Hanna instruments has a saved search that is unable to process due to the way they need to pull information together.

Many of the result fields are determined by ‘real time’ calculations rather than stored values in a field. With the high number of customer records, this causes the saved search to take 10-15 minutes to complete and will only get worse.

The proposed solution is to create a custom table in NetSuite that will house this information based on a script(s) that will run off hours to determine the values and store them in the custom table.

The saved search can then be created using the the custom table as a point of reference.

Step 1: Create the custom table.

We need to create a custom table with the following fields.

* **Customer ID:** This will be a list of customers only regardless of status. No prospects.
* **Orders Year to Date:** This will be a custom integer field and will be populated using the following logic: (you can also refer to this saved search which is currently used to determine the value in this field: <https://1055358.app.netsuite.com/app/common/search/search.nl?e=T&cu=T&id=16950183&whence=>
  + Date Created: Within this year
  + Account: Sales Orders
  + Status: Is NOT Sales Order : Cancelled
  + Results would be Document Number : Count
* **Prior Years Sales:** This will be a custom currency field and will be populated using the following logic: (you can also refer to this saved search which is currently used to determine the value in this field: <https://1055358.app.netsuite.com/app/common/search/search.nl?e=T&cu=T&id=17013286&whence=>
  + Date: is within prior year to date
  + Transaction Type: invoice, cash sale, cash refund, credit memo
  + Results would be: Amount - Sum
* **Last Years Sales Total:** This will be a custom currency field and will be populated using the following logic: (you can also refer to this saved search which is currently used to determine the value in this field: <https://1055358.app.netsuite.com/app/common/search/search.nl?e=T&cu=T&id=77080546&whence=>
  + Subsidiary = Hanna Instruments INC
  + Hanna Entity = Hanna Instruments US
  + Date: is within prior year 2 years – looking for 2022 data
  + Transaction Type: Invoice, Cash Sale, Cash Refund, Credit Memo
  + Results would be as follows and would be a ‘sum’:
    - (NVL({totalamount},0)-NVL({taxtotal},0)-NVL({shippingamount},0))
* **Total Value of Invoices:** This will be a custom currency field and will be populated using the following logic: (you can also refer to this saved search which is currently used to determine the value in this field: this is for current year;
* <https://1055358.app.netsuite.com/app/common/search/search.nl?e=T&cu=T&id=92352092&whence=>
  + Subsidiary: Hanna Instruments, INC.
  + Hanna Entity – Hanna Instruments US
  + Transaction Type is Invoice, Cash Sale,credit memo and cash refund
  + Results would be as follows and would be a ‘sum’:
    - {grossamount}-nvl({shippingamount},0)-nvl({taxamount},0)
* **Sum of Lifetime Sales:** This will be a custom currency field and will be populated using the following logic: (you can also refer to this saved search which is currently used to determine the value in this field: <https://1055358.app.netsuite.com/app/common/search/search.nl?e=T&cu=T&id=92359859&whence=>
  + Subsidiary: Hanna Instruments Inc.
  + Transaction Type is invoice, cash sale, cash refund, credit memo
  + Results would be Amount - Sum
* **Lifetime Orders:** This will be a custom Free Form Text field and will be populated using the following logic: (you can also refer to this saved search which is currently used to determine the value in this field: <https://1055358.app.netsuite.com/app/common/search/search.nl?e=T&cu=T&id=92359860&whence=>
  + Account: Sales Orders
  + Status: is NOT Sales Order : Canceled
  + Results would be Document Number - Count
* **Calls (current year):** This will be a custom Free Form Text field and will be populated using the following logic.
  + Use the following formula: CASE WHEN {activity.type} = 'Phone Call' AND TO\_CHAR({activity.createddate},'YYYY') = TO\_CHAR(CURRENT\_DATE, 'YYYY') THEN 1 ELSE 0 END
* **Tasks (current year):** This will be a custom Free Form Text field and will be populated using the following logic.
  + Use the following formula: CASE WHEN {activity.type} = 'Task' AND TO\_CHAR({activity.createddate},'YYYY') = TO\_CHAR(CURRENT\_DATE, 'YYYY') THEN 1 ELSE 0 END
* **Virtual Meetings (current year):** This will be a custom Free Form Text field and will be populated using the following logic.
  + Use the following formula: CASE WHEN {activity.type} = 'Virtual Meeting or In Person Visit' AND TO\_CHAR({activity.createddate},'YYYY') = TO\_CHAR(CURRENT\_DATE, 'YYYY') THEN 1 ELSE 0 END
* **Total Activities (lifetime):** This will be a custom Free Form Text field and will be populated using the following logic.
  + Use the following formula: CASE WHEN {activity.type} = 'Virtual Meeting or In Person Visit' OR {activity.type} = 'Task' OR {activity.type} = 'Phone Call' THEN 1 ELSE 0 END

Codes (SKU) sold in the current year. Quantity: Total number of different SKU’s ordered. This is NOT qty or amount, this is total number of different SKU’s. Example: If they ordered SKU123 qty 3, SKU456 qty 5, SKU789 qty 7, the result would just be 3 because they ordered three different SKU’s. This information would be pulled from the Invoices and Cash Sale transactions.

Codes (SKU) sold in 2023 (qty): Same logic as above

Codes (SKU) sold in 2022 (qty): Same logic as above

Quotes: the current year, (qty) = # of quotes

Review formulas for”

Sum of overdue balance

Sum of virtual meetings

Step 2: Develop script(s) to use the logic detailed above to populate and store the values on a nightly basis.