

SAVED SEARCHES

A - Z

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Agenda

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- 5 Saved Searches – The How
- 6 Saved search examples
- 7 Additional Q & A



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






Saved searches are used for...

Export Data

 **Route Planner Address List: Results**

[Return To Criteria](#) [Edit this Search](#) [Add](#)

+ FILTERS

   |   | EDIT ☒

NEW	EDIT VIEW	INTERNAL ID	COMPANY
	Edit View	40561	10015 Fuzzy's Tacos 1
	Edit View	40562	10074 Fuzzy's Tacos 2
	Edit View	40563	10075 Fuzzy's Tacos 3

Saved searches are used for...

Email Alerts

Daily Sales Register



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

To [redacted] com; ● 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

Customers & Projects

VIEW **Customer Financial** Customize View New Customer Add

- Collection Specialist
- Custom Customer All
- Customer Address
- Customer All
- Customer Contact**
- Customer Duplicates
- Customer Financial

NEW

INACTIVES | EDIT ☒

NAME ▲	ACCOUNT	TERMS	PRICE LEVEL	BALANCE	UNE
Anonymous Customer				6,525.00	
Anonymous Customer Child 2				50.00	
Edit View	10010	Avis Corporate		103,422.43	
Edit View	10012	Avis California		104,122.43	
Edit View	10041	asdfolajsdjk		0.00	
Edit View	10011	Avis Denver		105,544.96	

Saved searches are used for...

Highlighting

Custom Task Basic View: Results

List Search Audit Trail

[Return To Criteria](#) [Edit this Search](#) [Add](#)

+ FILTERS

1/18/2021 — 11/7/2020 ◄ ► TOTAL: 1617								
NEW	EDIT VIEW	INSERT	DUE DATE ▼	TASK TITLE	COMPANY	PRIORITY	STATUS	ASSIGNED TO
	Edit View		1/18/2021	RMNSUG Task 1	10015 Fuzzy's Tacos 1	Medium	Not Started	Gary Kangas
	Edit View		1/18/2021	RMNSUG Task 2	10074 Fuzzy's Tacos 2	Medium	Not Started	Gary Kangas
	Edit View		1/18/2021	RMNSUG Task 3	10075 Fuzzy's Tacos 3	Medium	Not Started	Gary Kangas
	Edit View		1/16/2021	Collections	10005 Anonymous Customer Child 2	Medium	Not Started	Gary Kangas
	Edit View		1/16/2021	Collections	10001 Kangas Ko. : Gary Kangas	Medium	Not Started	Gary Kangas
	Edit View		1/16/2021	Collections	10014 Gary Kangas	Medium	Not Started	Gary Kangas
	Edit View		1/16/2021	Collections	10011 Avis Corporate : Avis Denver	Medium	Not Started	Gary Kangas
	Edit View		1/16/2021	Collections	10024 Richard Thompson	Medium	Not Started	Gary Kangas
	Edit View		1/16/2021	Collections	10008 Customer Child A	Medium	Not Started	Gary Kangas
	Edit View		1/16/2021	Collections	10009 Customer Child B	Medium	Not Started	Gary Kangas
	Edit View		1/8/2021	Collections	10023 Parent Co.	Medium	Not Started	Gary Kangas
	Edit View		1/2/2021	Collections	10005 Anonymous Customer Child 2	Medium	Not Started	Gary Kangas
	Edit View		1/2/2021	Collections	10001 Kangas Ko. : Gary Kangas	Medium	Not Started	Gary Kangas
	Edit View		1/2/2021	Collections	10014 Gary Kangas	Medium	Not Started	Gary Kangas

Saved searches are used for...

Inline Editing

Customers & Projects

VIEW Subsidiary Customer General

Edit View

New Customer

Add

+ FILTERS



SHOW INACTIVES

EDIT



NEW

EDIT | VIEW

INTERNAL
ID

PRIMARY
SUBSIDIARY

ID

NAME

CATEGORY

DUPLICATE

PRIMARY CONTACT

Edit | View

-6

Parent Company

10000

Anonymous
Customer

Edit | View

15

Parent Company : S
- Leasing

10005

Anonymous Customer
Child 2

Edit | View

22

Parent Company :
Subsidiary 1



10010

Avis Corporate





From advertisement

Saved searches are used for...

Sublists

 **Assembly** 

81911

[Edit](#) [Back](#) [Supply Chain Snapshot](#)   [Actions](#)  

Drop files here. Click for more

Primary Information

INTERNAL ID	59	ITEM NAME/NUMBER	81911	ADV. UPC CODE	810414024802	AWG BRAND	<input type="checkbox"/>
SALES DESCRIPTION	Backpack, 3 day pack, with internal removable aluminum frame,			COLOR	Coyote	UNITS TYPE	Each
PURCHASE DESCRIPTION	Backpack, 3 day pack, with internal removable aluminum frame, Coyote. ample2345678 xxx			SGC CODE	81911	PRIMARY STOCK UNIT	Eaches
				SGC SORT	1	PRIMARY PURCHASE UNIT	Eaches
				PGC CODE	TaiwanBags	PRIMARY SALE UNIT	Eaches
				PGC SORT	1	PRIMARY CONSUMPTION UNIT	Eaches
				CATALOG	Catalog	BASE UNIT	EA
				CATALOG PAGE #	19.02	INVENTORY TYPE	Finished Good
						SUBITEM OF	

Item360 [GSA Info](#) [Matrix](#) [Inventory](#) [Pricing](#) [Sales](#) [Dms Wgts & Units](#) [Photos](#) [Related Records](#) [Competitor Data](#) [Inventory Details](#) [Accounting](#) [System Info](#) [Communication](#) [Hazmat](#) [Custom](#) [Manufacturing](#) [Web Store](#)

Item Stock Status • [Open Purchase Orders](#) • [Historical Item Sales](#) • [Sales & Margin](#) • [Monthly Item Qty Sold - SO](#) • [Work Order Status](#) • [Open Sales Orders](#) • [Transfers in Process](#) • [Items on Return Auth](#)

NAME (INTERNAL)

INVENTORY LOCATION

NAME

TYPE

- All -
Assembly
Description
Discount

Saved searches are used for...

Mass Updates

Mass Update Preview Results

[Return To Criteria](#)[Perform Update](#)[Save](#)[Cancel](#)

The following updates will be applied:

Field
Packed By
New Value
Larry

APPLY	*	DATE ▲	PERIOD	DOCUMENT NUMBER
<input checked="" type="checkbox"/>	*	8/16/2018	Aug 2018	10688
<input checked="" type="checkbox"/>	*	12/15/2018	Dec 2018	10691
<input checked="" type="checkbox"/>	*	12/21/2018	Dec 2018	10692
<input checked="" type="checkbox"/>	*	2/19/2019	Feb 2019	10693
<input checked="" type="checkbox"/>	*	2/19/2019	Feb 2019	10694
<input checked="" type="checkbox"/>	*	2/20/2019	Feb 2019	10695

Saved searches are used for...

Preferred Search Form

Personalize Transaction Search Form

** SuiteWorld D3 - Open AR

[Save](#) [Cancel](#) | [Preview](#) [New Template](#) [Change ID](#) | [Actions](#)

SEARCH TITLE *

** SuiteWorld D3 - Open AR


ID

customsearch49

☒ PUBLIC

☒ AVAILABLE AS LIST VIEW

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

 Use this tab to make this search the preferred list view, search form, dashboard view, or sublist view, either globally (with the list).

☐ PREFERRED SEARCH FORM

☐ PREFERRED SEARCH RESULTS

☐ PREFERRED LIST VIEW

LIST	FORM	RESULTS	DASHBOARD	SUBLIST	ROLE ▲
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	A/P Clerk
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	A/R Clerk
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	A/R Clerk - Restricted to Location
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Accountant
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Accountant (Reviewer)
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Administrator
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Advanced Partner Center

Saved searches are used for...

Custom Fields

Transaction Body Field

Save ▼ Cancel Reset Change ID Apply to Forms Actions ▼

LABEL *
Total Quantity

ID
custbody19

OWNER
Gary Kangas

DESCRIPTION

TYPE
Integer Number

LIST/RECORD
+
☐ STORE VALUE ☐ USE ENCRYPTED FORMAT
☐ SHOW IN LIST

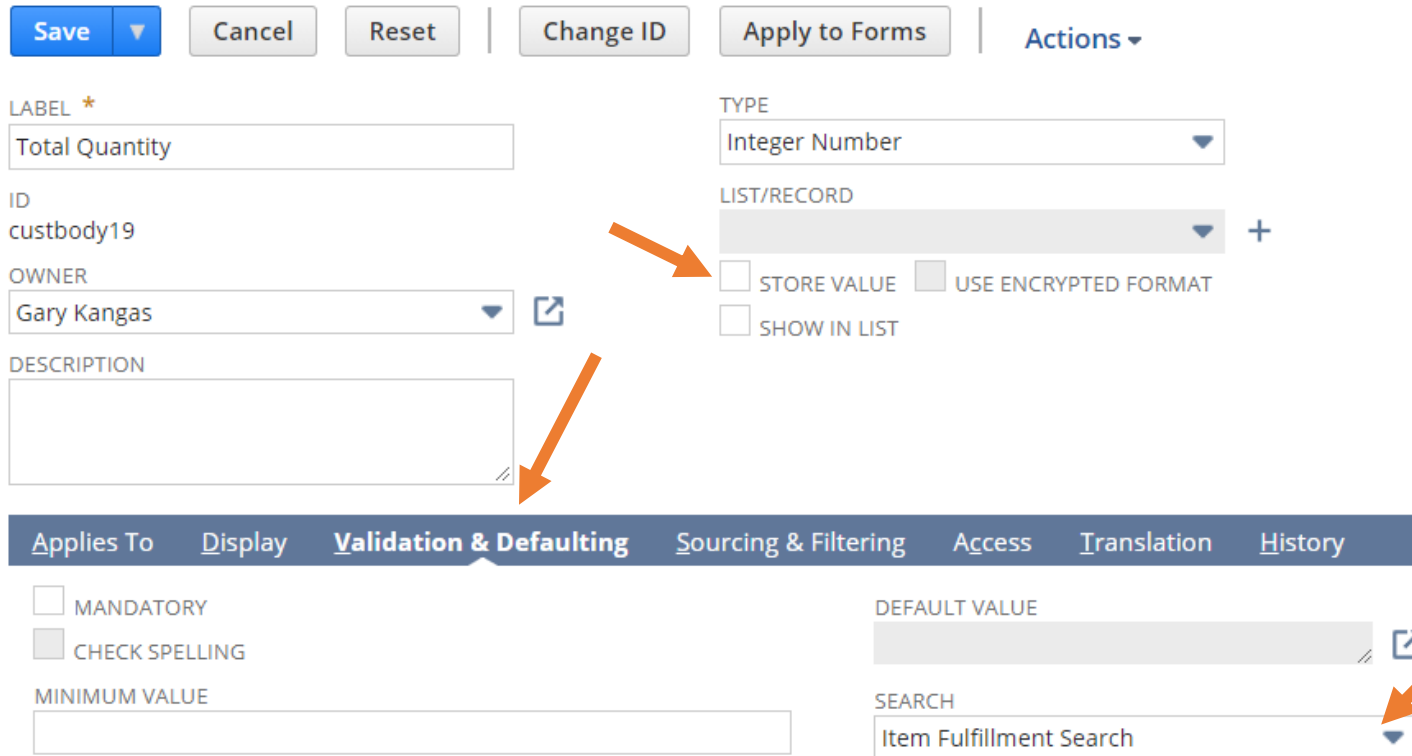
Applies To Display **Validation & Defaulting** Sourcing & Filtering Access Translation History

☐ MANDATORY
☐ CHECK SPELLING

MINIMUM VALUE

DEFAULT VALUE

SEARCH
Item Fulfillment Search




Saved searches are used for...













Key Performance Indicators (Meters and Graphs)

Set Up Key Performance Indicators

☐ CACHED DATA

Key Performance Indicators **Popup Trend Graphs**

Click directly on text to edit selection. Click **Add Custom KPIs** to add the summary of results from a Saved Search. Custom KPIs are indicated with .

KEY PERFORMANCE INDICATOR	RANGE	HIGHLIGHT IF...	THRESHOLD	HEADLINE	COMPARE	COMPARE RANGE
  Orders	this month to date	Greater Than		✓	✓	last month to date 
  2015 SW - Shipments for Packing Station 3	this month to date	Less Than	7,500.00		✓	last month to date 
  2015 SW - Shipments for Packing Station 2	this month to date	Less Than	7,500.00	✓	✓	last month to date 
  2015 SW - Shipments for Packing Station 1	this month to date	Less Than	7,500.00	✓	✓	last month to date 

Saved searches are used for...

KPI Scorecards

KPI Scorecard

[Edit](#)[Back](#)[Actions ▾](#)

ID

kpiscorecard_2_t905207_224

NAME

SW Magical Ratios

OWNER

Gary Kangas

[Content](#)[Audience](#)[KPIs •](#)[Periods •](#)[Custom •](#)[Highlighting •](#)

CUSTOM KPI #1

*** 2014 SW Gallon Equivalents - Quantity - KPI Scorecard

CUSTOM KPI #2

*** 2014 SW Gallon Equivalents - Dollars - KPI Scorecard

CUSTOM KPI #3

CUSTOM KPI #4

CUSTOM KPI #5

Saved searches are used for...

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

New Workflow
From Template

Vendor Bill

☐ ENABLE LOGGING
☐ INACTIVE

Initiation

☒ EVENT BASED ☐ SCHEDULED

Event Definition

☐ ON CREATE
☐ ON VIEW OR UPDATE

USE ☒ VISUAL BUILDER ☐ CUSTOM FORMU


TRIGGER TYPE
- All -

CONDITION

EVENT TYPES

SAVED SEARCH CONDITION

LOCALIZATION CONTEXT



Saved searches are used for...

Custom Reminders

The screenshot displays the SuiteWorld interface with a focus on custom reminders. The top navigation bar includes icons for a clock, star, and home, along with tabs for Activities, Payments, and Transactions. The main content area is divided into two sections: 'Reminders' on the left and 'Select reminders' on the right.

Reminders Section:

- Reminders:** 14 (indicated by an orange arrow)
- Open Orders Past Expected Ship Date**
- 4 Orders to Pack**
- 2 Cases to respond to**
- 1 Amortization Entry pending**

Select reminders Section:

Type: All Search: []

Click or Drag to Add

- ** SuiteWorld Purchase Orders to Approve
- *** 2014 SW - Zero Dollar Line on Sales Order
- *** 2014 SW Sales Orders Pending Approval
- *** 2014 SW Unapproved Credit Card Transactions - Email Alert
- Accounting Period Search - Part 1
- Allocation Schedules due

Current Selections (Drag to reorder)

Headline

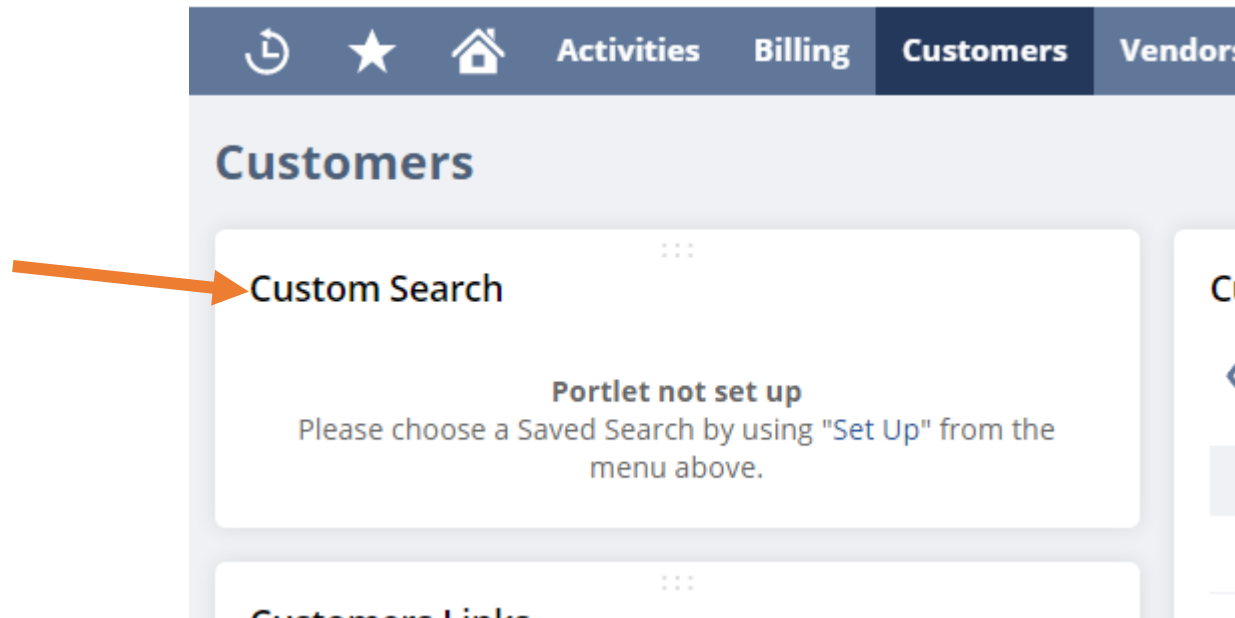
- ✗ ** Open Orders Past Expected Ship Date (indicated by an orange arrow)

Other

- ✗ Orders to Pack
- ✗ Cases to respond to
- ✗ Amortization Entries pending

Saved searches are used for...

Custom Searches on Dashboards



Saved searches are used for...

Script Parameters

Script Deployment

[Save](#) [Cancel](#) [Reset](#) | [Change ID](#) | [Actions](#) ▾

SCRIPT
EDP MR Item Price Update

TITLE *

EDP MR Item Price Update

ID
customdeploy_edp_mr_itempriceupdate

☒ DEPLOYED

[Schedule](#) • [Parameters](#) • [Execution Log](#) [System Notes](#)

SAVED SEARCH TO USE

Price Detail Update Search 2



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

Search

Tax Code
Tax Group
Tax Report Mapper
Tax Report Mapper Details
Tax Type
Test Record
Time
Topic
Transaction
Transaction Numbering Audit Log
Transaction Region
Transaction Type List
Truck Number

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

Saved Transaction Search List Search

Save & Run **Reset** **Cancel** **Preview** **Actions**

SEARCH TITLE *
Transaction Search

ID

☐ PUBLIC

☐ AVAILABLE AS LIST VIEW

☐ AVAILABLE AS DASHBOARD VIEW

☐ AVAILABLE AS SUBLIST VIEW

☐ AVAILABLE FOR REMINDERS

☐ SHOW IN MENU

Criteria Results Highlighting Available Filters Audience Roles Email Audit Trail Execution Log Search Title Tr

Use this tab to specify criteria that narrow down your search.


☐ USE EXPRESSIONS

Standard Summary

FILTER *	DESCRIPTION *	FORMULA
<div><div></div><div></div><div></div></div>		
Add Cancel Insert Remove		

How to create a saved search

Criteria **Results** Highlighting Available Filters Audience Roles Email Audit Trail Execution Log Search Title Translation

 Use this tab to indicate columns to be included in the search results as well as sort order.

SORT BY
Order Type ☐ DESCENDING

THEN BY
☐ DESCENDING

THEN BY
☐ DESCENDING

OUTPUT TYPE
Normal

CONSOLIDATED EXCHANGE RATE
Per-Account

☐ SHOW TOTALS

☐ RUN UNRESTRICTED ☐ DISALLOW DRILL DOWN

☐ MY PREFERRED SEARCH RESULTS

Columns • Drill Down Fields

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Order Type								
*								
Date								
As-Of Date								

How to create a saved search

Criteria Results **Highlighting** Available Filters Audience Roles Email Audit Trail Execution Log Search Title Translation

Highlight if... Highlight_if... (Summary)

CONDITION *	IMAGE	TEXT COLOR	BACKGROUND COLOR	BOLD	DESCRIPTION	TRANSLATION

✓ Add ✕ Cancel + Insert 🗑 Remove ⬆ Move Up ⬇ Move Down ⬆ Move To Top ⬇ Move To Bottom

How to create a saved search

Criteria Results Highlighting **Available Filters** Audience Roles Email Audit Trail Execution Log Search Title Translation

i Limit the set of filters available on the form when you reuse this search, or to set filters for the results (such as when used as a list view). Remove all filters to use advanced search.

☐ MY PREFERRED SEARCH FORM

☐ HIDE FILTER DROPDOWNS

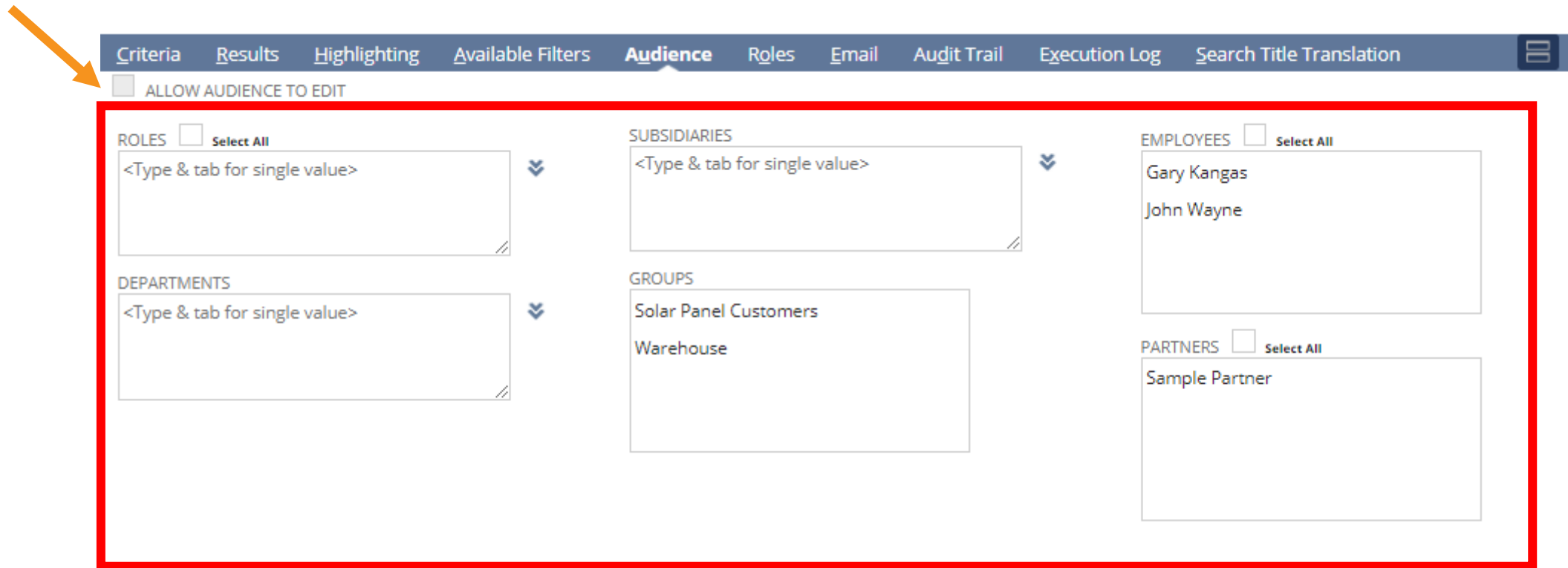
DEFAULT TEXT FIELD FILTER
Any

Remove all Add Multiple

FILTER *	SHOW IN FILTER REGION	SHOW AS MULTI-SELECT	LABEL	TRANSLATION

✓ Add ✕ Cancel + Insert 🗑 Remove ⬆ Move Up ⬇ Move Down ⬆ Move To Top ⬇ Move To Bottom

How to create a saved search




The screenshot displays the 'Audience' tab of a software interface. At the top, a navigation bar includes tabs for Criteria, Results, Highlighting, Available Filters, Audience (selected), Roles, Email, Audit Trail, Execution Log, and Search Title Translation. Below the navigation bar, a checkbox labeled 'ALLOW AUDIENCE TO EDIT' is visible. The main content area is divided into six sections, each with a title and a selection box:

- ROLES**: Includes a 'Select All' checkbox and a text input field with the placeholder '<Type & tab for single value>'. A dropdown arrow is to the right of the input field.
- SUBSIDIARIES**: Includes a text input field with the placeholder '<Type & tab for single value>' and a dropdown arrow.
- EMPLOYEES**: Includes a 'Select All' checkbox and a list of names: Gary Kangas and John Wayne.
- DEPARTMENTS**: Includes a text input field with the placeholder '<Type & tab for single value>' and a dropdown arrow.
- GROUPS**: Includes a list of names: Solar Panel Customers and Warehouse.
- PARTNERS**: Includes a 'Select All' checkbox and a list of names: Sample Partner.

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

Criteria Results Highlighting Available Filters Audience **Roles** Email Audit Trail Execution Log Search Title Translation

 Use this tab to make this search the preferred list view, search form, dashboard view, or sublist view, either globally (with the top checkboxes) or by role (with the list).

☐ PREFERRED SEARCH FORM
☐ PREFERRED SEARCH RESULTS
☐ PREFERRED LIST VIEW

☐ PREFERRED DASHBOARD VIEW
☐ PREFERRED SUBLIST VIEW

LIST	FORM	RESULTS	DASHBOARD	SUBLIST	ROLE ▲	CENTER TYPE
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	A/P Clerk	Accounting Center
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	A/R Clerk	Accounting Center
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	A/R Clerk - Restricted to Location	Accounting Center
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Accountant	Accounting Center
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Accountant (Reviewer)	Accounting Center
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Administrator	Classic Center
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Advanced Partner Center	Advanced Partner Center
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bookkeeper	Accounting Center
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Buyer	Accounting Center

How to create a saved search

The screenshot shows the 'Email' tab of a configuration interface. At the top, a navigation bar contains tabs: Criteria, Results, Highlighting, Available Filters, Audience, Roles, Email (selected), Audit Trail, Execution Log, and Search Title Translation. Below this, there are four checkboxes: 'SEND EMAIL ALERTS WHEN RECORDS ARE CREATED/UPDATED', 'SEND EMAILS ACCORDING TO SCHEDULE', 'SUMMARIZE SCHEDULED EMAILS', and 'SEND IF NO RESULTS'. The 'Specific Recipients' sub-tab is active, showing instructions on adding recipients and a checkbox for 'ALLOW USERS TO SUBSCRIBE'. Below this is a table with columns: 'RECIPIENT*', 'SEND ON UPDATE', 'SHOW RECENT CHANGES', and 'BCC'. The first row of the table has a text input field containing '<Type then tab>', followed by two icons (a dropdown arrow and a link icon). Below the table are four buttons: 'Add', 'Cancel', 'Insert', and 'Remove'. Orange arrows point to the 'Email' tab, the first two checkboxes, the 'Schedule' sub-tab, and the first cell of the recipient table.

Criteria Results Highlighting Available Filters Audience Roles **Email** Audit Trail Execution Log Search Title Translation

☐ SEND EMAIL ALERTS WHEN RECORDS ARE CREATED/UPDATED
☐ SEND EMAILS ACCORDING TO SCHEDULE ☐ SUMMARIZE SCHEDULED EMAILS ☐ SEND IF NO RESULTS

Specific Recipients Recipients from Results Updated Fields Customize Message • Schedule •

Add recipients here for alerts and/or scheduled emails, if you know them in advance. If you define a filter such as "Sales Rep is Mine" on the Criteria subtab, listed recipients receive emails only if they match the filter. Enable the Allow Users to Subscribe option to allow users to add themselves as alert recipients at Home > Set Preferences.

☐ ALLOW USERS TO SUBSCRIBE

RECIPIENT*	SEND ON UPDATE	SHOW RECENT CHANGES	BCC
<input type="text" value="<Type then tab>"/>			

✓ Add ✕ Cancel + Insert 🗑 Remove



Break Time
10 Minutes

Saved Search Examples

Formula for the Iframe in the MapQuest demo on the video

```
'<a  
href="https://tstdrv905207.app.netsuite.com/app/common/search/searchresults.nl?searchid=301&s  
averun=T&whence=" target="_blank" style="color:#c0392b !important;font-size:16px  
!important;font-weight:700;text-decoration:none !important;">🗺️ Todays Route Tasks (Saved  
Search)</a> <br> <br> <br> <iframe src="https://www.mapquest.com/routeplanner"  
style="height:65vh; width:100%;" frameborder="0" scrolling="no"></iframe>'
```




Q & A



Thank you!