

NETSUITE USER GROUP WEBCAST

Saved Searches Tips & Tricks

February 22nd, 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

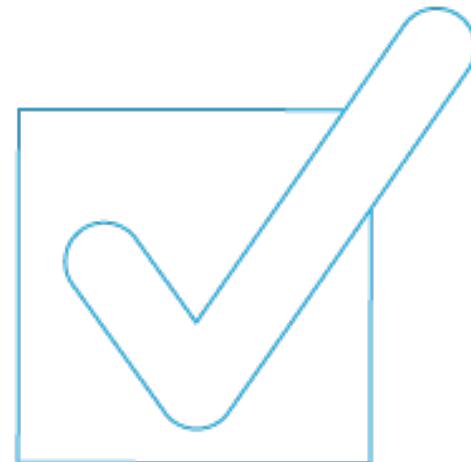
Agenda

- 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



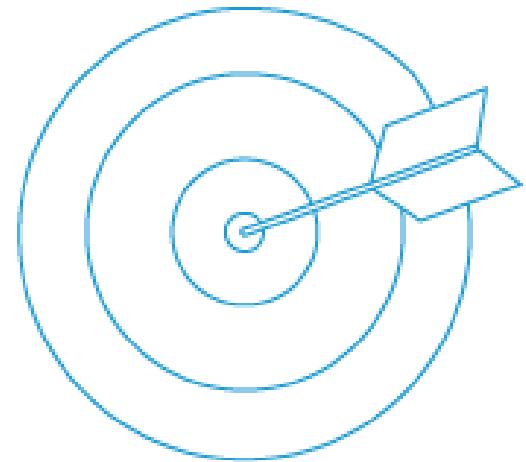
Formatting your data

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



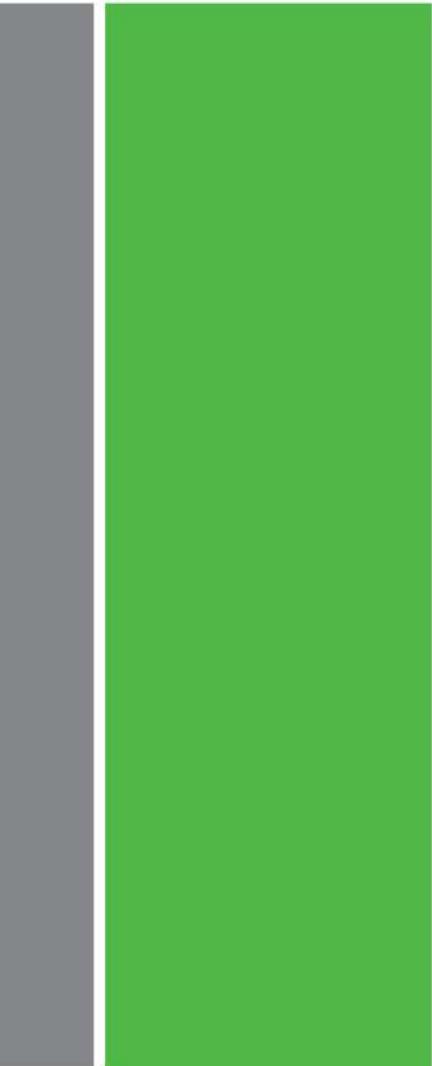
Emailing your results

- 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:)



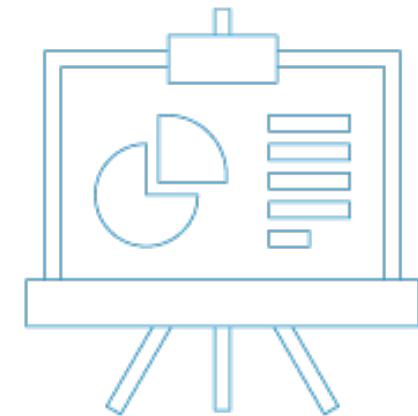
DEMO

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

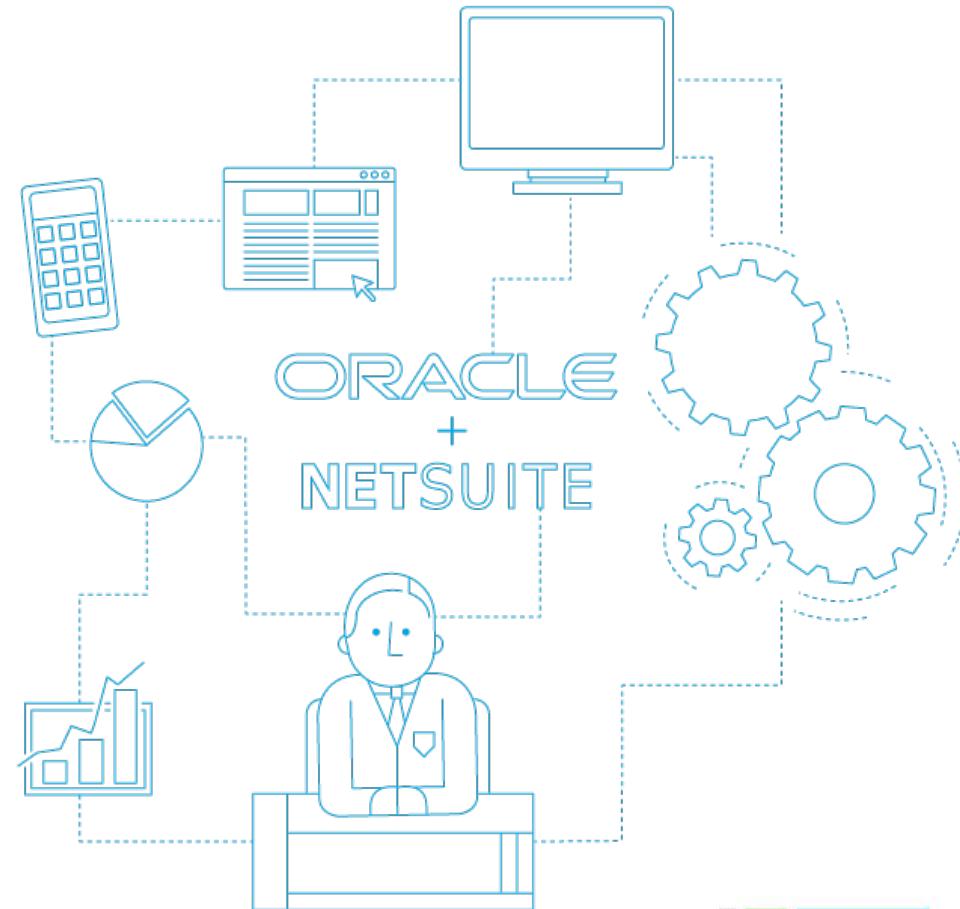
In summary...

- 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!

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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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