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Advanced Saved Searches

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Agenda

- ❑ Where Saved Searches Are Used
- ❑ Best Practices
- ❑ Where to Get Support
- ❑ Functions
- ❑ Grouping/Summaries
- ❑ Use summary data in the criteria
- ❑ When Ordered By
- ❑ Highlighting and Filtering
- ❑ HTML Formatting Results
- ❑ Formulas – simple ones
- ❑ Formulas with SQL Functions

Where Saved Searches Are Used

- ☐ Reporting on information
- ☐ Email alerts (on update or scheduled)
- ☐ Sublists
- ☐ Dynamic Custom Fields
- ☐ Mass Updates
- ☐ Scripts
- ☐ Workflows
- ☐ Dashboards (Reminders, Key Indicators, Custom Portlets)

Best Practices

- ❑ Naming Convention
 - ❑ Use prefix or suffix or combo
 - ❑ Type – Especially specifying the type of transaction
 - ❑ Department (FIN – Finance, OE – Order Entry, MAN – Manufacturing, etc)
 - ❑ Role
 - ❑ Initials
 - ❑ Uses (Workflow, script, sublist, etc)
 - ❑ Use an intuitive name vs “Custom transaction report 15”
- ❑ Create a custom internal id
- ❑ Saved Search to manage searches (store on custom tab)
 - ❑ Show all the scheduled reports
 - ❑ Show recipients on scheduled reports
 - ❑ Show Type (but not what type of transaction)

Where to get support

- ☐ Usergroup.netsuite.com
- ☐ NetSuite training
- ☐ Suite Answers
- ☐ Saved Search Examples Suite ID 8485
- ☐ Past User Group Presentations
- ☐ www.w3schools.com
- ☐ Google (of course!)

[Creating Saved Searches for Bin Numbers](#)

[Creating Saved Searches for System Notes](#)

[Creating Saved Searches for User Notes](#)

[Creating Saved Searches for Messages on Records](#)

[Creating a Campaign Response Search](#)

[Creating an Average Items Per Order Search](#)

[Creating a Web Orders Search](#)

[Creating a Daily Inventory Additions Search](#)

[Creating a Search for Customers with No Recent Activity](#)

[Creating a Search for Contacts with Customer Center Access](#)

[Creating a Search Email Alert for Leads Created through Online Forms](#)

[Creating a Search Email Alert for De-escalated Cases](#)

[Creating a Search for Shopping Cart Information](#)

Functions

- ❑ Use Functions instead of formulas
- ❑ Found on the results tab
- ❑ Great for Grouping

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	SUMMARY LABEL
⋮ *						
⋮ Date						
⋮ Date		Month				
⋮ Document Number						
⋮ Name						
⋮ PO/Check Number					PO Number	
⋮ Amount (Net)		% of Total				
⋮ Amount (Net)						
⋮ Accounting Approval Required (Custom Body)						
⋮ Status						

Grouping/Summaries

Using Summary searches is way to create more robust reporting of data with less manipulation in excel.

FIELD*	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	SUMMARY LABEL
⋮ *						
⋮ Type	Group					
⋮ Document Number	Count					Number of PO's
⋮ Replacement Order (Custom Body)						
⋮ Status						
⋮ Vendor : Name	Group				Vendor	
⋮ Item : Name	Group				Item	
⋮ Date	Maximum					Last Order Date
⋮ Memo						
⋮ Ship Date						
⋮ Item Rate						
⋮ Amount						
⋮ Quantity	Maximum					
⋮ Item : On Hand	Average					

Use summary data in the criteria

Reduce your result set even further by setting criteria on the summary data.

You can use formulas or expressions for this as well.

Standard • Summary •			
SUMMARY TYPE *	FIELD *	DESCRIPTION *	FORMULA
Maximum	Date	is before 1/1/2015	
Maximum	Item : On Hand	is greater than 100	
<input type="text"/>			

When Ordered By - Suite Answer ID 20995

- ❑ Must be used with Maximum or Minimum summary type
- ❑ In this example, if Date is not entered in the When Ordered By Field, the highest quantity of ALL po's is listed, instead of the quantity for the latest PO.

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	SUMMARY LABEL
:: *						
:: Type	Group					
:: Document Number	Count					Number of PO's
:: Replacement Order (Custom Body)						
:: Status						
:: Vendor : Name	Group				Vendor	
:: Item : Name	Group				Item	
:: Date	Maximum					Last Order Date
:: Memo						
:: Ship Date						
:: Item Rate						
:: Amount						
:: Quantity	Maximum			Date		
:: Item : On Hand	Maximum					

Highlighting and Filtering Suite Answer ID 8484


- Highlighting is a great way to visually call out specific criteria.
 - Use Expressions
 - Don't spend time on this if you will only export to excel
 - If more than one highlighting option used, it applies both but if a conflict in type (e.g. background color) then first criteria has higher priority
-
- Filtering is a way to let users drill down into data without actually having to edit the search

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

Highlight if... Highlight if... (Summary) •

Use this tab to enter highlight criteria based on summary rows. Only applies if you have a grouping on the results tab.

CONDITION *	IMAGE	TEXT COLOR	BACKGROUND COLOR	BOLD	DESCRIPTION
Max of Date is before 2 years ago AND Max of On Hand is greater than 1000	Exclamation Mark				
Max of Date is before 3 years ago					



✓ Add

✕ Cancel

+ Insert

Remove

Move Up

Move Down

Move To Top

Move To Bottom

Highlighting and Filtering Discounts taken on Payments

Transactions Saved search

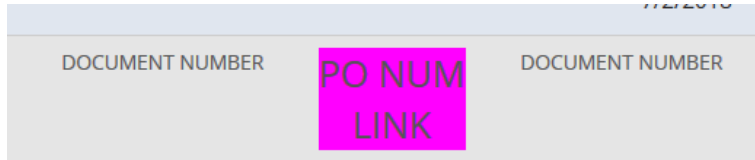
Standard • Summary	
FILTER *	DESCRIPTION *
Type	is Invoice
Applying Link Type	is Payment
Date	is within 4/1/2018 and 4/30/2018

⋮	*	
⋮	Type	
⋮	Applying Transaction : Document Number	Payment
⋮	Applying Transaction : Type	
⋮	Customer : Internal ID	
⋮	Customer : Number	Customer Number
⋮	Applying Transaction : Paid Amount	
⋮	Applying Transaction : Paid Amount Is Discount	
⋮	Applying Transaction : Paid Transaction	

HTML Formatting Results

Create additional visually pleasing formatting with HTML

*Note 99 character limit on Custom Label Field



Combine multiple formatting:

```
<div style ="text-align: center; font-size: 20px;background-color:#FF00FF">PO  
Num<br> Link</style>
```

Or if you only need one at a time:

```
<center>PO Num<br> Link</center>
```

```
<font size = 20>PO Num<br> Link</size>
```

HTML Formatting Results

Create links to transactions with HTML

7/2/2018 — 6/15/2018 TOTAL: 1062									
EDIT VIEW	INTERNAL ID	DATE	DOCUMENT NUMBER	PO NUM LINK	DOCUMENT NUMBER	NAME	MEMO	AMOUNT	
Edit View	820791	7/2/2018	13767	PO68277	PO68277	27127 SAG Co. Ltd.		98.45	
Edit View	820748	6/30/2018	13762	PO67834	PO67834	27233 Kimball Electronics		3,824.40	

- Single Quotes contain the HTML code
- Double Quotes contain the NetSuite link
- Double Pipe contain a NetSuite field name for dynamic data

```
'<a target="_blank"
href="https://system.netsuite.com/app/accounting/transactions/pu
rchord.nl?id=||{appliedtotransaction.internalid}||">||{appliedtotra
nsaction.number}||'</a>'
```

Formulas – simple ones Suite Answer ID 8439

- Can be used in criteria, summary criteria, results tab and highlighting tab.
- Note there is a 1000 character limit

In Criteria (Suite Answer ID 8449):

Standard • Summary		
FILTER *	DESCRIPTION *	FORMULA
Type	is Purchase Order	
Main Line	is false	
Formula (Numeric)	is not 0	{quantityshiprecv}-{quantitybilled}
Status	is any of Purchase Order:Pending Bill, Purchase Order:Pending Billing/Partially Received	

In Results (Suite Answer ID 8450):

Quantity Billed		Qty Billed
Formula (Numeric)	{quantityshiprecv}-{quantitybilled}	Qty Unbilled
Formula (Numeric)	{rate}	Rate
Formula (Numeric)	((quantityshiprecv}-{quantitybilled})*{rate}	Amt Unbilled

How to strip the grouped name off the item name:

- INSTR searches a string for a substring; SUBSTR returns a portion of char, beginning at character position, substring_length characters long
 - case when INSTR({name}, ':', -1) > 0 then SUBSTR({name} , INSTR({name} , ':' , -1) +2) else {name} end
- REGEXP_REPLACE lets you replace a sequence of characters (source_char) that matches a regular expression pattern with another set of characters (replace_string)
- REGEXP_SUBSTR lets you extract a sequence of characters that matches a regular expression pattern from the source string (source_char)
 - REGEXP_REPLACE(REGEXP_SUBSTR({item.name},': [^:]*\$'),': ','')
- REGEXP_SUBSTR({name}, '[^:]*\$')

All 3 formulas give the same result!

Formulas with SQL Functions

INSTR In String

- INSTR (char1, char2,[,n[,m]])
- Position of *m*th occurrence of char2 in char1, beginning
- search at character position *n*. *m* and *n* default to 1.
- If *n* = -1 means search R>L (or from end of string)
- If *n* = 1 means search L>R

SUBSTR sub-string

- SUBSTR(char, m[,n])
- Selects a string from another

The Case Statement

From as simple as:

`NVL(case when trunc({today})-{duedate} < 0 then {amount} end, '0')`

To as complex as:

`NVL(case when trunc({today})-{duedate} < 0 then {amount} end,0)+ NVL(case when trunc({today})-{duedate} between 1 and 30 then {amount} end,0) + NVL(case when trunc({today})-{duedate} between 31 and 60 then {amount} end,0) + NVL(case when trunc({today})-{duedate} between 61 and 90 then {amount} end ,0)+ NVL(case when trunc({today})-{duedate} > 91 then {amount} end,0)`

Or this:

`case when {customer.custentity9} = 'INTERCOMPANY' then 'IC' when {customer.custentity9} = 'OEM' then 'TP' when {customer.custentity9} = 'SALES SAMPLE ACCOUNTS' then 'IN' when {customer.custentity9} = 'SYSTEMS INTEGRATOR' then 'TP' when {customer.custentity9} = 'WHOLESALE ELECTRONIC' then 'TP' end`

Note* There can be up to 255 comparisons, where each When...Then clause is considered 2 comparisons.

Advanced Saved Searches

Q & A