Saved Search Tips as collated by Lisa Reed (lisa.reed@acceler8.tech)

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Basic Search Tips

Most common search type is Transactions

Remember transactions include posting and non posting transactions.

Criterias:-

Posting:	Yes or No – eliminates non-GL impact entries like Sales Orders
Main Line:	Both, Yes or No – header info or detail line info
Tax	Yes or No – do you want the tax line associated with the transaction?
Shipping	Yes or No – do you want the shipping line associated with the transaction?

One of the main challenges is duplicate lines and this is dealt with via Main Line being No – that will only show the line detail of the transaction.

Common Issue

Net Amount and Foreign Amount – whether the amount is debit or credit is not consistent as the system takes into account what account type it is. So a liability will show a positive amount but in fact it is really in a credit position aka negative.

Use **Formula, Currency**

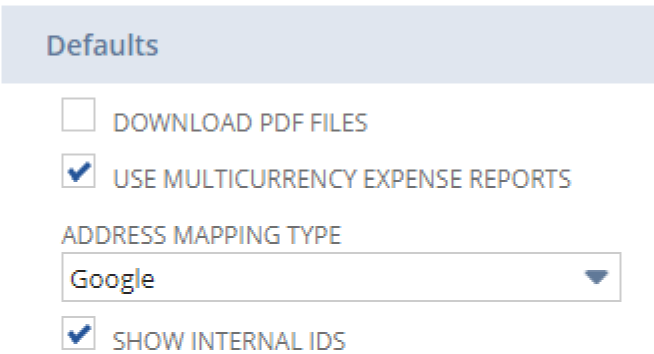
Net Amount and use this:-	NVL({debitamount},0)-NVL({creditamount},0)
Foreign Net Amount	NVL({debitfxamount},0)-NVL({creditfxamount},0)

Including Line Numbers in Transaction Searches

This is helpful and necessary when you are planning to do CSV updates.

To display internal ID – you must go to your Set Preferences:-

Under General,



A sales order will have an internalid but has multiple lines – this is why the field "**Line ID**" is most useful.

Note that line numbers are not guaranteed to be in order, even if results include all lines of a transaction. To make line numbers contiguous in search results, add a Formula(Numeric) field as a results field on the search, with the following formula expression:

RANK() OVER (PARTITION by {internalid} ORDER BY {linesequencenumber})

Referencing Field IDs

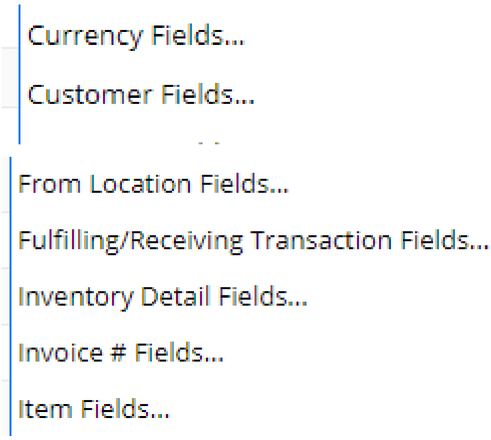
You can reference the ID values for List/Record type fields in search formulas. To include a field's ID in a formula, use the format {field_name.ID}.

Avoiding Divide By Zero Errors

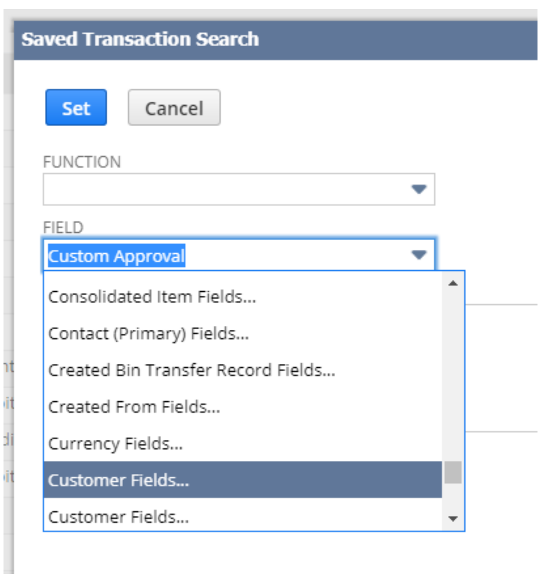
If you use division in a formula, please use **Y/nullif(X,0)** in place of Y/X.

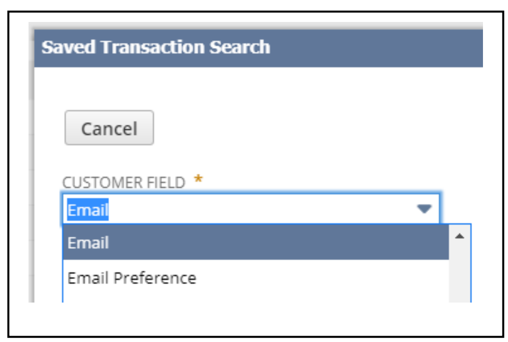
Using Joined Search Field Values

To get related records, remember at the bottom of the listing of the fields, there are numerous related records. For example,



Should you need to use any of these related records in your search criteria, you can find the field easily:-





And after making those selections, it will return **{customer.email}**

With time you will get to know the tables and field names.

Convert date to text of month

Select Formula (Text) and enter the following formula:

TO_CHAR ({FIELDNAME}, 'MONTH')

10/28/2019 would return October

Retrieving the Day of the Week for a Date on a Custom Record

Select Formula (Text) and enter the following formula:

TO_CHAR ({custrecordname_date}, 'DAY - DD Mon')

Displaying the Percentage Variance between Custom Record Values

On the Results subtab, select Formula (Percent), a summary type of Group, a Function of Round to Hundredths, and (if you want) a custom label such as Average. Enter the following formula:

ROUND (({custrecord_value1} / {custrecord_value2} - 1.00) * 100, 2)

Calculating Days Remaining Until Task Complete

You can calculate the number of days remaining for a task to be completed based on the value entered in the Due Date field. Select Formula (Numeric) and enter the following formula:

ROUND({enddate}-{today})

Displaying Multiplier from Cost to Base Price for Items

When you review a list of the same model items, you can ensure your markup is similar for all of them. Select Formula (Numeric) and enter the following formula:

ROUND ({price}/nvl({cost},1),2)

Comparing Summed Amounts Across Two Fiscal Years for Transactions

This formula uses the DECODE function which has since been replaced by the CASE function.

On the Criteria subtab, check the **Use Expressions box** and enter the following on two separate lines:

(Date is within this fiscal year to date OR Date is within last fiscal year to date).

On the Results subtab, enter the following formulas:

- If the fiscal year starts in July:
  - For current year to date, Formula (Numeric), SUMMARY TYPE = Sum:

DECODE(TO_CHAR(ADD_MONTHS({trandate},6),'YYYY'), TO_CHAR(ADD_MONTHS({today},6),'YYYY'),{amount},0)

For previous year to date, Formula (Numeric), SUMMARY TYPE = Sum:

DECODE(TO_CHAR(ADD_MONTHS({trandate},6),'YYYY'), TO_CHAR(ADD_MONTHS({today},-6),'YYYY'),{amount},0)

If the fiscal year is the calendar year:

For current year to date, Formula (Numeric), SUMMARY TYPE = Sum:

DECODE(TO_CHAR({trandate},'YYYY'),TO_CHAR({today},'YYYY'),{amount},0)

For previous year to date, Formula (Numeric), SUMMARY TYPE = Sum:

DECODE(TO_CHAR({trandate},'YYYY'), TO_CHAR(ADD_MONTHS({today} ,-12),'YYYY'),{amount},0)

- NOTES:
  - ADD_MONTHS compensates calendar year for current fiscal year (6) and previous fiscal year (- 6) if fiscal year begins in July, and compensates for previous year (-12) if fiscal year is the same as calendar year.
  - TO_CHAR extracts the (fiscal) years.
  - DECODE(value1, value2, {amount}, 0) compares the transaction date's fiscal year value (value1) to the current or previous fiscal year (value2). If equal, use amount; otherwise zero it out.

Calculating Days a Sale Is In Effect

You can use a formula to calculate the days a sale is in effect up to the date it is canceled, like a contract age. If there is no cancellation date, substitute today's date. Select Formula (Numeric) and enter the following formula:

ABS({custom_field_startdate}-nvl({custom_field_cxldate},{today}))

You can use a similar formula to calculate the days remaining on a contract based on the end date field.

Calculating Time Taken to Approve Orders

Do a Transaction search, with filters of Type is Sales Order, Main Line is true, System Notes : Field is Document Status, and System Notes : New Value is Pending Fulfillment.

Add a Formula(Numeric) results column with the formula **{systemnotes.date}-{datecreated}**. You can add a Custom Label that indicates this calculation is the time taken to approve each order.

Variables and corresponding synonyms

The following table shows the variables and corresponding synonyms available for your use in NetSuite.

Variable	Synonym	Description
{today}	{now}	Returns current date according to user's time zone, date, and time formatting.
{me}	{user}, {user.id}	Returns current user ID.
{userrole}	{userrole.id}	Returns current role ID.
{user.department}	{userdepartment.id}	Returns current user's department ID.
{user.location}	{userlocation.id}	Returns current user's location ID.
{user.subsidiary}	{usersubsidiary.id}	Returns current user's subsidiary ID.
{user.class}	{userclass.id}	Returns current user's class ID.
{usercurrency}	{usercurrency.id}	Returns current user's currency.

For example, on a Case Search form, you can:

- Define the formula **{today}-{startdate}** to return a case's number of days open as a new column in search results.
- Define the formula ({today}-{startdate}) > 3 as a search filter to return only cases open for greater than 3 days.

Formula (Numeric) Field to sum up desired GL accounts.

In the Formula Field, enter the expression:

((CASE WHEN {account} = 'GLxx01' THEN {amount} * 1 ELSE {amount} * 0 END) + (CASE WHEN {account} = 'GLxx02' THEN {amount} * 1 ELSE {amount} * 0 END) + (CASE WHEN {account} = 'GLxx03' THEN {amount} * 1 ELSE {amount} * 0 END))

This methodically goes through each scenario and you have multiple case statements!

Formula (Numeric) Field using the OR function

Basically you use IN and take note of all the brackets!

case when ({customer.category} IN ('Distributor', 'Service Provider', 'Etailer', 'Retailer') AND {custbody_redi_cost_gp_total}>199.99) THEN (.03*({amount}-(case when {taxtotal} is null then 0 else {taxtotal} end)-{shippingcost})) else 0 end

Favorite Suite Answers:-

Check out:-

Item 360 > Historical Item Sales Tab > Show in Transaction Units

Published 09/05/2018 03:29 AM | Updated 08/05/2019 09:48 PM | Answer Id: 77707

Item 360 > Monthly Item Qty Sold > Show in Transaction Units

Published 09/05/2018 03:10 AM | Updated 08/05/2019 09:48 PM | Answer Id: 77706

Create AR Aging Report and A/R Aging Detail using Saved Search

Published 05/30/2019 08:37 PM | Updated 08/06/2019 12:50 AM | Answer Id: 85341

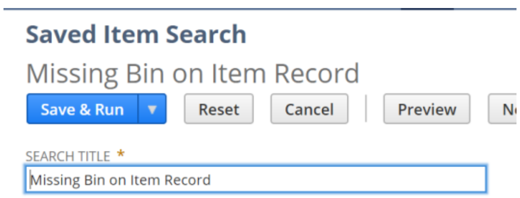
Favorite Searches:-

Missing Bin records on item card.

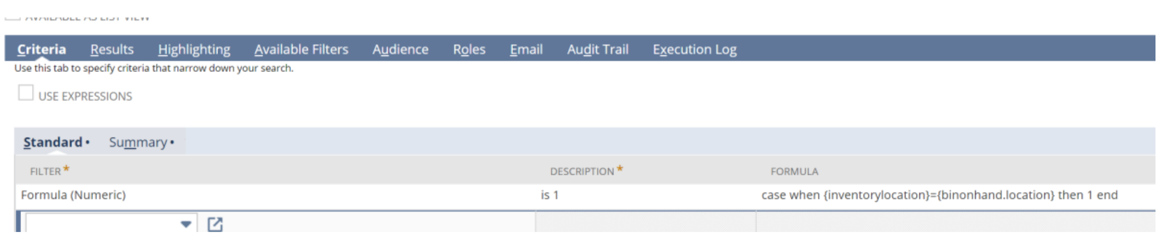
Advance Bin Management is turned on means users can use a bin that is not assigned to a particular item record. However, when you look at that item record, under Purchasing/Inventory and Bin Numbers – the on hand qty does not agree to the bin qty.

You can educate your users to simply look at the tab called Inventory Detail

However, users may find it frustration to see inconsistent information.

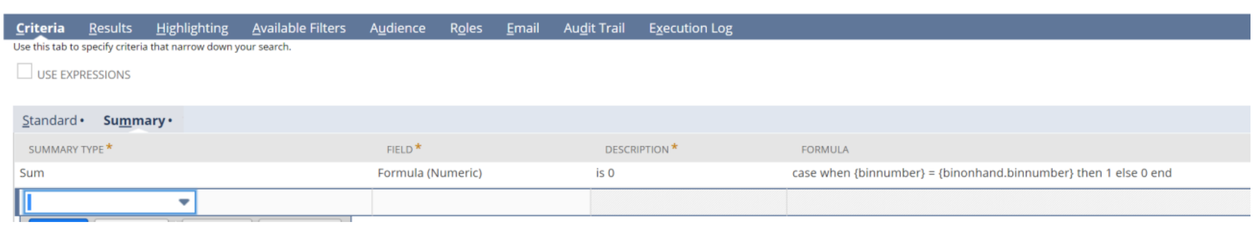


Standard Criteria tab

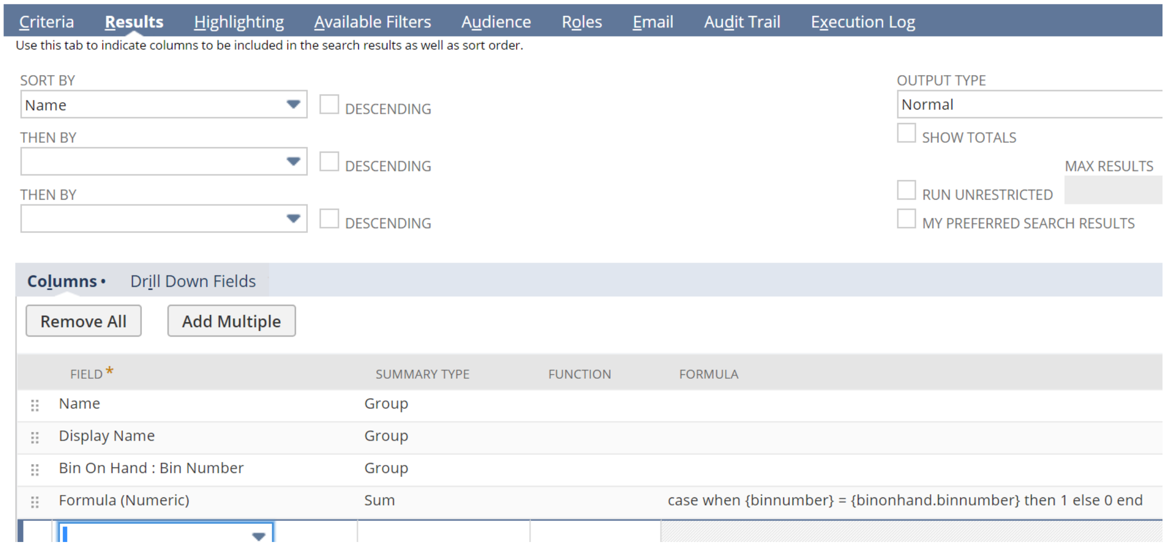


case when {inventorylocation}={binonhand.location} then 1 end

Summary Criteria Tab



case when {binnumber} = {binonhand.binnumber} then 1 else 0 end



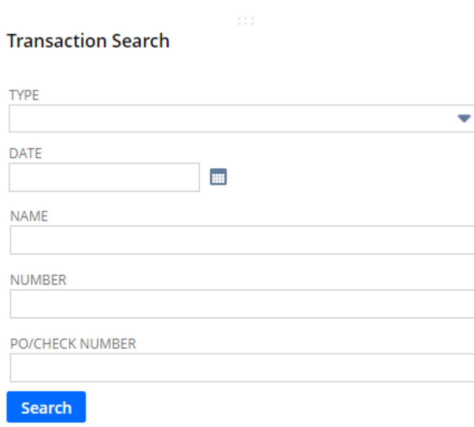
Formula is

case when {binnumber} = {binonhand.binnumber} then 1 else 0 end

This output can form the basis of a script and/or CSV update.

Searching for all transactions of a certain amount

On your dashboard, you can have this:-



However, you really want to find all transactions that are for a particular amount, like $115

To hunt for transactions that have the amount being $112.36 would be helpful. Having this on the dashboard is most helpful for AP and AR users as they look for misallocated entries!

To do this you need to create a custom Saved Search ** details o/s **

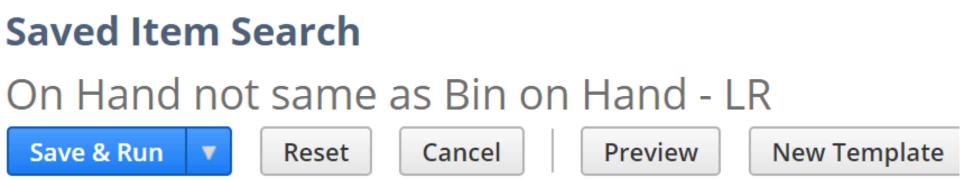
Discrepancy between Bin on Hand Qty vs On hand Qty

This can occur when going live with BINs after you have already been live on NS!

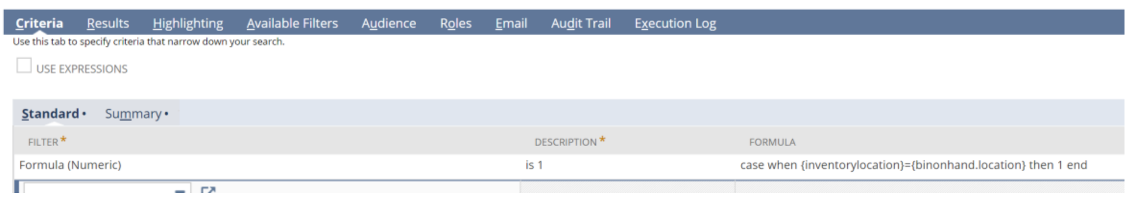
Firstly, lock down the accounting periods to prevent users modifying any item fulfillments or item receipts prior to Go Live date on Bins.

Should this happen, it will cause inconsistency with on hand quantity vs. bin on hand quantity.

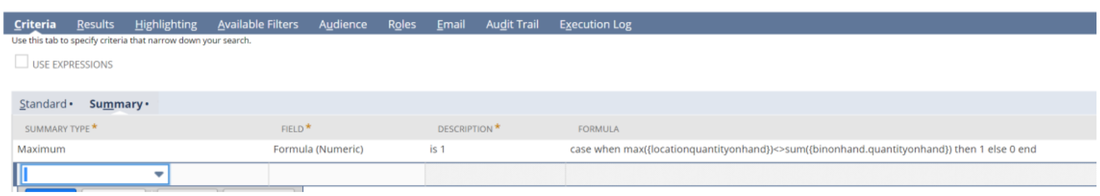
To find these issues:-



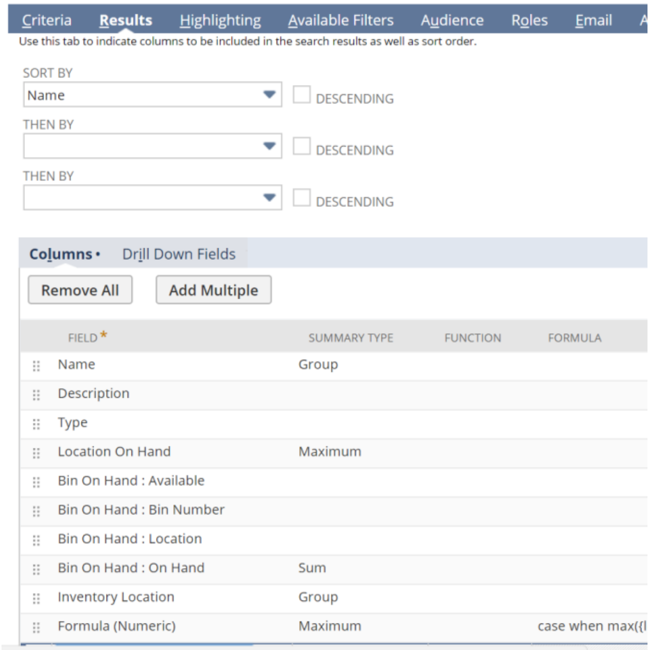
Standard - **case when {inventorylocation}={binonhand.location} then 1 end**



Summary – Maximum type



case when max({locationquantityonhand})<>sum({binonhand.quantityonhand}) then 1 else 0 end



Formula is Summary Type – Maximum:-

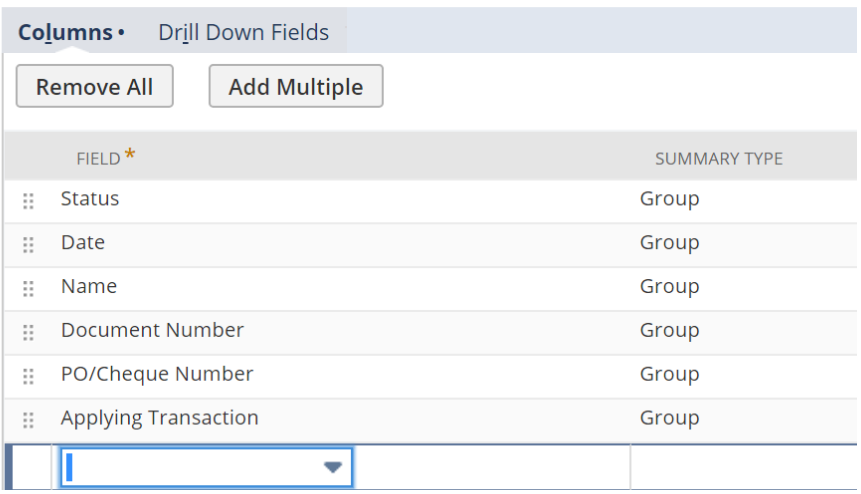
case when max({locationquantityonhand})<>sum({binonhand.quantityonhand}) then 1 else 0 end

Drop Ship Orders with no corresponding purchase order generated

Standard Criterias

Type	Sales Order
Status	Is not sales order billed or Sales Order closed
Applying transaction: Document Number	Is Empty

Results:-



This shows all sales orders that do not have an applying purchase order

Customer Deposits details as per their statement

To understand what transactions contribute to the deposit balance

Criteria

Type	Customer Deposit
Status	Customer Deposit: Not Deposited; Customer Deposit: Deposited
Main Line	False (No)

Results

You have to group various fields

Document Number	Group	
Applied To	Group	
Date	Group	
Name	Group	
Applying Transaction: Amount	Sum	
Amount	Maximum	
Formular: Currency:-	max({amount})-sum(ABS({applyingtransaction.amount}))	UNAPPLIED
Formular: Currency:-	max({fxamount})-sum(abs({applyingtransaction.fxamount}))	

In the filter – put customer – and then you can run this saved search, enter the customer name and know exactly what the deposit balance is made up of.

Open Demand for items

If you run inventory projections, you need a way of filtering the dates of transactions in the system.

Criteria

Posting	False
Status	None of Sales Order-Billed; Sales Order-Closed; Sales Order-Cancelled
	Purchase Order:Billed, and so on
Type	Sales Order; Purchase Order
Item: Type	Inventory Item

Use Expressions to filter on a date that is on the purchase order form vs a date on the sales order form

Results

Item: Name	Group
On Hand	Maximum - **nvl({item.quantityonhand},0)**
Qty on Sales Order	Sum
	case when {type} = 'Sales Order' then ({quantity}-{quantityshiprecv}) else 0 end
Qty on Purchase Order	
	CASE WHEN {type} = 'Purchase Order' AND ({quantity}-{quantityshiprecv}) < 0 THEN 0 ELSE CASE WHEN {type} = 'Purchase Order' AND ({quantity}-{quantityshiprecv}) > 0 THEN ({quantity}-{quantityshiprecv}) ELSE CASE WHEN (({quantity} IS NULL) OR ({quantityshiprecv} IS NULL)) THEN 0 ELSE 0 END END END
Net Projected on Hand	***Search can't do it due to the complexity of Qty on Purchase Order***

Negative item Projections

This has NO date filtering and it is an ITEM SEARCH. So date filtering is not possible.

Criteria

Type Inventory Item

Formula > 0 NVL({quantitycommitted},0) +NVL({quantitybackordered},0)

Formula < 0 ***NVL({quantityonhand},0)-NVL({quantitycommitted},0)-NVL({quantitybackordered},0)+NVL({quantityonorder},0)***

Results:-

Name

On Hand

Committed

Total Ordered, Formula Currency **NVL({quantitycommitted},0) +NVL({quantitybackordered},0)**

Available Today, Formula Currency **NVL({quantityonhand},0)-NVL({quantitycommitted},0)-NVL({quantitybackordered},0)**

On Purchase Order Field On Order

Balance after PO Receipt, Formula Currency

NVL({quantityonhand},0)-NVL({quantitycommitted},0)-

NVL({quantitybackordered},0)+NVL({quantityonorder},0)

Aged AR Aging

Current: **case when {daysoverdue} = 0 then {amountremaining}When {type} in ('Credit Memo', 'Payment') and ({today}- {trandate})=0 then {amount} else 0 end**

Overdue **case when {daysoverdue} >0 then {amountremaining} When {type} in ('Credit Memo', 'Payment') and ({today}- {trandate}) >0 then {amount} else 0 end**

AP Projected Cash Outlay

Type	is any of Bill, Bill Credit
Main Line	is true
Amount	is greater than 0.00
Due Date/Receive By	is not empty
Status	is any of Bill:Open, Bill:Pending Approval

Columns • Drill Down Fields •

Remove all | Add Multiple

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	SUMMARY LABEL
Due Date/Receive By						
Name	Group					
Amount	Sum					
Formula (Currency)	Sum		CASE WHEN TRUNC {duedate}-{today} <= 7 THEN {amount} END		Week 1 (Current)	Week 1
Formula (Currency)	Sum		CASE WHEN TRUNC {duedate}-{today} BETWEEN 7 AND 14 THEN {amount} END		Week 2 (+7)	Week 2
Formula (Currency)	Sum		CASE WHEN TRUNC {duedate}-{today} BETWEEN 15 AND 21THEN {amount} END		Week 3 (+14)	Week 3
Formula (Currency)	Sum		CASE WHEN TRUNC {duedate}-{today} BETWEEN 22 AND 28 THEN {amount} END		Week 4 (+21)	Week 4
Formula (Currency)	Sum		CASE WHEN TRUNC {duedate}-{today} BETWEEN 29 AND 35 THEN {amount} END		Week 5 (+28)	Week 5
Formula (Currency)	Sum		CASE WHEN TRUNC {duedate}-{today} BETWEEN 36 AND 42 THEN {amount} END		Week 6 (+35)	Week 6
Formula (Currency)	Sum		CASE WHEN TRUNC {duedate}-{today} > 43 THEN {amount} END		Future	Future

Week 3 outlay says:-

CASE WHEN TRUNC {duedate}-{today} BETWEEN 15 AND 21 THEN {amount} END

The issue with this is credit memos – they do NOT have a due date!