Some functions in this ebook require either the free Adobe Reader or Adobe Acrobat.

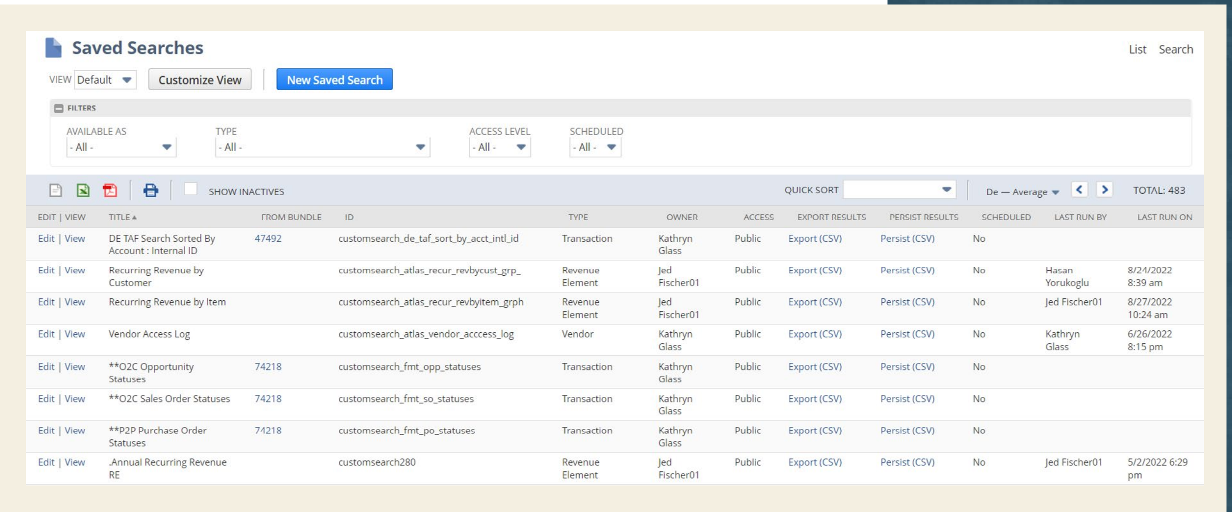
How to Build a NetSuite Saved Search

ORACLE NETSUITE

NetSuite Saved Searches

NetSuite Saved Search is a tool to search through available records existing in NetSuite. A Saved Search can provide information on any available search-record type, highlight important key information, send email alerts on new or updated records, schedule distribution to specific lists, be used in a mass update to add/remove or change field data, maintain dashboard KPIs and other portlets, feed data to custom fields, and offer many more benefits to your system.

The following tips will help you master the fundamentals of creating a Saved Search in NetSuite to get exactly the data you need to power your business.



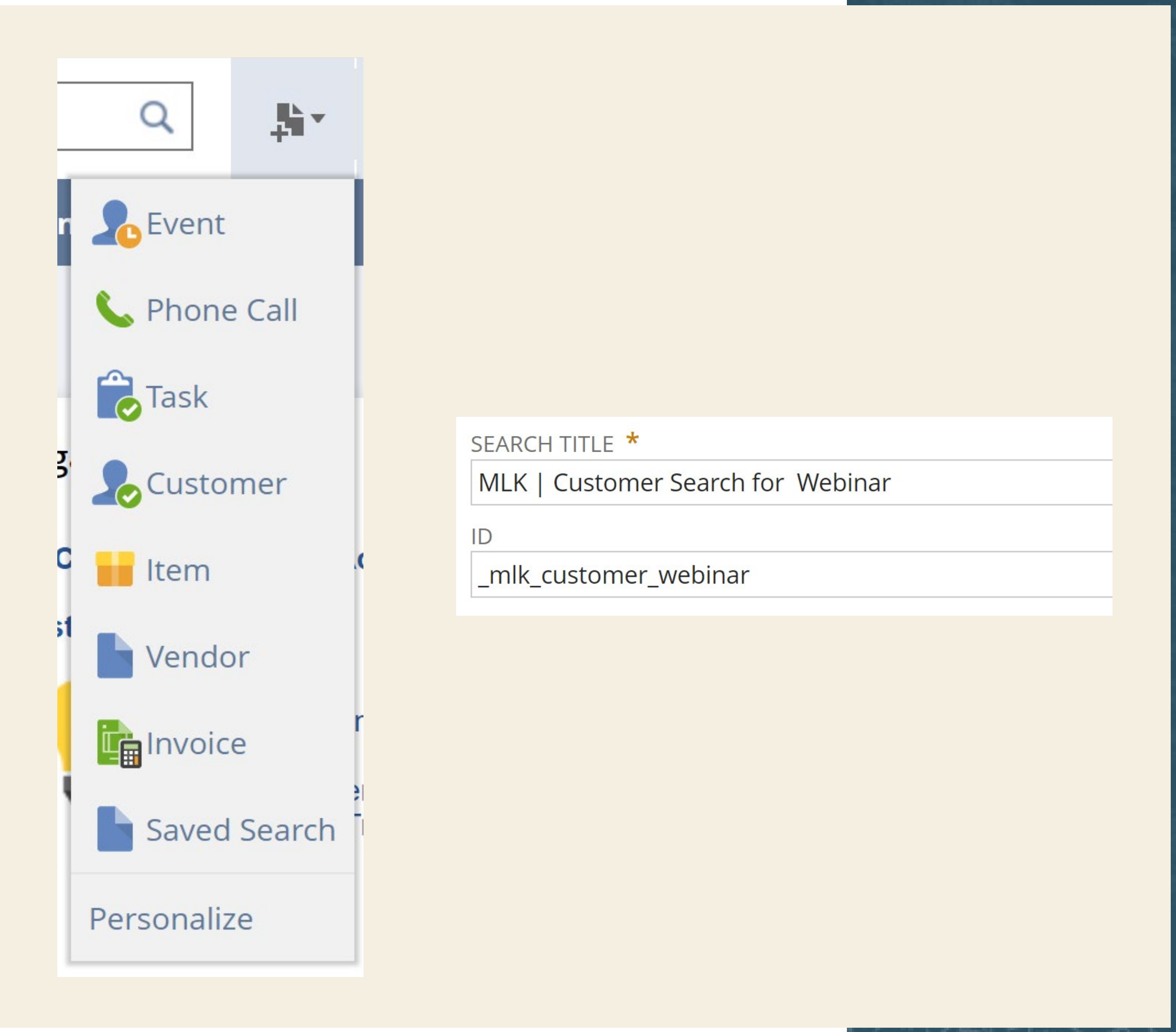
1. SETTING UP A SAVED SEARCH

Navigation. Easily access the Saved Search feature by adding Saved Searches to the Create New Shortcut menu on the Home Dashboard. Or, you can navigate through the menus: Reports > Saved Searches > All Saved Searches > New.

Data. When you create a Saved Search, you will see many data sources that are available to add to your search. Common sources include Customer, Vendor, Item, and Transaction data.

Naming your search. When you create a Saved Search, name your search with three initials, either your own or, if you will share the search, your company's. This will provide a useful three-character search term you can use in Global Search to easily pull up your Saved Searches in the future. Remove the word "Custom" from the custom search title as it is not useful and is not a descriptive search term.

Administrators may also add an intuitive custom ID in the ID field, a best practice if you use the search as a source of data for workflows and scripting purposes. If you do not create your own ID, NetSuite will provide a generic ID. A generic ID is difficult to recall when trying to refer to the search in scripts.



2. CUSTOMIZING YOUR SAVED SEARCH

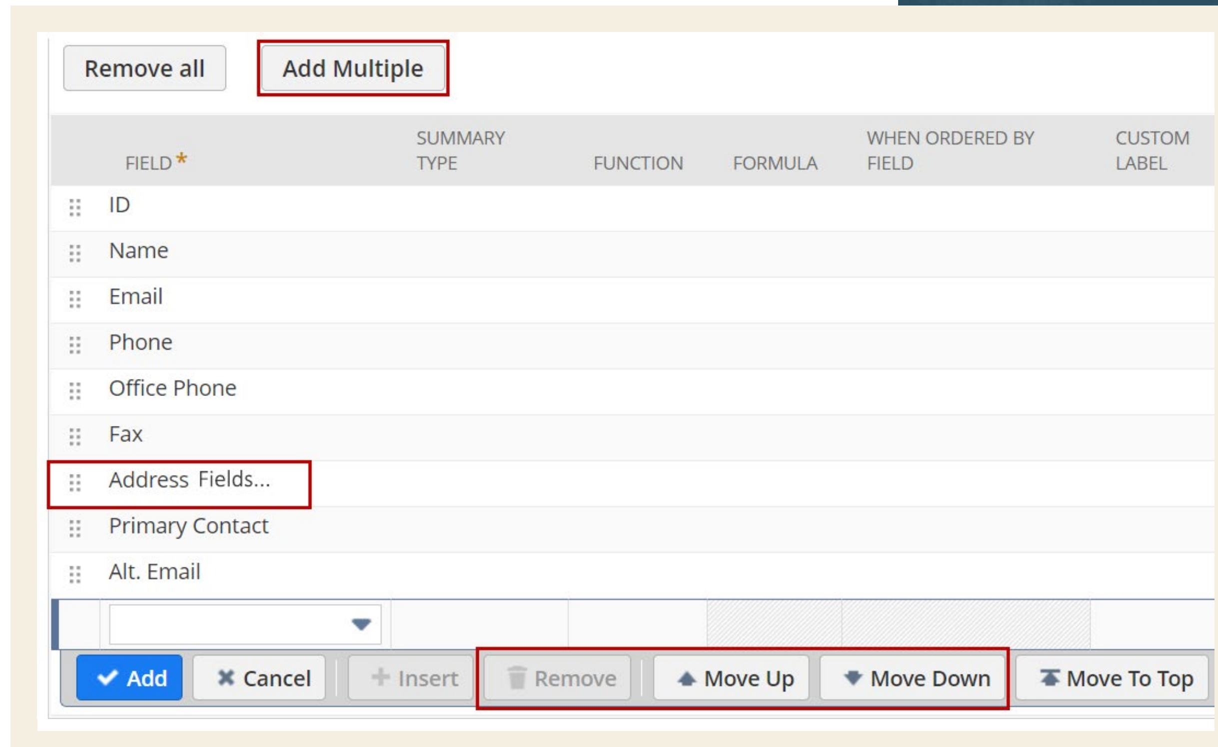
You can easily refine and customize your search results by selecting fields, setting criteria and filters, and adding highlighting options.

Results tab. Remove, add, or reorder fields that display in your Saved Search. You can also add fields from related, or joined, data sources. Related data sources are found below the primary Data Source fields and display as [Data Source] fields. Keep in mind that primary data sources may have one-to-many relationships with related data sources. For example, if you add Address fields, one customer may have many addresses.

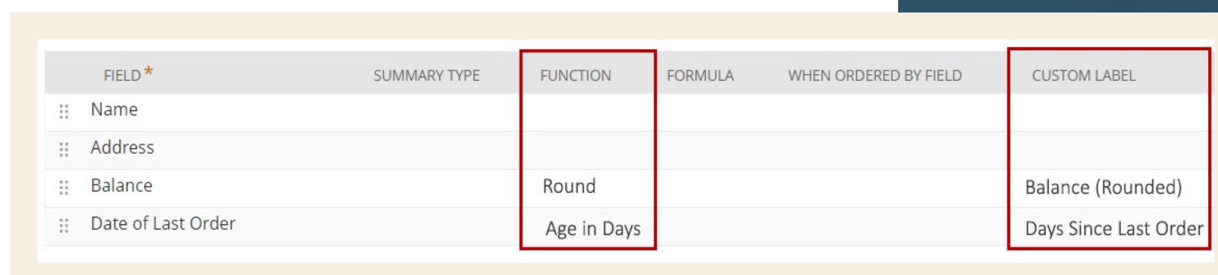
Click "Add Multiple" to select multiple fields to add to your result list.

Functions column. The functions column is found under the results tab. You can apply functions from the list directly to your fields. For example, you can use functions to round balances to the nearest whole number, combine dates to show date ranges, or show age in days from a specific order date.

In the "Custom Label" field, you can create custom labels to rename the function's results.



Results Tab

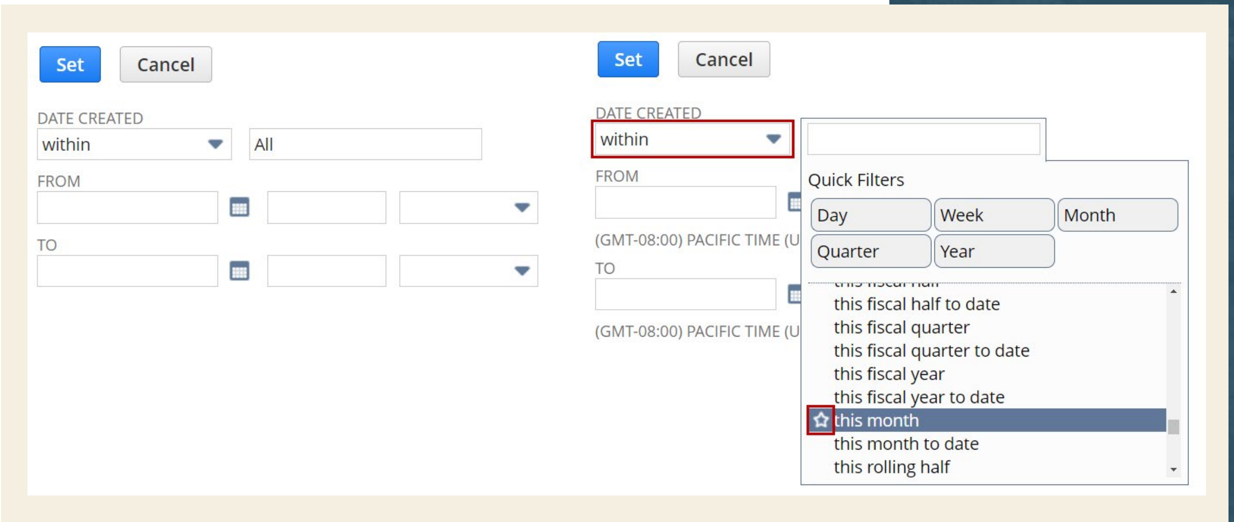


Functions Column

Criteria tab. Criteria are conditions that must be met for a record to appear in your search results. Set criteria using field-operator-value clauses under the criteria tab. For example, “Category equals Computer Software.”

Special considerations for date criteria. When setting date criteria, take advantage of dynamic date selectors. Dynamic selectors, such as “this month” or “this year,” update the ranges of your date criteria automatically as time passes. Find dynamic date selectors in the field to the right of the Operator field. Click the star icon to create favorite selectors. Any favorites you create will be available in any date field anywhere in NetSuite.

Adding multiple criteria clauses. By default, NetSuite will filter results assuming all conditions are true using the “And” condition. Click the “Use Expressions” checkbox to access additional operations, such as NOT, OR, and parentheses. Use parentheses to group clauses. Grouped clauses behave as a unit and execute together.



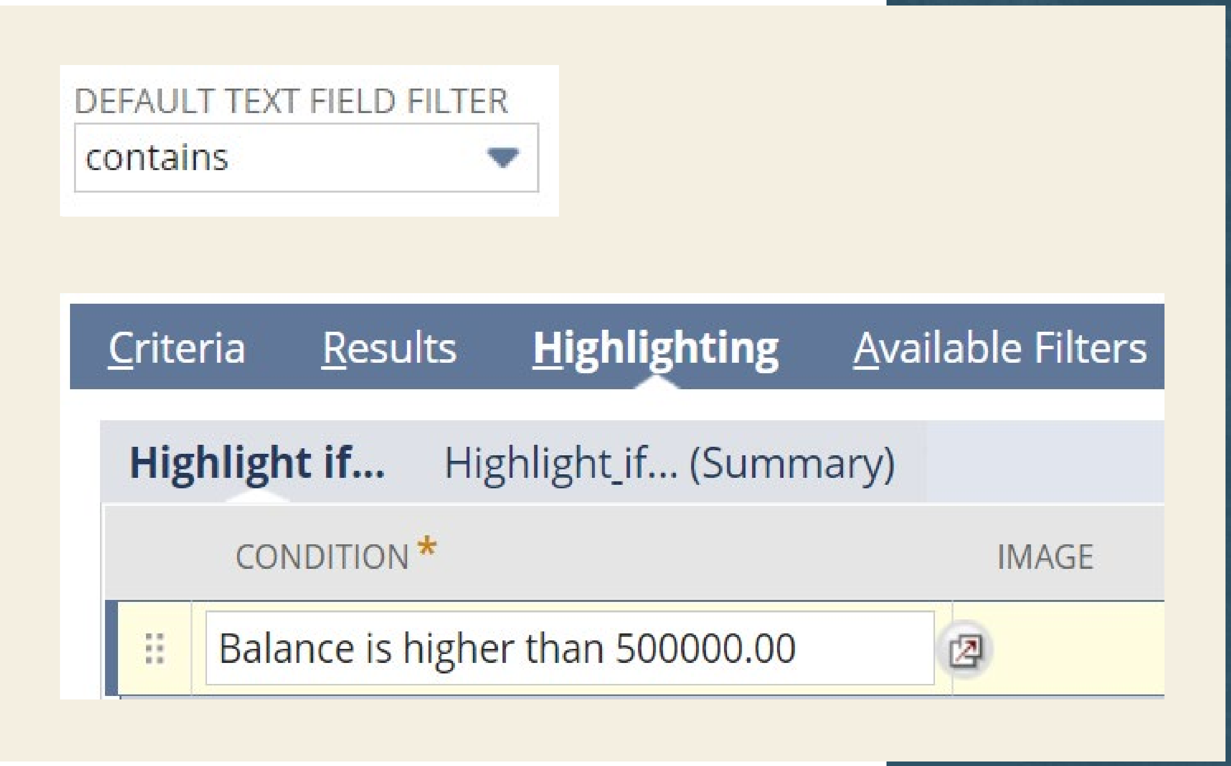
Special Considerations for Date Criteria

Filter tab. Add filters at the top of your Saved Search to allow users to filter the data that is displayed. Note that NetSuite may disallow using the same field in both criteria and as a user filter.

Special considerations for free-text filters. When setting up free-text filters, it is a best practice to set the default text field filter operator to "contains." This allows users to enter search terms in the field without the need for a wildcard.

Once a search term is entered into a free-text filter, click or tab away from the filter field to activate the filter on the screen. If you hit "enter," you will download a CSV file of your filtered results.

Highlighting tab. Use the Highlighting tab to highlight results that meet specific criteria. Select the Set Filters icon to set the criteria to trigger the highlight. You can select images and specify how your highlighting displays using text colors, background colors and bolding, and add a description that appears when you hover over the highlighted data.



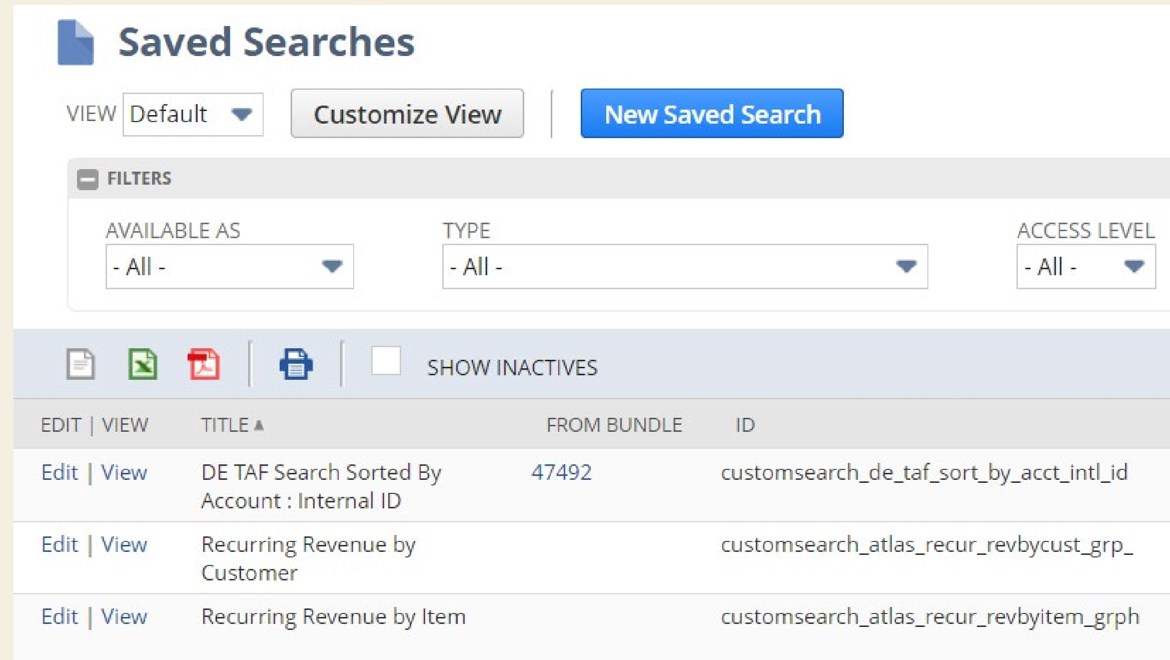
3. ACCESSING YOUR SAVED SEARCH

Once you have built and customized a Saved Search, you can find it again by navigating to Reports > Saved Search. You can also search by title in the Global Search dialogue.

Account administrators can access their own private searches as well as:

- Shared searches, with or without the Allow Audience to Edit option enabled, whether or not the creator includes the administrator in the audience.
- Public searches, with or without the Allow Audience to Edit option enabled.
- Private searches owned by users other than the administrator.

You can decide who can access your Saved Searches and where they can be accessed. If you choose to make your search public, anyone who has role permissions for that record type can access the Saved Search.



You can publish your Saved Search as a List View in your list of records or as a Custom Search on your Dashboard using the Custom Search portlet, or you may choose to make your Saved Search available for reminders using the Reminders Portlet.

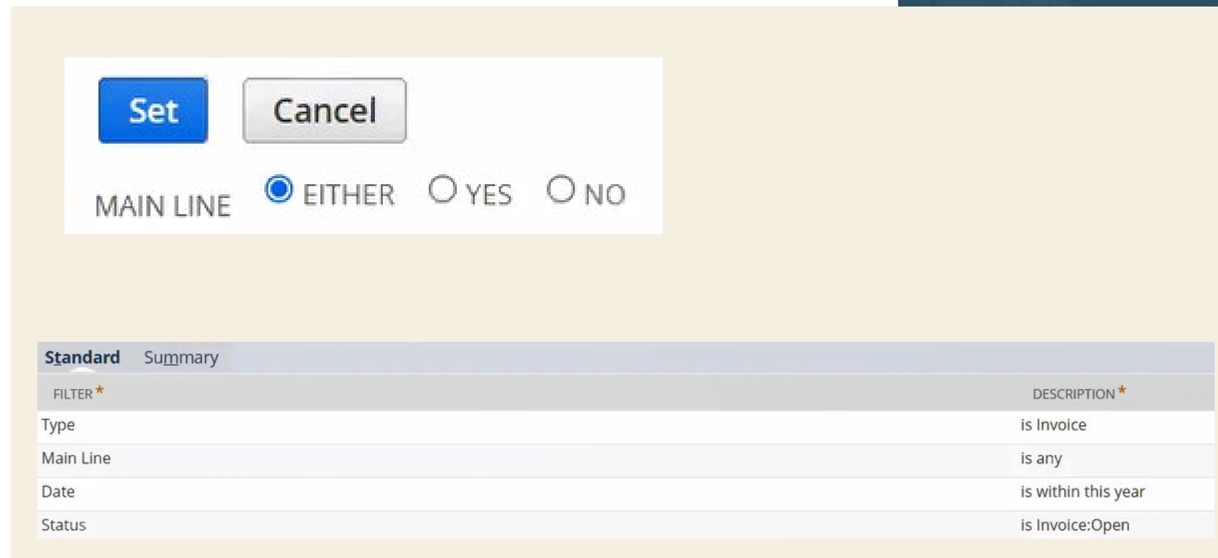
4. TRANSACTION SEARCHES

Transaction searches are Saved Searches that are specific to transaction records. It is important to remember that all transactions live in the transaction data source. Therefore, it is a good practice to set criteria prior to running the search.

There are several recommended criteria to set for transaction searches.

Type. Use the Type field to select the record type you want to search, such as invoice, vendor bill, or sales order. Do not use the specific record name from the Field selector dropdown list.

Main line. You can choose to display only main level, only line level, or both in your results.



Date. It is a best practice to use dynamic date selectors to filter date ranges.

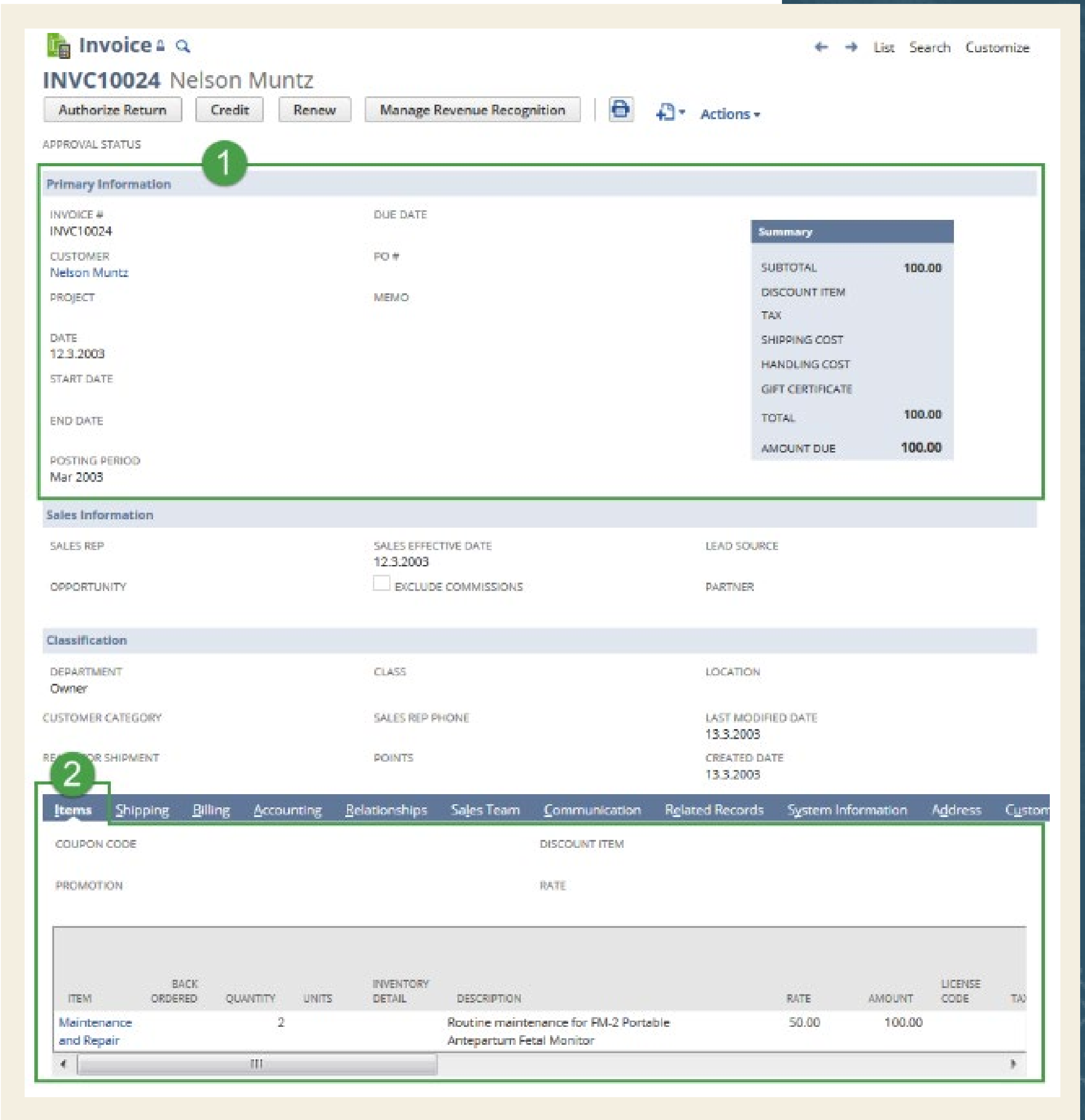
Status. Use this field to show a specific status for each transaction. Status can be used on its own or in conjunction with a date. For example, you can show only open invoices, or show only open invoices within a specific date range.

Main line criterion. Main line criterion refers to how NetSuite differentiates main level versus line level data on the transaction record. Line level data is item/expense sublist information. Main level data includes all other fields in the main body of the record. Note that these main body fields may appear above the item/expense sublist and may also appear on other subtabs of the record.

In the example, Image 1 indicates the transaction's main line data, and Image 2 indicates the transaction's line-item data.

By default, main line data and line-item data for each transaction appear on separate rows in search results. You can choose to display either main line data rows only or line-item data rows only.

Search results when main line is set to either. Main line data rows in the search results are marked with an asterisk, and line-item data displays underneath the main line data row.



Main Line Criterion

Search results when main line is set to true (yes).
Search results display one row per transaction, and line level details are omitted. Note that all results have an asterisk.

Search results when main line is set to false (no).
Search results display line level information per row in the item/expense sublist.

EDIT TOTAL: 3

EDIT | VIEW	INTERNAL ID	*	DATE ▲	TYPE	DOCUMENT NUMBER	NAME	ACCOUNT	ITEM	MEMO	AMOUNT
View	953	*	12.3.2003	Invoice	INVC10024	Nelson Muntz	11000 Accounts Receivable			100.00
View	883	*	13.4.2003	Invoice	INVC10032	Nelson Muntz	11000 Accounts Receivable			408.96
View	1456	*	12.4.2004	Invoice	INVC10128	Nelson Muntz	11000 Accounts Receivable			212.50

Search Results When Main Line Is Set to True (Yes)

EDIT TOTAL: 5

EDIT | VIEW	INTERNAL ID	*	DATE ▲	TYPE	DOCUMENT NUMBER	NAME	ACCOUNT	ITEM	MEMO	AMOUNT
View	953		12.3.2003	Invoice	INVC10024	Nelson Muntz	40700 Services	Maintenance and Repair	Routine maintenance for FM-2 Portable Antepartum Fetal Monitor	100.00
View	883		13.4.2003	Invoice	INVC10032	Nelson Muntz	40500 Sales	Diagnostic Tests : Alco Screen Alcohol Saliva Test	Alco Screen Alcohol Saliva Test, Box of 24	147.80
View	883		13.4.2003	Invoice	INVC10032	Nelson Muntz	40500 Sales	Diagnostic Tests : Clearview 1-Step hCG Pregnancy Test	Clearview 1-Step hCG Pregnancy Test, Box of 20	261.16
View	883		13.4.2003	Invoice	INVC10032	Montana Tax Man	27150 Sales Tax Payable	Montana	Sales Tax	0.00
View	1456		12.4.2004	Invoice	INVC10128	Nelson Muntz	40700 Services	Maintenance and Repair		212.50

Search Results When Main Line Is Set to False (No)

SUPPORTING YOU ALONG THE WAY

If you want to learn more about Saved Searches, check out these Learning Cloud Support (LCS) courses:

- How Do I Create a Custom Search?
- Saved Search Series
- SuiteAnalytics: Advanced Searches

LCS provides subscription-based training that allows all NetSuite users to engage in continuous education easily and cost-effectively. With on-demand learning, hands-on lab exercises, and multiple training options, LCS can help accelerate your entire organization's system knowledge and productivity.

Join the NetSuite Support Community

The NetSuite Support Community is an online gathering place for NetSuite professionals to share information, experiences, and advice. Ask a Support Guru for help with how-to questions or start a public discussion with the community.

www.netsuite.com
Infonetsuite_WW@oracle.com
877-638-7848