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

More Tips for Enhancing Your NetSuite Saved Searches

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MORE TIPS FOR ENHANCING YOUR NETSUITE SAVED SEARCHES

NetSuite Saved Search is a customizable tool that enables you to search all records in NetSuite. With its advanced features, you can create powerful saved searches to easily retrieve the data you need for your business. Define criteria, use complex logic, access custom tools, and more.

In this ebook, you will learn how to take your saved searches to the next level with best practices for enhanced formatting and advanced customization to uncover richer, more current data.

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1. DEPLOYING ADVANCED SAVED SEARCHES

To get started with Advanced Saved Search, Go to Reports > New Search and choose the type of records you want to find.

Select the Use Advanced Search box to switch to advanced search.

To build your advanced saved search, you'll need to define the Criteria filters and the Results display options.

After you have defined criteria and results display options for an advanced search, you can:

1. Click Submit to run the search and display a list of results. After you have submitted the search, you can export the results as a .csv, .xls, or .pdf file that you can save or open on your desktop.

2. Click Reset to clear the criteria and results options you defined.

3. Click Personalize Search to display a page where you can define results columns and available filters for a personalized search form.

4. Click Create Saved Search to display a page where you can save and modify a search that includes the filters you defined.

Share your search with others. Use the public Checkbox in your search term to allow others to see your search (based on role permissions). If you do not see the public checkbox, ask your administrator for "publish search" permissions for your role.

Easy access for yourself. You can add your saved search as a custom sub-list to records, lists, and dashboards, as well as portlets.

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2. DEFINING CRITERIA

You can define advanced filtering options for advanced searches and saved searches. On the Criteria subtab of an advanced or saved search, check the Use Expressions box.

You can also indicate expression sets you do not want to include in your results by checking the Not column.

And/Or Expressions. You can define And/Or expressions for standard search filters by checking the Use Expressions box.

Select "And" to enter criteria in the next line that records or transactions must also meet to be in your results list.

Select "Or" to enter criteria in the next line to return records or transactions that match criteria in either the first line of criteria or the next line you are adding.
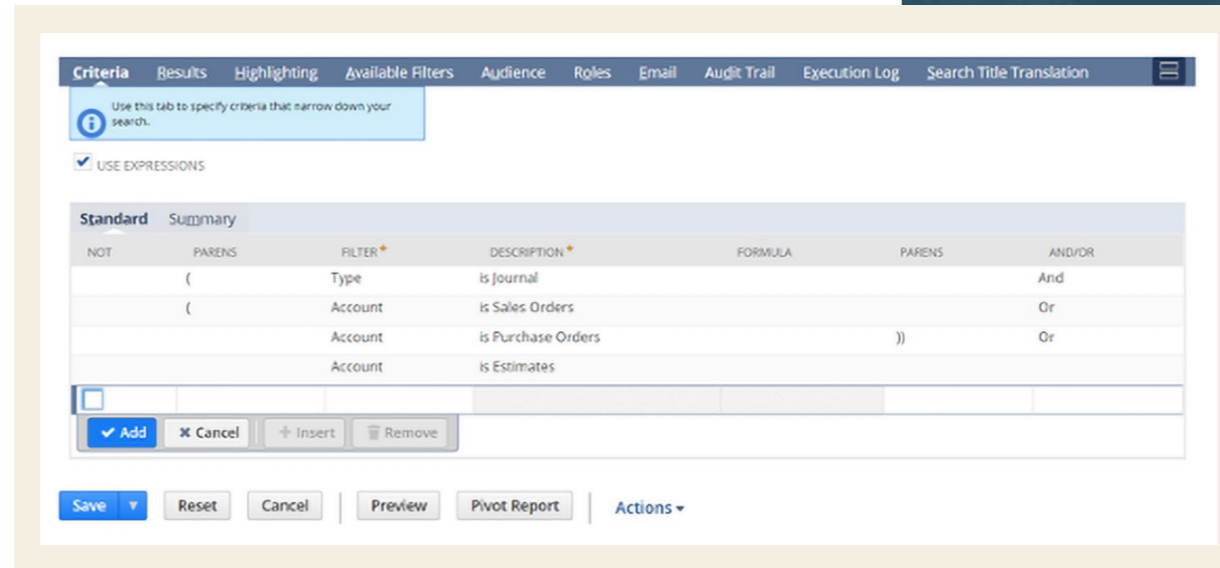
Tip! If you define multiple date filters for a search, the date filter with the most recent date is used to calculate exchange rates for monetary values, no matter the order in which the date filters are specified.

3. FORMULA IN SAVED SEARCHES

For advanced searches, you can define formulas to be used for results, criteria, and highlights. For example, you can use formulas to display specific currencies, dates, or text within your saved search list data.

On the Criteria subtab of an advanced or saved search page, in the Filter column, select the required Formula type.

Formula Types. The following options are available; they are listed in alphabetical order, intermingled with field names in the Filter column dropdown list:

- Formula (Date)
- Formula (Numeric)
- Formula (Text)

The best choice for a formula type depends on the calculation the formula will perform, because validation varies according to the formula type. For example, to do character manipulation using regular expressions, you should select Formula (Text). To do numeric calculations, Formula (Numeric) is likely a better choice.

Formula Editor. Use the formula editor and dropdowns to select functions and fields to create a formula.

	New	Edit | View	Name ▲	Balance	Credit Limit 🖉	Remaining Credit	% Remaining Credit
		🖉 ⊙	ALK-Abelló	684,015.22	800,000.00	115,984.78	14.0%
⚠️		🖉 ⊙	American Meats Inc	726,689.00	700,000.00	-26,689.00	-4.0%
⚠️		🖉 ⊙	Australian Furniture Manufacturers Association	133,200.45	100,000.00	-33,200.45	-33.0%
		🖉 ⊙	Bankert Bank	60,000.00	75,000.00	15,000.00	20.0%
		🖉 ⊙	BASF, Düsseldorf	305,509.06	400,000.00	94,490.94	24.0%

MKT | Customers within 25% of Credit Limit — Alk-abelló — Basf, ▾ TOTAL: 25

⚠️ Balance over Credit Limit

The field you select will display at the end of the formula. You will need to cut and paste the field into the the the formula editor.

Date formulas. You can use the Formula (Date) field to add numbers to dates or to add or subtract dates from each other. For example, to add 90 days to today, you can create the following formula: {today} + 90. The result is based on your NetSuite date and date/time configuration settings. These can be updated under Home Dashboard > Set preferences.

If you want to subtract two dates from each other, remember to select Formula (Numeric) as your formula type, as the output will be a number instead of a date. For example, {today}-{datecreated} yields a numerical value.

4. FUNCTIONS IN SAVED SEARCH

As with formulas, summary functions can be used in results, criteria, and highlights. Select Function from the Function Column on the Results tab to apply a variety of predefined functions directly to a field or formula.

Most predefined functions in the function field can be applied only to numeric data or date information. For example, Age in Days, Percent Total, and Round are all useful pre-built functions you can apply to your data.

Function syntax. By default, NetSuite provides default formatting for functions. But it's helpful to understand the formatting to modify functions.

- **Function names** are in uppercase, with the parameter list enclosed in parentheses. Parameters can be specific values, expressions, variables or field IDs, or nested functions.
- **Multiple parameters** are separated by commas, and you will need to replace default formatting with real values.
- **Variables** are written in lowercase and surrounded by curly brackets.

Here are a few useful functions you may want to apply to your saved search data:

Function Use/Name	Use
Joining	Join, or link together, text strings in formulas to functions using the double pipe (||). For example, you can display a name and phrase in your data.
SUBSTR	This function allows you to extract characters from a formula string. For example, you can display only three characters from a longer character name using this function.
NULLIF	This function is often used to prevent denominators from containing a 0 value, for example, if you want to return a NULL when a balance is 0.
CEIL/FLOOR	These functions allow you to codify a number preference. These functions are commonly used to codify numerical values into whole days.

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5. SUMMARY FUNCTIONS IN SAVED SEARCH

The Results subtab for an advanced search includes a summary type column where you can define how to roll up, or group, data. When you define one or more summary types, a search returns a summary results page, where you can drill down to each group of results.

For example, in a customer search, you can define a Group summary type for the sales rep field. The summary results page includes a list of all sales reps, and you can click each sales rep to see a list of their customers.

Here are a few useful functions you may want to apply to your saved search data:

Summary Type	Purpose	Example Use Cases
Group	Rolls up search results by the field to which you apply this type	Group transactions by customer name
Count	Counts the number of results found that apply to this column	Count the number of items purchased by each customer
Sum	Sums search results for the column	Sum the dollar amount of sales orders for each customer
Minimum	Displays the minimum amount, or the earliest date value	Show the minimum amount sold in a transaction for each customer
Maximum	Displays the maximum amount, or the most recent date value	Show the maximum amount sold in a transaction for each customer
Average	Calculates the average amount found for the column	Show the average amount sold in a transaction for each customer

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6. USING HTML IN SAVED SEARCHES

Use HTML to format search results, create links to internal pages and external websites, and embed images in search results. You can also use HTML to define color values to search results, such as using red to denote an overdue bill. Additionally, knowing how to manipulate HTML can help you troubleshoot a saved search.

HTML syntax. HTML is written as balanced pairs of start and end tags wrapped in brackets. End tags have a forward slash before the symbol. There are two elements with no end tags, a line break (<br>) and an image (<img>).

HTML formatting. Use HTML formatting in search results to emphasize whole columns or text within a column, align text within a column, add text or background color, and adjust text size and decoration. HTML must be used within a formula text field. In the screenshot, HTML is used to italicize the industry name and change the company name to blue, bold text.

HTML Example	Meaning
	Bold
<i></i>	Italic
	Paragraph
	Span
	Division
<a>	Link

Common HTML elements

HTML for links. Use HTML to create links in saved search results. Link to external web pages using the full URL, or to internal pages in NetSuite through a relative URL. HTML link code must be created within a formula text field.

HTML for images. Use HTML to add images to saved search results. Store images in the Images folder in the NetSuite file cabinet.

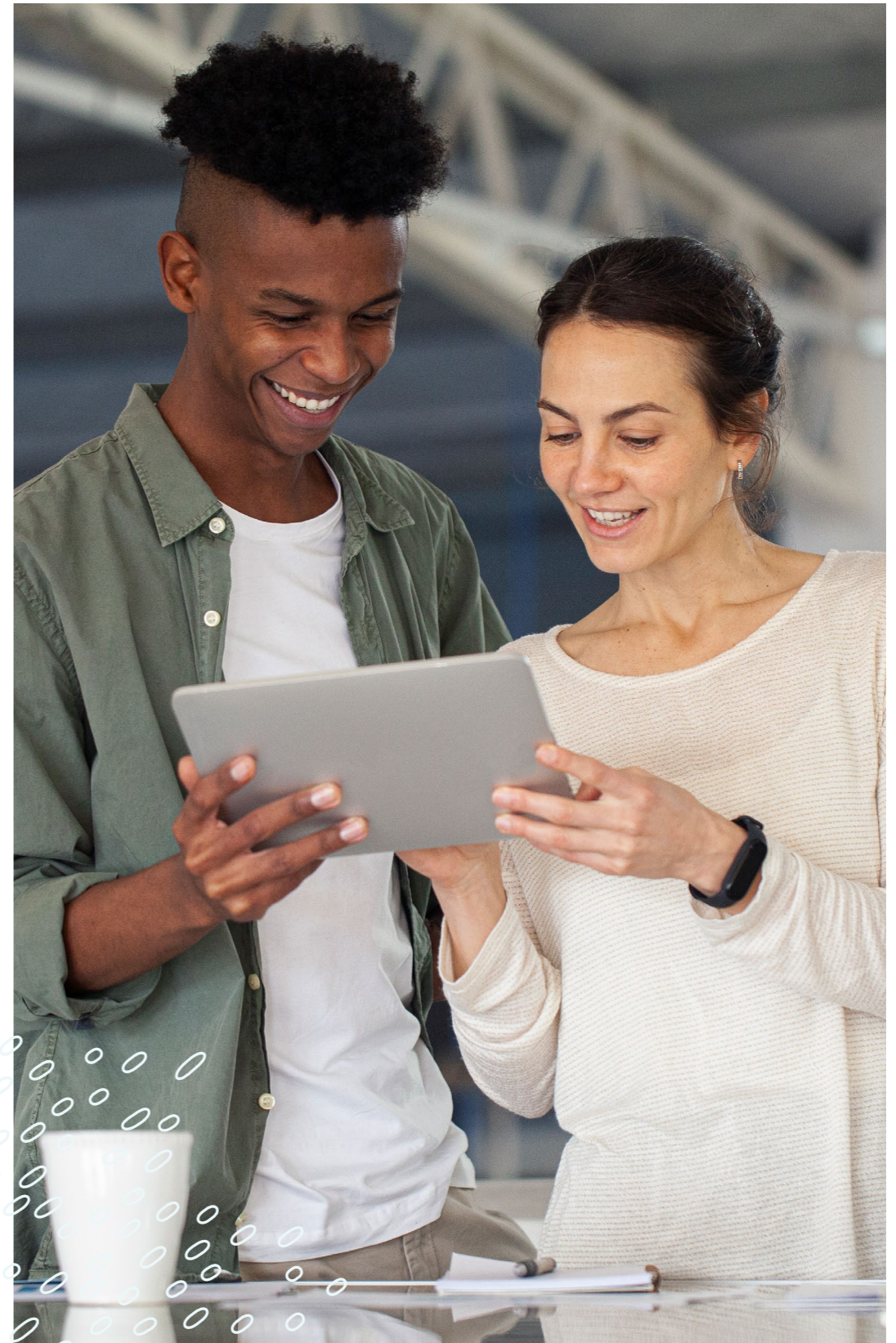| 237 | *Computer Software* | Cutting Technology |
| 291 | *Consumer Electronics* | Data.com |
| 29 | *Retail* | **Fabre Technology** |

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SUPPORTING YOU ALONG THE WAY

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

- How Do I Create a Custom Search?
- Saved Search Series
- SuiteAnalytics: Advanced 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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