



SuiteAnalytics: Reports and Searches

Module 05: Setting Up Standard KPIs

Page 31 in your Student Guide

About This Module

How do you monitor key business drivers and how quickly can you spot changes in your business?

Do you spend hours running reports and drilling for data?

- Do you need the information “right now”?
- Do you need a real-time display, each time you access NetSuite?

Using Key Performance Indicators (KPIs) facilitates:

- Tracking specific metrics
- Spotting changes in your business drivers, as they happen



Module Objectives

- 1 Add the KPI portlet to the Home Dashboard
- 2 Setup standard KPIs
- 3 Display a KPI as a popup trend graph
- 4 Setup a KPI meter
- 5 Share a KPI trend graph with another application

What is a Key Performance Indicator?

A KPI is a measurement or count of one of your business metrics:

- Shows key variances and over-time trends
- Helps identify trends so you can make course corrections in a timely fashion

NetSuite provides over 75 pre-packaged KPIs based on NetSuite standard reports:

- Synthesizes your raw data into critical business metrics in the formats you choose
- Allows you to spend more time learning from and acting on important data, and less time gathering it

Key Performance Indicators					
INDICATOR	PERIOD	CURRENT	PREVIOUS	CHANGE	
Sales	This Year vs. Three Fiscal Years Ago	\$11,261,147	\$11,399,951	↓	1.2%
Total Bank Balance	This Period vs. Last Period	\$41,444,752	\$40,263,827	↑	2.9%
COGS	This Period vs. Last Period	\$4,586,137	\$1,865,090	↑	145.9%
Income	This Period vs. Last Period	\$5,665,290	\$2,833,466	↑	99.9%
New Business	This Month vs. Same Month Last FQtr to Date	\$61,691	\$0	↑	N/A
Open Opportunities	This Month vs. Last Month to Date	3	0	↑	N/A
Net Cash Flow	This Period vs. Last Period	\$1,180,925	\$2,775,346	↓	57.4%
 Payables	 Today vs. Same Day Last Month	\$3,439,610	\$1,085,273	↑	216.9%
Revenue	This Period vs. Last Period	\$5,677,474	\$2,778,299	↑	104.4%

Use KPIs When You Need To

Track information to spot trends in your business, for example:

- A KPI on the Bank Balance with a Threshold set will let you know if the Company Bank Balance falls below \$20,000
- A KPI on Sales will let you know if Sales are trending up or down, and by how many percentage points
- A KPI on Web Page hits will allow you to see if more or fewer people are visiting your website



KPIs Are Role-Based and Feature-Based

The KPIs you choose depend upon the Role used to log in to NetSuite and features enabled in your NetSuite account

Key Performance Indicators					
INDICATOR	PERIOD	CURRENT	PREVIOUS	CHANGE	
Open Cases	Today vs. Same Day Last Month	47	47		0.0%
New Cases	This Week vs. Last Week	0	0		0.0%
Cases Closed	This Week vs. Last Week	0	0		0.0%
Cases Escalated	This Month vs. Same Month Last FQtr to Date	7	0	↑	N/A

Support Rep’s Key Performance Indicators Portlet

Key Performance Indicators					
INDICATOR	PERIOD	CURRENT	PREVIOUS	CHANGE	
Opportunities Won	This Month vs. Last Month to Date	11	3	↑	266.7%
Pipeline (Projected)	This Month	\$611,261			
Quota	This Month vs. Last Month	\$8,988,000	\$7,958,000	↑	12.9%
Forecast	This Month	\$7,173,584			
Orders	This Month vs. Last Month to Date	62	19	↑	226.3%
Sales	This Month vs. Last Month to Date	\$5,745,778	\$766,342	↑	649.8%
Estimated Commission	This Month vs. Last Month to Date	\$603,755	\$71,422	↑	745.3%
Authorized Commission	This Month	\$56,246			

Sales Manager’s Key Performance Indicators Portlet

Walkthrough: Set Up KPI Portlet and Meters

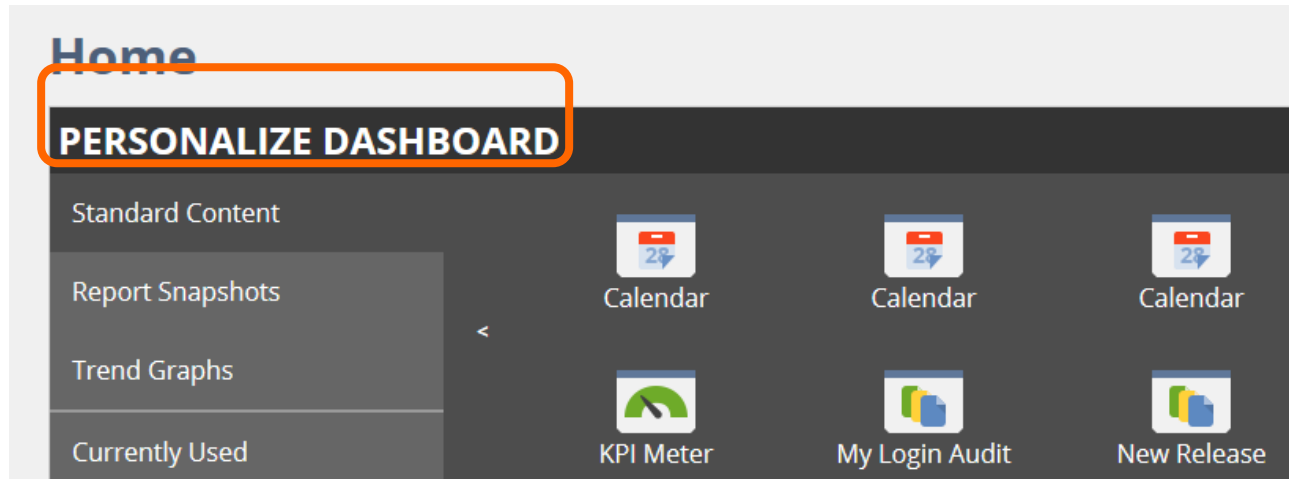
1. Add Metrics to the Home Dashboard
2. Set up the KPI Portlet
3. Configure the KPIs
4. Configure KPI Headlines (optional)
5. Configure the Popup Trend Graphs
6. Set Up KPI Meter



1. Add Metrics to the Home Dashboard

Click the **Personalize** link in the upper right area of the Home Dashboard to open the **Personalize Content** panel and select, or drag and drop the following portlets:

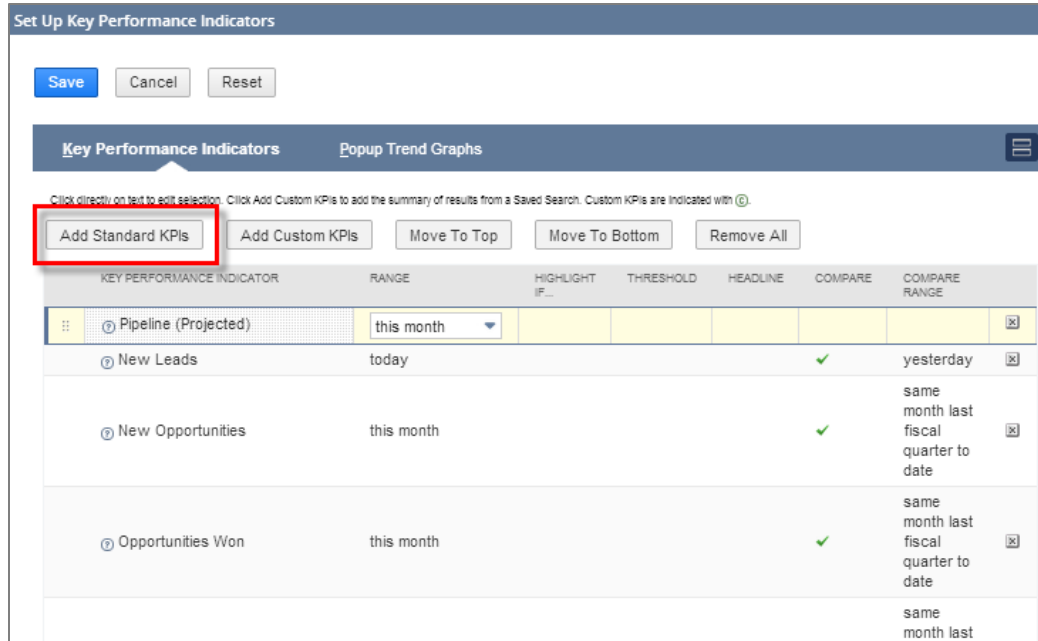
- KPI Meter - up to 3
- Key Performance Indicators
- Trend graph



2. Setup the KPI Portlet

Click **Setup**, in the KPI portlet, on the Home Dashboard

- Click **Add Standard KPIs**



Set Up Key Performance Indicators

Save Cancel Reset

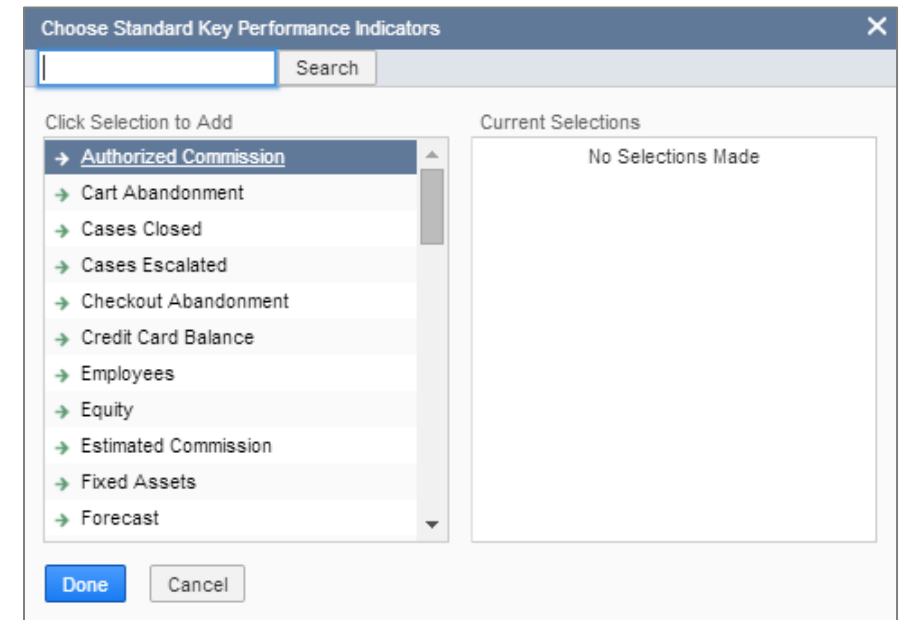
Key Performance Indicators Popup Trend Graphs

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 (C).

Add Standard KPIs Add Custom KPIs Move To Top Move To Bottom Remove All

KEY PERFORMANCE INDICATOR	RANGE	HIGHLIGHT IF...	THRESHOLD	HEADLINE	COMPARE	COMPARE RANGE
ⓘ Pipeline (Projected)	this month					[X]
ⓘ New Leads	today				✓	yesterday [X]
ⓘ New Opportunities	this month				✓	same month last fiscal quarter to date [X]
ⓘ Opportunities Won	this month				✓	same month last fiscal quarter to date [X]
						same month last

- Choose the KPIs in the pop-up window and then click **Done**



Choose Standard Key Performance Indicators

Search

Click Selection to Add

- Authorized Commission
- Cart Abandonment
- Cases Closed
- Cases Escalated
- Checkout Abandonment
- Credit Card Balance
- Employees
- Equity
- Estimated Commission
- Fixed Assets
- Forecast

Current Selections

No Selections Made

Done Cancel

3. Configure the Selected KPIs

Configure your KPIs and save your changes:

- Move KPIs up or down, for preferred display order
- Set the date Range and Compare Range, if needed
- Choose Employees to display data for
- Turn on or turn off comparisons
- Setup Highlight and Thresholds functionality

The screenshot shows the 'Set Up Key Performance Indicators' interface. At the top, there are 'Save', 'Cancel', and 'Reset' buttons. Below them are tabs for 'Key Performance Indicators' and 'Popup Trend Graphs'. A note states: '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 @.' Below the note are buttons for 'Add Standard KPIs', 'Add Custom KPIs', 'Move To Top', 'Move To Bottom', and 'Remove All'.

KEY PERFORMANCE INDICATOR	RANGE	HIGHLIGHT IF...	THRESHOLD	HEADLINE	COMPARE	COMPARE RANGE	
Bank Balance	This Period	Less Than	20,000.00			Last Period	X
Income	Third Fiscal Quarter of Last FY			✓	✓	Last Period	X
	Third Fiscal Quarter of This FY						
	This Fiscal Quarter						
COGS	This Fiscal Quarter to Period				✓	Last Period	X
	This Fiscal Year						
Expenses	This Fiscal Year to Period				✓	Last Period	X
	This Period						
Payables	today				✓	one month ago	X
Receivables	today				✓	one month ago	X

3. Configure the KPI Headlines (Optional)

Extra prominence can be given to KPIs using the Headline feature

- Don't have too many headlines as this dilutes the impact

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 Ⓢ.

Add Standard KPIs Add Custom KPIs Move To Top Move To Bottom Remove All

KEY PERFORMANCE INDICATOR	RANGE	HIGHLIGHT IF...	THRESHOLD	HEADLINE	COMPARE	COMPARE RANGE
Ⓢ Income	This Period			✓	✓	Last Period
Ⓢ Bank Balance	This Period	Less Than	20,000.00			Last Period
Ⓢ COGS	This Period				✓	Last Period
Ⓢ Expenses	This Period				✓	Last Period

Key Performance Indicators

Income

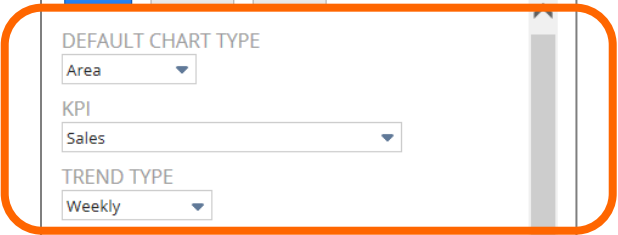
↑ 218.3%

INDICATOR	PERIOD	CURRENT	PREVIOUS	CHANGE
Income	This Period vs. Last Period	\$5,605,190	\$1,760,942	↑ 218.3%
Total Bank Balance	This Period	\$41,444,752		
COGS	This Period vs. Last Period	\$4,171,188	\$1,844,442	↑ 126.1%

4. Configure KPI Trend Graph...

Click **Setup** in the upper right area of the **Trend Graph**

- **Default Chart Type:** select which chart displays by default
- **KPI:** select the KPI to display from the drop down list
- **Trend Type:** select the default time increment to display



The screenshot shows the 'Trend Graph' configuration window. At the top are 'Save', 'Cancel', and 'Reset' buttons. Below them, an orange rectangle highlights the following settings:

- DEFAULT CHART TYPE:** A dropdown menu currently set to 'Area'.
- KPI:** A dropdown menu currently set to 'Sales'.
- TREND TYPE:** A dropdown menu currently set to 'Weekly'.

Below the highlighted section, there are several checkboxes and a text input:

- ☒ **SHOW MOVING AVERAGE**
- PERIOD TO CALCULATE MOVING AVERAGE *** with a text input containing '2'.
- ☒ **SHOW LAST DATA POINT**
- ☐ **INCLUDE ZERO ON Y-AXIS**
- CHART THEME:** A dropdown menu set to 'Global Theme'.
- CUSTOM SERIES COLOR:** A label with a vertical color bar to its right.

4. Configure KPI Trend Graph...

Trend Graph

Save Cancel Reset

DEFAULT CHART TYPE
Area

KPI
Sales

TREND TYPE
Weekly

☒ SHOW MOVING AVERAGE
PERIOD TO CALCULATE MOVING AVERAGE *
2

☐ SHOW LAST DATA POINT

☐ INCLUDE ZERO ON Y-AXIS

CHART THEME
Global Theme

CUSTOM SERIES COLOR

- **Show Moving Average:** Smoothens irregular data to expose underlying trends
- **Show Last Data Point:** If left unchecked, excludes the last data point in popup trend graphs:
 - If left checked the latest data might not be complete - example, one week into a new month shows only one week's data compared to the previous complete month. Leave unchecked to exclude data for incomplete periods

4. Configure KPI Trend Graph...

Trend Graph

Save Cancel Reset

DEFAULT CHART TYPE
Area

KPI
Sales

TREND TYPE
Weekly

☒ SHOW MOVING AVERAGE

PERIOD TO CALCULATE MOVING AVERAGE *
2

☒ SHOW LAST DATA POINT

☐ INCLUDE ZERO ON Y-AXIS

CHART THEME
Global Theme

CUSTOM SERIES COLOR

Include Zero on Y-Axis: Starts graph plotting at zero

- If checked, includes zero as the starting point in popup trend
- By default, option is disabled to avoid showing misleading dramatic increases in initial trend graph data. Enable this option only if the time period data represented in the KPI truly starts at zero
- **Save** your settings

4. Configure KPI Trend Graph

Trend Graph

Save Cancel Reset

DEFAULT CHART TYPE
Area

KPI
Sales

TREND TYPE
Weekly

☒ SHOW MOVING AVERAGE

PERIOD TO CALCULATE MOVING AVERAGE *
2

☒ SHOW LAST DATA POINT

☐ INCLUDE ZERO ON Y-AXIS

CHART THEME
Global Theme

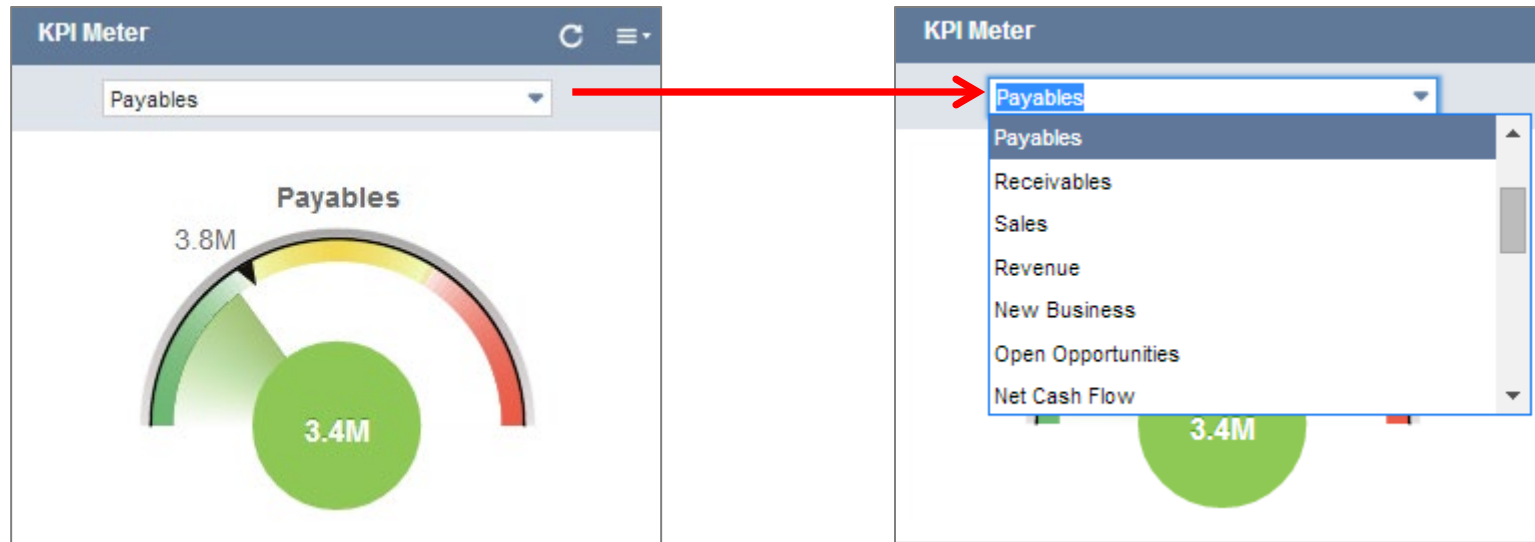
CUSTOM SERIES COLOR

- **Chart Themes:** select a theme that configures the look and colors of shapes representing popup trend graph data
- **Chart Background:** You can set the background to display behind popup trend graph data here
- **Custom Series Color:** select a color or enter the hexadecimal value for the color you want to use for the trend graph line
- **Save** your settings

5. Setup a KPI Meter

Click the dropdown menu, in the KPI portlet, and select the KPI that you want to display as a meter

- **Note:** The KPI must first be displayed in the KPI portlet

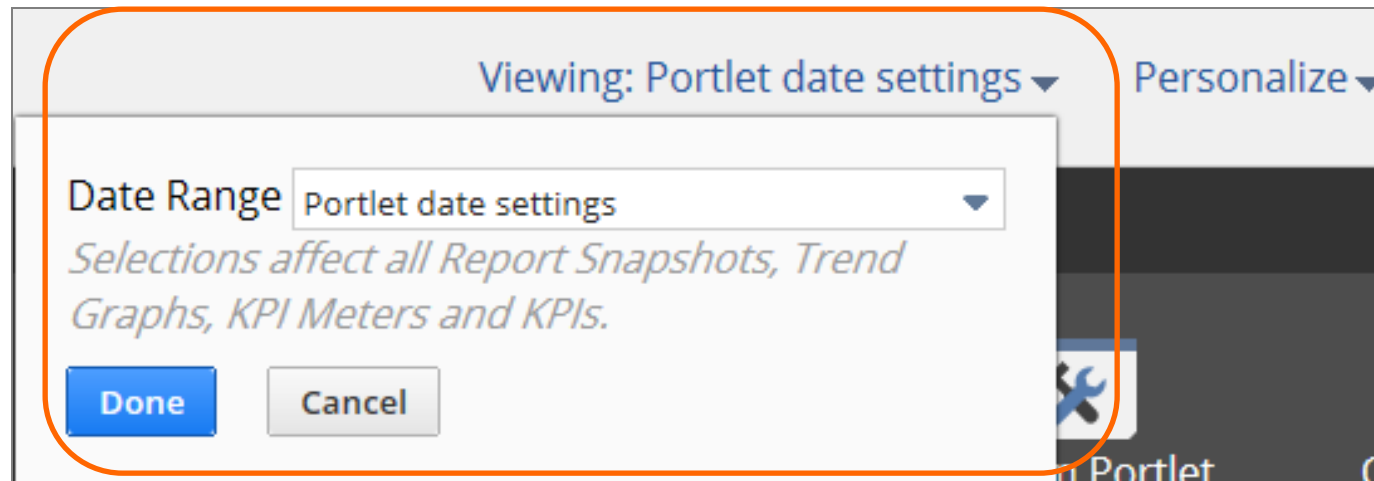


KPI Meters are graphical representations of your KPIs

- Up to 3 KPI meters can be displayed on the Home Dashboard

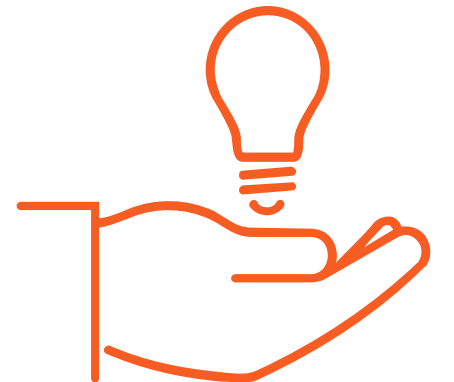
Use Portlet Date Settings

- Click Viewing: Portlet Date Settings settings to calibrate all dashboard analytics, such as KPIs and meters, to the same date comparisons
- Click **Done** to save



Configuring Best Practices

- The KPI portlet should be placed at the top of the center column of the Home Dashboard
- Place KPIs in a logical order
- When using comparisons, the date ranges you set should complement each other
- Use Portlet Date Settings to “change the window” on your KPIs, Meters, and Report Snapshots simultaneously



Now It's Your Turn

01 – Add a standard KPI to the Home Dashboard

02 – Display KPI data graphically and copy/paste to Microsoft Word

03 – Add a KPI Meter to the Home Dashboard

Page 32 in your workbook

Approximately 10 minutes

Checkmark when you are done

Coffee Cup if away...



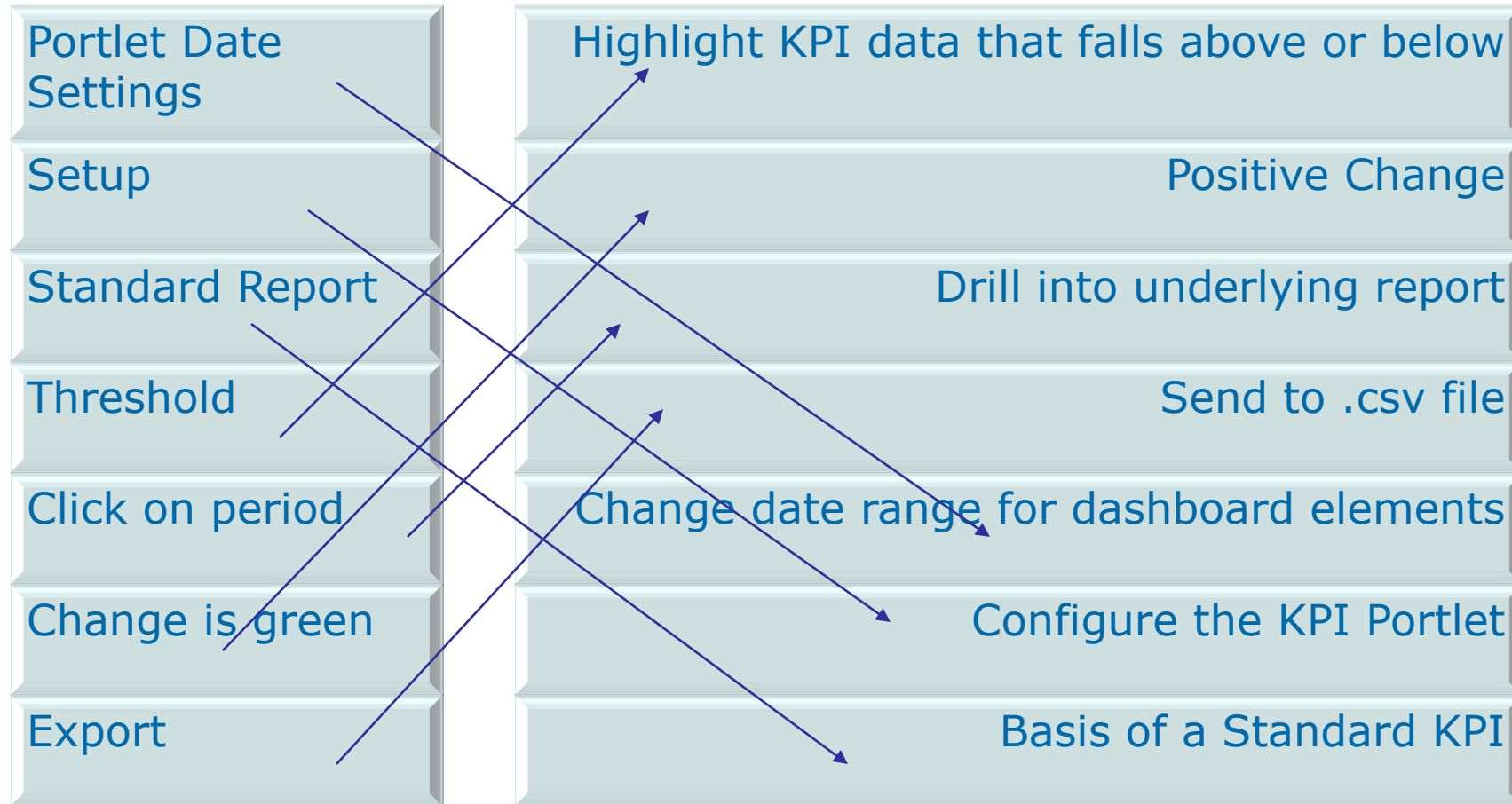
Activity: Match Game

Using the Webex line tools  to match the terms on the left to the task/description on the right

Portlet Date Settings	Highlight KPI data that falls above or below
Setup	Positive Change
Standard Report	Drill into underlying report
Threshold	Send to .csv file
Click on period	Change date range for dashboard elements
Change is green	Configure the KPI Portlet
Export	Basis of a Standard KPI

Activity: Match Game

Using the Webex line tools  to match the terms on the left to the task/description on the right





SuiteAnalytics: Reports and Searches

Module 06: Creating Saved Searches

Page 36 in your Student Guide

About This Module

Saved searches can highlight critical data and facilitate business process flows:

- Allowing new lead records to be updated quickly
- Identifying specific groups of customers to be targeted for campaigns
- Identifying customers who have overdue payments

In this module, we examine how to:

- Define saved search criteria and results
- Use highlighting and filters to make information obvious and manageable
- Export, email and add saved searches to Home Dashboards to share information and make it more accessible



Module Objectives

- 1 Define saved search criteria and results
- 2 Add images, colors and other formatting options to results
- 3 Add filtering options
- 4 Export and email saved search results
- 5 Add saved search to the Home Dashboard

Why a Saved Search?

When you need to:

- Create a dynamic list of results
- Incorporate criteria-based row highlighting to alert users to specific data
- Use complex formulas to obtain specific results from your data
- Expose saved search results in lists
- Create a custom KPIs
- Build KPI Scorecard components

New Saved Search	
SEARCH TYPE	
Account	
Accounting Period	
Activity	
Amortization Schedules	
Analytics Audit Trail	
Billing Class	
Billing Schedule	
Board Plan: Revenue Target	
Budget	
Campaign	
Case	
Class	

Walkthrough: Constructing a Saved Search

1. Start a saved search
2. Define criteria
3. Choose results
4. Save and view



1. Start a Saved Search...

Start from multiple ways:

- Reports > Saved Searches > All Saved Searches > New
- Lists > Search > Saved Searches > New
- Transactions > Management > Search Transactions > Saved Searches > New

Select the record-based search type:

- Both standard and custom record types are available
- Available types depend upon your role's permissions

New Saved Search	
SEARCH TYPE	
Account	
Accounting Period	
Activity	
Amortization Schedules	
Analytics Audit Trail	
Billing Class	
Billing Schedule	
Board Plan: Revenue Target	
Budget	
Campaign	
Case	
Class	

TIP! If your search involves any transaction data, start with a transaction type of search. It is easier to add entity-based fields to a transaction search, than to add transaction-based fields to an entity search.

1. Start a Saved Search

Add key information:

- Enter a meaningful **Search Title**
- Enter an **ID** to identify creation date or pull into a script
- Select Access Choices options
- Click the Subtabs to go to the different search components

Saved Transaction Search
RM Transaction Search

Save & Run ▼ Reset Cancel Preview Change ID Actions ▼

Search Title *
RM Transaction Search

ID
customsearch210

Owner
Larry Nelson ▼

☐ Public
☐ Available as List View

☐ Available as Dashboard View
☐ Available as Sublist View
☐ Available for Reminders
☐ Show in Menu

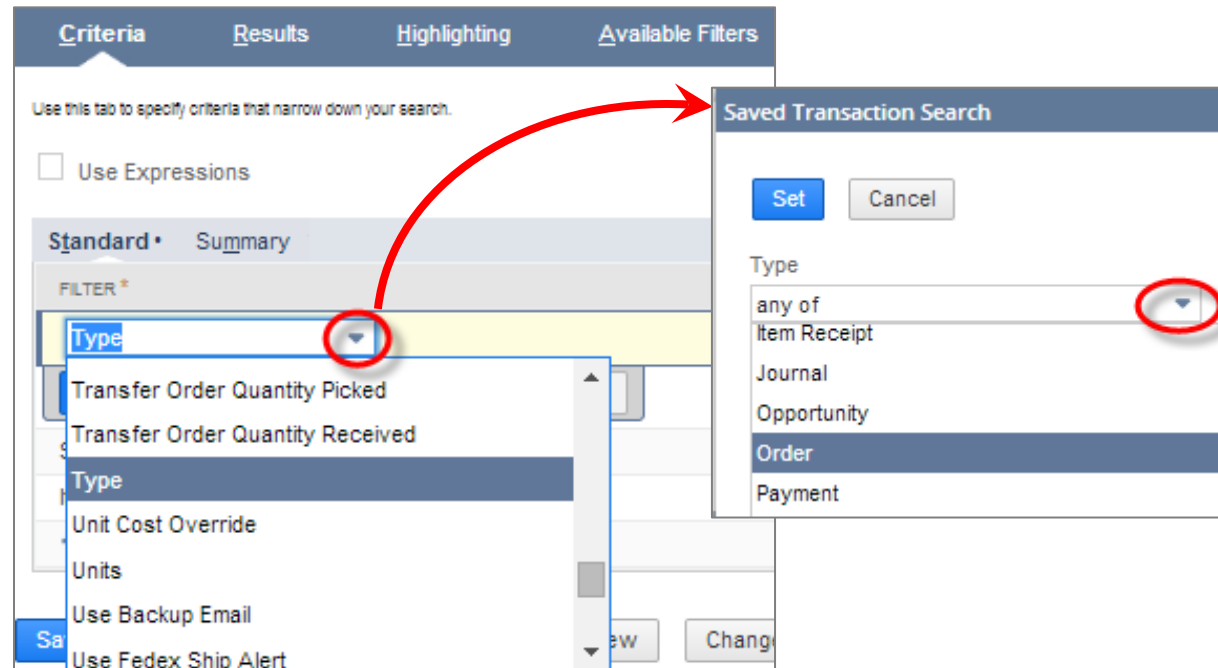
Criteria Results Highlighting Available Filters Audience Roles Email Audit Trail Execution Log Search Title Translation

TIP! Prefix your saved search titles with your initials. This will make finding them later much easier.

2. Define Criteria

Go to the Criteria and Standard subtab:

- Select fields from the standard Filter the drop-down list
 - Includes standard and custom fields
- Define field values from the pop-up window



3. Choose Results...

Go to the Results subtab:

- Specify up to three sorting options
- Select Output Type from the drop-down list
- Check, or not, the **Run Unrestricted** box
 - Only the Administrator can check the Run Unrestricted box
- Define **Max Results** field for number of records to display
- Check, or not, **Disallow Drill Down** box

The screenshot shows the 'Results' subtab of a NetSuite search configuration page. The interface includes a navigation bar with tabs: Criteria, Results, Highlighting, Available Filters, Audience, Roles, Email, Audit Trail, Execution Log, and Search Title Translation. Below the tabs, a message states: 'Use this tab to indicate columns to be included in the search results as well as sort order.'

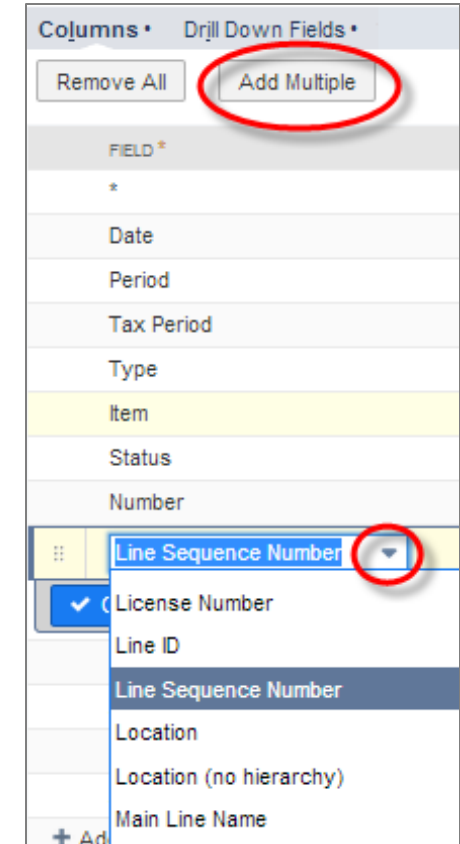
Key configuration areas are highlighted with red boxes:

- Sorting Options:** A section on the left containing three 'Sort By' dropdowns and checkboxes for 'Descending' order. The first two are set to 'Date' and 'Number', both with 'Descending' checked. The third is empty.
- Output Type:** A dropdown menu on the right set to 'Normal'.
- Consolidated Exchange Rate:** A dropdown menu set to 'Per-Account'.
- Show Totals:** A checkbox that is checked.
- Run Unrestricted:** A checkbox that is unchecked.
- Max Results:** A text input field for specifying the number of records to display.
- Disallow Drill Down:** A checkbox that is unchecked.
- My Preferred Search Results:** A checkbox at the bottom that is unchecked.

3. Choose Results...

Select fields for Column display:

- Add columns by choosing fields, as needed, from drop-down list
- Include your criteria in your results
 - To include line numbers in transaction search results, add the **Line Sequence Number** field



TIP! You can use the Add Multiple button to select several fields from a multi-select, pop-up window. It's faster!

3. Choose Results

Work with Columns:

- Remove columns that you do not want displayed
- Reorder columns
- Re-label column headings, if required, using Custom Labels

The screenshot shows the 'Columns' configuration dialog box in NetSuite. The dialog has a title bar with 'Columns' and 'Drill Down Fields'. Below the title bar are two buttons: 'Remove All' and 'Add Multiple'. The main area is a table with the following columns: 'FIELD *', 'SUMMARY TYPE', 'FUNCTION', 'FORMULA', 'WHEN ORDERED BY FIELD', 'CUSTOM LABEL', and 'CUSTOM LABEL TRANSLATION'. The 'FIELD *' column contains a dropdown menu with 'Date' selected and a 'Period' dropdown menu. The 'CUSTOM LABEL' column is highlighted with a red box. At the bottom of the dialog, there is a row of buttons: 'OK', 'Cancel', 'Insert', 'Remove', 'Move Up', 'Move Down', 'Move To Top', and 'Move To Bottom'. The 'Remove', 'Move Up', 'Move Down', 'Move To Top', and 'Move To Bottom' buttons are highlighted with a red box.

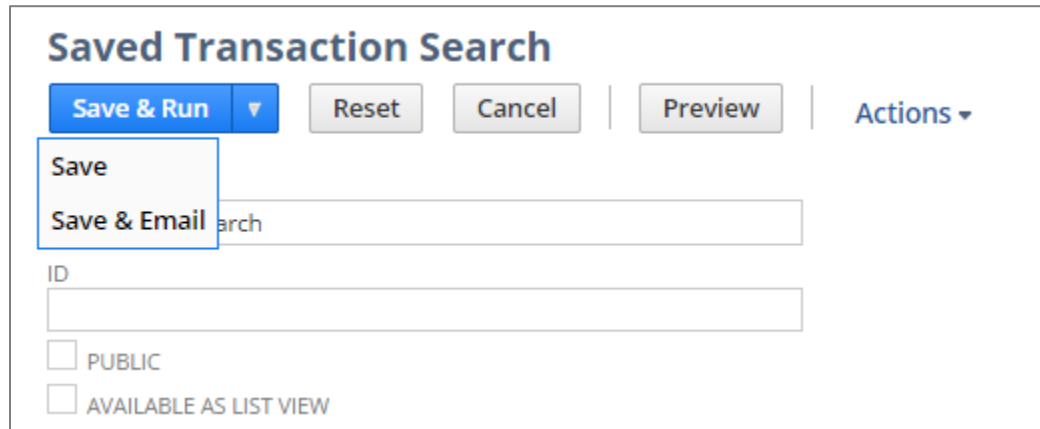
FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION
*						
Date						
Period						

Buttons: OK, Cancel, Insert, Remove, Move Up, Move Down, Move To Top, Move To Bottom

4. Save and View...

Click **Save & Run** to save and view the results:

- Save often so you do not accidentally lose your work
 - Saving the search saves the search criteria



The screenshot shows a dialog box titled "Saved Transaction Search". At the top, there is a row of buttons: "Save & Run" (highlighted in blue with a dropdown arrow), "Reset", "Cancel", "Preview", and "Actions" (with a dropdown arrow). Below the "Save & Run" button, a dropdown menu is open, showing two options: "Save" and "Save & Email". Below the dropdown menu, there is a text input field containing the word "Search". Underneath the text field is a label "ID" followed by another empty text input field. At the bottom of the dialog, there are two checkboxes: "PUBLIC" and "AVAILABLE AS LIST VIEW", both of which are currently unchecked.

- Clicking save navigates you away from your saved search, but does not display the results

4. Save and View

View the results, then return to search to edit:

- Each time the search is run, results are refreshed
- Click Edit this Search to edit results
- You can continue to edit and modify the search

ASE Case Search: Results List Search Audit Trail

[Edit this Search](#)

FILTERS

STYLE
Normal

📄 📧 📧 📧 📧 Edit ⌵ Total: 27

EDIT VIEW	INTERNAL ID	NUMBER ▲	GRAB	SUBJECT	COMPANY	CONTACT	STAGE	STATUS	PROFILE	INCIDENT DATE	DATE CREATED	TYPE	ASSIGNED TO
Edit View	5	2		Jupiter Inventory Application	Jupiter Technology	Tom Ajax	Closed	Closed	US - West	11/21/2013 11:42 am	2/20/2014 11:42 am	Problem	Larry Nelson
Edit View	9	6		Scrambled Screen Output	Foster Software	Chris Foster	Escalated	Escalated	US - West	2/20/2014 1:01 pm	2/20/2014 1:01 pm	Concern	Larry Nelson
Edit View	16	7		Incorrect Platform	Bay Media Research	Mary Contreau	Escalated	Escalated	US - West	12/19/2013 10:19 am	12/19/2013 10:24 am	Problem	Larry Nelson

TIP! Change how single record results display by going to Home > Set Preferences > Reporting Search and selecting Show List When Only One Result.

Activity: True or False

Use the green checkmark or the red x   to indicate if the statement is true or false.

1. You can only create searches for standard records.
2. Customer searches are always the best.
3. Criteria is defined by selecting from a list of standard NetSuite fields.
4. Including criteria in your results is usually a best practice.
5. Save and Run saves the criteria and displays the results.

Walkthrough: Refining a Saved Search

1. Use mainline in transaction searches
2. Include joins
3. Highlight critical information
3. Add available filters

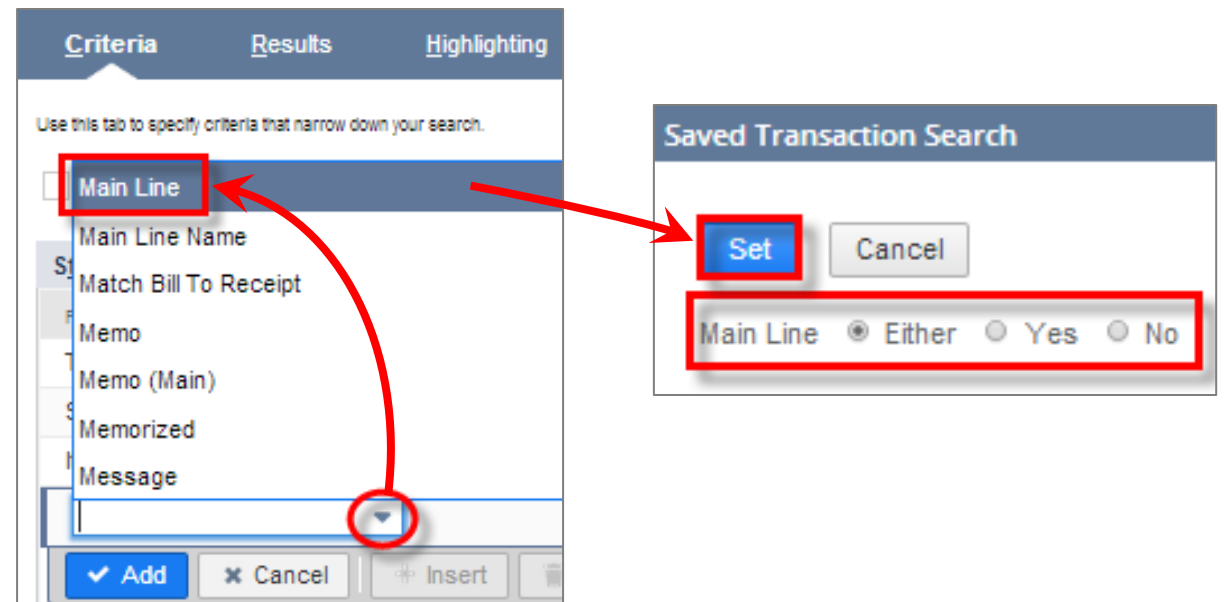


1. Use Main Line in Transaction Searches

By default transaction saved searches default to Main Line Either

You can change this behavior:

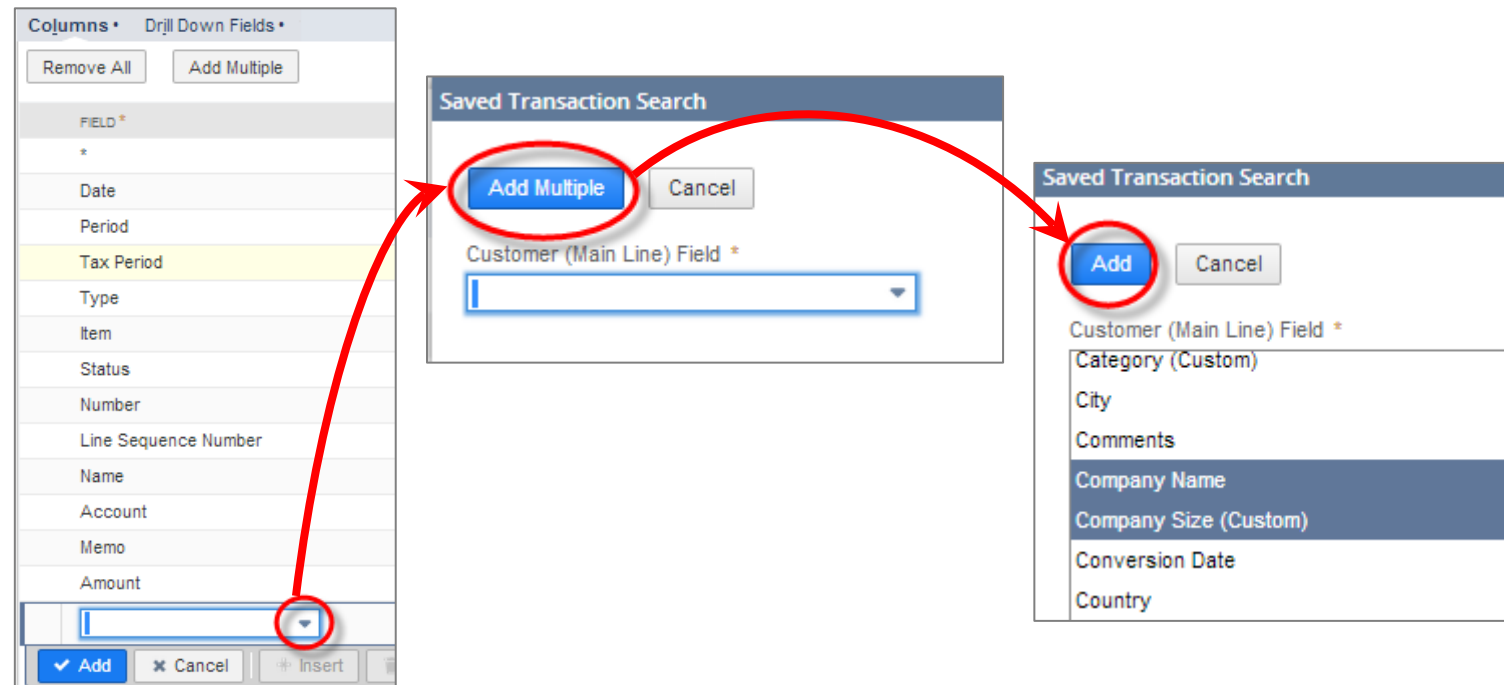
- Select Main Line from the standard Filter the drop-down list
- Define field values from the pop-up window
 - Select **Yes** to return transaction header information
 - Select **No** to return line-level information
 - Click **Set** to register your choice



2. Include Joins

Include joined fields, in search results, to display more details

- Joined fields are usually found on record sublists
 - Scroll down to joined fields, indicated by ellipses
- When adding joins, use Add Multiple to select more than one field
 - Select the fields in the pop-up window and click Add



3. Highlight Critical Information...

Select your formatting on the Highlighting and Highlighting if... subtab:

- Select the Highlight if Condition fields from Set Filters icon
 - The condition must be one of the criteria fields in the search
- Select the Filter fields from the drop-down list
- Define the values and click Set, and then Set the filter
- Continue selecting fields as needed

The screenshots illustrate the process of setting a highlight condition:

- Highlighting Subtab:** The 'Highlighting' subtab is selected. The 'Highlight if...' section shows a 'CONDITION' field. A red circle highlights the 'Set Filters' icon.
- Saved Transaction Search:** A red arrow points from the 'Set Filters' icon to the 'Saved Transaction Search' window. A red box highlights the 'Amount' field in the 'FILTER' dropdown list.
- Set Dialog:** A red arrow points from the 'Amount' field to the 'Set' dialog box. A red box highlights the 'Set' button and the 'greater than or equal to' option in the condition dropdown.
- Set the filter Dialog:** A red arrow points from the 'Set' dialog to the 'Set the filter' dialog box. A red box highlights the 'Set' button and the text 'Amount is greater than or equal to 100000.00' in the filter definition area.

3. Highlight Critical Information

Define the formatting for each condition

- Each condition has its own formatting
- Conditions are highlighted in the order listed
 - Conditions may be re-ordered using the buttons
- Highlighting applies an if/then statement to the condition
 - For example: **If** amount is less than \$50000, **then** text is bold
- Add an Image, Text Color, Background Color, Bold formatting
- Enter a description to add a legend explaining the highlighting

CONDITION *	IMAGE	TEXT COLOR	BACKGROUND COLOR	BOLD	DESCRIPTION
Amount is greater than or equal to 100000.00	Checkmark	Orange	Black	Yes	Over \$100k
Amount is greater than or equal to 50000.00		Yellow	Green		Over \$50k

Buttons: Add, Cancel, Insert, Remove, Move Up, Move Down, Move To Top, Move To Bottom

4. Add Available Filters


Define filters, on the **Available Filters** tab, allowing users to limit and refine the search results:

- Select the field from the pop-up window or use Add Multiple
- Choose to Show in Filter, Show as Multi-Select (optional)
- Enter an Label (optional)

The screenshot shows the 'Available Filters' configuration window in NetSuite. The window has tabs for 'Criteria', 'Results', and 'Highlighting'. The 'Criteria' tab is active. Below the tabs, there is a checkbox for 'My Preferred Search Form' and buttons for 'Remove All' and 'Add Multiple'. A table at the bottom lists filters with columns for 'SHOW IN FILTER REGION', 'SHOW AS MULTI-SELECT', and 'LABEL'. A red box highlights the 'Add' button and the 'Date' field in the pop-up window. Another red box highlights the 'SHOW IN FILTER REGION', 'SHOW AS MULTI-SELECT', and 'LABEL' columns in the table.

Note: Filters display in the footers area of the search results.

Activity: True or False

Use the green checkmark or the red X   to indicate if the statement is true or false.

1. Transaction searches default to header-level information.
2. Joins allows you to display more detailed information, pulling information from a related record.
3. I can highlight anything I want, even if it is not part of search criteria.
4. Available filters allow users to see a subset of the search results.

Walkthrough: Share a Saved Search

1. Print, export or email results
2. Track executions
3. Manage Searches via Audit Trail



1. Print, Export or Email Results

Search results may be shared through Print, Export, and Email functions:

- Click Print to print your search results to a local printer
- Choose which Export option you want
 - Export – CSV can be used to export out a file for import to another system
 - Export – Excel facilitates further manipulation and graphing of the data

Transaction Search: Results List Search Audit Trail

[Return To Criteria](#) [Save This Search](#)

FILTERS

STYLE
Normal

Edit ☐

Total: 2

EDIT VIEW	INTERNAL ID	CUSTOMER	CONTRACT END DATE ▲	PHONE NO.	ITEM
Edit View	293	Gentry Inc.	9/12/2014	415.230.9600	FURNITURE HIRE : 10 Office Chairs - 12 Months Hire
Edit View	171	Great Lakes Software	9/15/2014	670-342-1900	CARPETS/FLOORCOVERINGS : Berber Carpet - Dark Brown

Note: User must have “Export Lists” permission (under Lists) to expose the Export button.

2. Track Search Executions

Edit the search and click on the **Execution Log** subtab

- Track executions and exports of saved searches
- View a history of the last 60 days

Criteria	Results	Highlighting	Available Filters	Audience	Roles	Email	Audit Trail	Execution Log
RUN ON				RUN BY				
7/24/2014 3:17 pm				Larry Nelson				
7/24/2014 3:06 pm				Larry Nelson				
7/24/2014 2:54 pm				Larry Nelson				
7/24/2014 2:52 pm				Larry Nelson				
7/24/2014 11:24 am				Larry Nelson				
7/24/2014 10:06 am				Larry Nelson				
7/24/2014 10:04 am				Larry Nelson				
7/24/2014 9:25 am				Larry Nelson				

Note: Only available to Administrators or users with “Publish Search” permission.

3. Searches Audit Trail

- Search properties tracked including top-level options, Criteria, Results, Available Filters, Audience, Roles, Email
- Drill-down onto details which supports expressions and operators

CriteriaResultsHighlightingAvailable FiltersAudienceRolesEmailAudit TrailExecution LogSearch Title Translation

VIEW

Default

Customize View

DATE

7/25/2014 3:49 pm

7/25/2014 3:49 pm

7/25/2014 3:49 pm

7/25/2014 3:49 pm

7/25/2014 3:49 pm

7/25/2014 3:49 pm

7/25/2014 3:49 pm

7/25/2014 3:49 pm

7/25/2014 3:49 pm

7/25/2014 3:49 pm

TOTAL: 4

DETAIL NAME	OLD VALUE	NEW VALUE
Alias		Transaction_NUMBER
Order		6
Summary Label		Number of Orders
Summary Type		COUNT

Larry Nelson	Create	Column	Amount
Larry Nelson	Create	Column	Date
Larry Nelson	Create	Column	Name
Larry Nelson	Create	Column	Number
Larry Nelson	Create	Column	Period

Now It's Your Turn

01 – Create a Saved Search for Inline Editing

02 – Create a Saved Search List for Marketing

03 – Create an Overdue Customers Saved Search

Page 37 in your Student Guide

Take 25 minutes...

Checkmark when Done

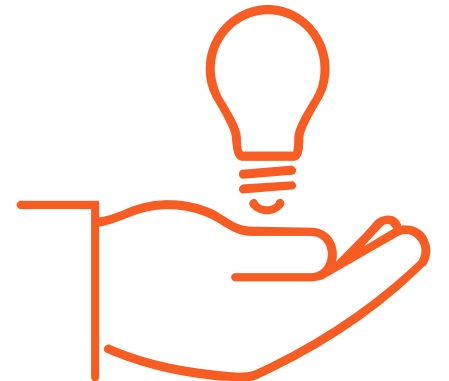
Coffee Cup if away...

Note: Save your searches as you create them so you do not accidentally lose your search criteria if you navigate to a different page.



Best Practices

- ***Design, design, design:*** design your search before you start to construct it
- Determine the required fields for your criteria and results
- Look at records and transactions in NetSuite to familiarize yourself with where data “lives”
- If your search has anything to do with a transaction, start with a transaction search
- Reflect your criteria in your results
- Use Set Preferences to “Show List When Only One Result”
- By using a search (Type = Analytics Audit Trail), you can view properties of searches (and Reports) that have been deleted



Activity: Match Game

Using the Webex line tools
on the right



match the terms on the left to the task/description

Joins

Criteria

Save and Run

Mainline Setting

Highlight if...

Results

Selects header, line-level detail, or both

Focus on critical information

Access fields on tables related to main search object

Set the display

What are you looking for?

Save your criteria and display your results



SuiteAnalytics: Reports and Searches

Module 07: Publishing Saved Searches

Page 44 in your Student Guide

About This Module

Now that I can define a saved search, how can I:

- Ensure that only the appropriate roles have access to it?
- Provide users access to the search when and where they need it in the application?
- Guarantee that the saved search results are “actionable” – in other words, can I enforce business process flows and tasks?

This module examines how to publish saved searches so they are:

- Accessible to specific users only
- Viewable from multiple places in the application
- Display results in a way that helps facilitate user action



Module Objectives

- 1 Identify the data for a saved search
- 2 Publish saved searches to different application views
- 3 Show saved searches in a menu
- 4 Use saved searches as custom dashboard reminders
- 5 Create saved search emails alerts and scheduled emails

Walkthrough: Defining Access for Saved Searches

Public Access

Define Audience

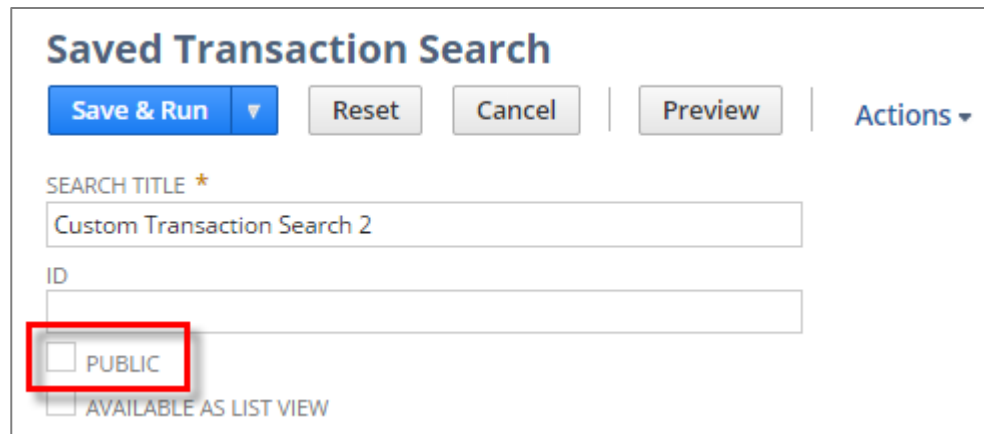
Allow Audience to Edit



Public Access

Saved Searches can be made available to all users:

- Select the **Public** check box
- Allow all roles and users access to the saved search
 - **Benefit:** Public saved searches can save employees time and ensure all users conduct searches using the same criteria
 - **Warning:** Too many public saved searches can become overwhelming and difficult to manage



The screenshot shows a 'Saved Transaction Search' dialog box. At the top, there are buttons for 'Save & Run' (with a dropdown arrow), 'Reset', 'Cancel', 'Preview', and 'Actions' (with a dropdown arrow). Below these buttons, there is a 'SEARCH TITLE' field with a red asterisk, containing the text 'Custom Transaction Search 2'. Below that is an 'ID' field. At the bottom, there are two checkboxes: 'PUBLIC' and 'AVAILABLE AS LIST VIEW'. The 'PUBLIC' checkbox is highlighted with a red rectangle.

Define Audience

Restrict access to specific audience members:

- Go to the **Audience** subtab
- Choose audience restrictions that facilitate minimal maintenance
 - For example: Choose roles instead of individual employees
 - Note: Be aware that if you select both a role and department, then the user must have that role *and* be assigned to the department
- Users must have permissions to the record type and related data to access the saved search

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

☐ Allow Audience to Edit

Roles ☐ Select All

- A/P Clerk
- A/R Clerk
- Accountant
- Accountant (Reviewer)

Subsidiaries

- HEADQUARTERS
- HEADQUARTERS : AMERICAS
- HEADQUARTERS : AMERICAS : C
- HEADQUARTERS : AMERICAS : U

Employees ☐ Select All

- APAC User
- Jan Schumacher
- Larry Nelson
- Willheim Schueler

Allow Audience to Edit

Decide how audience member can edit the search:

- Check **Allow Audience to Edit**
 - Users can make changes to the saved search **and** can save it with the same name, i.e. overwriting the search
- **Do not check** Allow Audience to Edit
 - Users can make changes to the saved search **but** must save the search with a new name, i.e. cannot overwrite the search

The screenshot shows the 'Audience' tab in a NetSuite interface. The 'Allow Audience to Edit' checkbox is highlighted with a red rectangle. Below the checkbox are three selection lists: 'Roles' with a 'Select All' button, 'Subsidiaries' with a scrollable list, and 'Employees' with a 'Select All' button and a list of names.

Criteria	Results	Highlighting	Available Filters	Audience	Roles	Email	Audit Trail	Execution Log	Search Title Translation
<div><input type="checkbox"/> Allow Audience to Edit</div> <div><div>Roles <input type="checkbox"/> Select All</div><div>A/P Clerk A/R Clerk Accountant Accountant (Reviewer)</div></div> <div><div>Subsidiaries</div><div>HEADQUARTERS HEADQUARTERS : AMERICAS HEADQUARTERS : AMERICAS : C HEADQUARTERS : AMERICAS : U</div></div> <div><div>Employees <input type="checkbox"/> Select All</div><div>APAC User Jan Schumacher Larry Nelson Willheim Schueler</div></div>									

Walkthrough: Provide Different Search Views

List View

Dashboard View

Sublist View

Publish Search



Available as List View

Allow users to select saved searches from the bottom of list pages for the related record type

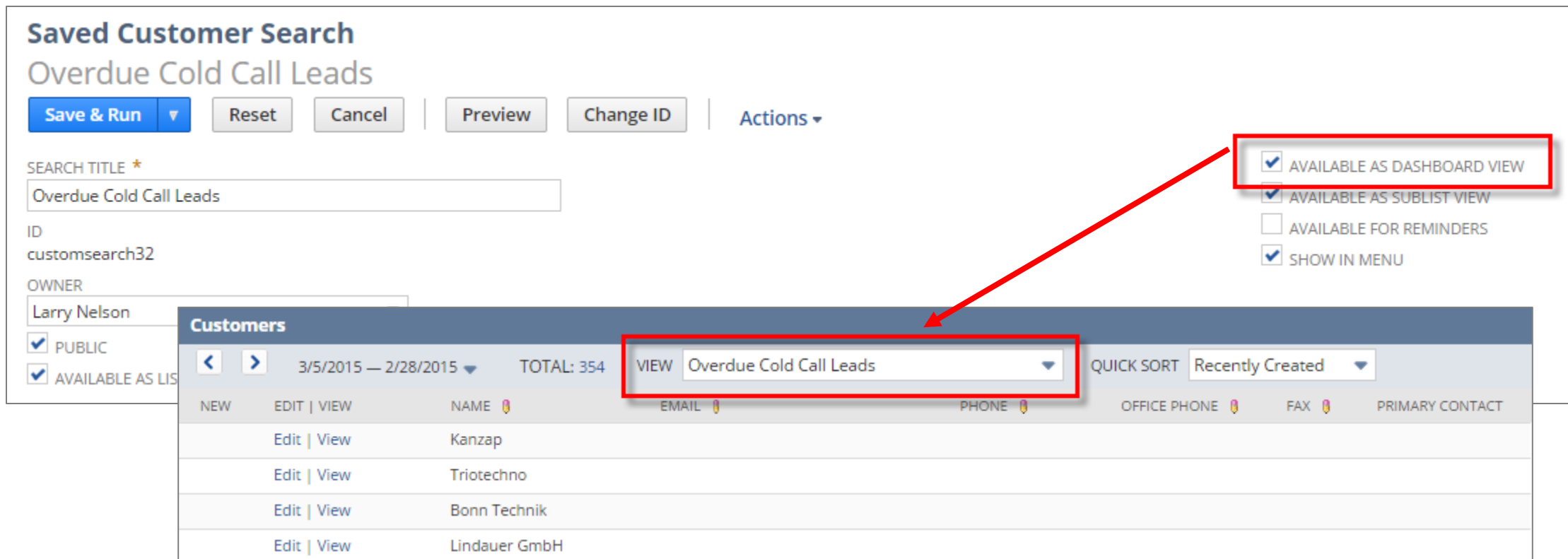
- Check the **Available as List View** box
- Users can then select the saved search from the View dropdown list.

The screenshot illustrates the process of making a saved search available as a list view. On the left, the 'Saved Customer Search' configuration for 'California Customers' is shown. It includes fields for 'SEARCH TITLE', 'ID' (customsearch22), and 'OWNER' (Joan Mencino). At the bottom, the 'AVAILABLE AS LIST VIEW' checkbox is checked and highlighted with a red box. A red arrow points from this checkbox to the 'VIEW' dropdown in the 'Customers' list view on the right. The 'Customers' list view shows the 'VIEW' dropdown set to 'California Customers', also highlighted with a red box. Other elements in the 'Customers' view include 'Edit View', 'New Customer' buttons, and a 'FILTERS' section with a 'STYLE' dropdown set to 'Normal'.

Available as Dashboard View

Available as Dashboard View makes search available in the **List** portlet

- Add the **List** portlet to the Home Dashboard
- Click **Set Up** and select the saved search record type
- Select the saved search as the **View** in the List portlet



The screenshot shows the 'Saved Customer Search' configuration for 'Overdue Cold Call Leads' and a 'Customers' List portlet. A red arrow points from the 'AVAILABLE AS DASHBOARD VIEW' checkbox in the configuration panel to the 'VIEW' dropdown in the List portlet, which is set to 'Overdue Cold Call Leads'.

Saved Customer Search Configuration:

- Search Title:** Overdue Cold Call Leads
- ID:** customsearch32
- Owner:** Larry Nelson
- ☒ PUBLIC
- ☒ AVAILABLE AS LIST VIEW
- ☒ AVAILABLE AS DASHBOARD VIEW
- ☒ AVAILABLE AS SUBLIST VIEW
- ☐ AVAILABLE FOR REMINDERS
- ☒ SHOW IN MENU

Customers List Portlet:

- VIEW:** Overdue Cold Call Leads
- QUICK SORT:** Recently Created
- TOTAL:** 354
- Filters:** 3/5/2015 — 2/28/2015

NEW	EDIT VIEW	NAME	EMAIL	PHONE	OFFICE PHONE	FAX	PRIMARY CONTACT
	Edit View	Kanzap					
	Edit View	Triotechno					
	Edit View	Bonn Technik					
	Edit View	Lindauer GmbH					

Create Sublist Views: Preferred Method

Provide different information to different roles on sublists:

- Go to the record's subtab and then to the desired sublist
- Click the **Customize View** button
- Saved Search displays, choose **More Options** to use full capabilities

Saved Customer Search
California Customers

Save & Run ▼ Reset Cancel Preview Change ID Actions ▼

SEARCH TITLE *
California Customers

ID
customsearch22

OWNER
Joan Mencino ▼

☒ PUBLIC
☐ AVAILABLE AS LIST VIEW

☐ AVAILABLE AS DASHBOARD VIEW
☒ AVAILABLE AS SUBLIST VIEW
☐ AVAILABLE FOR REMINDERS
☐ SHOW IN MENU

Support Financial Preferences

Downloads Projects Qualification •

STATUS
- All - ▼

VIEW
Default ▼

New Opportunity Customize View

Available as Sublist View: Alternate Method

Saved searches can be used to present a custom view of a sublist on a record subtab:

- Check the **Available as Sublist View** box so users can select the saved search from the View dropdown list on a subtab of a record.

Saved Customer Search
California Customers

Save & Run ▼ Reset Cancel Preview Change ID Actions ▼

SEARCH TITLE *
California Customers

ID
customsearch22

OWNER
Joan Mencino

☒ PUBLIC
☐ AVAILABLE AS LIST VIEW

☐ AVAILABLE AS DASHBOARD VIEW
☒ **AVAILABLE AS SUBLIST VIEW**
☐ AVAILABLE FOR REMINDERS
☐ SHOW IN MENU

Relationships Communication Address **Sales** Marketing Support Financial Preferences

TERRITORY
Western Region

Opportunities **Transactions** Items Purchased Upsell Downloads Projects Qualification

BILLING STATUS
Open

New Quote

EDIT DATE
Edit 2/15/
Edit 2/23/
Edit 3/9/2

VIEW
A/R - A/P
A/R - A/P
Default
Orders with Discount > 30%
Projects to Assign
Revenue- All
Sales Orders Pending Approval
Software View

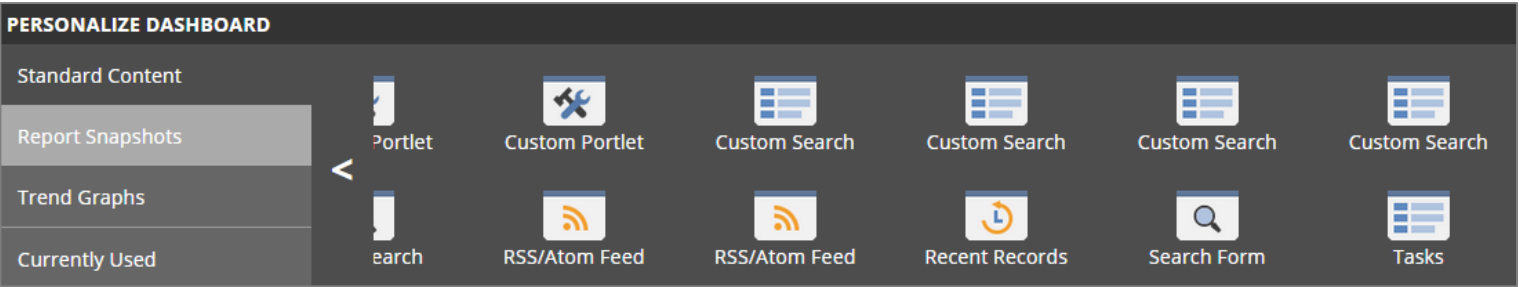
New Cash Sale Customize View

PO/CHECK #	AMOUNT	AMOUNT P
	447.00	
	447.00	
	999.00	

Publish Search

Saved searches may be added to the Home Dashboard:

- Go **Home** and click the **Personalize** link
- In the **Standard Content** panel, select up to six custom search portlets
- Close the panel
- Click **Set Up** in each Custom Search portlet and select your search



Transaction Search: Transaction Impact							
		2/1/2010(1) ▼	TOTAL: 68512				
EDIT VIEW	ACCOUNT	AMOUNT (DEBIT)	AMOUNT (CREDIT)	POSTING	MEMO	NAME	SUBSIDIARY
View	Inventory Adjustments		547,624.66	Yes	Inventory Opening Balance		HEADQUARTERS
View	Inventory Asset	4,995.00		Yes	Inventory Opening Balance		HEADQUARTERS
View	Inventory Asset	1,000.00		Yes	Inventory Opening Balance		HEADQUARTERS
View	Inventory Asset	1,000.00		Yes	Inventory Opening Balance		HEADQUARTERS
View	Inventory Asset	1,200.00		Yes	Inventory Opening Balance		HEADQUARTERS
View	Inventory Asset	4,900.00		Yes	Inventory Opening Balance		HEADQUARTERS

SaveCancelReset

Please choose your custom search preferences.

SEARCH

Transaction Impact

RESULTS SIZE *

10

DRILL DOWN

To New Page

☒ ALLOW INLINE EDITING

CHART THEME

Global Theme

BACKGROUND TYPE

Global Background

Activity: True or False

Use the green checkmark or the red X   to indicate if the statement is true or false.

1. Checking **Public** makes the saved search available for all roles, departments, etcetera?
2. If **Allow Audience to Edit** is checked, then the user working with that saved search must save it with a new name.
3. Check **Available as Dashboard View** to allow the saved search to reside in one of the six (6) Custom Search portlets.
4. Users can customize their view of sublists.

Walkthrough: Enforce Business Process Flows and “Action”

Create Links in Menu Paths

Create Custom Reminders

Create Email Alerts

Set Up Scheduled Emails



Show in Menu

Create a link in the menu paths:

- Check the **Show In Menu** box
 - Saved searches available from the **Reports > Saved Searches** menu

Saved Customer Search
Overdue Cold Call Leads

Save & Run ▼ Reset Cancel Preview Change ID Actions ▼

SEARCH TITLE *
Overdue Cold Call Leads

ID
customsearch32

OWNER
Larry Nelson

☒ PUBLIC

☒ AVAILABLE AS LIST VIEW

Reports	Customization	Documents	Setup	Support
Reports Overview				
New Report				
New Financial Report				
Recent Reports	▶	Meine Deutsch-Fälle		
Saved Reports	▶	Meine Offenen Möglichkeiten > €20K		
Scheduled Reports	▶	My High Priority Cases		
New Search		My Leads From Today		
Saved Searches	▶	Orders with Discount > 30%		
Scheduled Searches	▶	Overdue Cold Call Leads		
Financial	▶	Revenue Target - All		
Revenue	▶	Revenue per User		

☒ AVAILABLE AS DASHBOARD VIEW
☒ AVAILABLE AS SUBLIST VIEW
☐ AVAILABLE FOR REMINDERS
☒ SHOW IN MENU

Custom Reminders

Base custom reminders on the number of results from a saved search:

- Name the saved search to reflect an appropriate reminder name to be displayed in the Reminders portlet
- Check the **Available for Reminders** box to make the saved search available from the Reminders portlet
- Click the **Set Up** in the Reminders portlet to add the saved search to the Reminders portlet list
- Drill down on custom reminders to view the results

Saved Customer Search

Overdue Cold Call Leads

Save & Run ▼

Reset

Cancel

Preview

Change ID

Actions ▼

SEARCH TITLE *

Overdue Cold Call Leads

ID

customsearch32

OWNER

Larry Nelson ▼

☒ PUBLIC

☒ AVAILABLE AS LIST VIEW

☒ AVAILABLE AS DASHBOARD VIEW

☒ AVAILABLE AS SUBLIST VIEW

☒ AVAILABLE FOR REMINDERS

☒ SHOW IN MENU

Reminders	
12	Opportunities to Close
3	Customers to Renew
1	Memorized Transaction due
5	Item on Backorder
354	Overdue Cold Call Leads

Create Email Alerts

Improve job function or business process flow by notifying users, automatically, about records being created or updated:

- Enable email alerts when records are created/updated
- Enable the **Send on Update** option to include updates, as well as adds, in email alerts to the recipients
- Send alerts when specific field values change
- Check **Include View Record Link** to display record links in email alert messages

Criteria Results Highlighting Available Filters Audience Roles **Email** Audit Trail

☒ 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 to add themselves as alert recipients at Home > Set Preferences.

☐ Allow Users to Subscribe

Set Up Scheduled Emails

Send Scheduled Emails, with results relevant to the user, on a regular basis

- Select **Send Emails According to Schedule**
- Specify frequency for Scheduled emails with matching results are sent
- Display saved search results as an attachment or within email message

Criteria Results Highlighting Available Filters Audience Roles **Email**

☐ 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**

☐ Single Event

☒ Daily Event ☒ Repeat every 1 day(s)

☐ Weekly Event ☐ Repeat every weekday

☐ Monthly Event

☐ Yearly Event

Series Start Date
7/29/2014

Start Time
2:00 am 2:00 am ▼

Deselect to prevent sending emails for saved searches without results

Change Default Saved Search Email Sender

By default, saved search emails are sent from the search owner's email address. Alternatively, you can:

- Set the **From Address for Search Emails** preference to define the email address of your choice as the default sender for all saved search emails
 - **Setup > Company > Printing, Fax & Email Preferences > Email** subtab
- Define a non-default sender for a saved search email to override the email address set in the company preference, for that search only
 - Edit the search and go to the Email subtab > Customize Message subtab, and then enter the email address in the **From** field

Printing, Fax & Email Preferences

Save Cancel Reset

Printing Fax **Email**

General

Global BCC List (Separate Addresses With Commas)

Global Footer

Default Mail Message in

From Address For Search Emails

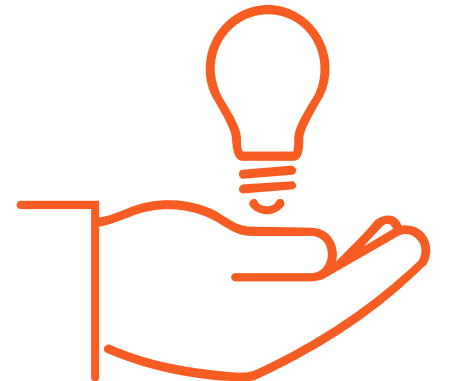
Required format:
"name" <email address>

Email Alerts vs. Scheduled Emails

Feature	Email Alerts	Scheduled Emails
DELIVERY		
Sends emails when specified records are created/changed	X	
Sends emails on a scheduled basis containing relevant search results		X
RECIPIENTS		
Specific Recipients tab defines individual person(s) or group(s) to receive emails	X	X
Allow users to subscribe to the email	X	
Recipients derived from results fields	X	X
MESSAGE		
Updated Fields. If used, specific fields and/or changes in field values are required to produce an email alert	X	
Customize email message content	X	X
Customize message for Single Record Results	X	X

Best Practices: Email Alerts and Scheduled Emails

- Enable Allow Users to Subscribe to allow other users, not identified as recipients, to subscribe to saved search alerts
- Schedule a large, saved search to prevent it from timing out
- Use both email alerts and scheduled emails on the same saved search, if necessary/desired
- Schedule searches to run the following day if you want the search to include information up until the end of a particular day (it's likely that you will also have to set date parameters in your search criteria)



Now It's Your Turn

01 - Add filters and restrict access to a saved search

02 - Create a saved search for a sublist view

03 - Create a saved search with an email alert

04 - Add a saved search email to an existing search

05 - Create a saved search (Email Alert & Scheduled Email)

Page 45

About 40 minutes

Checkmark when done

Coffee cup if away...



Activity: Match Game

Using the Webex line tools  match the terms on the left to the task/description on the right

Audience

Available as
Dashboard View

Sublist

Email Alerts

Available as List
View

Scheduled Emails

Select saved search in List portlet

A list of records related in some way to
the record being viewed

Sends emails on a regular basis

Users who have been given access to the
saved search

Select view from a list of records

Notify users about records being created
or updated