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

How to Build NetSuite Reports

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HOW TO BUILD NETSUITE REPORTS

NetSuite reporting capabilities provide real-time visibility into company operational and financial performance across all business functions. NetSuite offers pre-built standard reports that can be fully customized.

The following tips will help you master the fundamentals of using standard reports, customizing reports, and building new reports in NetSuite to get exactly the data you need to empower your business.
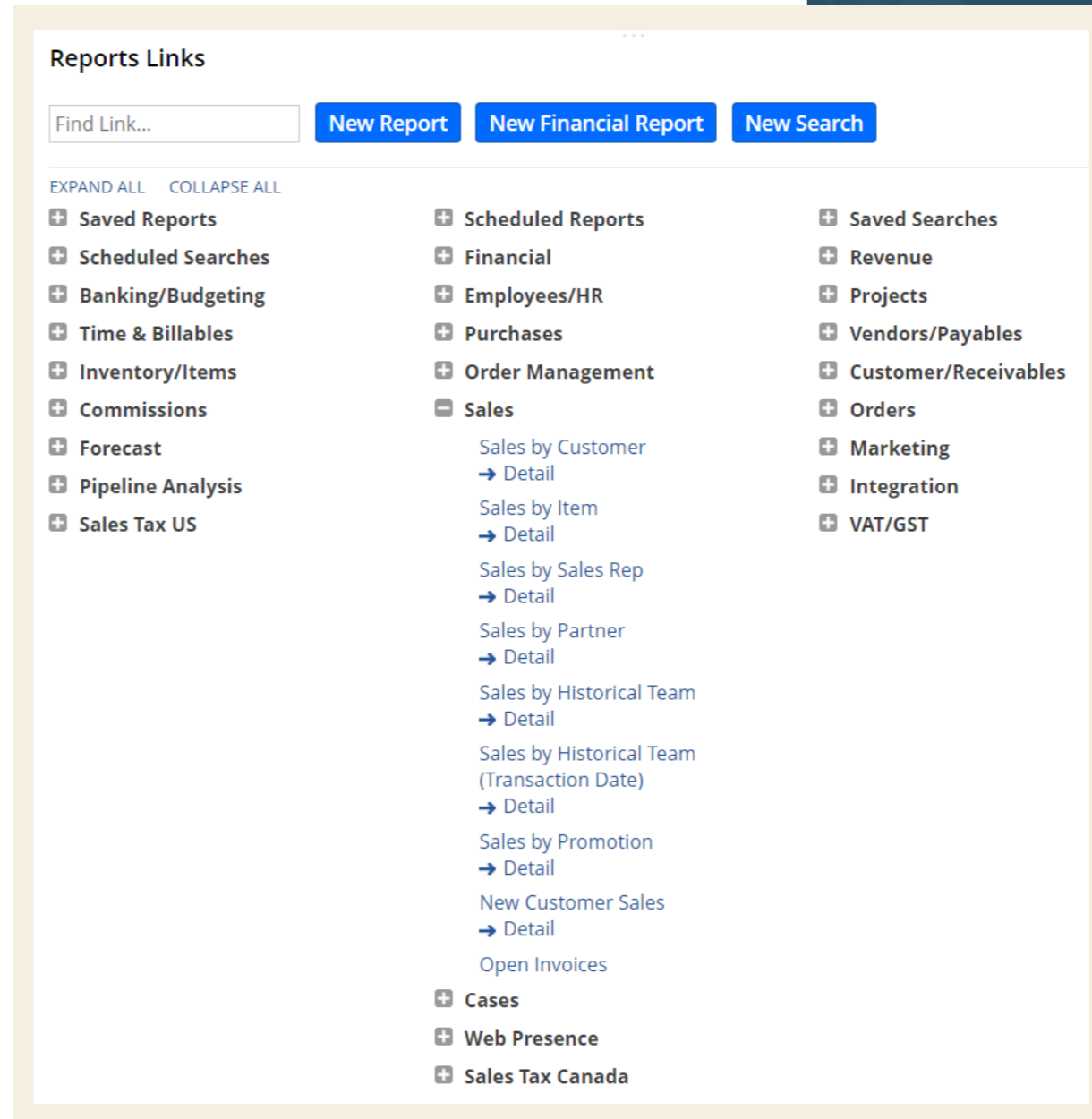

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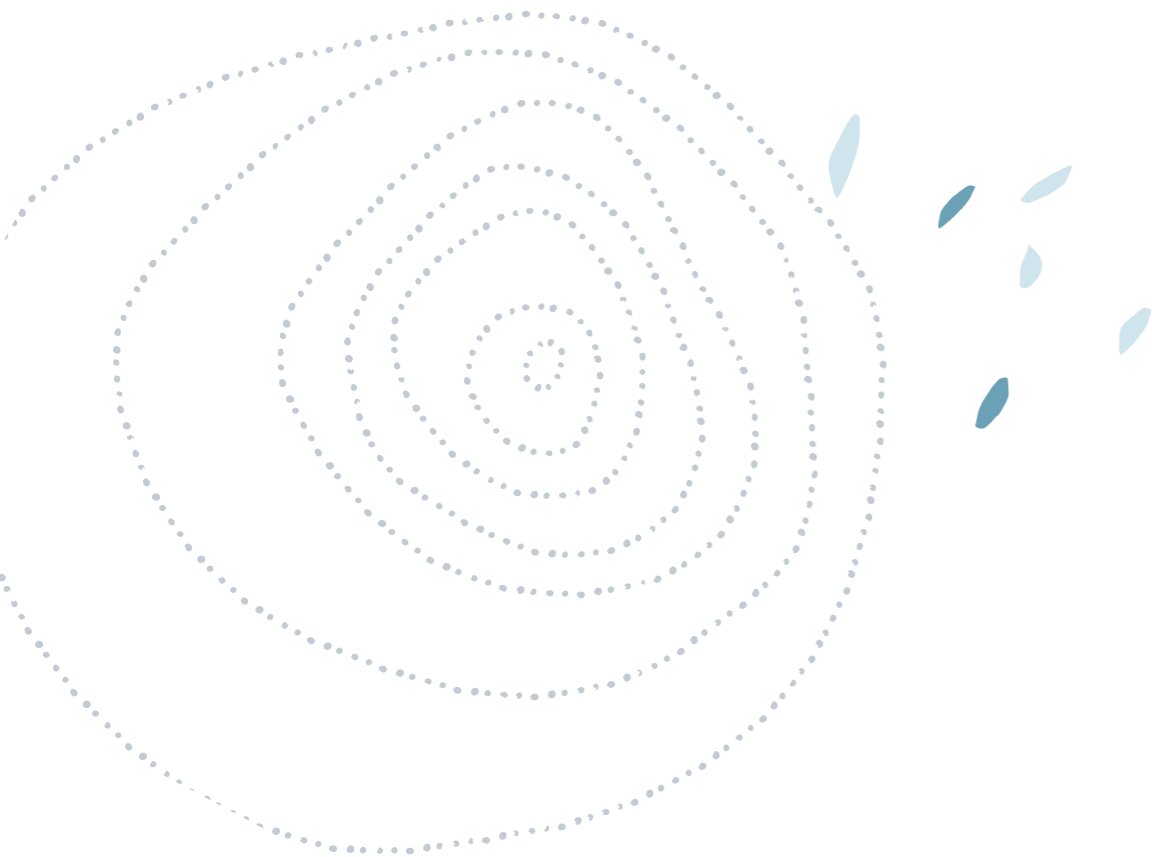
1. USING STANDARD REPORTS

Navigation. Easily access pre-built reports from the "Reports Dashboard" located at the top menu. You can expand and collapse available reports by category to view a list of available reports. You may also use the "Expand All" and "Collapse All" links.

When in the "Expand All" view, you can use your browser's highlight function (CTRL-F on a PC; CMD-F on a Mac) to highlight the report name on the page for easier spotting.

Report Alerts. For reports that take a while to generate, you can take advantage of the "Alert Me When Ready" feature. Clicking this link loads the snapshot of the report in the background while you continue to work on other tasks in NetSuite. When the report is ready, an email alert is sent to you with a link to the report results.

Scheduling Reports. You can schedule reports to run on a one-time or recurring basis. You can also email reports to a list of recipients. Under "Scheduled Reports," you can access "Report Results" and "Report Schedules." You can also schedule specific reports to run on a regular basis. For example, schedule the balance sheet report to run at the end of the month and automatically distribute it to the CFO.

Reports Links

Find Link...   New Report   New Financial Report   New Search

EXPAND ALL   COLLAPSE ALL

- Saved Reports
- Scheduled Searches
- Banking/Budgeting
- Time & Billables
- Inventory/Items
- Commissions
- Forecast
- Pipeline Analysis
- Sales Tax US

- Scheduled Reports
- Financial
- Employees/HR
- Purchases
- Order Management
- Sales
  - Sales by Customer
    → Detail
  - Sales by Item
    → Detail
  - Sales by Sales Rep
    → Detail
  - Sales by Partner
    → Detail
  - Sales by Historical Team
    → Detail
  - Sales by Historical Team (Transaction Date)
    → Detail
  - Sales by Promotion
    → Detail
  - New Customer Sales
    → Detail
  - Open Invoices
- Cases
- Web Presence
- Sales Tax Canada

- Saved Searches
- Revenue
- Projects
- Vendors/Payables
- Customer/Receivables
- Orders
- Marketing
- Integration
- VAT/GST

As a best practice, schedule large reports to run during off-peak hours to save performance load during daytime hours.

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Summary and Detail Views. Many reports are paired as "Summary" and "Detail" views. The Summary view displays summarized information, while the Detail view displays information at the individual transaction level.

You can click the individual fields to drill down to specific transaction, item, or entity records.

Filters. Report information may be filtered based on date range, subsidiary, and grouping context. NetSuite retains your date and subsidiary filter choices upon reopening a report. Use dynamic date filters, such as "this month" and "this fiscal year," to update data ranges automatically as time passes.

Tools. The Tools grid allows you to update the report title, collapse or expand groups by level, or view information in a bar graph.

Export Options. There are four primary methods for exporting reports:

1. Download as Excel, PDF, CSV, or Word
2. Print reports
3. Email reports
4. Schedule reports to run daily, weekly, monthly, or yearly

Sales by Customer Summary ⤢ View Detail

CUSTOMER	SALES
- No Customer/Project -	$1,140,431.59
1 Renault	$21,910.30
ABC Marketing Inc	$5,097.00

Sales by Customer Detail ⤢ Back to Summary

CUSTOMER	TRANSACTION TYPE	DATE	DOCUMENT NUMBER
⊞ - No Customer/Project -			
⊟ 1 Renault			
	Invoice	4/1/2022	46086
	Invoice	4/15/2022	32859

Summary and Detail Views

DATE last year	FROM 1/1/2021	TO 12/31/2021	SUBSIDIARY CONTEXT HEADQUARTERS (Consolidated)	COLUMN Total

Refresh   Customize

Filters

Tools

Export Options

2. CUSTOMIZING REPORTS

You can easily customize reports by changing or modifying a pre-built standard report. While you could build a completely customized report, modifying an existing report is recommended over creating a report from scratch.

Report Builder. Use the Report Builder to customize any standard report. Select the appropriate standard report as your starting point. Then add, move, and delete fields as needed. You can set attributes and modify date ranges, groupings, and so on.

When you customize a summary report, its associated detail report is not affected. You can create both a custom summary and a custom detail report and link them in the Report Builder.

Edit Columns. By selecting fields from the data sources available within the left panel, you can add, remove, or rearrange fields. Data sources contain both standard and custom record fields.

Alternate Date Ranges. To compare values between two date ranges, set alternate date ranges on a numeric column to display results in a period that is different from the report's date range.

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Formula Fields. Use formula fields to complete a comparative analysis between columns. Select a formula and select columns for the X and Y variables. Note that only numeric columns may be used in formula calculations.

Groups and Subgroups. Use this feature to display reports as a series of groups or subgroups. You can group results by one or more values, such as industry type and company size.

Filters. The filters section provides filtering options to narrow down your data results. Create user filters to allow users flexibility in selecting data to display.

Sorting. Define the fields to sort your report. You can sort to multiple levels, in ascending or descending order.

More Options. Customize additional options under the More Options tab. Additional options display in the sample screenshot.

Report Builder

CUSTOM SALES BY CUSTOMER SUMMARY

| ● Edit Columns | ● Filters | ● Sorting | ● More Options |

NAME *

Custom Sales by Customer Summary

Additional Options

Custom Sales by Customer Summary 2 ⤵ View Detail

COMPANY SIZE	CUSTOMER	SALES
⊟ **Computer Software**		
⊟ **100 - 499 Employees**		
	Best Buy Software	$64,864.00
	Casey Software	$6,000.00
	Zone Catering Inc.	$171,699.00
Total - 100 - 499 Employees		**$242,563.00**
⊟ **Greater than 1,000**		
	Bural Systems	$100,000.00
	Foster Software	$21,669.00
	Foster Software:Office Refurbishment	$499.00
	Great Lakes Software	$13,170.00
	Hogan Software	$65,324.00
Total - Greater than 1,000		**$200,662.00**
1 - 99 Employees	Cutting Technology	$43,800.00

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3. CREATING NEW REPORTS

If pre-built or customized reports do not meet your needs, you can build a new report.

Identify Data for the Report. Start by selecting a pre-built report and choosing the data you want to replicate. Reports are built as (Metric data source X : Field X) BY (Component data source Y : Field Y). For example: "Purchasing : Amount by Vendor : Name."

Note: Options available depend on your role and the features enabled in NetSuite.

Select Metrics. Based on your selected metric, a list of associated fields are displayed. Select the fields to report on.

Select the Format of the Report. The "Summary" format is the default format and provides roll-up level reporting with subtotals of the selected field's data for each subgrouping field value.

The "Detail" format provides row values at the individual record or transaction level. This adds to roll-up totals for subtotal grouping field values.

The "Matrix" format provides roll-up level reporting with both vertical and horizontal subtotals. Vertical or row-level subtotals are calculated for each subtotal grouping field value.

Summarize the Data. For matrix reports, select the dimension to summarize data across columns.

Run the Report. Choose from the following options:

- Run Report – Displays the results of the new report.
- Save – Runs and saves the report.
- More Customization – Displays the Report Builder, where you can add additional columns, filters, sorting options, and additional options to the report.
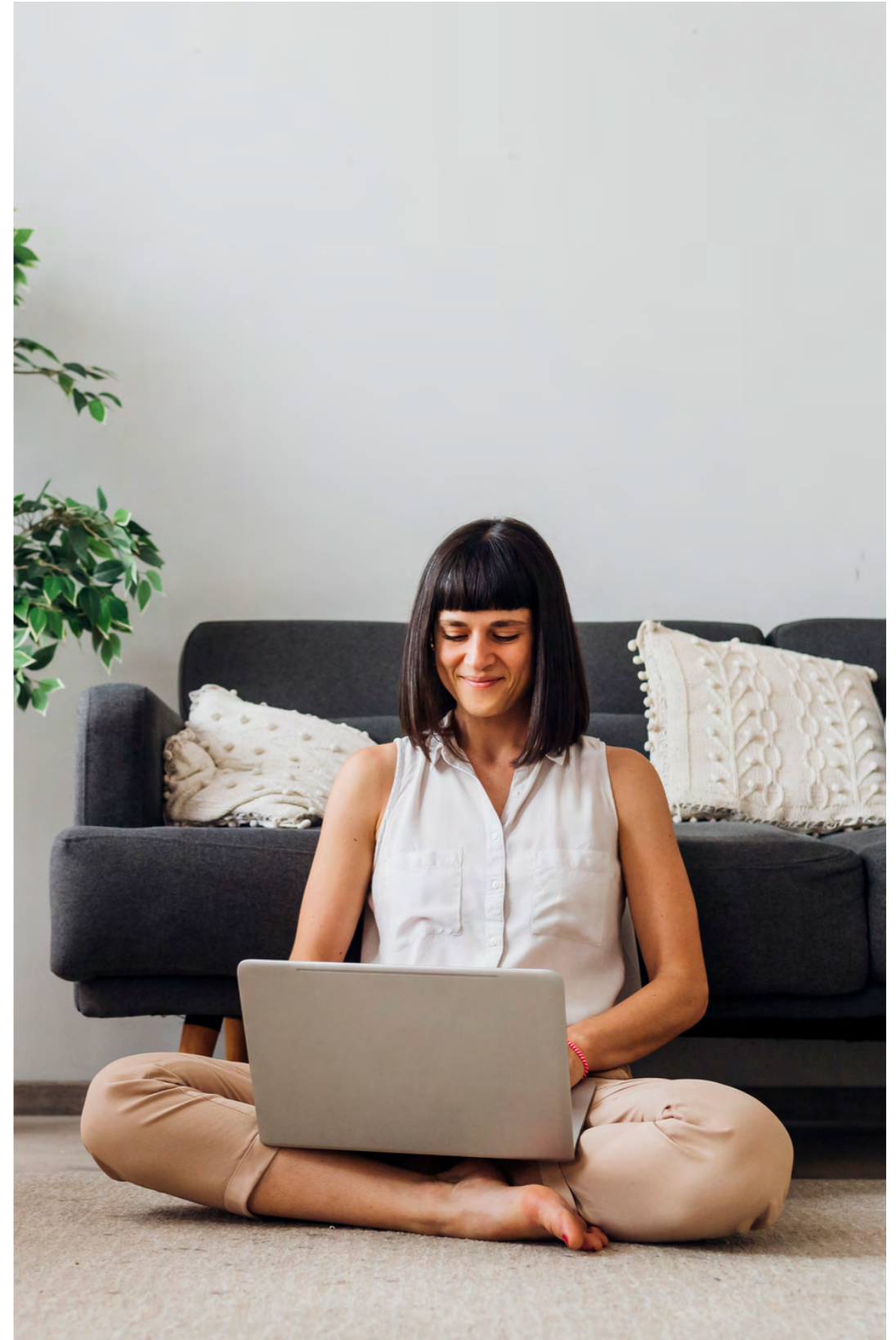
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SUPPORTING YOU ALONG THE WAY

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

- SuiteAnalytics: Reports and Searches
- SuiteAnalytics: Financial Reports and Searches

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

Join the NetSuite Support Community

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

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