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PRACTICAL GUIDE



NETSUITE REPORTING

Build Better NetSuite Reports

Many NetSuite users rely too heavily on Excel exports, disconnected dashboards, and ad hoc requests. If your team doesn't fully trust what's in NetSuite—or can't find what they need—you're not alone. The good news: with a few focused steps, you can turn NetSuite into a true reporting powerhouse.

What this guide covers

01 **Master the Basics of SuiteAnalytics Workbooks** 03
Flexible, interactive, no-code reporting

02 **Supercharge Saved Searches** 04
The backbone of nearly every report or alert

03 **Design Role-Based Dashboards** 05
A dashboard that shows everything helps no one

04 **Improve Data Quality** 06
Your reports depend on it

05 **Automate & Schedule Reports** 07
Reporting without weekly rebuilds



01 Master the Basics of SuiteAnalytics Workbooks

Why it matters: SuiteAnalytics Workbooks are NetSuite's native solution for flexible, interactive, no-code reporting.

BEST PRACTICES

Use drag-and-drop fields to avoid custom scripting.

Build pivot tables, charts, and summary tables—all in one view.

Save and reuse filters and datasets for consistency.



PRO TIP

Always start with a dataset. Think of it like your report's "data engine."

02 Supercharge Saved Searches

Why it matters: Saved Searches are the backbone of nearly every NetSuite report or alert.

QUICK WINS

A Add summary types (e.g. Group, Sum, Count) to create pseudo-pivot reports.

B Use highlight rules to surface exceptions (e.g. past-due invoices).

C Leverage "Available Filters" to let users customize views on the fly.



PRO TIP

Avoid showing unnecessary fields. Keep your Saved Search laser-focused.

03 Design Role-Based Dashboards

Why it matters: A dashboard that shows "everything" often helps no one.

TIPS FOR BETTER DASHBOARDS

BY ROLE

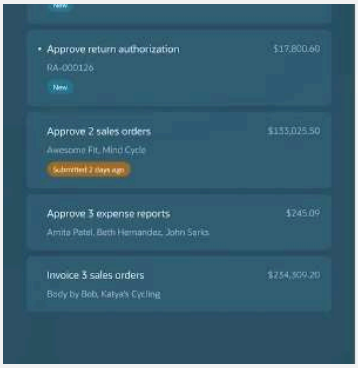
Tailor by role: Sales should see pipeline; Finance should see cash flow.

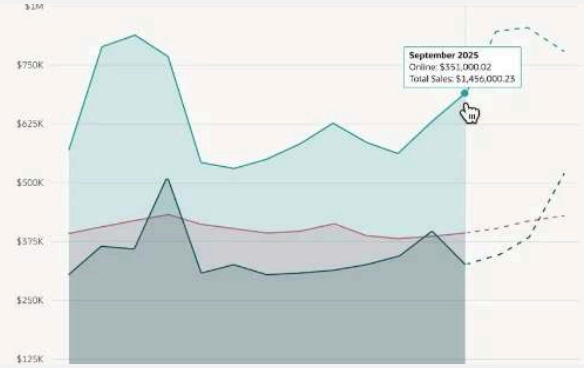
5–7 WIDGETS

Limit widgets to 5–7 max per dashboard.

KPI METERS

Use KPI meters for visual cues and quick insights.







PRO TIP

Embed Saved Searches and Workbooks directly into the dashboard for instant context.

04 Improve Data Quality (Your Reports Depend on It)

Why it matters: Even the best report logic fails if the source data is messy.

QUICK WINS

A Regularly audit custom fields for relevance and accuracy.

B Eliminate duplicate records using built-in NetSuite deduplication tools.

C Validate naming conventions (e.g., customer types, item categories) for consistency.



PRO TIP

Build a Saved Search that flags incomplete records—then fix in bulk.

05 Automate & Schedule Reports

Why it matters: Reporting should serve your team without weekly rebuilds.

STEPS TO AUTOMATE

1

Schedule Saved Search email delivery (e.g., every Monday at 8am).

2

Use alerts to notify users when thresholds are breached.

3

Save time for analysts by converting common Excel exports into dashboards.



PRO TIP

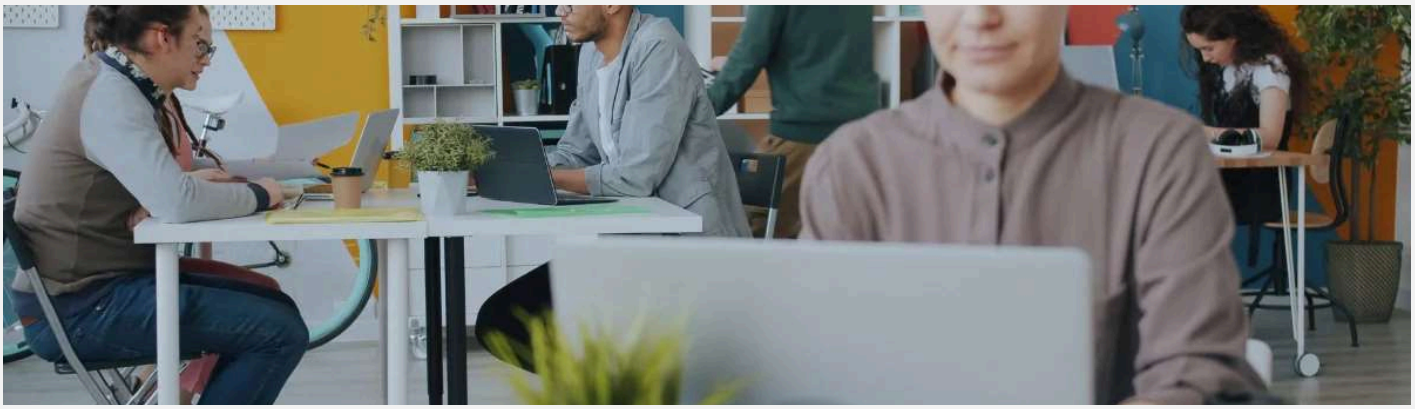
Label automated reports with clear names like "Weekly Sales Flash – [Date]".

You don't need to be a SuiteScript wizard to build better NetSuite reports.

By focusing on:

01	**SuiteAnalytics Workbooks**
02	**Smart Saved Searches**
03	**Streamlined dashboards**
04	**Clean data**
05	**Automation**

You'll deliver insights your team trusts—and uses.



Reporting you can trust, without the rebuild.

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