



Rocky Mountain NetSuite User Group

# TIPS & TRICKS

## GLOBAL SEARCH SHORTCUTS & OTHER SHORTCUTS

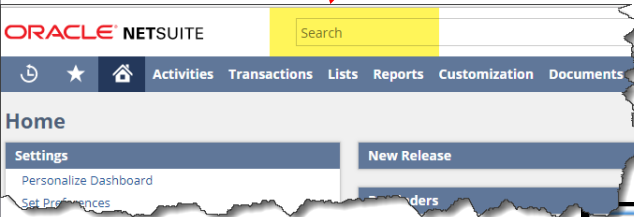
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JANUARY 24, 2024

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PlantScan Corporation (manufacturer/distributor)

# Set Preferences > Analytics Tab

## Page Search checkbox



When you enter keywords in the global search field, search results include all hierarchy levels (bread crumbs) within the navigation menus so you can find exactly where it came from

The additional results appear under a **Current Page Results** heading.

### Set Preferences

[Save](#) [Cancel](#)

[General](#) [Appearance](#) [Transactions](#) [Analytics](#)

#### Search

Show List When Only One Result

Quick Search Uses Keywords

Popup Search Uses Keywords

Include Inactives in Global & Quick Search

Popup Auto Suggest

Global Search Auto Suggest

**Page Search**

Global Search Sort by Name/ID

Global Search Customer Prefix Includes Leads and Prospects

Global Search Includes Transaction Numbers

product release

#### Global Search Results

- Search: **\*\*sublist - product release PO**
- Page: **Accessories and Misc Product Release by Date**
- Page: **All Product Release by Date**
- Page: **All Product Release by Date w/ \$\$\$ Open** [Edit](#)
- Page: **All Products Release by Date** [Edit](#)
- Page: **All Products Release by Date 2** [Edit](#)
- Search: **Default Product Release** [Edit](#)
- Search: **Denver Precision Product Release** [Edit](#)
- Dashboard Tile: **DPP Product Release** [Edit](#)
- Navigation Shortcut: **DPP Product Release Report** [Edit](#)

[Show all results](#)

#### Current Page Results Alt+Shift+G

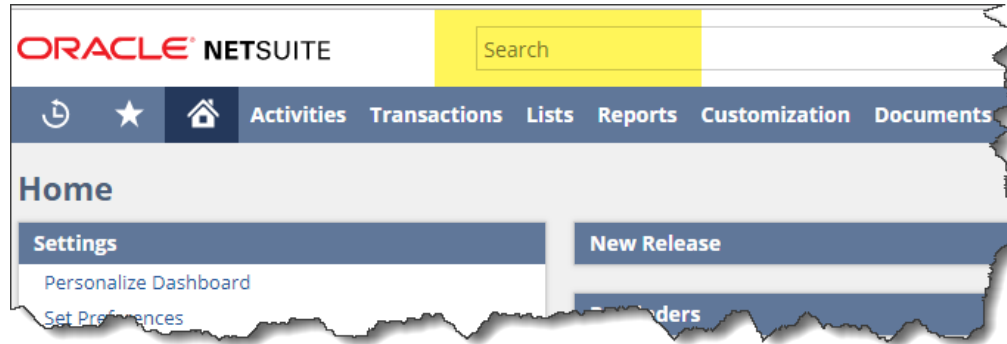
- Menu: **Product Release**
- Menu: **Bach Product Release Report Results**
- Menu: **Search/Reporty by Category > Margie > Product Release**
- Menu: **Search/Reporty by Category > Margie > Product Release > New**
- Menu: **Reports > Saved Reports > Accessories and Misc Product Release by Date**
- Menu: **Reports > Saved Reports > Accessories and Misc Product Release by Date > Customize**
- Menu: **Reports > Recent Reports > All Product Release by Date**
- Menu: **Reports > Saved Reports > All Product Release by Date > Customize**
- Menu: **Reports > Saved Reports > All Product Release by Date w/ \$\$\$ Open**
- Menu: **Reports > Saved Reports > All Product Release by Date w/ \$\$\$ Open > Customize**

**Alt+Shift+G** only displays the Current Page Results



# Global Search

Appears on every page



Operator	Description
★ prefix: (prefix followed by colon) (see next slide)	Find specific record type, saved searches, reports, pages, ...
% (percent sign) , _ (underscore)	Wildcards
OR (in capital letters)	Multiple text strings – inclusive OR
Blank between text strings	Multiple text strings – implied AND
+ (plus sign)	Include inactive records

Uses SQL “Contains” versus “StartsWith”

Example: if enter RMA1214 NetSuite would return cases like CA2855 RMA1214...

# Global Search – Prefixes



A search prefix is made up of the first few characters of a record type plus a colon (:) or a caret (^).

Examples:

- **C:** returns cases, contacts, and customers
- **CU:** returns customers \*
- **I:** returns any item, invoice, image
- **Inv:** returns invoice, inventory item
- **Invo:** invoice
- **A:** assembly items, assembly build
- **Serv:** Service items
- **Se:** Saved searches
- **HELP:** finds topics in the NS Help Center

Prefix	Record Type
bil	Vendor Bill
cam	Campaign
cash	Cash Sale
con	Contact
cu	Customer
emp	Employee
est	Estimate
ev	Event
exp	Expense Report
fi	File
invo	Invoice
iss	Issue
it	Item
opp	Opportunity
par	Partner
ph	Phone Call
sales	Sales Order
ven	Vendor

+ more

Note: if only 1 record to be returned and you want it to be in edit mode, capitalize first letter of prefix.

\* Note: for **cu** prefix to include leads and prospects, go to Home > Set Preferences > Analytics subtab

GLOBAL SEARCH CUSTOMER PREFIX INCLUDES LEADS AND PROSPECTS



# Set Preferences > Analytics Tab

## Include Inactives checkbox

To find inactive records  
use '+' suffix in search bar

Example without + sign

i:front panel

- Inventory Item: RM MP : Front Panel Laser Port 67-0000-0139
- Inventory Item: RM MP : Front Panel PSn 67-1000-0140
- Inventory Item: RM MP : Front Panel, MX Case (GN) 67-0002-0000

### Search

SHOW LIST WHEN ONLY ONE RESULT

QUICK SEARCH USES KEYWORDS

POPOP SEARCH USES KEYWORDS

INCLUDE INACTIVES IN GLOBAL & QUICK SEARCH

POPOP AUTO SUGGEST

GLOBAL SEARCH AUTO SUGGEST

GLOBAL SEARCH SORT BY NAME/ID

GLOBAL SEARCH CUSTOMER PREFIX INCLUDES LEADS AND PROSPECTS

Example with + sign

i:front panel+

- Inventory Item: RM MP : Front Panel 67-1000-0900
- Inventory Item: RM MP : Front Panel Laser Port 67-0000-0139
- Inventory Item: RM MP : Front Panel PSn 67-1000-0140
- Inventory Item: RM MP : Front Panel, MX Case (GN) 67-0002-0000

Inactive  
item



# Global Search – Wildcard

What the He\_k? I didn't know you could do that!

**Percent (%)** - matches a string of any length (including zero)

**Underscore (\_)** - matches any single character.

Examples:

- **cu:%max** to search for customers with records containing the letters “max”, but potentially preceded by other letters. Results could be: Maxwell House, IMAX, Flomax, and Mad Max.
- **inv:115%** to return all invoices containing 115 followed by anything else
- **cu:m\_x** to search for customers with records containing the letters “m” and “x” with any other single character separating the two. Possible results could be: Maxwell House, Mexico Travel, and That Girl Has Moxie.

# Global Search – More Tips

## Multiple text strings - OR

- uppercase OR as a separator between keywords to search for multiple matches
- Example: **max OR macs OR machs** to search for records containing any of these three strings in one search.

## Search for exact text matches only

- Enclose the search string in quotation marks, or follow it with a backslash, to search for records containing only exact matches. Note that quotation marks or backslashes are not required for numeric keywords, as these searches return only exact matches.
- Example: **cu: "max"** or **cu:max\** to search for customers with a name of Max—Max Fischer LTD. Customers with names only containing the letters max, like Maxam, Lomax, or Maximum Tires, are NOT returned.

**Use Keywords that are at least 3 characters long:** If you have a search terms that is only 2 characters long then a workaround is to use a prefix before it. For example, vendor SC will return nothing, but with the prefix before it, v:SC, will find the match. Best practice is to make sure all records have at least 3 characters to start.

# Global Search – More Tips

## Navigate quickly to NetSuite pages and reports

- Example: **page:cust** to return a list of pages with the name “cust” in any NetSuite page or report (i.e. Forecast by Customer, New Customer Sales, Page Hits by Customers, Online Customer Forms)
- Note: there is no way to distinguish between NetSuite pages, NetSuite reports, and customized reports

## Return a single result in edit mode – Capitalize first letter of search prefix

- By default, a single record returned by a global search opens in view mode.
- Examples:
  - **Emp:beth farkel** opens this employee's record in edit mode.
  - **Inv:115** opens invoice number 115 in edit mode.
- Note that you can also open a suggested matching record in edit mode by clicking the Edit link that appears at right when your cursor is over the record in the suggested matches list box.

## Include custom fields/records in global searches

- Search for matches in custom fields as well as name/ID fields. See [Including Custom Fields in Global Search](#) (Suite Answers 8403)
- In custom field check the ‘GLOBAL SEARCH’ checkbox
- If greyed out then not available for this field type (e.g. Checkbox)
- Can set global search for custom records (not by custom fields in custom records)



# Other Shortcuts

## Utilize Your Browser Find/Search


- **CTRL + F** = keyboard shortcut for “find” or “search” in browser
- Use on filters in search results (example on next page)
- Use when creating saved searches and reports to search for specific fields or filters to include
- Use for finding fields in search results on each page
- Not consistent for finding fields in report results – best to use the Find capability in the report results directly

**RMNSUG Closed Case Analysis Detail**  
**January 1, 2010 - December 31, 2023**

SUPPORT REP	CASE NUMBER	DATE STARTED	DATE CLOSED	NUMBER OF SOLUTIONS	ORIGIN	TIME TO CLOSE
AEM Support						
	1575	10/8/2009	1/28/2010	0	Web-My Account	112 days 11 hrs.
	1576	10/9/2009	1/28/2010	0	Web-My Account	111 days 9 hrs.
	1580	10/16/2009	1/28/2010	1	Web-My Account	104 days 9 hrs.
	1581	10/16/2009	1/28/2010	1	Web-My Account	104 days 9 hrs.
	1582	10/16/2009	1/28/2010	0	Web-My Account	104 days 9 hrs.
	1583	10/16/2009	1/28/2010	0	Web-My Account	104 days 9 hrs.
	1584	10/16/2009	1/28/2010	1	Web-My Account	104 days 9 hrs.

DATE (Custom) FROM 1/1/2010 TO 12/31/2023 MORE Find...

Refresh Return To Customization



# Example using Ctrl + F (browser find)

Home - NetSuite | calms | 1/1 | Search E... >>

ORACLE NETSUITE | PLANTSCAN | Search | H

Activities | Search/Reporty by Category | Transactions

### RMNSUG Closed Case Analysis Detail

PlantScan

#### RMNSUG Closed Case Analysis Detail

January 1, 2023 - December 31, 2023

SUPPORT REP	CASE NUMBER	DATE STARTED	DATE CLOSED	NUMBER OF SOLUTIONS	ORIGIN	TIME TO
AEM Support	CA2929	9/19/2022	1/9/2023	1	Web-My Account	112 da
	CA2931	9/19/2022	1/9/2023	0	Web-My Account	112 da
	CA2939	9/28/2022	1/9/2023	1	Web-My Account	103 d
	CA2941	10/4/2022	1/9/2023	0	Web-My Account	97 da
	CA2942	10/12/2022	1/9/2023	1	Web-My Account	89 da
	CA2945	10/18/2022	1/9/2023	0	Web-My Account	83 da
	CA2949	11/1/2022	1/9/2023	0	Web-My Account	69 da
	CA2950	11/1/2022	1/9/2023	0	Web-My Account	69 da
	CA2955	11/2/2022	1/9/2023	1	Web-My Account	68 d
	CA2956	11/3/2022	1/9/2023	2	Web-My Account	67 da
	CA2959	11/8/2022	1/9/2023	0	Web-My Account	62 d
	CA2961	11/11/2022	1/13/2023	0	Web-My Account	63 d
	CA2966	11/22/2022	1/9/2023	1	Web-My Account	47 day

COMPANY ANY OF SSC

DATE last fiscal year FROM 1/1/2023 TO 12/31/2023

Refresh Customize

- Brown & Brown
- Brown & Brown : Pat Emsley
- Budget
- BUSINESS 4 TODAY
- BUSINESS 4 TODAY : Nicola Reid
- Cal Switch
- CALMS Nordic AB**
- Capacitor and Components, L.L.C.
- CarGo
- CarGo : Conrad Ellis
- Castle Country Supply
- Cayuga Corporation
- Cayuga Corporation : Todd W. Gillis

OK All

COMPANY ANY OF SSC

DATE last fiscal year FROM 1/1/2023 TO 12/31/2023

Refresh Customize


Clicking on the drop down for Company brings up ALL companies. But using the Browser find command it can find the matches you want

# Shortcuts for Saved Searches Results





## Shortcuts for Direct List Editing

- **ALT + X** to edit the first direct editable field (left most column, first row.)
- **CTRL + Z** to undo the value of the selected field.
- **Tab** to move right through editable fields in a row and onto the next row
- **Shift + Tab** to move left through editable fields in a row.
- **Enter** to move down through editable fields in a column.
- **Shift + Enter** to move up through editable fields in a column.
- **CTRL + Shift** to change several fields at one time (example on next slide)

# Direct List Editing Shortcut – Change Multiple Fields at one time

 **Cases** List Search

View

     Show Inactives | EDIT

Quick Sort

New	Edit   View	Internal ID	Number	Subject	Price	Ship Date	Ship Track#
	<a href="#">Edit</a>   <a href="#">View</a>	12852	CA3110	RMA11032023SPA VPE 92-0049-0014 HHH Boatworks	\$125	12/14/2023	1ZE809920356789799
	<a href="#">Edit</a>   <a href="#">View</a>	12857	CA3113	RMA11132023SF VPE GN Plus 92-1121-0487	\$125	11/22/2023	1ZE809920355686535
	<a href="#">Edit</a>   <a href="#">View</a>	12862	CA3118	RMA11162023SPC VPE1000 92-0336-0076 American Plant Maintenance	\$140	12/12/2023	1ZE809920356454935
	<a href="#">Edit</a>   <a href="#">View</a>	12863	CA3119	RMA11162023SPD VPE1000 92-0337-0112 American Plant Maintenance	\$140	12/12/2023	1ZE809920356454935
	<a href="#">Edit</a>   <a href="#">View</a>	12860	CA3116	RMA11162023SPA VPE1000 92-0336-0082 American Plant Maintenance	\$150	12/12/2023	1ZE809920356454935
	<a href="#">Edit</a>   <a href="#">View</a>	12861	CA3117	RMA11162023SPB VPE1000 92-0337-0084 American Maintenance	\$150	12/12/2023	1ZE809920356454935
	<a href="#">Edit</a>   <a href="#">View</a>	12864	CA3120	RMA11162023SPE VPE1000 92-0339-0125 American Plant Maintenance	\$150	12/12/2023	1ZE809920356454935

This example we want to change the date from 12/12 to 12/13

# Direct List Editing – Change Multiple Values Simultaneously

## Cases

List Se

MAK Bill CASE VIEW

Edit View

New Case

Add



Show Inactives

EDIT



Quick Sort

Edit   View	Internal ID	Number	Subject	Price t	Ship Date	Ship Track#
Edit   View	12852	CA3110	RMA11032023SPA VPE 92-0049-0014 HHH Boatworks	\$125	12/14/2023	1ZE809920356789799
Edit   View	12857	CA3113	RMA11132023SF VPE GN Plus 92-1121-0487	\$125	11/22/2023	1ZE809920355686535
Edit   View	12862	CA3118	RMA11162023SPC VPE1000 92-0336-0076 American Plant Maintenance	\$140	12/12/20	1ZE809920356454935
Edit   View	12863	CA3119	RMA11162023SPD VPE1000 92-0337-0112 American Plant Maintenance	\$140	12/12/2023	1ZE809920356454935
Edit   View	12860	CA3116	RMA11162023SPA VPE1000 92-0336-0082 American Plant Maintenance	\$150	12/12/2023	1ZE809920356454935
Edit   View	12861	CA3117	RMA11162023SPB VPE1000 92-0337-0084 American Maintenance	\$150	12/12/2023	1ZE809920356454935
Edit   View	12864	CA3120	RMA11162023SPE VPE1000 92-0339-0125 American Plant Maintenance	\$150	12/12/2023	1ZE809920356454935

1. Check that the field is editable (if pencil shows)
2. Select first field
3. Shift and select last row (notice the dashed line around the fields that will be impacted)
4. Enter new value in first row
5. Press Enter

# Direct List Editing – Change Multiple Fields at one time

MAK Bill CASE VIEW: Results out NetSuite Analytics Warehouse Li

[Return To Criteria](#) [Edit this Search](#) [Add](#)

EDIT

NEW	EDIT   VIEW	INTERNAL ID	NUMBER ▲	SUBJECT 📄	PRICE T	SHIP DATE 📅	SHIP TRACK# 📄
	Edit   View	12852	CA3110	RMA11032023SPA VPE 92-0049-0014 HHH Boatworks	\$275	12/14/2023	1ZE809920356789799
	Edit   View	12857	CA3113	RMA11132023SF VPE GN Plus 92-1121- 0487	\$125	11/22/2023	1ZE809920355686535
	Edit   View	12860	CA3116	RMA11162023SPA VPE1000 92-0336- 0082 American Plant Maintenance	\$150	12/13/2023	1ZE809920356454935
	Edit   View	12861	CA3117	RMA11162023SPB VPE1000 92-0337- 0084 American Maintenance	\$150	12/13/2023	1ZE809920356454935
	Edit   View	12862	CA3118	RMA11162023SPC VPE1000 92-0336- 0076 American Plant Maintenance	\$140	12/13/2023	1ZE809920356454935
	Edit   View	12863	CA3119	RMA11162023SPD VPE1000 92-0337- 0112 American Plant Maintenance	\$140	12/13/2023	1ZE809920356454935
	Edit   View	12864	CA3120	RMA11162023SPE VPE1000 92-0339- 0125 American Plant Maintenance	\$150	12/13/2023	1ZE809920356454935

By changing the first field ALL date fields changed to 12/13

# Shortcuts for Date Fields

## inline editing, online forms, transaction forms

- Press **t** to enter today's date
- Press **T** to enter tomorrow's date
- Press **y** to enter yesterday's date
- Press **p** to enter the end of the current period (if you use accounting periods)
- Press **m** to enter the last day of the month
- Press **l** to enter the last day of the prior month
- Press **+** (plus key) to increase one day
- Press **-** (minus key) to decrease one day

note: all letters above are case insensitive

note: these do NOT work in the Reconcile Account Statement page



# Shortcuts for Entering Transaction Data

- **Enter** key to save the transaction while in transaction body
- **Enter** key to save the line and go to the next line while on a sublist
- **Tab** to move the cursor between fields and buttons.
- **Spacebar** to check or clear a checkbox.
- Press and hold **CTRL** while clicking with your mouse to select multiple choices in a list
- **Amount** fields support addition/subtraction/multiplication/division
  - For example, enter 10 + 15 to calculate a total amount
  - Does not work in all transactions (e.g. NOT for Inventory Adjustments 😞)
  - Very useful when doing a deposit that was purchased online with a credit card where the bank deposit does not match what the customer paid and you need to assign something to Cash Back (example on next slide)



# Example of Amount Field



- Customer bought instrument for \$658.75
- Bank account shows \$641.20 deposited because the merchant processor took fees out that go to the credit card company

 **Deposit** 


**899**

Primary Information

DEPOSIT # 899 \* DATE 10/24/2023

\* ACCOUNT 1000-300 Web Orders -  POSTING PERIOD Oct 2023 

AMOUNT 658.75



**Deposits** Communication System Information Custom Warranties 

Payments 658.75 • Other Deposits 0.00 Cash Back 0.00 •

<input type="checkbox"/>	DATE	TYPE	NUMBER	MEMO	PAYMENT METHOD	REF NO.	FROM	AMOUNT
<input checked="" type="checkbox"/>	10/20/2023	Customer Deposit	DEP15	1 Psi-gn hybrid kit Diversified Truck	BC CC via BrainTree			658.75

Step 1: Enter the deposit and select the transaction

# Example of Amount Field

 **Deposit** 

899

Primary Information

DEPOSIT # 899 \* DATE 10/24/2023


\* ACCOUNT 1000-300 Web Orders POSTING PERIOD Oct 2023

AMOUNT 658.75

Deposits Communication System Information Custom Warranties

Payments 658.75 • Other Deposits 0.00 Cash Back 0.00 •


AMOUNT *	ACCOUNT *	DEPARTMENT	CLASS	LOCATION	MEMO
658.75-641.20	7000-850 Misc Expenses : Merchant Fees				



Step 2: Go to Cash Back tab and enter the full amount less the amount deposited in the bank

Let NetSuite figure out what that payment to the merchant processor was

# Example of Amount Field

**Deposit** 

**899**

Primary Information

DEPOSIT # 899 \* DATE 10/24/2023

\* ACCOUNT 1000-300 Web Orders -  POSTING PERIOD Oct 2023

AMOUNT 658.75

**Deposits** Communication System Information Custom Warranties

Payments 658.75 • Other Deposits 0.00 Cash Back 0.00 •

AMOUNT *	ACCOUNT *	DEPARTMENT	CLASS	LOCATION	MEMO
17.55	7000-850 Misc Expenses : Merchant Fees				

Result is calculated for you

# Questions?



Please contact me at [mkomninos@plantscan.com](mailto:mkomninos@plantscan.com)

Thank you 😊