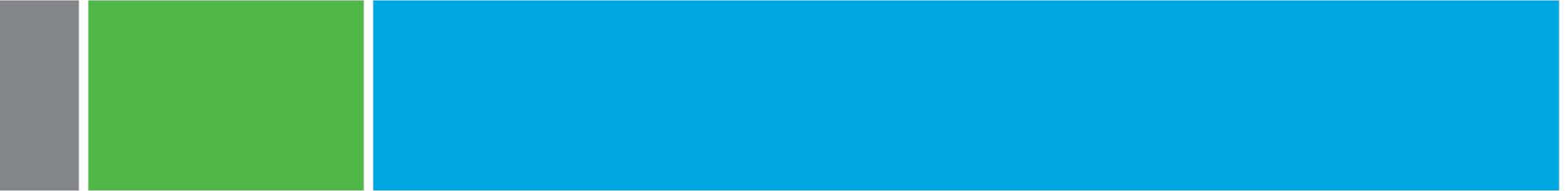


# NETSUITE USER GROUP WEBCAST

## Saved Searches Tips & Tricks



February 22<sup>nd</sup>, 2018

# Today's speaker



**Matt Bailey**

*Director, Technology & Management Consulting*

- Over 18 years of experience in ERP/CRM implementations
- Certified NetSuite ERP Consultant
- Industry experience includes Nonprofit, Wholesale Distribution, Manufacturing, Retail, Professional Services, and Finance
- NetSuite pre-sales engineer

# Agenda

- Defining a saved search
- Creating shortcuts
- Displaying in dashboard
- Sending emails
- Highlighting results
- Examples



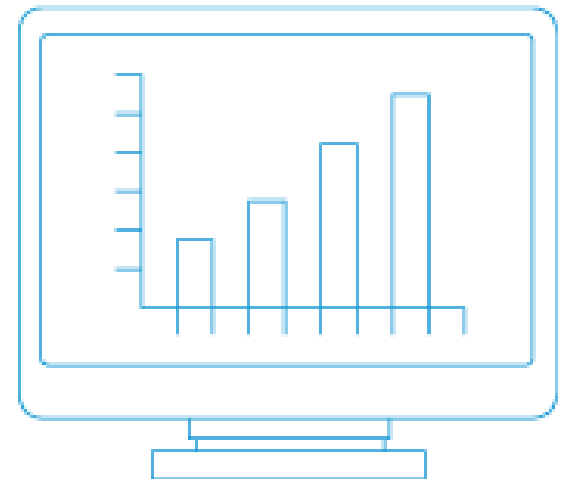
# Getting started

- Select your record type
- Determine your criteria
- Define your output
- Determine your 'main line' preference for transaction searches



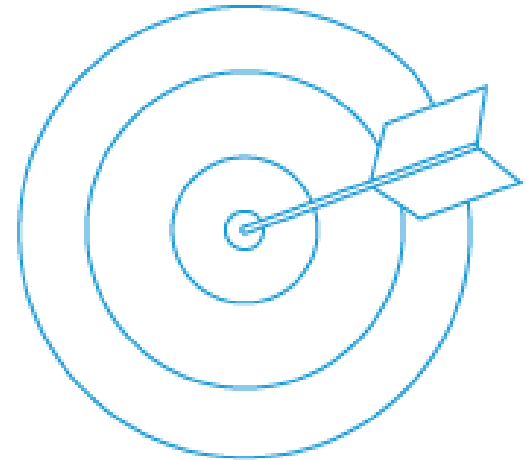
# Formatting your data

- Sorting your data
- Summarizing your data
- Drill down
- Highlight results based on criteria



# Emailing your results

- Choose your Recipients
- Determine Triggers or Schedule
- Customize your email



# Viewing your results

- Add a shortcut for saved searches
- Add to dashboard
- Global search (sea:)

DEMO



# Example

- Display all vendor bills by vendor
- Display totals by vendor (Group & Sum)
- Highlight if amount is greater than \$30K
- Review email options
- Add as a shortcut and/or to your dashboard

# Saved Search Examples

- System notes
- Transaction join fields
- Formulas:
  - Adding/subtracting fields
  - NVL > convert a null value to 0
  - Upper/lower/proper case & length
  - Concatenate 2 or more fields
  - Return a portion of a field (substring)
  - Dates ({today})
  - Case when



## Example - System Notes

- Display any changes to an existing customer
- Filter to only changes on customer name

## Example – Transaction join fields

- Display a field from customer record on sales transaction search
- Display customer invoice fields, related sales order fields, and related customer payment fields on one search

# Example – Formulas

- Adding/subtracting fields
  - Amount minus tax = subtotal
- Convert a null value to 0
  - If tax amount is zero, amount minus tax
- Upper/lower/proper case & length
  - Item number, length of item description
- Concatenate 2 or more fields
  - Item number & description
- Return a portion of a field
  - Display characters 3-8 of a vendor name
- Dates
  - Days transaction is past due
  - Parse month/year/day from date field
  - Add months to date
- Case when
  - Show total quotes, sales orders, & invoices per customer

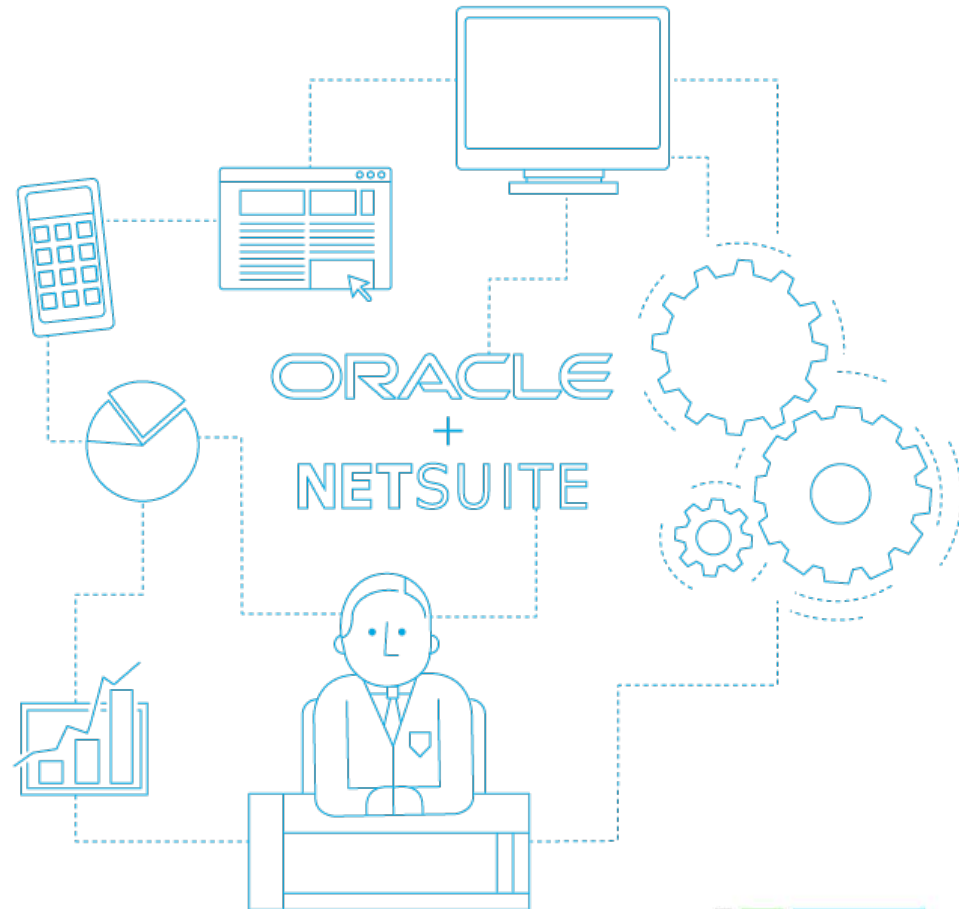
## In summary...

- Saved Searches are a powerful tool that can be leveraged for not only providing insights in to your data but for automating processes and increasing efficiencies in your business processes.
- Check out our blog for posts related to new tips and tricks for using saved searches!

[www.clouderpadvisor.com](http://www.clouderpadvisor.com)

# RSM's NetSuite optimization services

- SuiteCommerce
- Advanced Revenue Management (ARM)
- Multi-Book
- SuitePeople
- SuiteSuccess
- Reports & Saved Searches
- Workflow Development
- Code Upgrades & Optimization
- System Documentation
- Roles & Permissions
- SuiteScript Development
- Integration
- Training
- Support



# Next user group webcast – March 14th

## Make the most of your budgeting and planning

RSM is offering our annual NetSuite year-end webcast. This complimentary webcast will focus on budgeting and planning processing and include a Q&A session.

Highlights will include:

- Standard NetSuite Budgeting
- Budget to actual reporting
- Adaptive Insights

Presenter: Matt Bailey & Shaz Milan

### Event details:

Tuesday, March 14, 2018

2:00 p.m. EST | 1 p.m. CST | noon MST | 11:00 a.m. PST



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