has been left out.	Check your file and add the missing element. Then, import your file again.
You must provide a company.	A company reference is missing from a case record import.	Add a company reference and import again.
The record could not be uniquely identified by given id constraints.	The information entered to identify this record is not sufficient to single out a record.	Add additional information, such as a handle, name or id, and import again.
Need to provide a code.	A code is missing from a new solution record import.	Add a code for this record and import again.
Need to provide an abstract.	An abstract is missing from a new solution record import.	Add an abstract for this record and import again.
Need to provide a description.	A description is missing from a new solution record import.	Add a description for this record and import again.
Need to provide topics in creating a solution.	A topic reference is missing from a new solution record import.	Add a topic reference for this record and import again.
You must enter an assignedHandle or assignedRef.	An employee reference is missing from a new case or task record.	Add a reference to the assigned employee and import again.
You must provide a valid accessLevel in creating the record.	An incorrect or missing access level was specified for this event or task record.	Correct or add an access level and import again.
You must enter a transaction date.	A transaction date is required for each transaction imported.	Check that each transaction has a transaction date and import again.
You must use the advanced query.	A standard query is not supported for this object.	Consult the DTD, Developer's Guide and Examples for advanced query guidelines. Then, import your file again.
The advanced query is not supported on this record at this time.	You can only query this object with a standard query.	Consult the DTD, Developer's Guide and Examples for simple query guidelines. Then, import your file again.
Could not grant request since there are MULTIPLE references to ONE object.	There are multiple records in your account that could fit a reference in the file. Because of this, NetSuite cannot uniquely identify the requested object.	Check that your references are for unique objects and add more information to your references. Then, import your file again.
There is no type attribute in the id reference block.	A type is required to properly identify the record you are looking for.	Add the appropriate type for this object and import again.
Could not identify the record by the id block.	The id block doesn't offer sufficient information for identifying a single record.	Add additional identifying information and import again.
You may not perform an addOrUpdate of a custom record which does not have a name field. You may add the record instead.	For custom records that do not include a name field, addOrUpdate is not supported. You can only add new records, or use handles to identify the record.	If you are adding a new record, change the command to add and import again. If you are attempting to update an existing record, it must be done through the UI or using handles.

Message	Meaning	Resolution
Non-unique reference.	A reference included in your file is not a unique object. For example, you have more than one payment method of the same name.	Resolve the duplicate reference in you account. Check that your reference is entered correctly and import again.
Non-existent or invalid reference.	A reference included in your file attempts to reference an object that does not exist in your account.	If the reference object can be imported with smbXML, add a request for this object before the reference. If the reference object is not available for smbXML import, add the object through the UI. Then, import your file again.
A non-unique handle was assigned to the import record.	A handle was assigned using id block that has already been assigned to another object.	Change the id block handle to be unique and import again.
Inconsistent key obtained by id block and by handle. Handle (handle) is for record (key) and id is for record (key).	The handle and id for this request do not match the same record.	Check the handle and id to ensure that they are correct for the specified record and import again.
You entered an invalid accessLevel value and the valid accessLevel value is Public or Private.	For task and event records, the only available access levels are Public or Private. Anything else entered for this field is invalid.	Correct the accessLevel element with the appropriate level and import again.
You entered an invalid everySelect value and the valid everySelect value is every, every other, every third or every fourth.	For event records, the only available recurrence settings are every, every other, every third or every fourth. Anything else entered for this field is invalid.	Correct the everySelect element with the appropriate recurrence rate and import again.
You entered an invalid attendance value and the valid attendance value is Required or Optional.	For event records, the only available attendance settings are Required or Optional. Anything else entered for this field is invalid.	Correct the attendance element with the appropriate setting and import again.
Set fromRef, caseNumberRef, crmHandle, crmRecordId, entityRecordId, entityHandle, transactionHandle or transactionRecordId.	One of the listed required references is missing from this request.	Add the required reference and import again.
You entered an invalid reminderType value and the valid reminderType value is Popup Window or E-mail.	For event records, the only available reminder types are Popup Window or E-mail. Anything else entered for this field is invalid.	Correct the reminderType element with the appropriate reminder type and import again.
No Custom Field Name was provided, cannot complete transaction.	A name for the custom field you are importing is missing. Names are required for custom fields.	Add a name to your custom field request and import again.

Message	Meaning	Resolution
Could not retrieve next Custom Field Key, cannot complete transaction.	The data for this custom field is inconsistent with the system retrieving the custom field key.	Consult the DTD, Developer's Guide and Examples to ensure your data is formatted properly and includes all the necessary information. Then, import your file again. If you continue to experience this problem, contact support.
Could not create a Custom Field of type List/Record without providing the List/Record as a reference.	A reference to a list was not included for a custom field of the List/Record type.	Add a reference to the list you want this custom field to reference and import again.
Could not create a Custom Field for a custom record type without providing the record type as a reference.	A reference to the record type for this field was not included. The system does not know which custom record type this field is intended for.	Add a reference to the appropriate custom record type and import again.
Could not locate Custom Field Type for Custom Field.	A reference to a custom field type was not included for this custom field.	Add a reference to the appropriate custom field type and import again.
No Valid Custom Field exists with Key XXXX for Parent XXXX.	The custom field being references does not exist in your account.	Add this custom field in a request before the reference or add the field through the UI. If the field does exist, check your reference to ensure it is correct. Then, import your file again.
Failed to find the next available custom field suffix and sequence number on key and type.	The data for this custom field is inconsistent with the system retrieving the custom field key.	Consult the DTD, Developer's Guide and Examples to ensure your data is formatted properly and includes all the necessary information. Then, import your file again. If you continue to experience this problem, contact support.
XXXXX is not being supported in the advanced query.	An invalid item record type is included in this query.	Check that your item record types are correct and supported by smbXML. Then, import your file again.
This special account cannot be modified.	The name or accountNumber element for one of the special accounts listed on page 60 has been updated.	Special accounts are not available for updating with smbXML. Remove the request in question and import your file again.

Message	Meaning	Resolution
There is insufficient information to uniquely identify a single record to update. You may use the add operation to create a new record or the addOrUpdate operation with a reference id block to uniquely identify the record for update.	An addOrUpdate query for an Event or a Task record is submitted without adequate specification of the uniqueness of the record — the <id> block is NOT provided and the record handle is either unspecified or does NOT exist.	Ensure that when you submit an addOrUpdate for case, task, solution or event record that you adequately specify uniqueness of the record by specifying either of the following: - an existing handle - a valid <id> block
Failed parsing XML: The import has failed due to one of the following reasons: 1) Required data fields were missing; 2) There were invalid or nonsupported characters which may have been introduced by external file editors; or 3) If this is an smbXML import, the elements may have been out of order as defined by the DTD.	This error is returned for a number of reasons and will include a line that provides further information as to the source of the problem as well as the location of the error. Possible additional information includes: - The character reference must end with the ';' delimiter. - The file contained characters that were not valid members of the UTF-8 character set. - The content of element type "xxxxxx" must match "(xxxxxxxxxx)". (this is due to missing required fields) - A general parsing error as returned by the server.	Correct the character definitions or add the required missing fields as needed and import your file again. Note that smbXML imports must contain valid UTF-8 character definitions.

Country Codes

The following table lists the acceptable country codes to be used in smbXML document imports.

Country	Code	Country	Code	Country	Code
Afghanistan	AF	Bulgaria	BG	El Salvador	SV
Albania	AL	Burkina Faso	BF	Equatorial Guinea	GQ
Algeria	DZ	Burundi	BI	Eritrea	ER
American Samoa	AS	Cambodia	KH	Estonia	EE
Andorra	AD	Cameroon	CM	Ethiopia	ET
Angola	AO	Canada	CA	Falkland Islands (Malvina)	FK
Anguilla	AI	Cap Verde	CV	Faroe Islands	FO
Antarctica	AQ	Cayman Islands	KY	Fiji	FJ
Antigua and Barbuda	AG	Central African Republic	CF	Finland	FI
Argentina	AR	Chad	TD	France	FR
Armenia	AM	Chile	CL	French Guiana	GF
Aruba	AW	China	CN	French Polynesia	PF
Australia	AU	Christmas Island	CX	French Southern Territories	TF

Country	Code	Country	Code	Country	Code
Austria	AT	Cocos (Keeling) Islands	CC	Gabon	GA
Azerbaijan	AZ	Colombia	CO	Gambia	GM
Bahamas	BS	Comoros	KM	Georgia	GE
Bahrain	BH	Congo, Democratic People's Republic	CD	Germany	DE
Bangladesh	BD	Congo, Republic of	CG	Ghana	GH
Barbados	BB	Cook Islands	CK	Gibraltar	GI
Belarus	BY	Costa Rica	CR	Greece	GR
Belgium	BE	Cote d'Ivoire	CI	Greenland	GL
Belize	BZ	Croatia/Hrvatska	HR	Grenada	GD
Benin	BJ	Cuba	CU	Guadeloupe	GP
Bermuda	BM	Cyprus	CY	Guam	GU
Bhutan	BT	Czech Republic	CZ	Guatemala	GT
Bolivia	BO	Denmark	DK	Guernsey	GG
Bosnia and Herzegovina	BA	Djibouti	DJ	Guinea	GN
Botswana	BW	Domenica	DM	Guinea-Bissau	GW
Bouvet Island	BV	Dominican Republic	DO	Guyana	GY
Brazil	BR	East Timor	TP	Haiti	HT
British Indian Ocean Territory	IO	Ecuador	EC	Heard and McDonald Is.	HM
Brunei Darussalam	BN	Egypt	EG	Holy See (City Vatican State)	VA

Country	Code	Country	Code	Country	Code
Honduras	HN	Malaysia	MY	Panama	PA
Hong Kong	HK	Maldives	MV	Papua New Guinea	PG
Hungary	HU	Mali	ML	Paraguay	PY
Iceland	IS	Malta	MT	Peru	PE
India	IN	Marshall Islands	MH	Philippines	PH
Indonesia	ID	Martinique	MQ	Pitcairn Island	PN
Iran, Islamic Republic of	IR	Mauritania	MR	Poland	PL
Iraq	IQ	Mauritius	MU	Portugal	PT
Ireland	IE	Mayotte	YT	Puerto Rico	PR
Isle of Man	IM	Mexico	MX	Qatar	QA
Israel	IL	Micronesia, Federal State of	FM	Reunion Island	RE
Italy	IT	Moldova, Republic of	MD	Romania	RO
Jamaica	JM	Monaco	MC	Russian Federation	RU
Japan	JP	Mongolia	MN	Rwanda	RW
Jersey	JE	Montserrat	MS	Saint Kitts and Nevis	KN
Jordan	JO	Morocco	MA	Saint Lucia	LC

Country	Code	Country	Code	Country	Code
Kazakhstan	KZ	Mozambique	MZ	Saint Vincent and the Grenadines	VC
Kenya	KE	Myanmar	MM	San Marino	SM
Kiribati	KI	Namibia	NA	Sao Tome and Principe	ST
Korea, Democratic People's Republic	KP	Nauru	NR	Saudi Arabia	SA
Korea, Republic of	KR	Nepal	NP	Senegal	SN
Kuwait	KW	Netherlands	NL	Seychelles	SC
Krgyzstan	KG	Netherlands Antilles	AN	Sierra Leone	SL
Lao, People's Democratic Republic	LA	New Caledonia	NC	Singapore	SG
Latvia	LV	New Zealand	NZ	Slovak Republic	SK
Lebanon	LB	Nicaragua	NI	Slovenia	SI
Lesotho	LS	Niger	NE	Solomon Islands	SB
Liberia	LR	Nigeria	NG	Somalia	SO
Libyan Arab Jamahiriya	LY	Niue	NU	South Africa	ZA
Liechtenstein	LI	Norfolk Island	NF	South Georgia	GS
Lithuania	LT	Northern Mariana Islands	MP	Spain	ES
Luxembourg	LU	Norway	NO	Sri Lanka	LK
Macau	MO	Oman	OM	St. Helena	SH
Macedonia	MK	Pakistan	PK	St. Pierre and Miquelon	PM
Madagascar	MG	Palau	PW	Sudan	SD
Malawi	MW	Palestinian Territories	PS	Suriname	SR

Country	Code	Country	Code	Country	Code
Svalbard and Jan Mayen Islands	SJ	Tunisia	TN	Vanuatu	VU
Swaziland	SZ	Turkey	TR	Venezuela	VE
Sweden	SE	Turkmenistan	TM	Vietnam	VN
Switzerland	CH	Turks and Ciacos Islands	TC	Virgin Islands, British	VG
Syrian Arab Republic	SY	Tuvalu	TV	Virgin Islands, USA	VI
Taiwan	TW	Uganda	UG	Wallis and Futuna Islands	WF
Tajikistan	TJ	Ukraine	UA	Western Sahara	EH
Tanzania	TZ	United Arab Emirates	AE	Western Samoa	WS
Thailand	TH	United Kingdom	UK	Yemen	YE
Togo	TG	United States	US	Yugoslavia	YU
Tokelau	TK	Uruguay	UY	Zambia	ZM
Tonga	TO	US Minor Outlying Islands	UM	Zimbabwe	ZW
Trinidad and Tobago	TT	Uzbekistan	UZ		

State and Province Codes

The following table lists the acceptable state and province codes to be used in smbXML document imports.

State/Province	Code	State/Province	Code	State/Province	Code
Alabama	AL	Maine	ME	Nunavut	NU
Alaska	AK	Manitoba	MB	Ohio	OH
Alberta	AB	Maryland	MD	Oklahoma	OK
Arizona	AZ	Massachusetts	MA	Ontario	ON
Arkansas	AR	Michigan	MI	Oregon	OR
British Columbia	BC	Minnesota	MN	Pennsylvania	PA
California	CA	Mississippi	MS	Prince Edward Island	PE
Colorado	CO	Missouri	MO	Puerto Rico	PR
Connecticut	CT	Montana	MT	Quebec	QC
Delaware	DE	Nebraska	NE	Rhode Island	RI
District of Columbia	DC	Nevada	NV	Saskatchewan	SK
Florida	FL	New Brunswick	NB	South Carolina	SC
Georgia	GA	New Hampshire	NH	South Dakota	SD
Hawaii	HI	New Jersey	NJ	Tennessee	TN
Idaho	ID	New Mexico	NM	Texas	TX
Illinois	IL	New York	NY	Utah	UT
Indiana	IN	Newfoundland	NL	Vermont	VT
Iowa	IA	North Carolina	NC	Virginia	VA
Kansas	KS	North Dakota	ND	Washington	WA
Kentucky	KY	Northwest Territories	NT	West Virginia	WV
Louisiana	LA	Nova Scotia	NS	Wisconsin	WI
				Wyoming	WY
				Yukon	YT