

Tips:

NetSuite Global Search



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Tips:

Want to be a Global Search Expert? We've got the tips to get you there!

NetSuite's Global Search is one of the most powerful tools in the business platform. It is one of the first fields you see when logging onto your NetSuite portal and acts like a Google search engine for your ERP. The global search feature is one of the first things you will learn when becoming a NetSuite user, but using this powerful feature can be a headache or become disorganized if you do not know the proper tips and tricks to search within the various aspects of NetSuite. That's why we're here!

The global search bar provides quick access to every search, page, report, record, list and transaction inside your NetSuite system. With a few tricks and shortcuts, global search makes navigating NetSuite a quick and effortless process.



How To Get Started Using NetSuite Global Search

Choose your designated role and click in the center top of your NetSuite dashboard in the search field.

Tip: press **Alt + G** to move your cursor there directly.

To begin your search, enter any keyword consisting of numbers, dashes, letters, underscores or wildcards. We will explain the common shortcuts below.

Global search will auto-populate suggested matches and results based on what you type. This is where knowing the right terms and prefixes come in handy to find what you are looking for fast.



NetSuite Search Prefixes

NetSuite ERP contains a lot of information and you may have many customers records in the system as well. To narrow your search results, simply add a shorthand search prefix of the first few characters of a record type, followed by a colon or caret to separate it from your search terms. Not only does this speed up the search process, but it also cleans up the results of irrelevant records. By learning a few of this shortcuts in the search bar, you can pinpoint the information, record or page you are looking for every time, with ease.

For example, to locate a customer contact record enter the contact prefix con: or con^ followed by the first few letters of their name and it will filter only customer records beginning with that keyword.

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Here are a few search prefixes to stick in your back pocket for fast searching:

PREFIX	RECORD TYPE
cam	Campaign
cash	Cash Sale
con	Contact
cust	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

What is a wildcard?

Wildcards allow a little wiggle room in your search if you are not exactly sure what you are looking for by adding it to the beginning and end of a string.

% Sign:

The most helpful to the average NetSuite user is perhaps the % wildcard. For example, if inv:101 is entered, Global Search will return all invoices with 110 as the invoice number. The % wildcard can be used before or after to indicate ends with or starts with text to filter search records.

_Underscore:

Use an _ underscore (search cust:a_b) to produce customer records containing the specific letters you are looking for.

+ Inactive Records:

Insert a + at the end of your keyword to search inactive and active records in your search results.

OR:

Search multiple strings of text at once by using an uppercase OR to separate keywords

“Exact Matches”:

Surround the keyword search string in quotes (“ ”) to receive records only containing those specific words.

In summary, who doesn't like shortcuts to show off your search skills! We hope the knowledge of search prefixes and shorthand keys allow you to get the most out of your NetSuite system and find what you need quickly.

If you have questions or need help with NetSuite let's talk!

Our senior team of experienced NetSuite consultants is available and happy to assist right away. We work on-demand, when you need us. No long-term commitments or retainers.

Check out more NetSuite tips, tricks, and how-to blog posts from our experts!
We can help you to implement, service and support NetSuite today.

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