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Oracle NetSuite BI and Saved Searches Professional Exam Demo

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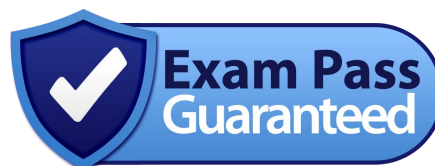
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QUESTION 1

You need to create a report that allows users to filter by customer region and view total sales per month dynamically. Which NetSuite feature provides the most flexibility for this requirement?

- A. Static Excel exports generated weekly
- B. Standard reports with fixed filters
- C. Saved search with summary type and dynamic filter fields
- D. Custom form using SuiteBuilder

Correct Answer: C

Section: (none)

Explanation

Explanation/Reference:

Explanation: Saved searches with summary types (e.g., sum, count, average) and dynamic filters let users adjust criteria such as customer region or date range without editing the search. This interactivity makes them ideal for self-service BI. Standard reports (B) are less flexible, and Excel exports (A) lack real-time data. Custom forms (D) control UI, not analytics.

QUESTION 2

A finance manager wants to see the top 10 customers by revenue each month. Which saved search feature allows this ranking automatically?

- A. Summary criteria with "Limit Results" and sorting by total revenue descending
- B. Grouping by customer only
- C. Static filter with customer names manually entered
- D. Dashboard snapshots

Correct Answer: A

Section: (none)

Explanation

Explanation/Reference:

Explanation: The "Limit Results" option in a summary saved search allows you to display a set number of top results (e.g., Top 10) based on sorting (e.g., total revenue descending). This is the most efficient method to rank customers automatically. Grouping (B) organizes data but doesn't limit or rank. Manual filters (C) require maintenance. Dashboard snapshots (D) simply display existing data sources.

QUESTION 3

Which field type is most suitable for creating a formula that calculates gross margin percentage in a saved search?

- A. Formula (Text)
- B. Formula (Numeric)
- C. Formula (Date)
- D. Formula (Currency)

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

Explanation: Gross margin percentage involves numerical calculation: $(\text{Revenue} - \text{Cost}) / \text{Revenue} \times 100$.

Therefore, Formula (Numeric) is used to compute this value in a saved search. Formula (Currency) displays a single currency, not a ratio. Formula (Text) and (Date) are for strings and date logic respectively.

QUESTION 4

You create a saved search showing sales transactions, but you also want to include related customer industry data stored in the Customer record. Which feature allows you to access that field?

- A. Inline editing
- B. Join (or "Use fields from related records") functionality
- C. Summary type
- D. Highlighting

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

Explanation: Saved searches in NetSuite support joins that let you pull data from related records (e.g., Customer fields into a Transaction search). This is crucial for cross-record analytics. Inline editing (A) is for updating data. Summary types (C) aggregate results, and highlighting (D) formats them visually.

QUESTION 5

A user needs to schedule a saved search to automatically email weekly performance summaries to department heads. Which NetSuite feature fulfills this?

- A. Custom roles
- B. Search email scheduling (via "Email" and "Schedule" tabs in the saved search)
- C. Manual export
- D. SuiteAnalytics Dataset

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

Explanation: Saved searches can be scheduled to run at defined intervals and automatically email results to recipients. This feature supports automated reporting workflows. Custom roles (A) control access but don't send emails. Manual exports (C) require user action. Datasets (D) are used for analytics and workbooks, not automated email distribution.

QUESTION 6

What is the key advantage of SuiteAnalytics Workbook over traditional saved searches?

- A. Workbooks only support transactions.
- B. Workbooks allow multi-dataset joins, pivoting, and chart visualizations without scripting.
- C. Saved searches have more formatting options than workbooks.
- D. Workbooks cannot be shared with other users.

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

Explanation: SuiteAnalytics Workbooks enable advanced analytics " combining datasets from multiple record types, creating pivot tables, charts, and filters " all in a drag-and-drop interface. Traditional saved searches are powerful but limited to single-record joins and tabular data. Option A is false; workbooks support many

record types. Option C reverses the truth. Option D is wrong because workbooks can be shared via permissions or dashboards.

QUESTION 7

A company wants a dashboard chart showing quarterly sales trends from a saved search. What must be done to enable this visualization?

- A. Convert the saved search into a Dataset or Workbook and add a chart view.
- B. Export the search results to Excel and make a chart.
- C. Use a static image in the dashboard.
- D. Rebuild the report using HTML templates.

Correct Answer: A

Section: (none)

Explanation

Explanation/Reference:

Explanation: To visualize saved search data on dashboards, you either convert it into a Workbook or create a chart portlet linked to a dataset. This allows automatic updates and interactive analysis. Excel charts (B) are static and disconnected. Static images (C) and HTML templates (D) don't integrate with live data.

QUESTION 8

You want to highlight any invoice that is overdue by more than 30 days in red within a saved search. Which feature allows this visual cue?

- A. Conditional Highlighting
- B. Formula (Text)
- C. Custom Role Permissions
- D. Drill-down link

Correct Answer: A

Section: (none)

Explanation

Explanation/Reference:

Explanation: Conditional highlighting lets you format rows or columns in saved search results based on criteria (e.g., overdue > 30 days = red). This feature helps users quickly identify exceptions. Formula (Text) can label but not color. Permissions (C) and drill-down links (D) are unrelated to formatting.

QUESTION 9

You've created a saved search with multiple summary columns. However, one user reports incorrect totals. What's the most likely cause?

- A. User's time zone settings
- B. Incorrect summary type (e.g., "Group" instead of "Sum") assigned to columns
- C. Missing access role
- D. Too many filters applied

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

Explanation: In saved searches, the summary type defines how NetSuite aggregates values "such as Sum, Average, Maximum, or Group." Choosing the wrong type can produce incorrect totals. User settings (A) don't affect calculations. Missing roles (C) would block access entirely. Filters (D)

might hide data but don't distort totals.

QUESTION 10

A business analyst wants to build a report combining transaction-level data with budget information for variance analysis. Which approach is best suited in NetSuite BI?

- A. Create a single saved search limited to one record type.
- B. Build a Workbook joining a transaction dataset with a budget dataset for side-by-side comparison.
- C. Export both datasets to Excel and combine manually.
- D. Write a SuiteScript to merge CSVs.

Correct Answer: B

Section: (none)

Explanation

Explanation/Reference:

Explanation: Workbooks can combine multiple datasets, such as transactions and budgets, within the SuiteAnalytics environment. This allows variance analysis with calculated fields, filters, and visualizations all in real time. A saved search (A) can only access one record type. Manual exports (C) and scripts (D) reduce data integrity and automation benefits.