SAVED SEARCHES A - Z

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Agenda

1. Saved Searches – The What
2. Saved Searches – The Why
3. Saved Searches – The When
4. Saved Searches – The Who
5. Saved Searches – The How
6. Saved search examples
7. Additional Q & A

Gary Kangas, J

Professional Highlights

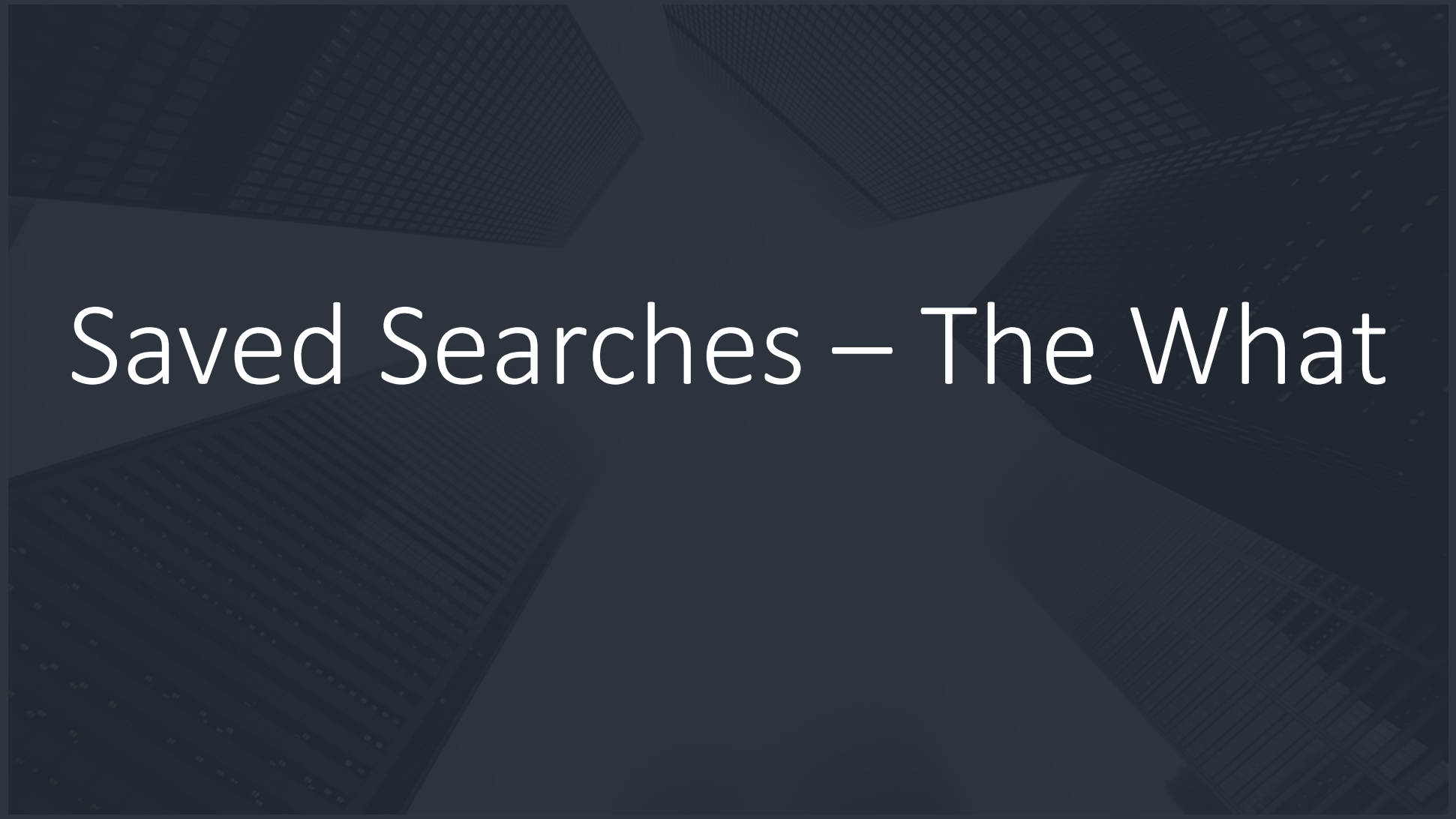
- 9+ years of NetSuite Implementation Experience
- Technical expertise and project leadership in the analysis, design, implementation, and support of multiple ERP systems
- CFO and Controller - Financial management and controllership functions, including tax compliance and audits

NetSuite Work Experience

- ***Bresatech* –** NetSuite Managing Principal Consultant
- ***NetSuite* –** Solution Architect (Wholesale Distribution, Manufacturing, General Business)

Certifications

- Netsuite Foundations, ERP Consultant and Administrator
- CPA – State of Florida (Expired)



Saved Searches – The What

A Saved Search is…

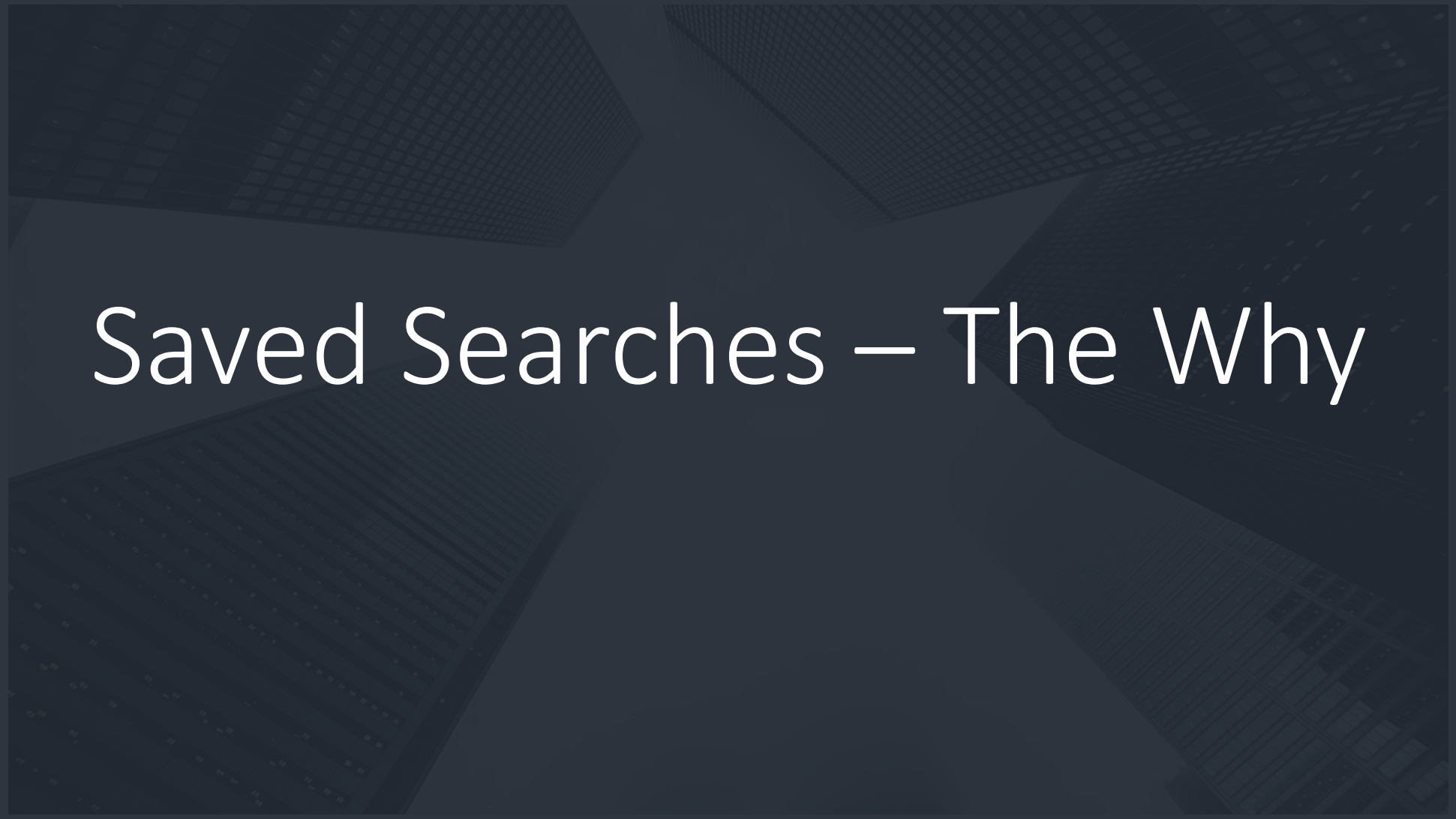
- According to NetSuite Help Center, “a reusable search definition, that can have many advanced search filters and results display options.”

- In plain English, a saved search is a way to filter and group information from NetSuite, to easily provide data that can be utilized to assist in making good business decisions, no matter how big or small.

A Saved Search is…

- Also an advanced way to organize and mine the proper data using Oracle PL/SQL commands – https://www.techonthenet.com/oracle/index.php

- A way to display data in web formatted fashion using HTML



Saved Searches – The Why

Saved searches are used for…

- Easy Data export using CSV, Excel, and PDF
- Alerting customers, employees, and others when certain conditions occur.
- Highlighting certain values based upon predefined criteria
- Easily modify certain data on records (i.e., Inline Edit)
- Custom Lists of all record types (i.e., Customers, Sales Order, Vendor Bills)
- Custom Sublists on most record types (i.e., SuiteSuccess Item360, SuiteSuccess Customer360)
- Mass Updates (a way of using criteria to update certain field values on records)
- Preferred Search Forms (i.e., Serial # search)

Saved searches are used for…

- Custom Fields (calculated with the results of a saved search)
- Key Performance Indicators / Meters / Graphs
- KPI Scorecards
- Workflow Conditions
- Reminders (Portlet on Dashboard)
- Custom Searches on Dashboards
- Script Parameters
- Aiding in the automation of NetSuite tasks

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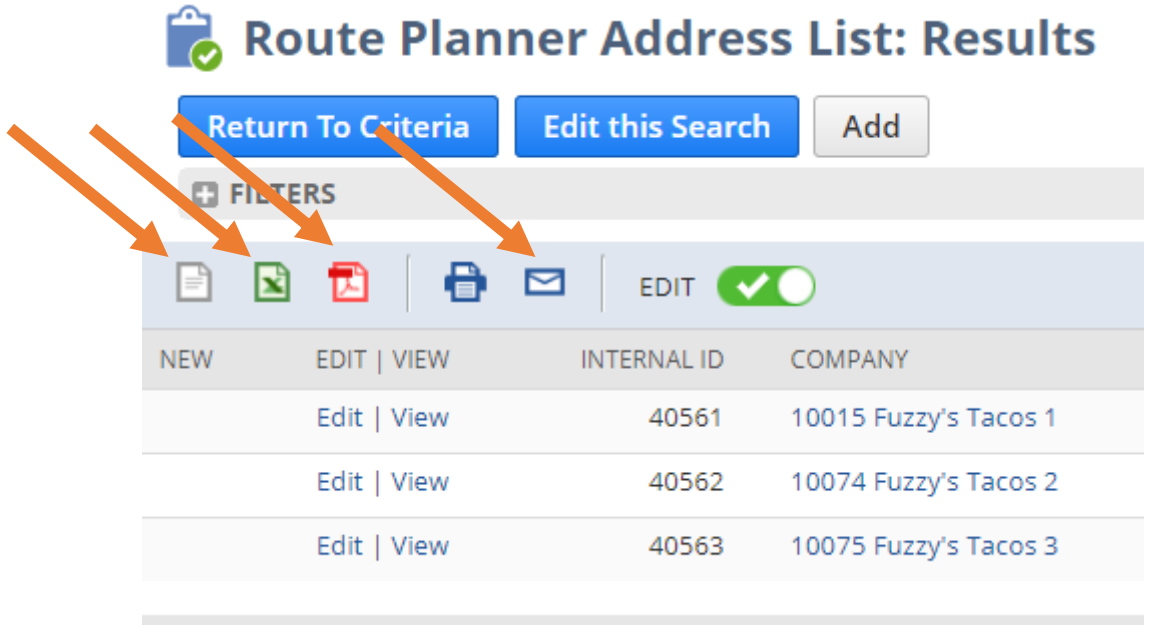
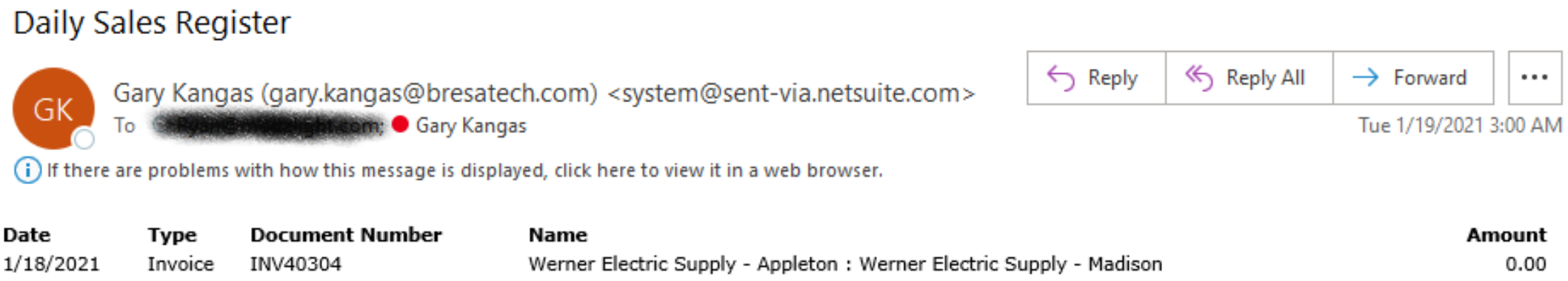
Saved searches are used for…

Export Data



Saved searches are used for…

Email Alerts



Daily Sales Register

GK

Gary Kangas (gary.kangas@bresatech.com) <system@sent-via.netsuite.com>

To [redacted] Gary Kangas

Reply | Reply All | Forward | ...

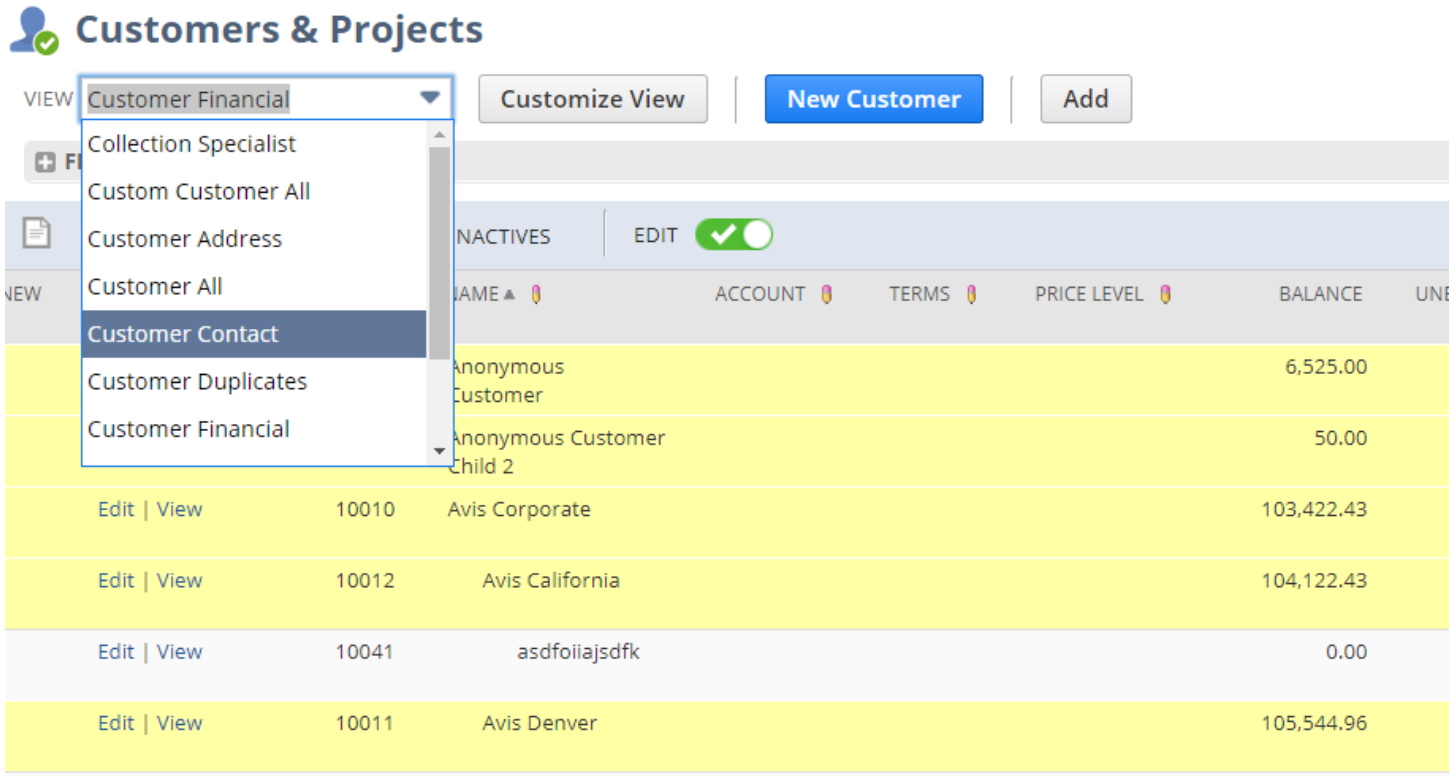
Tue 1/19/2021 3:00 AM

If there are problems with how this message is displayed, click here to view it in a web browser.

Date	Type	Document Number	Name	Amount
1/18/2021	Invoice	INV40304	Werner Electric Supply - Appleton : Werner Electric Supply - Madison	0.00

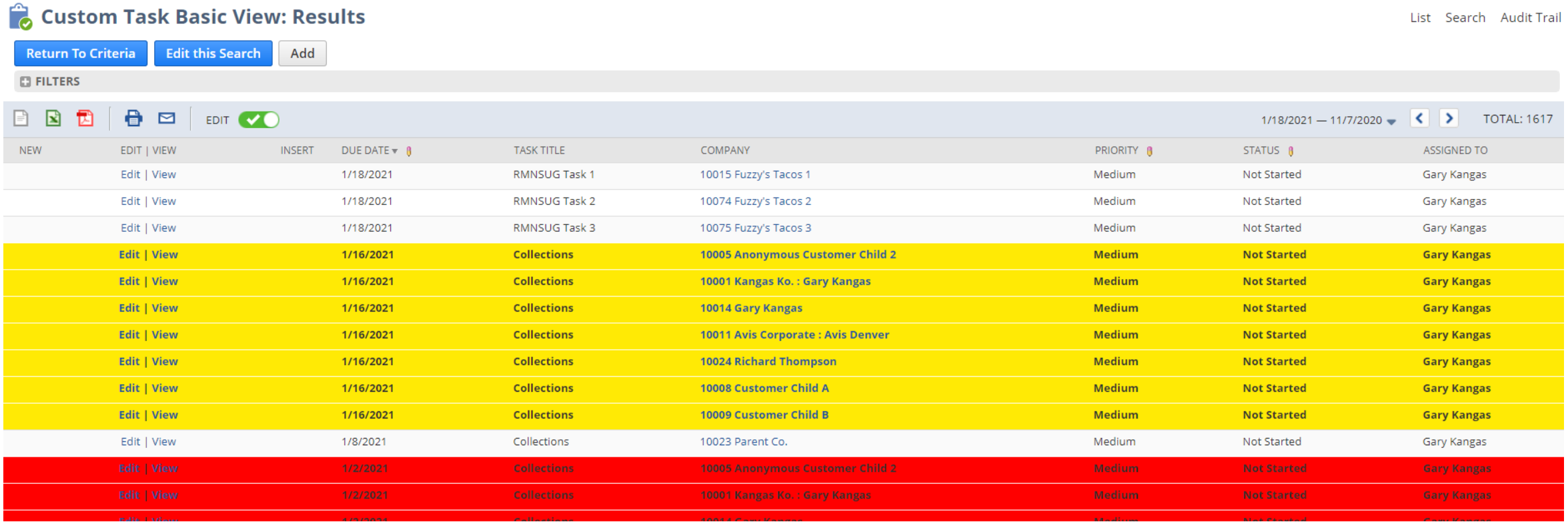
Saved searches are used for…

Lists with Different Views



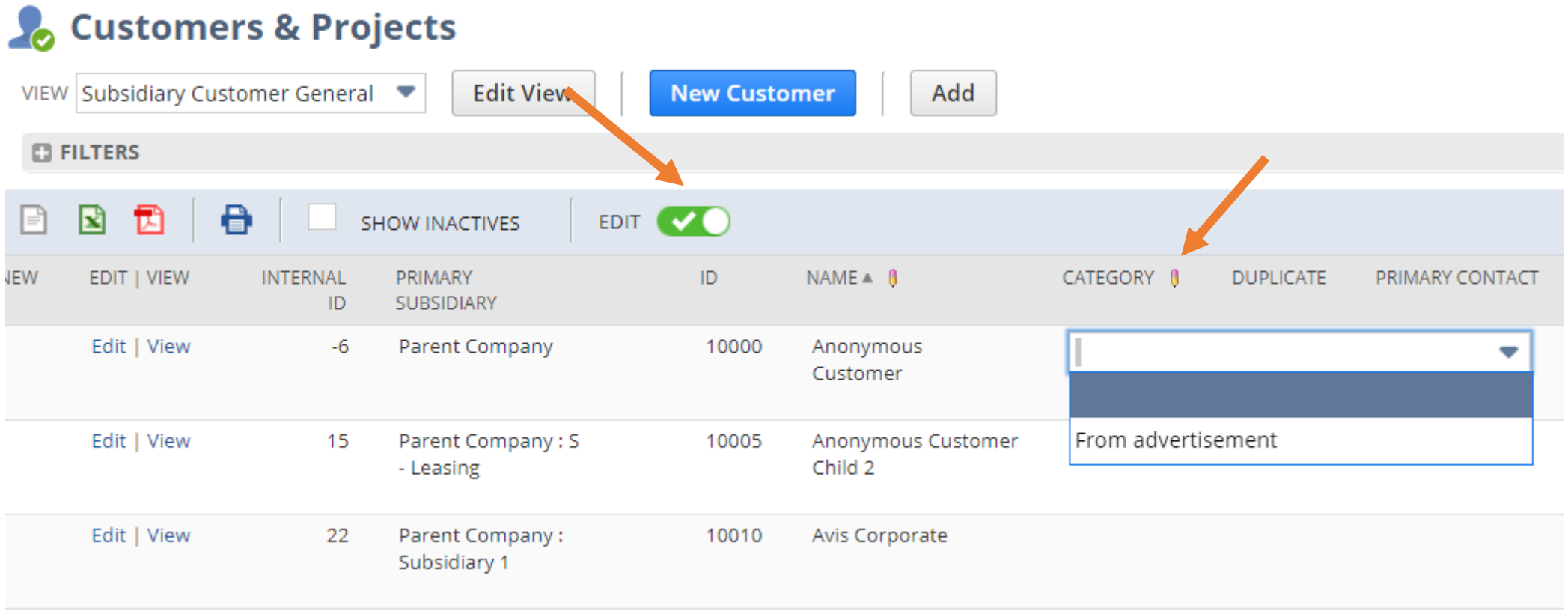
Saved searches are used for…

Highlighting



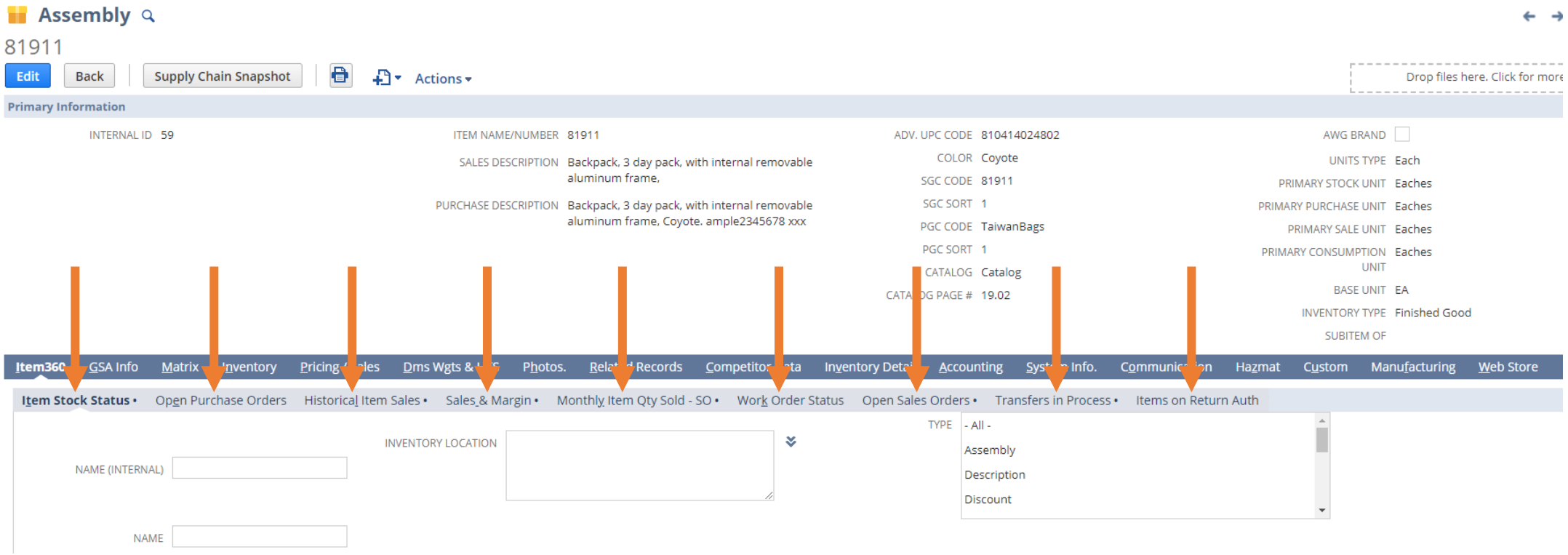
Saved searches are used for…

Inline Editing



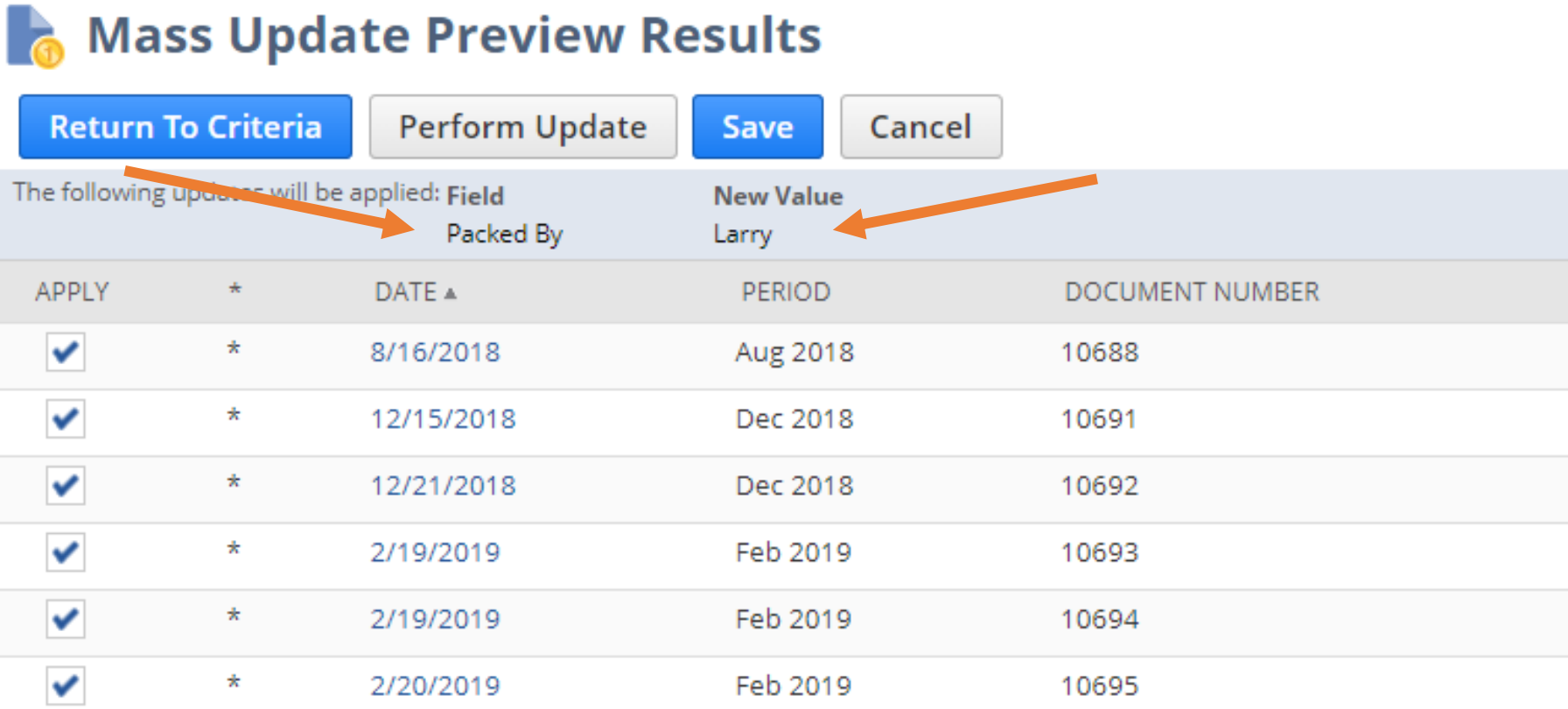
Saved searches are used for…

Sublists



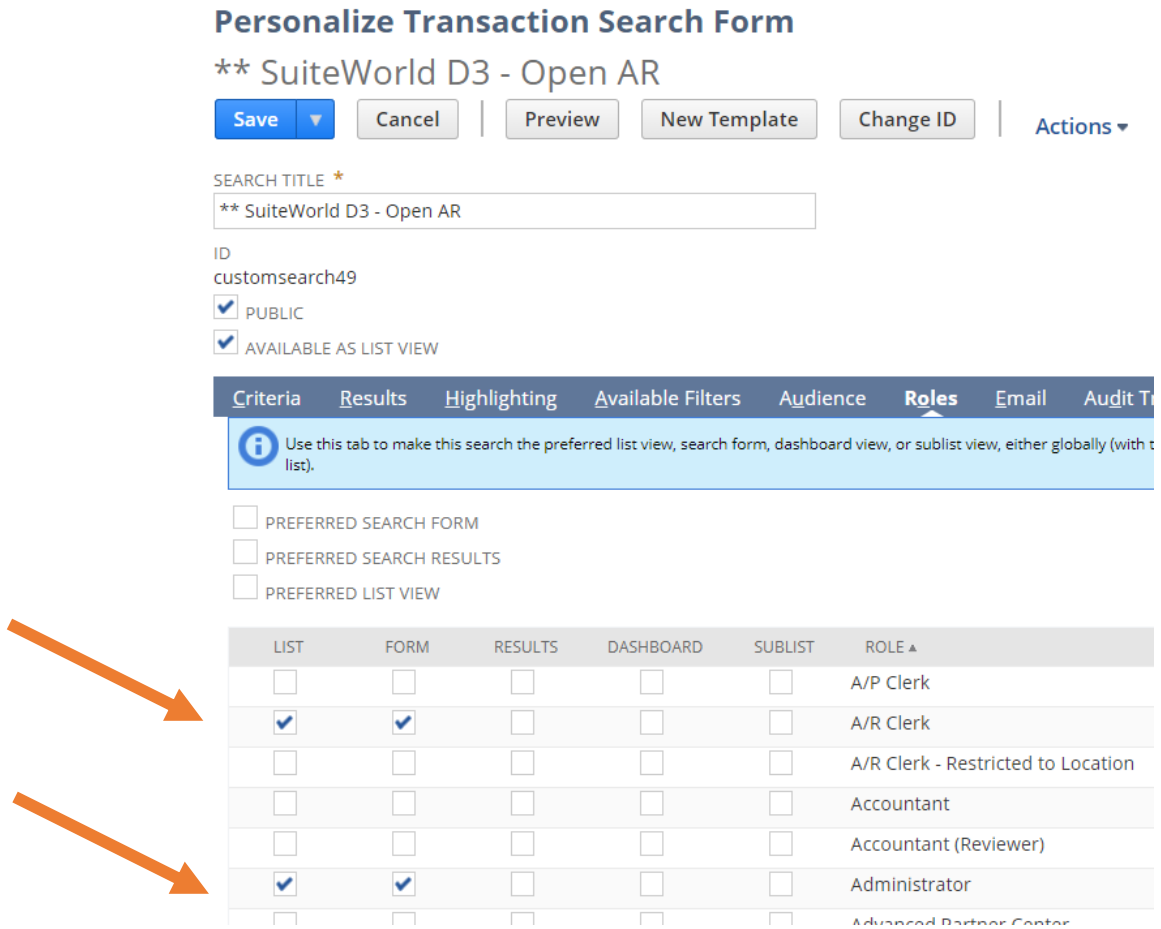
Saved searches are used for…

Mass Updates



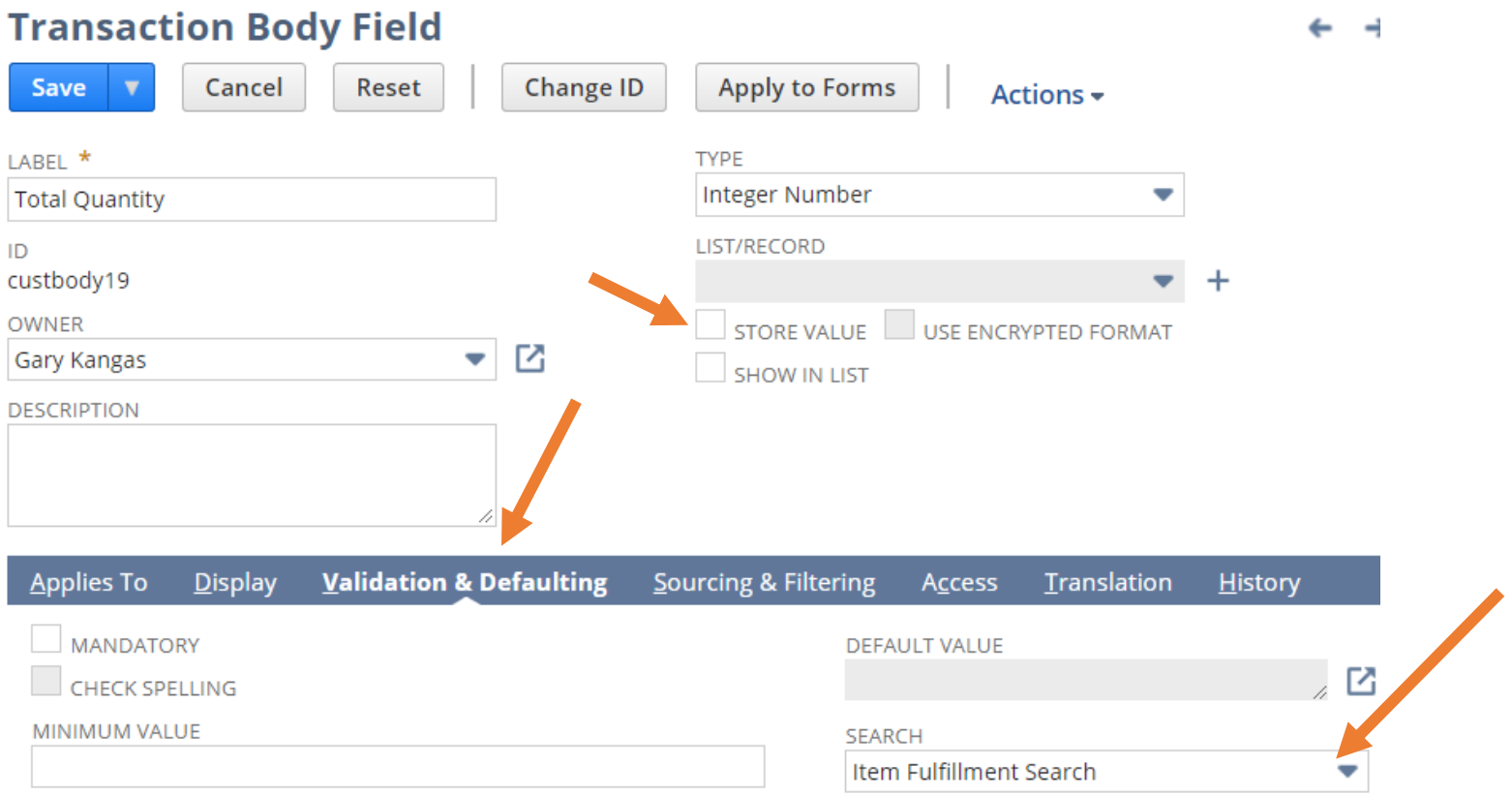
Saved searches are used for…

Preferred Search Form



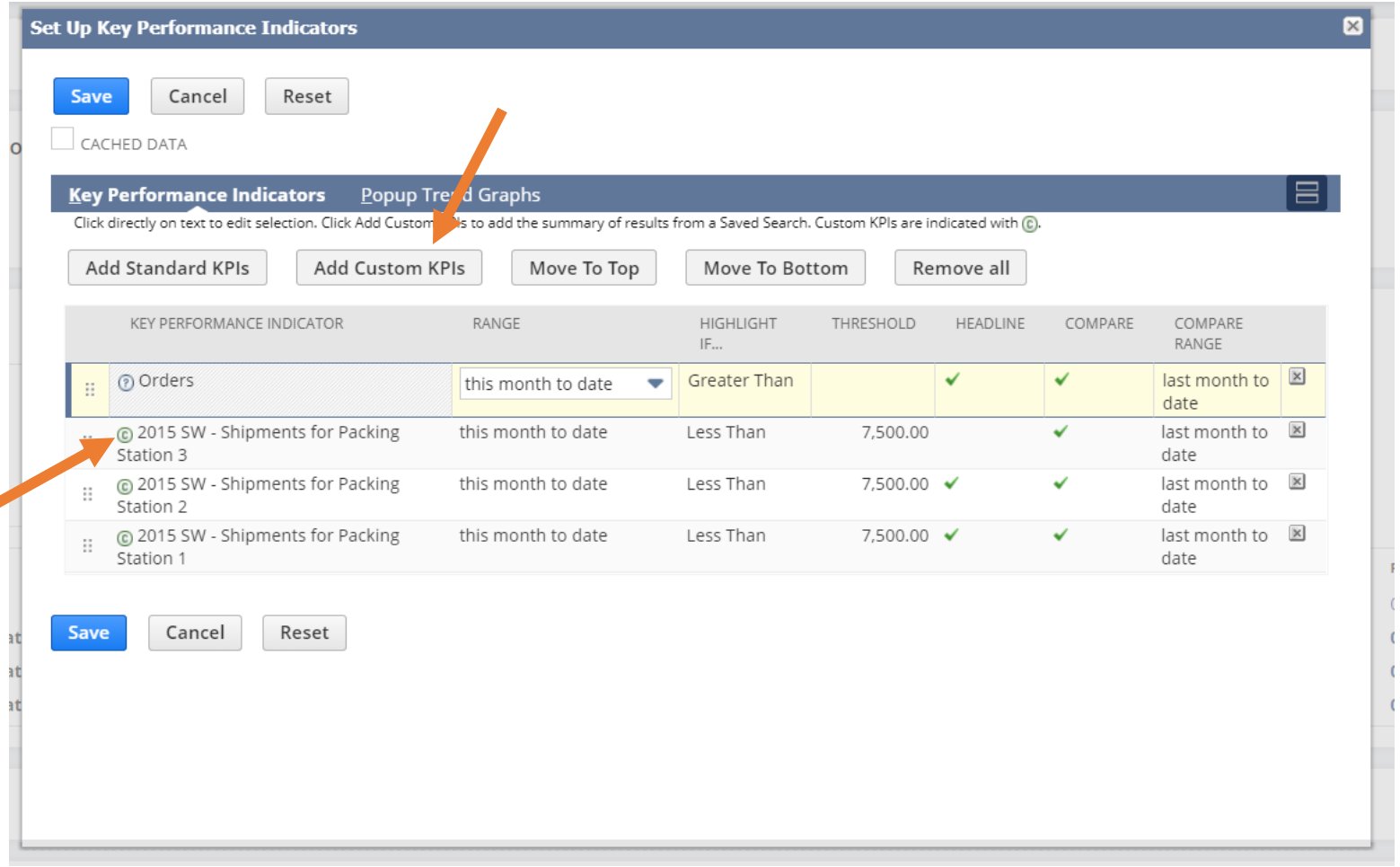
Saved searches are used for…

Custom Fields



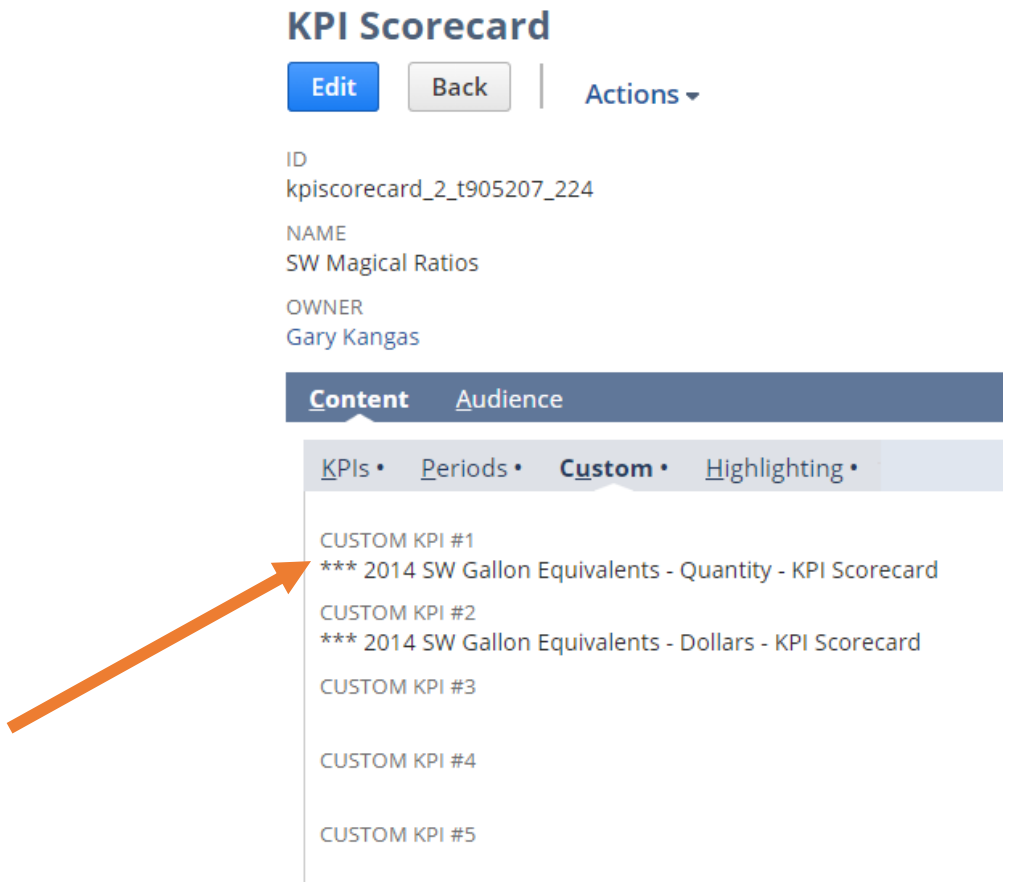
Saved searches are used for…

Key Performance Indicators (Meters and Graphs)



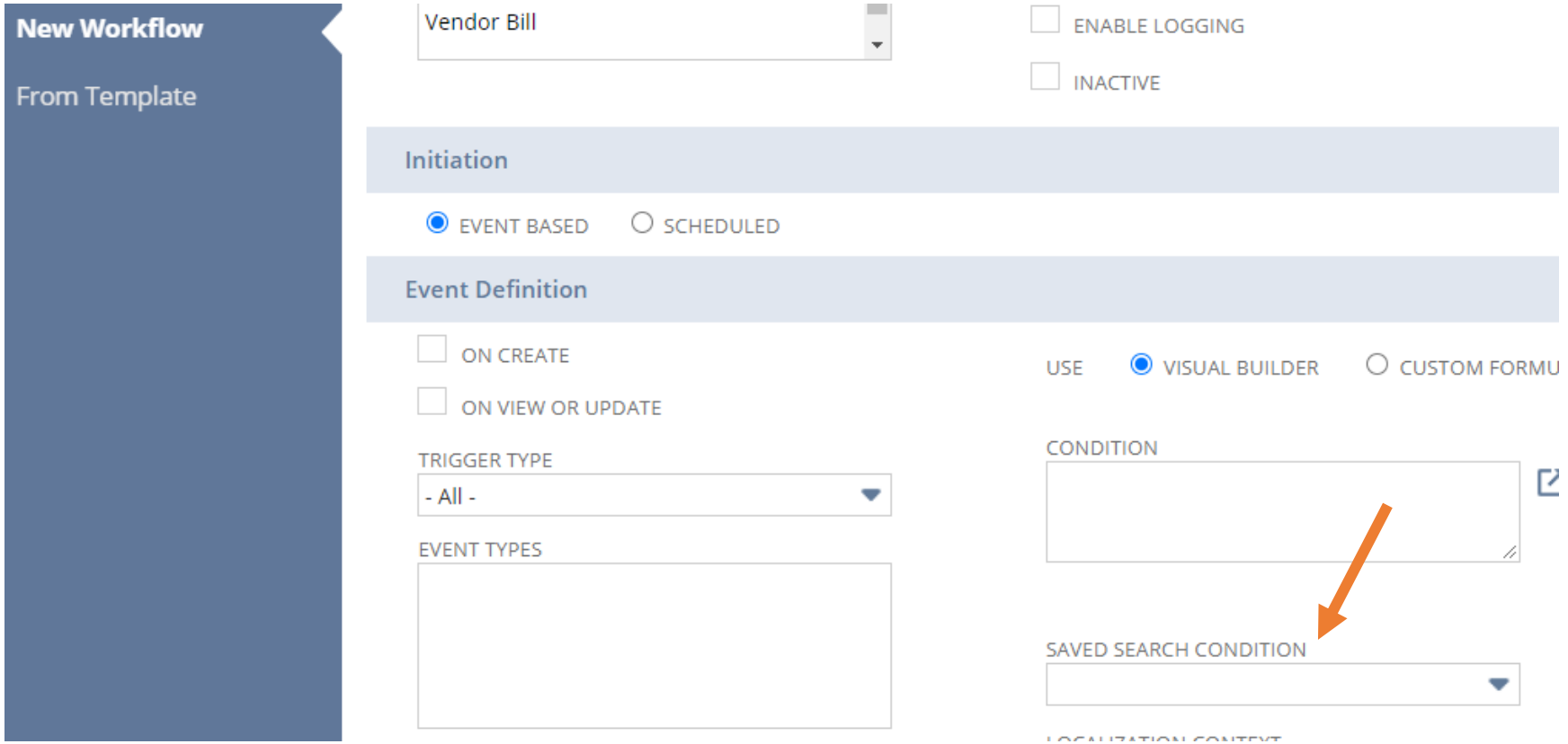
Saved searches are used for…

KPI Scorecards



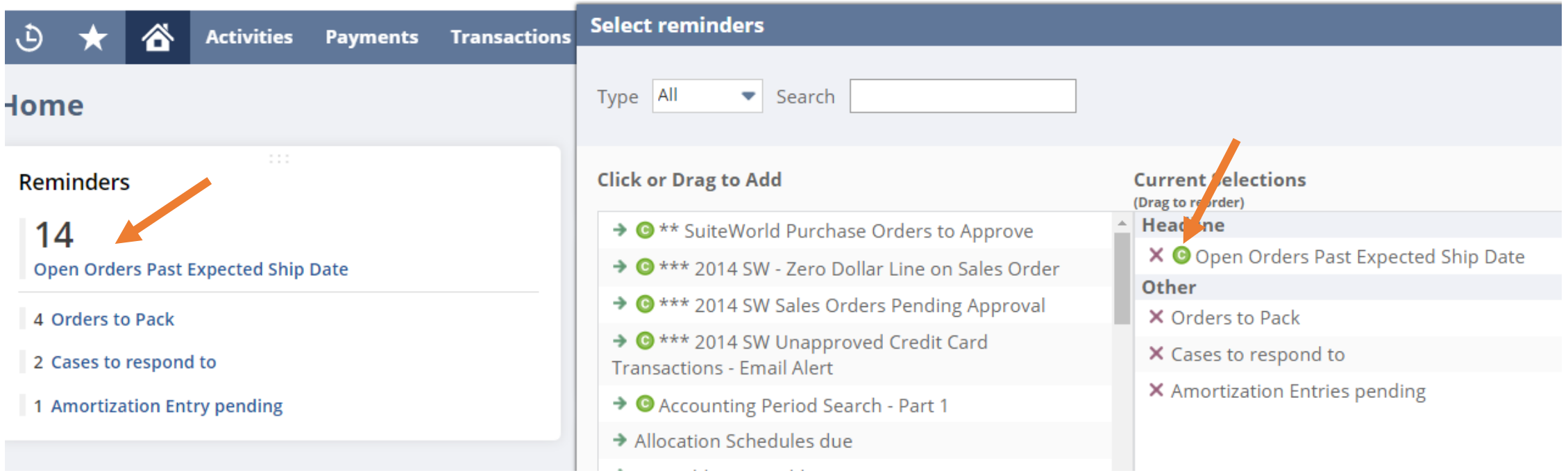
Saved searches are used for…

Workflow Conditions (Trigger, State, Actions, & Transitions)



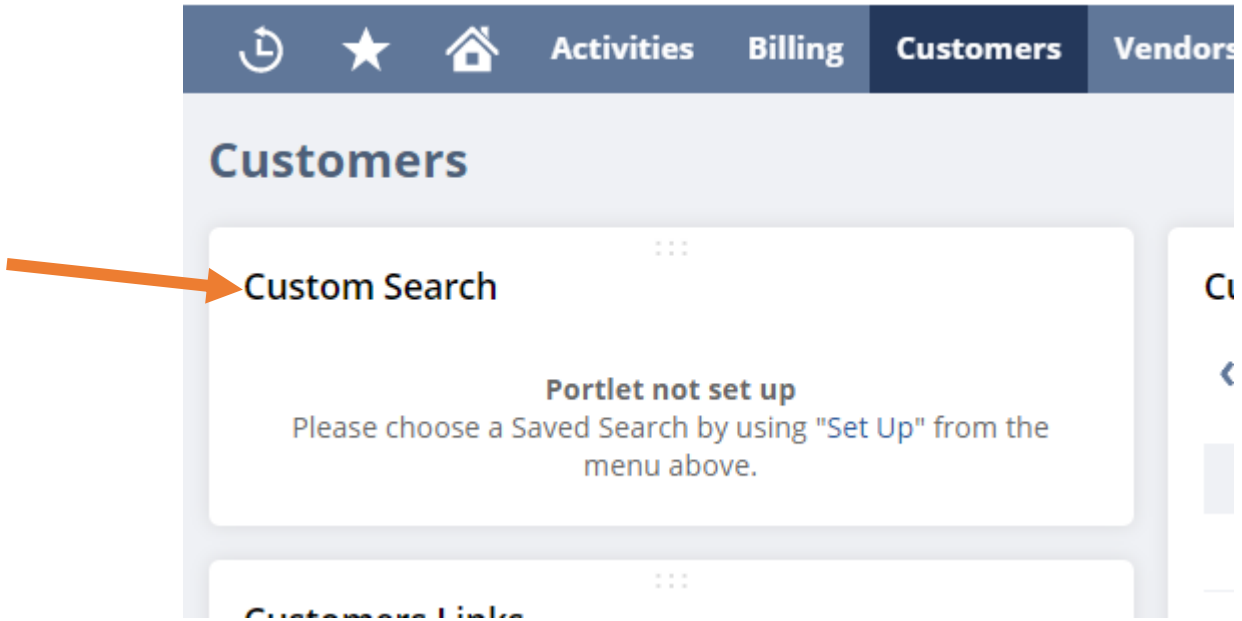
Saved searches are used for…

Custom Reminders



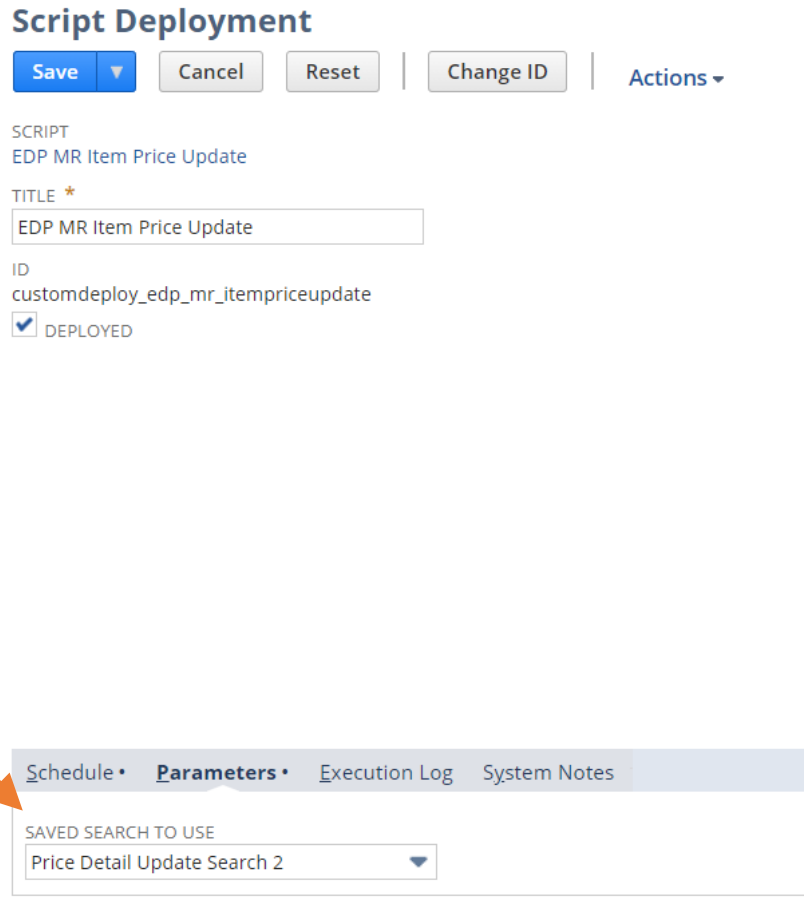
Saved searches are used for…

Custom Searches on Dashboards



Saved searches are used for…

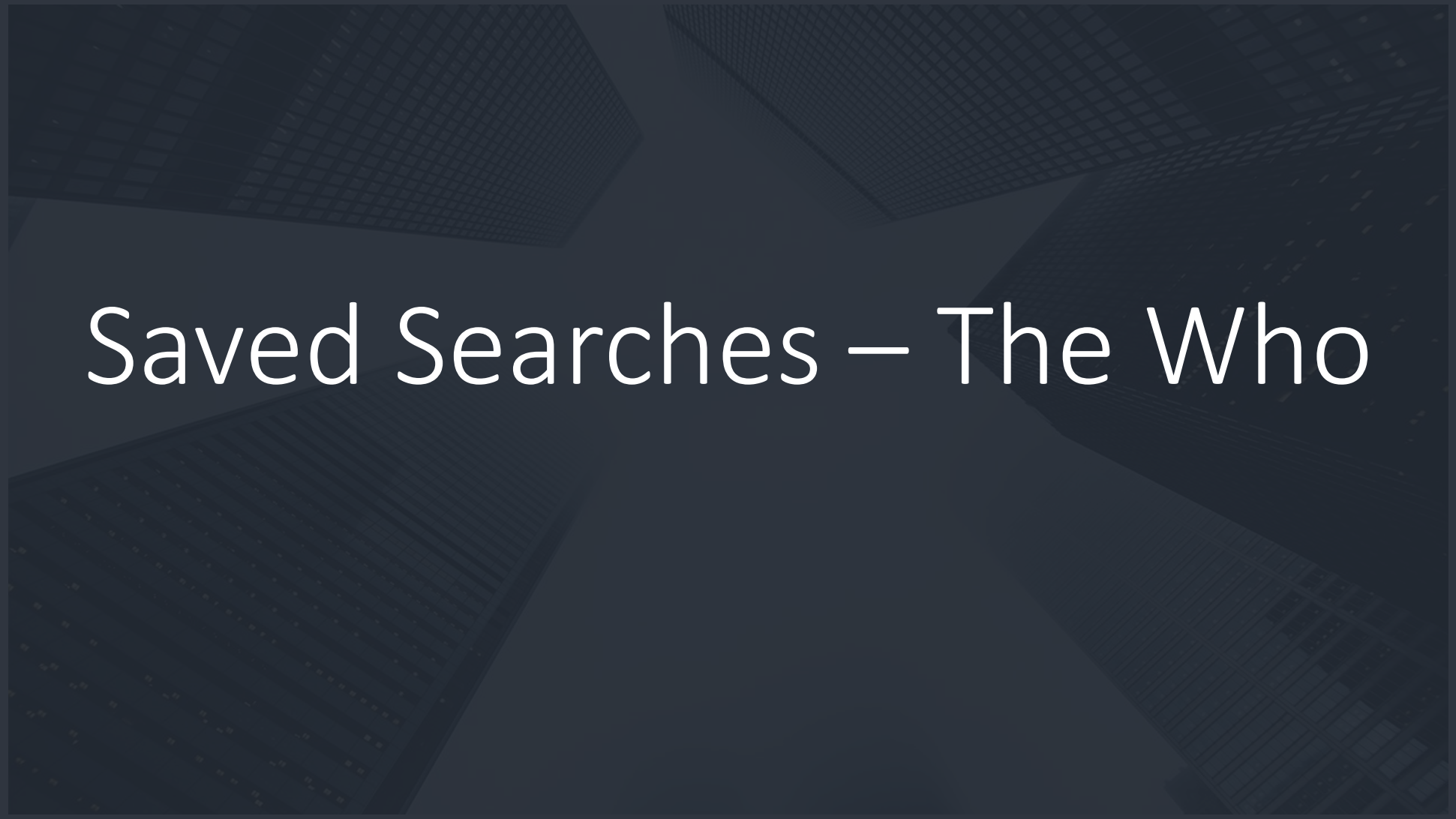
Script Parameters



Saved Searches – The When

When Do I Use a Saved Search

- Do not need it formatted (well, kind of)
- Want to display it on a dashboard (well, kind of)
- Need to send an alert to someone
- Need to export to an outside tool
- Report Formatting is not necessary
- Need summarized data only
- Don’t know how to use the reporting tools
- Create a Mass Update
- Have multiple conditions to meet for a workflow to trigger

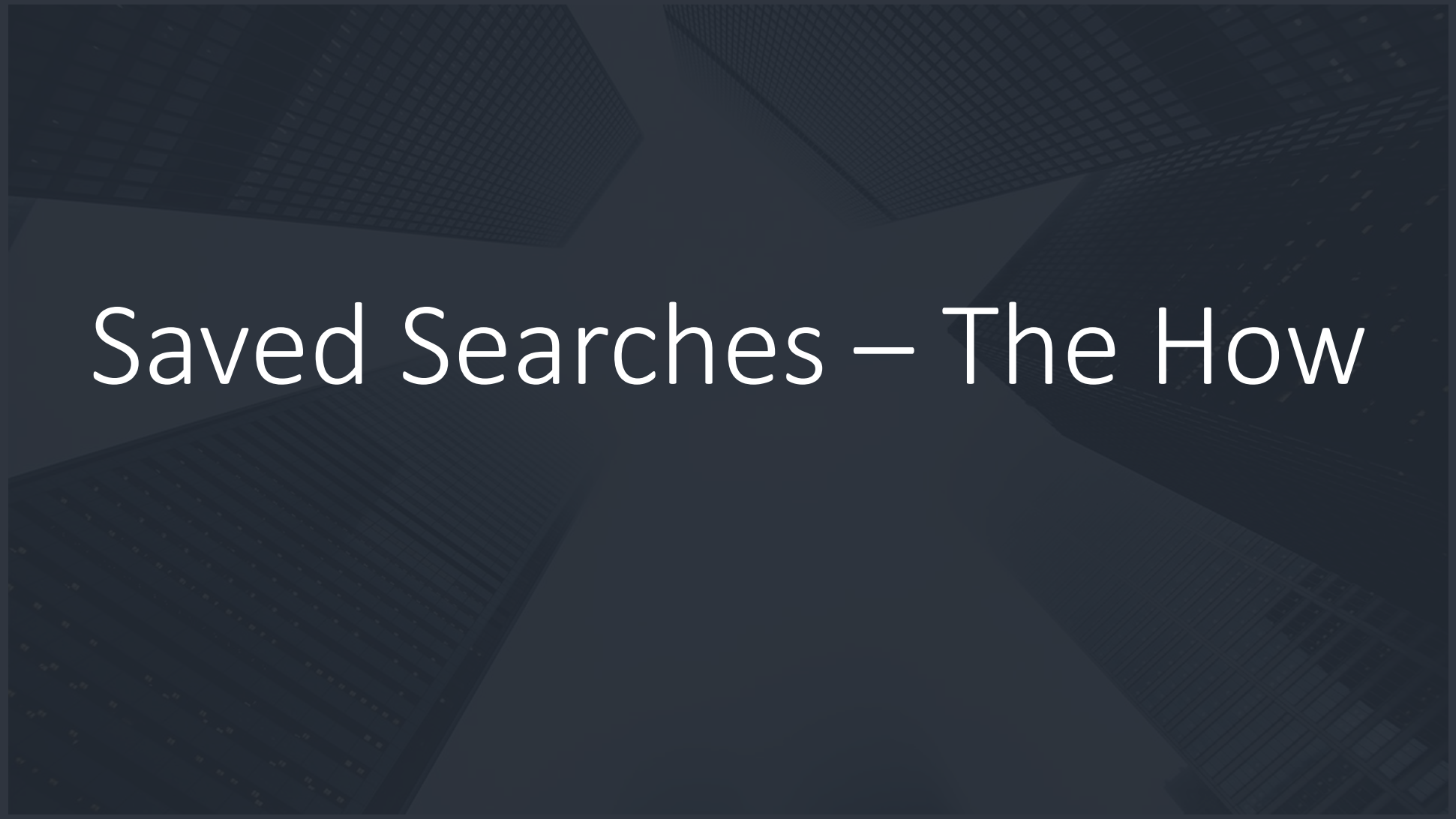


Saved Searches – The Who

How to Create a Saved Search

- Permissions
  - Creating a Saved Search - the user must have Permissions > Lists > “Perform Search” with minimum “Create” level access
  - Publishing a Saved Search – the user must have Permissions > Lists > “Publish Search” with minimum “Create” level access
  - The user must have minimum “View” level access to a record on which they would like to create a saved search (For example, users without access to Employee records cannot create a search against the Employee record even though they have access to creating a saved search)

Perform Search	Full
Phone Calls	Full
Product Categories	Edit
Projects	Edit
Publish Search	Create



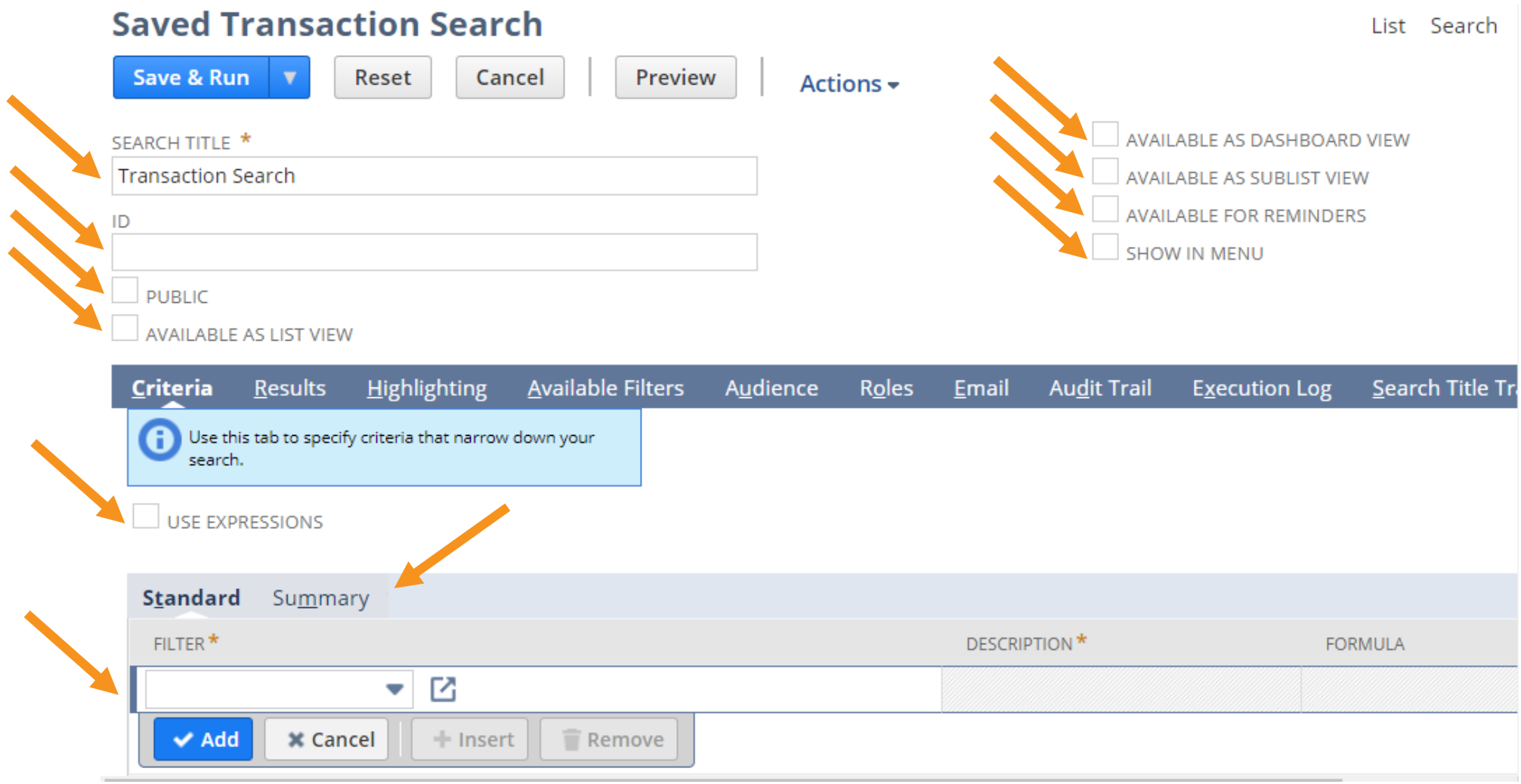
Saved Searches – The How

How to Create a Saved Search

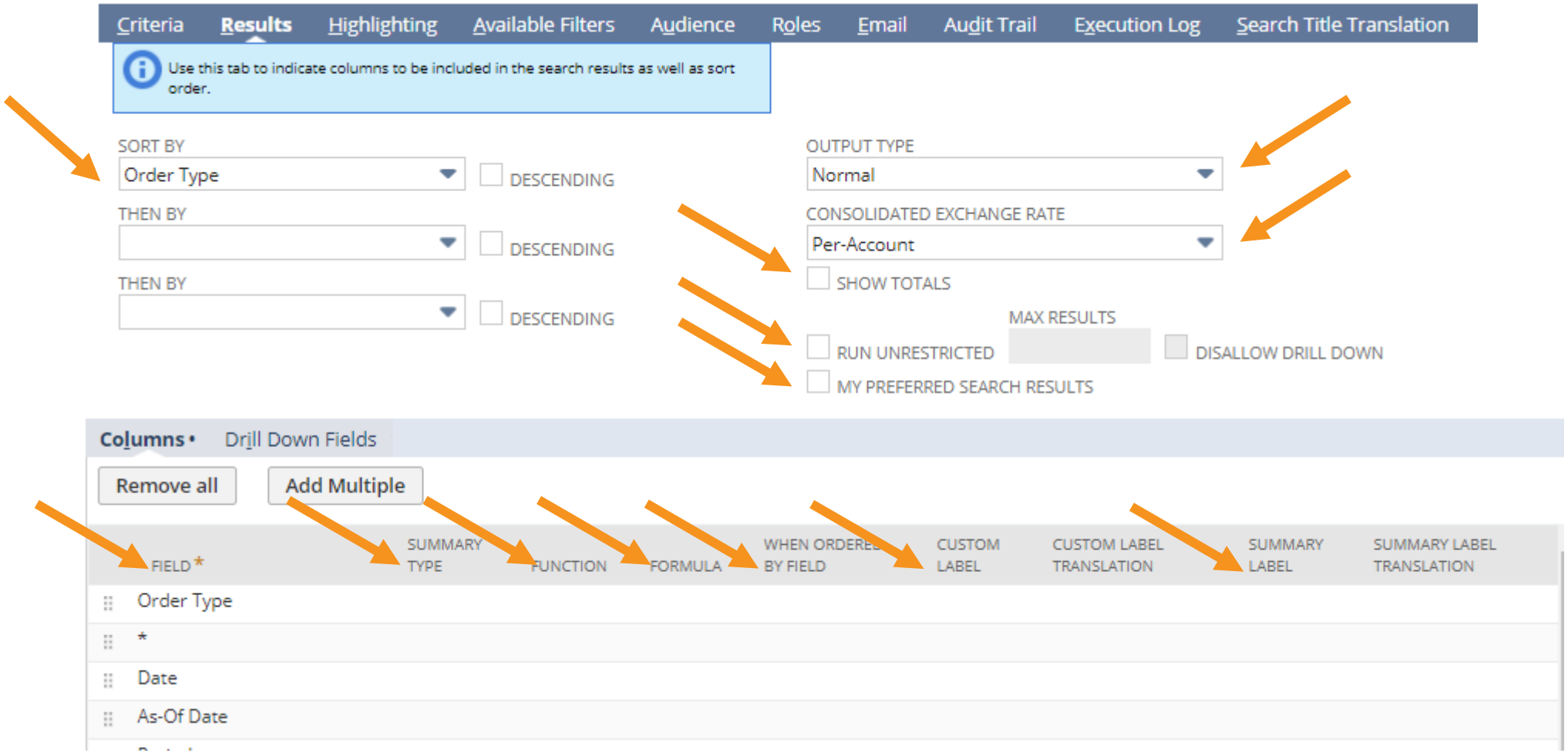
- To Create A Saved Search (no matter which role with proper permission)
  - Reports > New Search
  - Select the record on which you'd like to perform the saved search

Note: a user will only have the records to which they have access listed. They cannot see the records to which they do not have at least "View" access. This includes standard records, plus any custom records.

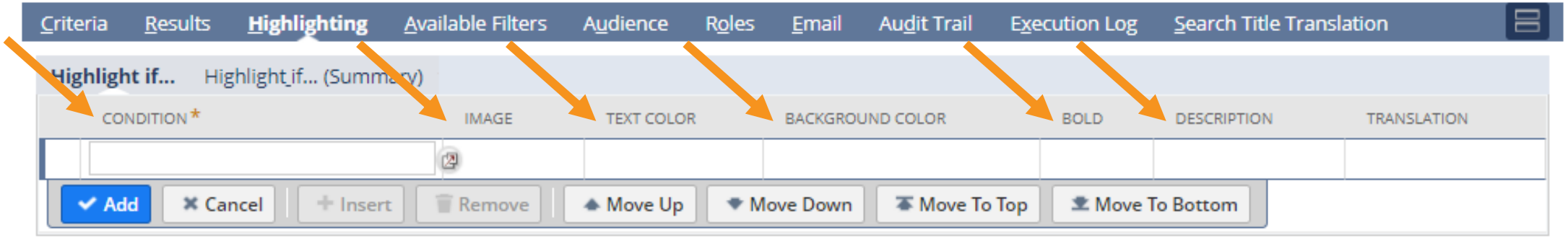
How to create a saved search



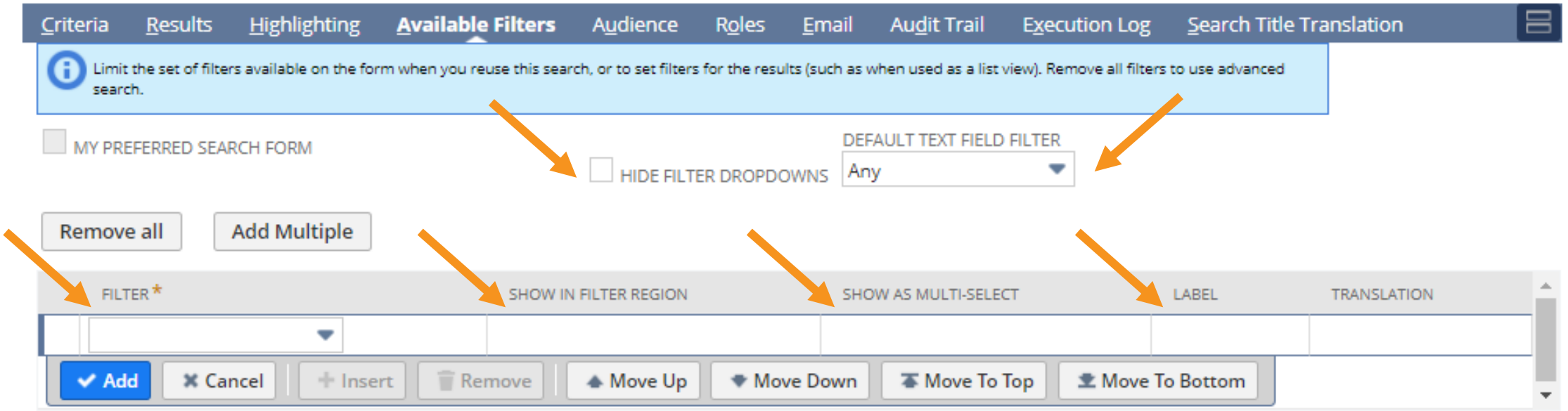
How to create a saved search



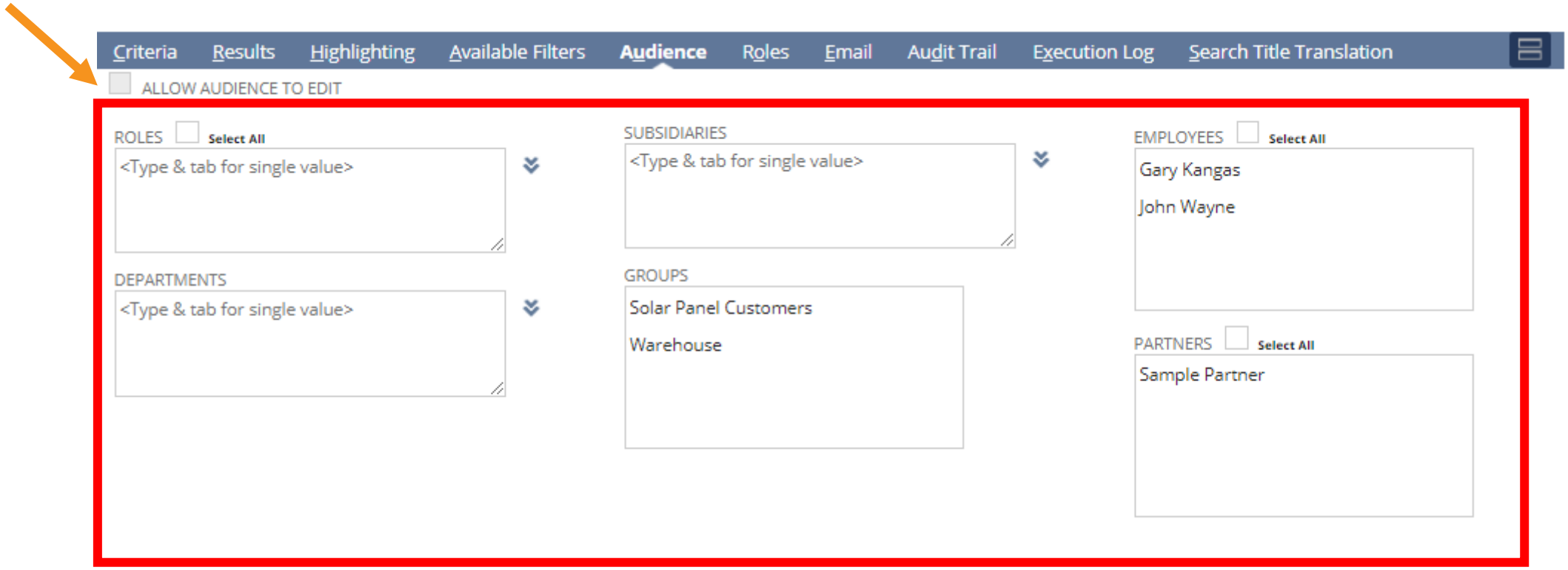
How to create a saved search



How to create a saved search

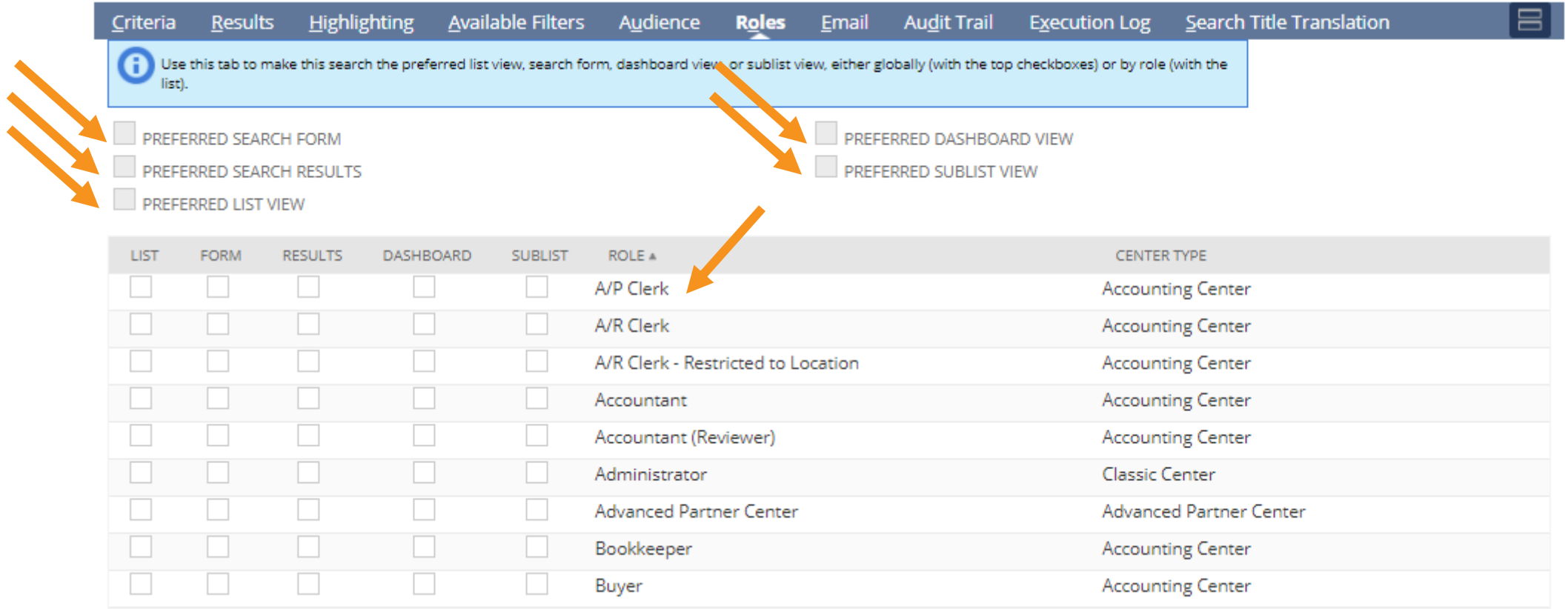


How to create a saved search

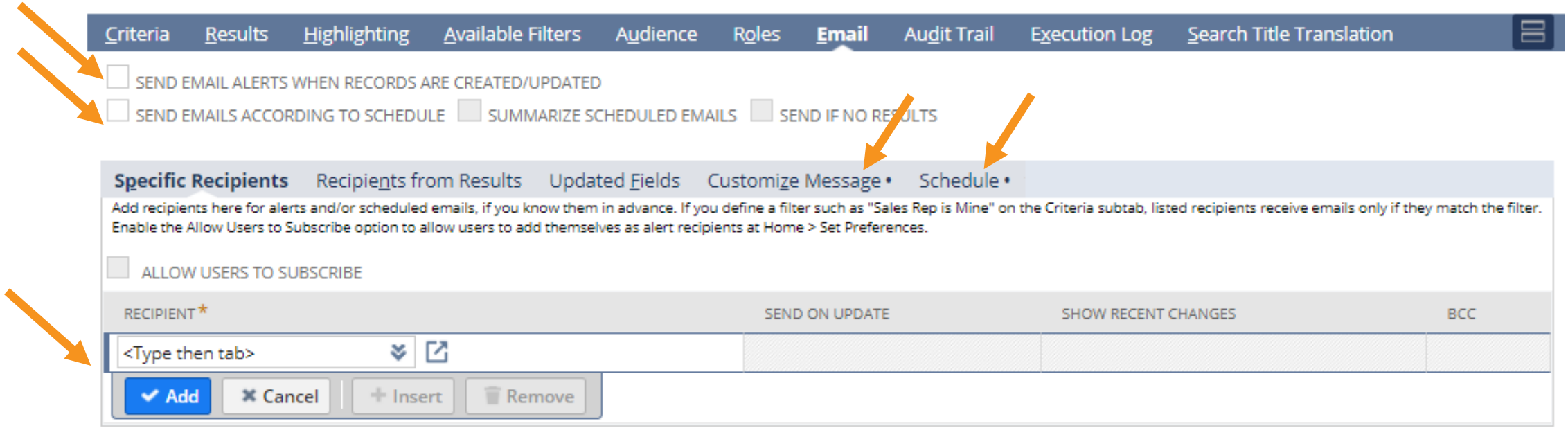


By default, when Public is selected on the header of the saved search, the Roles checkbox is marked. Groups are a great way to control access to a search for a specific subset of users. For example, if your entire sales department has the same role, but only an sales reps in the east region need access to the saved search, you define a dynamic group of employees with East Region selected on their employee record.

How to create a saved search



How to create a saved search



Break Time
10 Minutes

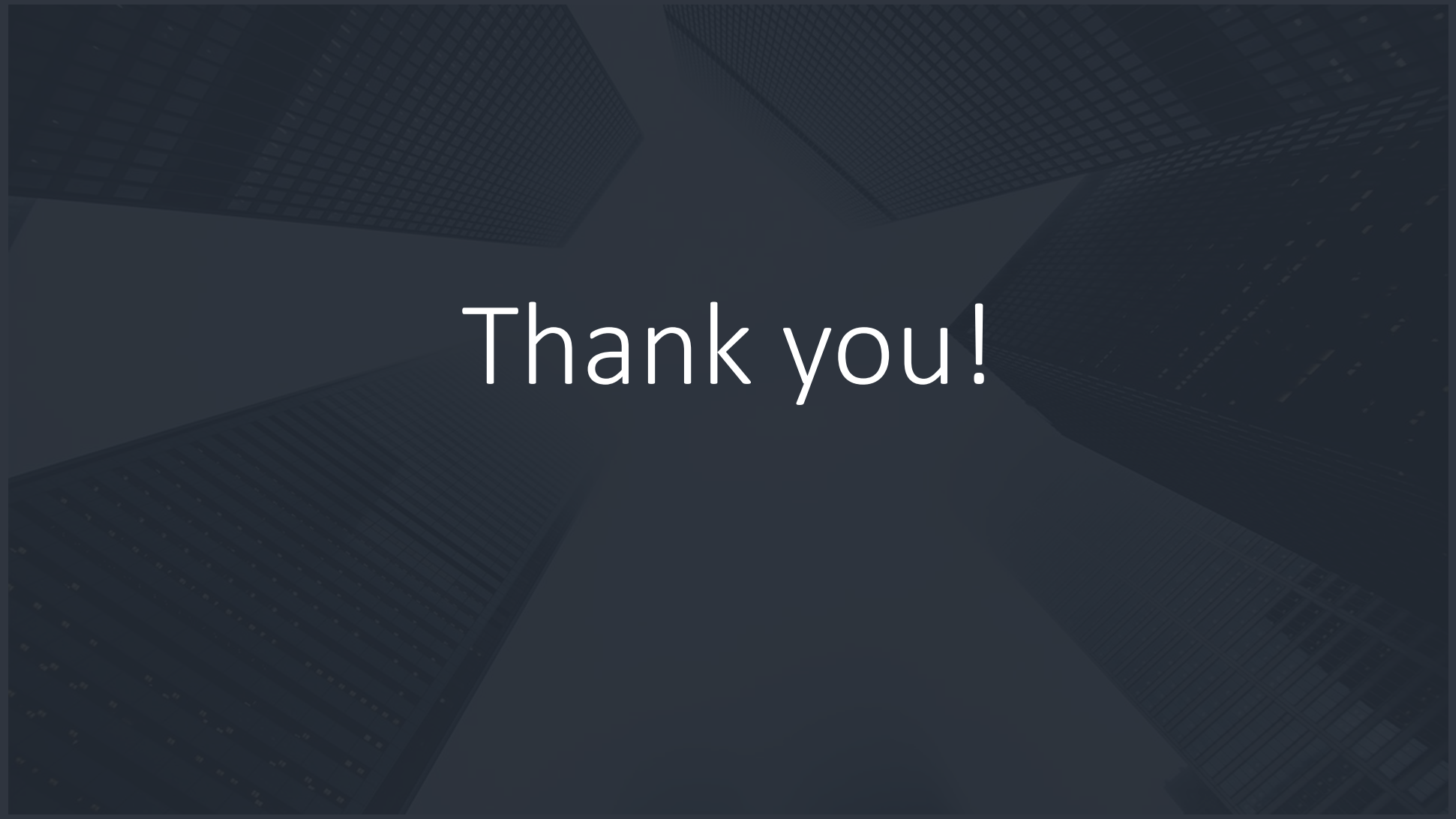
Saved Search Examples

Formula for the Iframe in the MapQuest demo on the video

'📝 Todays Route Tasks (Saved Search)

 <iframe src="https://www.mapquest.com/routeplanner" style="height:65vh; width:100%;"" frameborder="0" scrolling="no"></iframe>'

Q & A


Thank you!