



# SuiteAnalytics: Advanced Searches

## Course Description

Do you already know the basics of saved searches? Acquire the skills to power up your saved searches using formulas, structured query language (SQL) functions and HTML.

During this course, you will discover the tools you need to explore data to get the information you need.

You will learn SQL and HTML syntax, allowing you to incorporate functions and code into your saved searches and take advantage of their powerful data transformation and formatting functionality.

You will learn ways to utilize saved searches in notifications, reminders, portlets and search forms, creating tools to improve the efficiency of your day-to-day activities.

## Who Should Attend

NetSuite administrators, super users and users responsible for creating saved searches who want to take their skills to the next level.

## Prerequisites

- Ability to create saved searches in NetSuite from scratch: add criteria, add and arrange results, add filters, and work with highlights. Prior attendance in **SuiteAnalytics: Financial Reports and Searches** or **SuiteAnalytics: Reports and Searches** is recommended.

## Key Tasks

How do I:

- Find the data I am looking for?
- Use dynamic variables, main line and expressions in criteria?
- Embed formulas in saved search results, criteria and highlights?
- Use text, date, numeric and conditional SQL functions to transform data?
- Use HTML to format results, create links and add images?
- Group and aggregate results?
- Create reminders, notifications, custom search forms, lookup searches and sublists?
- Deploy saved searches?
- Understand best practices when creating and deploying saved searches?

- Basic NetSuite user skills, such as global search, navigation to records, adding portlets to the Home Dashboard, and use of the Create New menu and Shortcuts menu.
- A background in using SQL and HTML is helpful, but not required.

## Topics

**Introduction to Saved Searches:** Review the basics of creating saved searches, including selecting a dataset, reviewing the saved search interface, and adding criteria, results, filters and highlights.

**Exploring Data:** Explore data structures using the SuiteScript Records Browser. Determine the primary data source for your saved search. Examine record forms to understand your data. Set preferences to expose the internal ID in Field Help.

**Setting Criteria:** Avoid common errors. Use dynamic criteria. Use expressions to set criteria. Create complex criteria logic by grouping clauses. Use the Main Line criterion in transaction searches.

**Introduction for Formulas:** Describe the available formula types. Use variables in formulas. Use the Formula Editor. Add fields to your formula through their field id.

**Introduction for Functions:** Write correct function syntax. Use the function field. Access help resources for functions.

**Text Formulas and Functions:** Write correct text formula syntax. Concatenate text phrases to variables and functions. Use text formatting and substring functions.

**Text Datatype Conversion:** Recognize when datatype conversion is necessary. Use the TO\_CHAR function to convert dates and numbers to text. Format dates using date formatting elements. Format currency and numbers using numeric formatting elements.

**Numeric Formulas and Functions:** Create calculations in numeric formulas. Use numeric functions. Supply dynamic parameters by nesting numeric functions. Convert text fields into numeric data.

**Date Formulas and Functions:** Create calculations in date formulas. Use date functions. Create complex formulas by nesting date functions. Recognize when to use numeric formulas when working with date information. Convert text into dates.

**Conditional Logic Formulas:** Display values based on conditional logic. Use NVL functions and CASE expressions. Utilize conditional operators. Create CASE expressions using standard and selector syntax.

**Rank Formulas:** Create formulas to rank data based on a selected field. Use RANK and DENSE\_RANK functions. Rank over partitions.

**Formulas in Criteria and Highlights:** Create criteria based on formulas. Highlight information based on formulas.

**Group and Aggregate Functions:** Create Summary and Detail saved searches. Use group functions in criteria and highlights. Utilize the “When Ordered By” field. Create charts using group functions. Use single-row aggregate functions.

**Introduction to HTML:** Recognize applications for HTML within saved searches. Review HTML syntax. Follow basic rules for working with HTML in saved searches. Access HTML reference resources.

**HTML for Formatting:** Recognize opportunities for using HTML for formatting. Utilize HTML to format custom labels. Utilize HTML to format search results. Concatenate variables and formulas with HTML text strings. Follow formula type and datatype rules when using HTML.

**HTML for Links:** Write HTML syntax for links. Investigate NetSuite records and URLs to create links to internal pages. Concatenate variables into HTML link syntax. Use the File URL field.

**HTML for Images:** Write HTML syntax for images. Add images to Saved Searches. Use images in formulas and functions.

**Matrix Searches:** Create matrix searches using group functions. Create subgroup totals using aggregate functions.

**Transaction Searches:** Display a transaction chain of related records. Extract field information from transaction related records.

## SuiteAnswers

Get answers to your support and training related questions:

- Go to Videos to find Getting Started tutorials.
- Go to Videos to watch New Feature Previews to learn about the latest NetSuite release.

**Audit Searches:** Use system notes to create audit searches.

**Lookup Searches:** Create Lookup Searches. Assign Preferred Search Forms.

**Sublists:** Create a custom sublist using a saved search. Add a custom sublist to a record.

**Notifications:** Create searches for notification. Schedule searches for distribution. Subscribe to a search notification.

**Custom Reminders and KPIs:** Create and set up custom reminders. Create and set up custom KPIs.

**Search Permissions and Deployment:** Set the audience for your saved search. Deploy searches to lists, dashboards, the reminders portlet and menus.

**Best Practices:** Review best practices when creating, deploying and troubleshooting saved searches.

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Features and functions covered in this course might not reflect those in your purchased NetSuite account.