How to Create a Custom Report in NetSuite

NetSuite gives you the tools to generate, view, and customize reports so you can track the metrics that matter to your business. This guide walks you through how to create a custom report in NetSuite, starting with standard and ad hoc reports, and then moving into advanced customization with the Report Builder.

Before you begin

NetSuite supports two main types of reports:

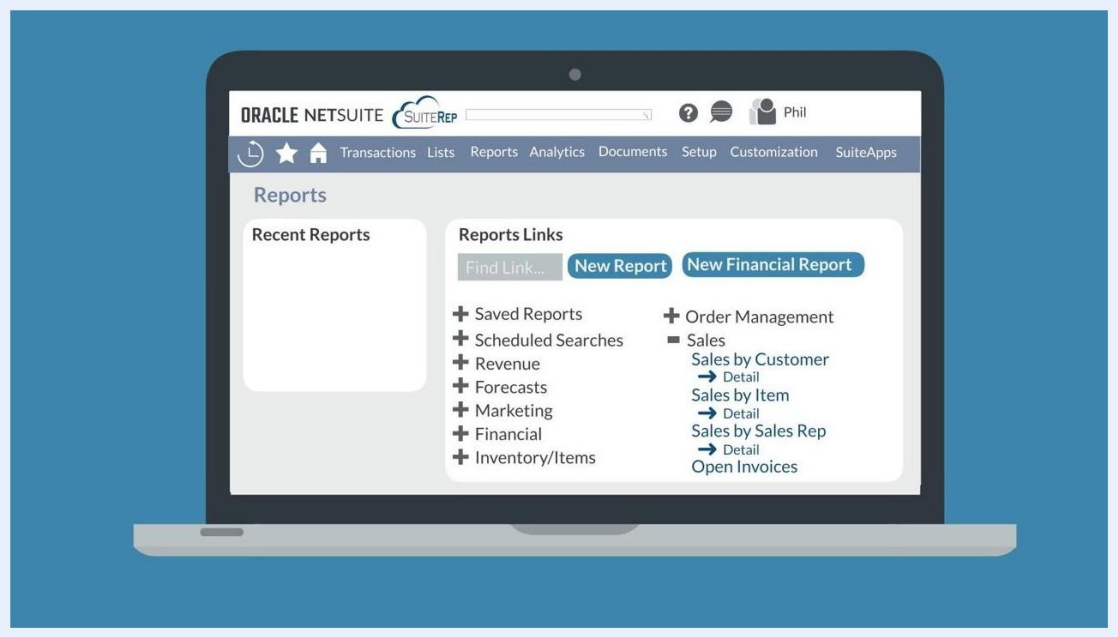
- Standard reports — pre-built reports organized by category that you can view and adjust.
- Ad hoc reports — reports you build from scratch based on a metric you choose.

Both report types can be further customized using the Report Builder, covered later in this guide.

Part 1: Work with standard reports

Step 1: Explore the Reports Dashboard

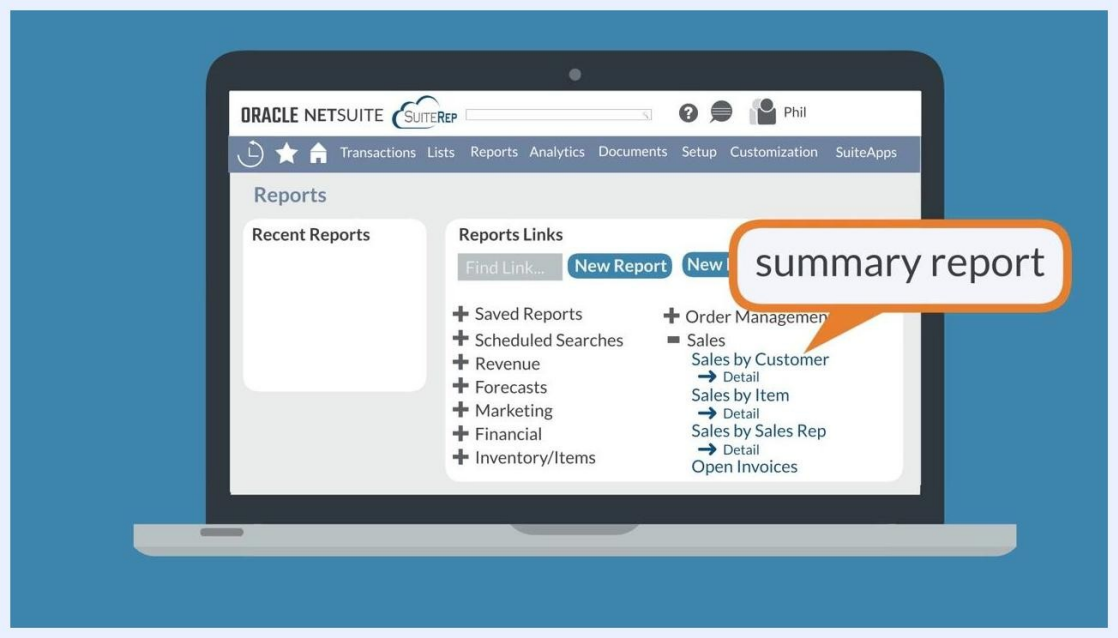
Navigate to the Reports Dashboard in NetSuite. The dashboard gives you access to all available reports, organized into categories for easy browsing. You can search for a specific report by keyword, or expand each category to see the reports it contains.



NetSuite Reports Dashboard showing categories, a search bar, and report links

Step 2: Open a standard report

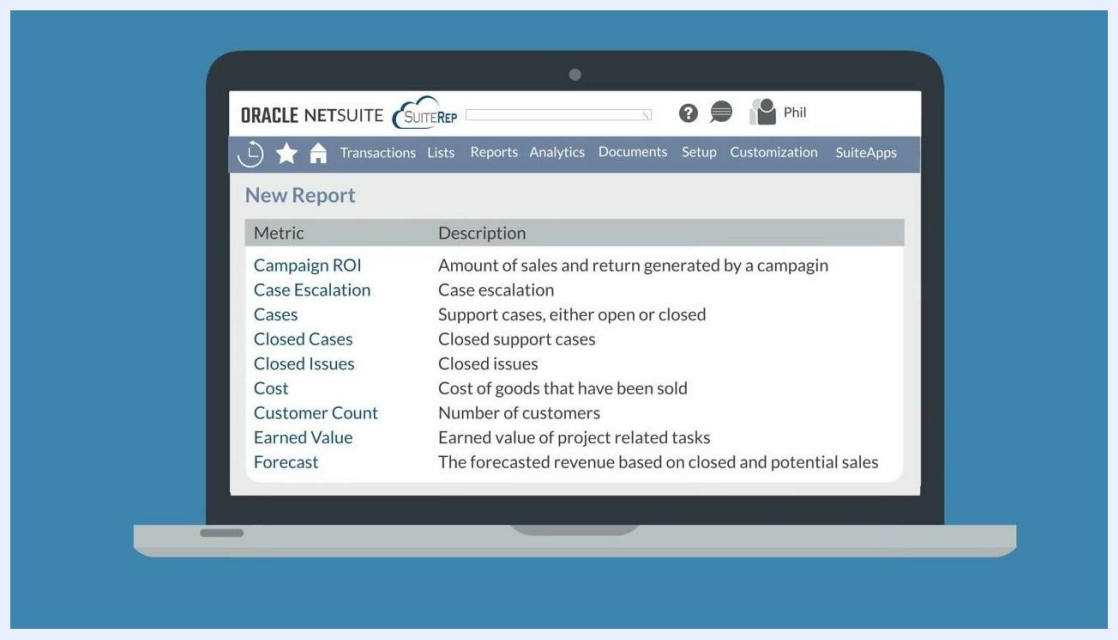
Find the report you need by searching or expanding the relevant category, then click the report name to open its summary version. Some reports also include a Detail link underneath the report name, which opens a more detailed version of the same report.



Reports dashboard showing the summary report and Detail links under Sales reports

Step 3: Adjust the report display

Once a standard report is open, use the footer options to change how the data is displayed. Keep in mind that these adjustments only affect how you view the data on screen — they do not change the underlying data itself.

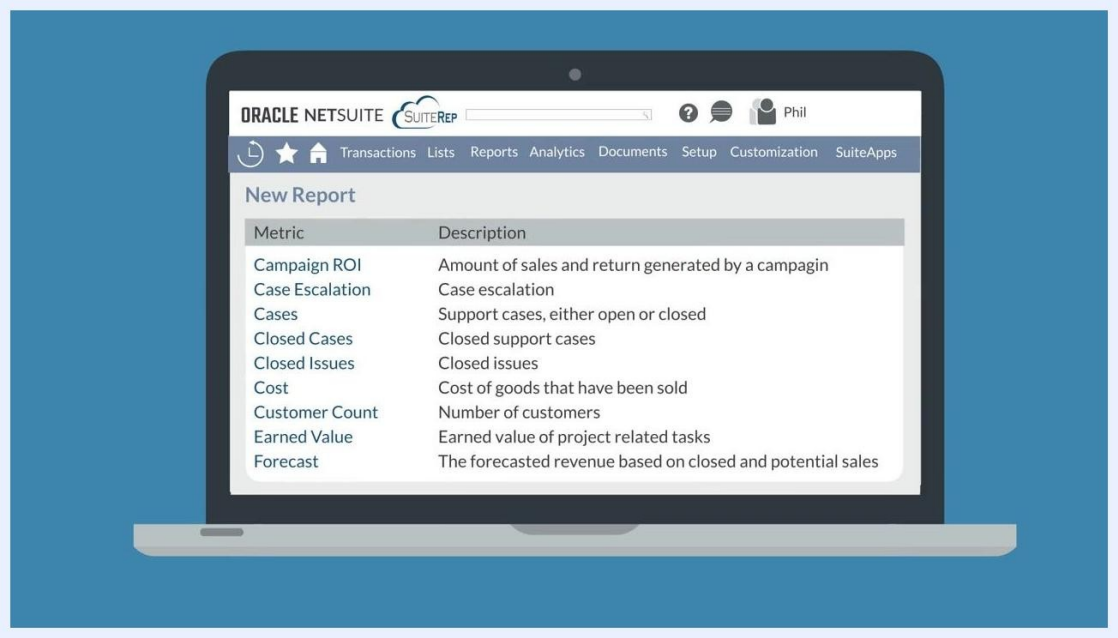


Open Invoices report with footer display options and a note explaining that adjustments only affect the view

Part 2: Create an ad hoc report

Step 4: Start a new ad hoc report

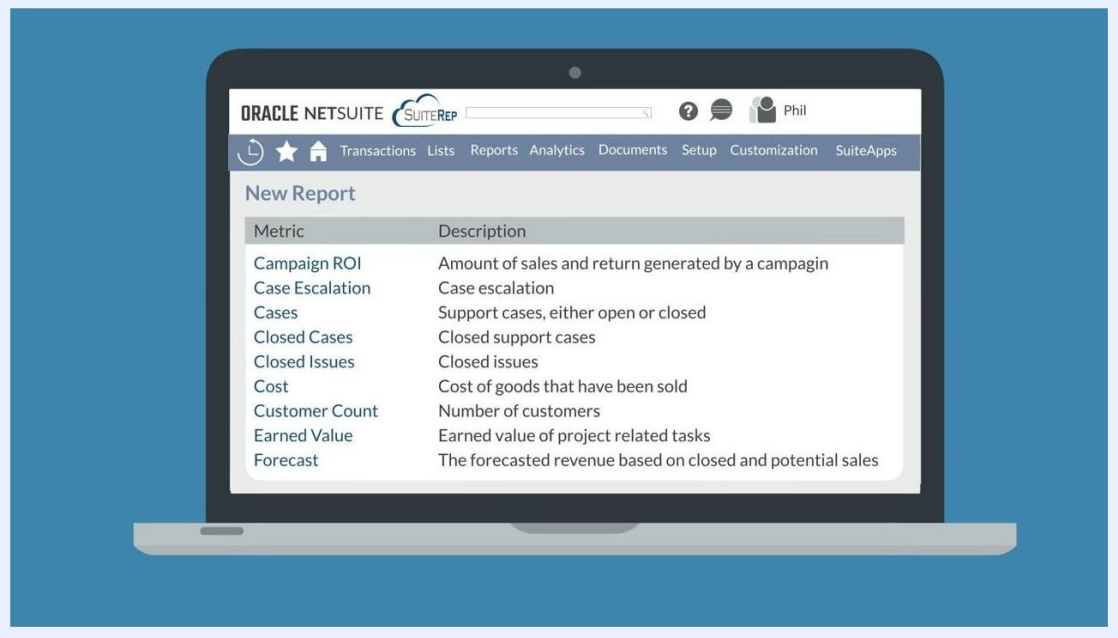
From the Reports Dashboard, click the New Report button to begin building an ad hoc report.



Reports dashboard with the New Report button highlighted by an arrow

Step 5: Choose a metric

Select the metric you want to base your report on from the list provided. Example metrics include Campaign ROI, Case Escalation, Cases, Closed Cases, Closed Issues, Cost, Customer Count, Earned Value, and Forecast.



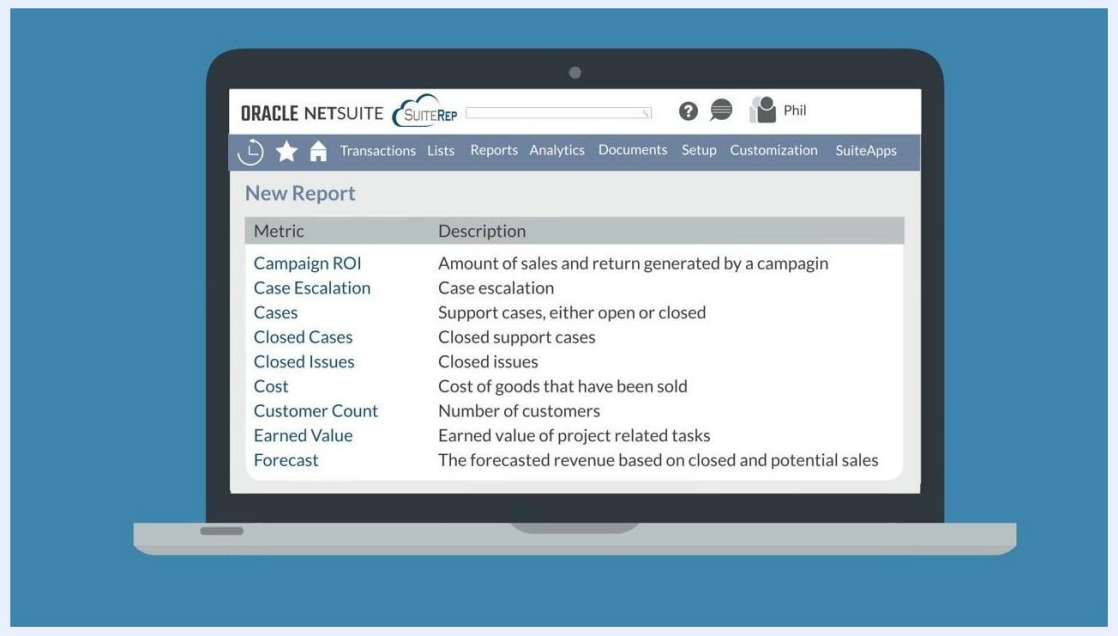
New Report screen listing available metrics and their descriptions

Step 6: Set report details and run the report

After choosing a metric, configure the following:

- The exact field to report on (for example, Metric: Sales Total)
- The report format: Summary, Detail, or Matrix
- How to subtotal the report (for example, by Lead Source)

The options available depend on the metric you selected. Once configured, click Run Report to generate it, or save it for future use.

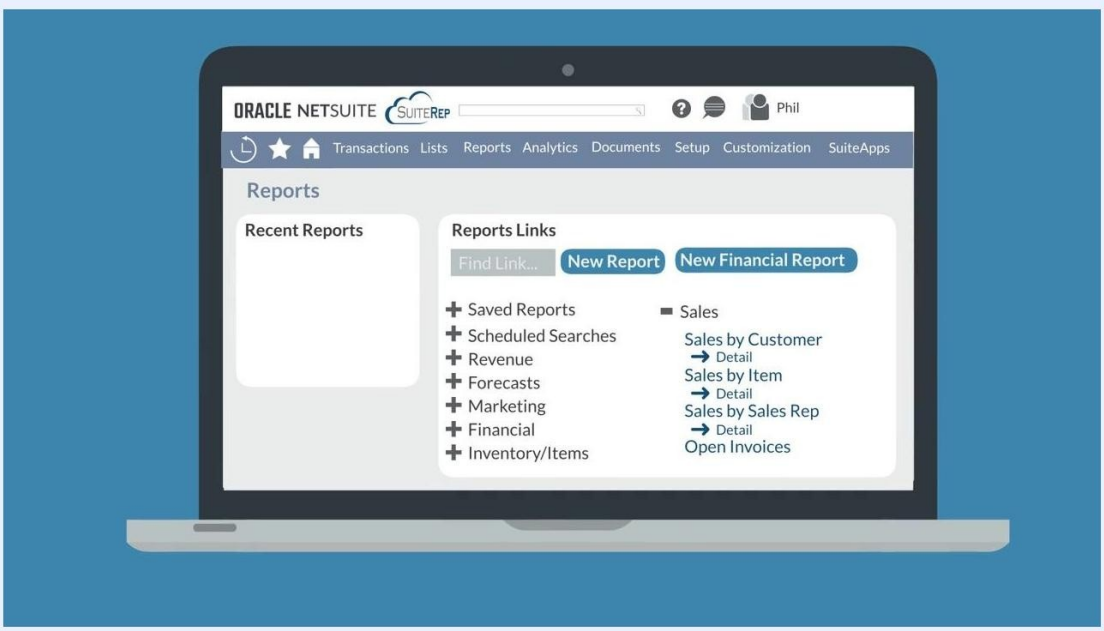


New Campaign ROI Report setup screen with field, format, and subtotal options

Part 3: Customize reports with the Report Builder

Step 7: Open the Report Builder for advanced customization

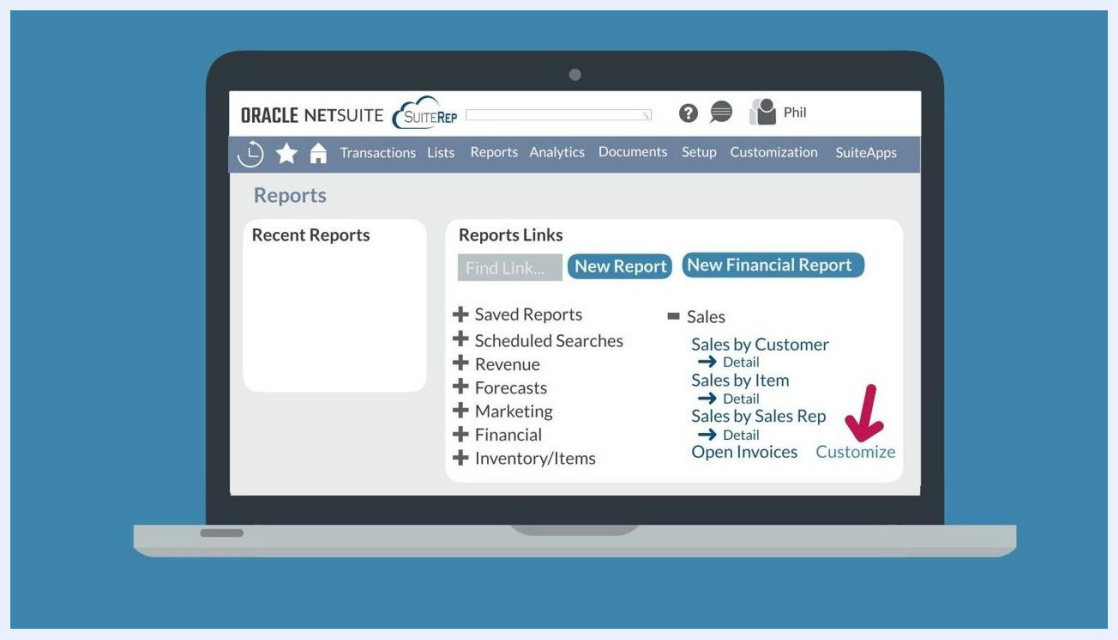
For deeper customization, use the Report Builder. You can access it from the Reports Dashboard, from a standard report by hovering over the report name and selecting Customize, or while creating an ad hoc report.



Reports dashboard ready for further customization, showing standard and ad hoc report options

Step 8: Launch the Report Builder

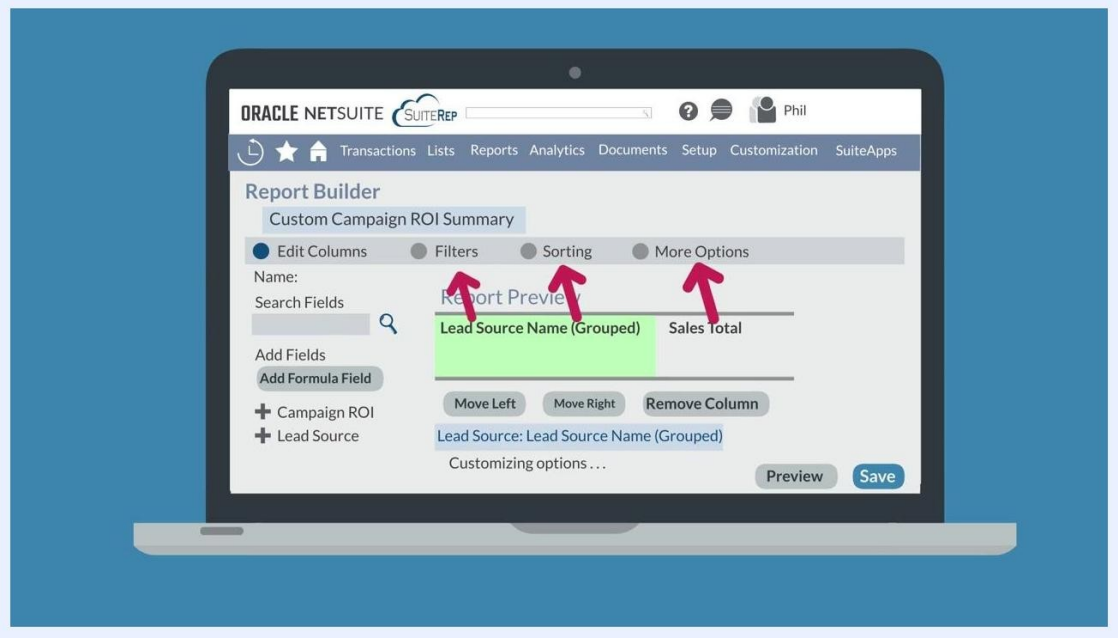
Hover over a standard report's name and select the Customize link that appears beside it. Alternatively, select Customize at the bottom of an open standard report, or select More Customization while creating an ad hoc report.



Reports dashboard showing the Customize link next to a standard report name

Step 9: Get familiar with the Report Builder interface

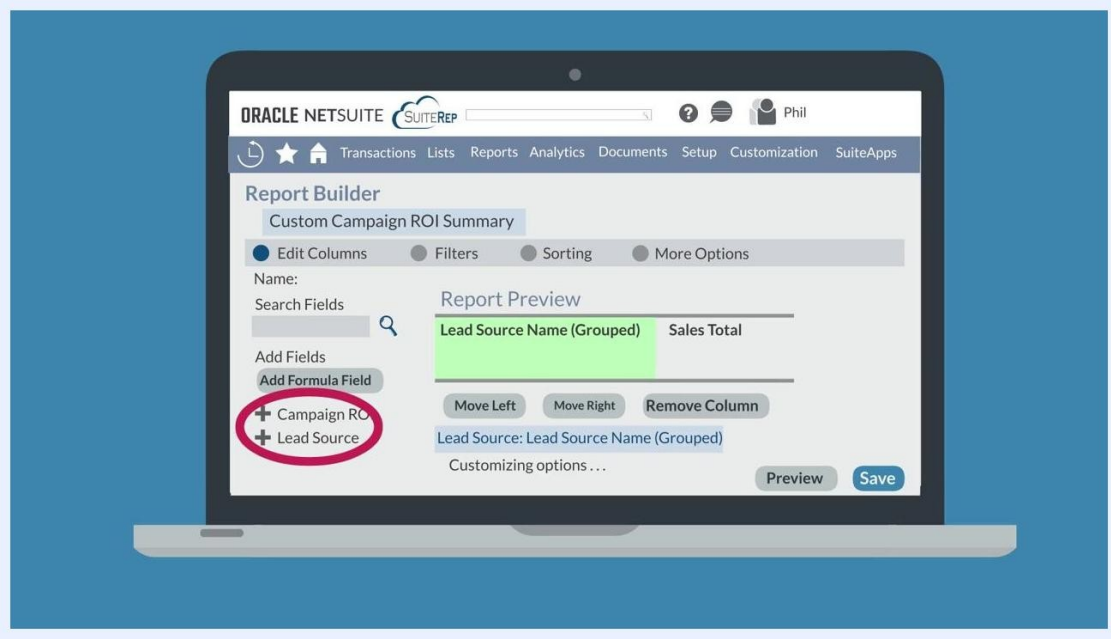
The Report Builder is organized into four sections: Edit Columns, Filters, Sorting, and More Options. Move between them by selecting the section name at the top of the page.



Report Builder interface showing the Edit Columns, Filters, Sorting, and More Options tabs

Step 10: Edit columns in your report

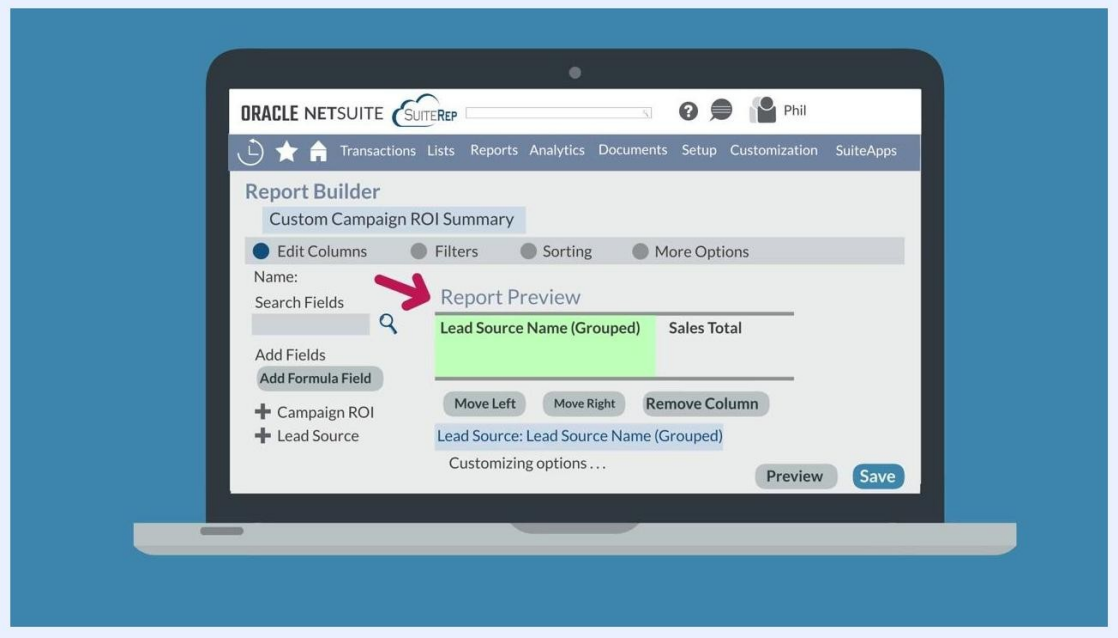
To add a field, expand the relevant section on the left side of the page, such as Campaign ROI or Lead Source, and select the field you want.



Report Builder with Campaign ROI and Lead Source fields available for selection

Step 11: Search for a specific field

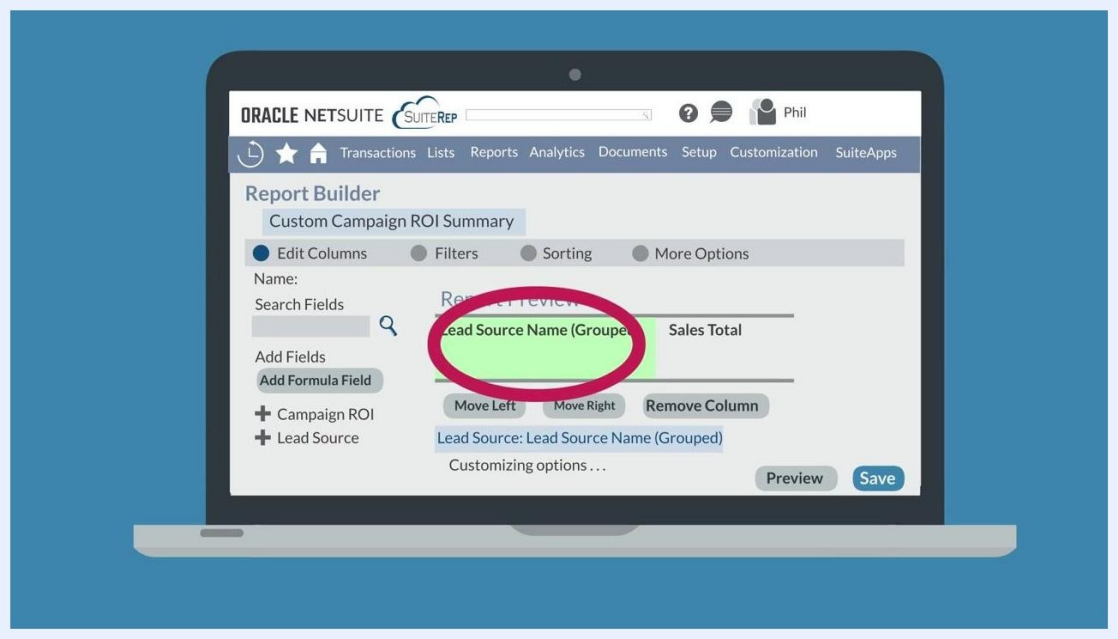
If you already know the name of the field you need, use the Search Fields bar to find it quickly. You can also select Add Formula Field to insert a calculated field. As you make changes, the Report Preview pane updates in real time.



Report Builder with the Search Fields bar highlighted

Step 12: Customize a selected column

Select a column in the Report Preview pane to display its customization options directly below the pane. These options vary depending on the field type.



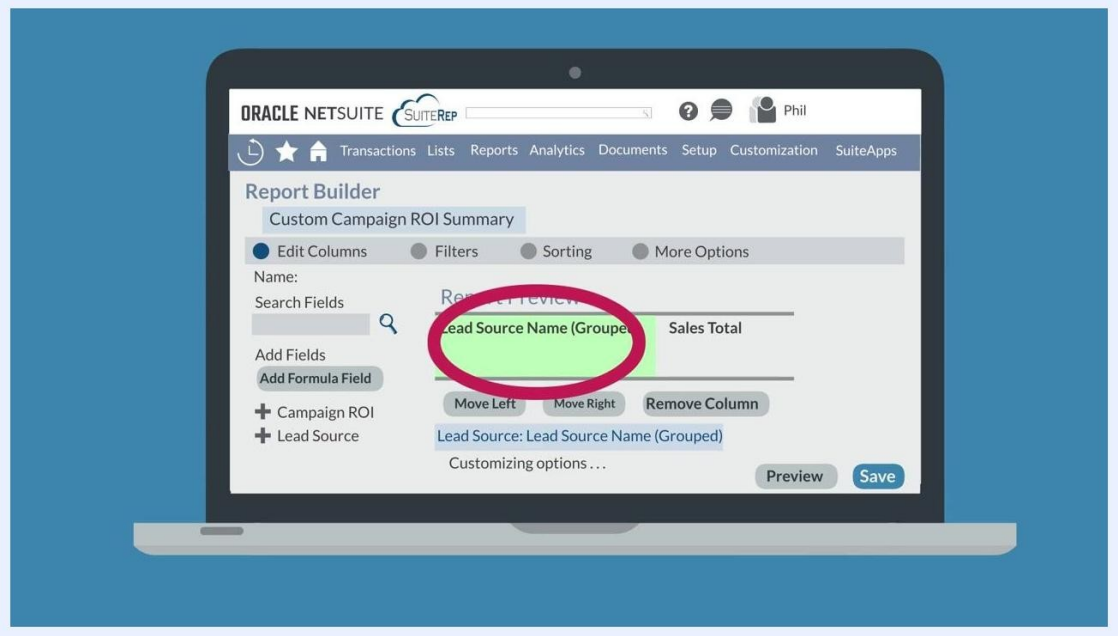
Report Builder with a column selected in the Report Preview pane

Step 13: Set filters for your report

Click Filters at the top of the Report Builder. On the left, you'll see the fields available for filtering. Add a field and set the values that define the filter.

- Check Show in Filter Region if you want users to adjust this filter directly on the report.

- Leave it unchecked if the filter should restrict results permanently and not be user-editable.

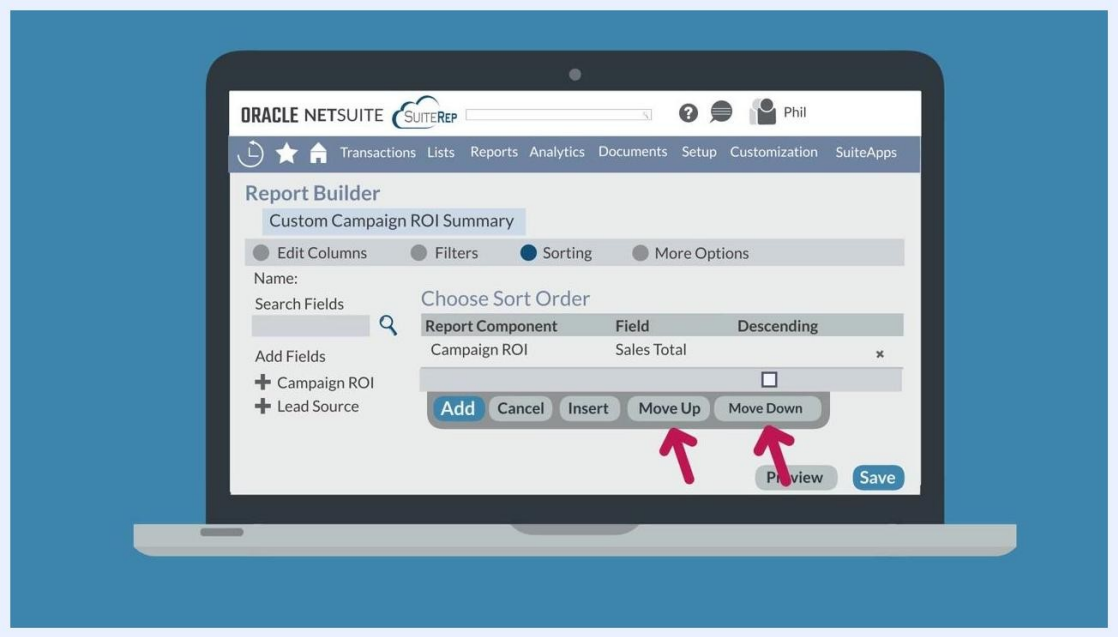


Report Builder Filters section with filter values and the Show in Filter Region option highlighted

Part 4: Fine-tune sorting and report options

Step 14: Set the sort order

Go to the Sorting tab and use the Choose Sort Order area to select a field. Use Move Up and Move Down to reorder sorting fields, or select the X next to a row to remove it. Since this section has no live preview, select Preview at the bottom of the page to see the effect of your changes.



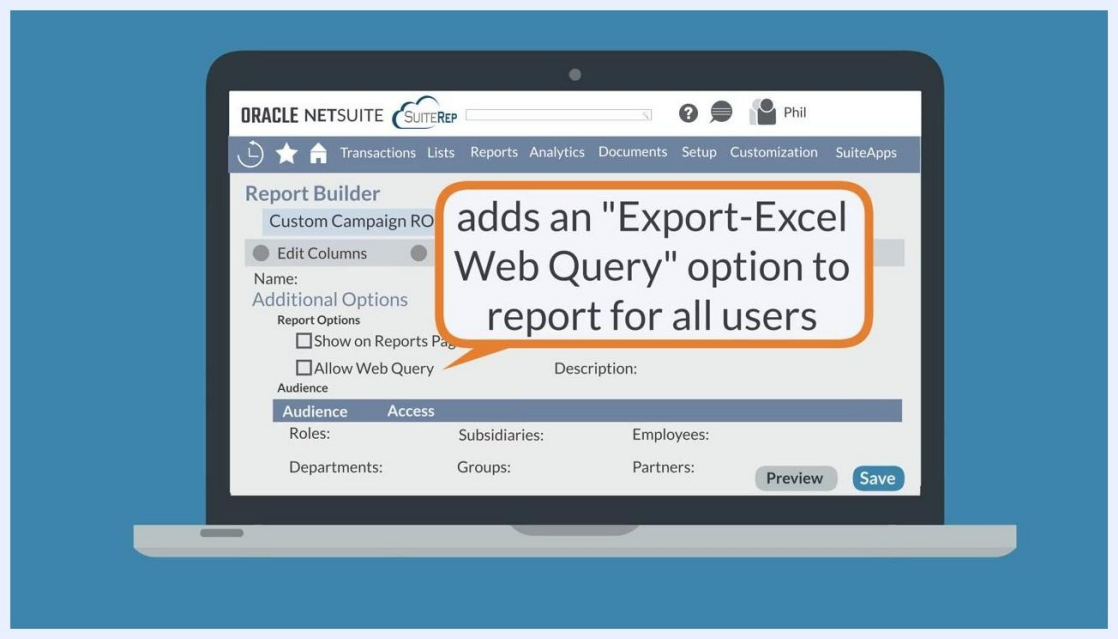
Report Builder Sorting tab with Move Up, Move Down, and remove (X) options highlighted

Step 15: Configure more options

Select the More Options tab to access additional report settings:

- Show on Reports Page — places the report in the Saved Reports section of the Reports Dashboard.
- Allow Web Query — enables the Export Excel Web Query option for all users who can access the report.
- Expand Level — sets the default expand level for the report.

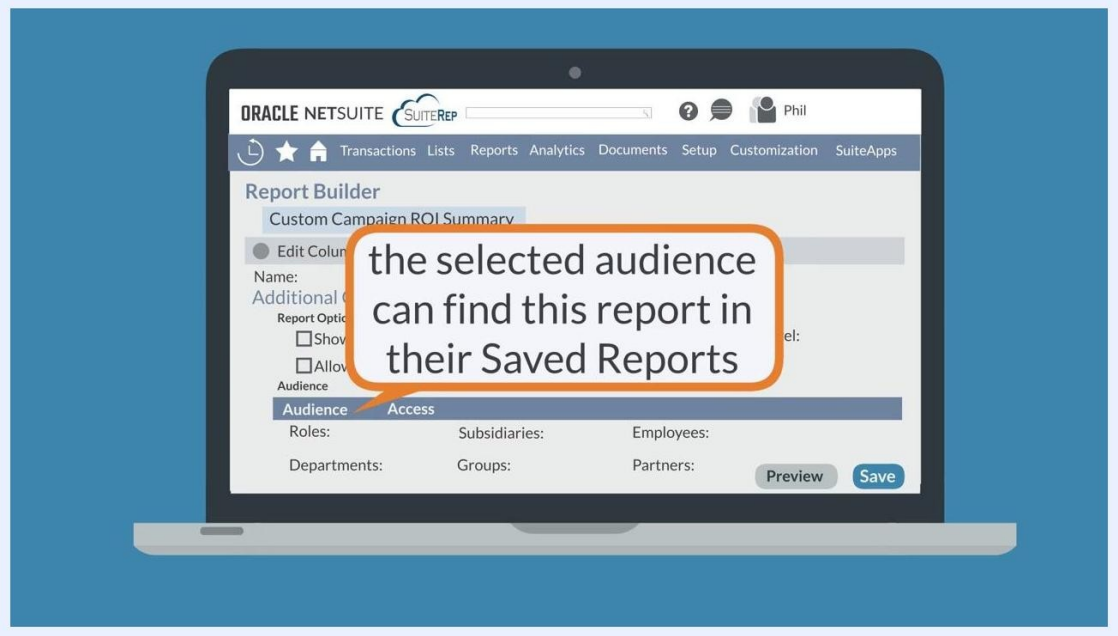
- ID and Description — identify the report as needed.



Report Builder More Options tab showing Show on Reports Page and Allow Web Query options

Step 16: Set the report audience

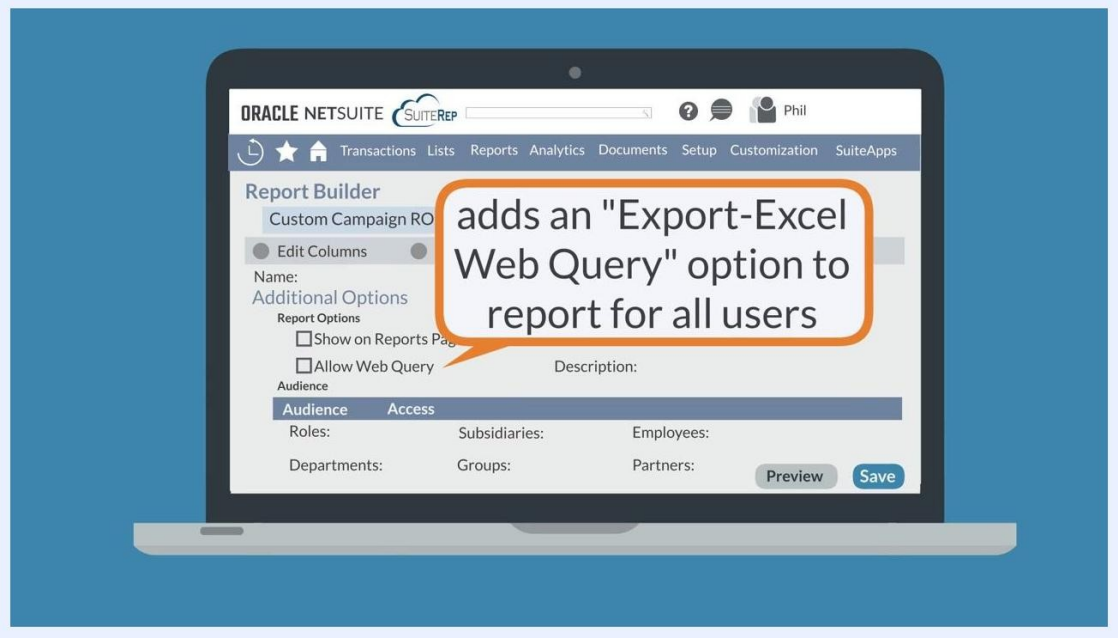
In the Audience section, select which roles, departments, subsidiaries, groups, employees, or partners should have access. Selected users will see the report in their Saved Reports list on the Reports Dashboard.



Report Builder showing Audience and Access tabs, with the selected audience able to find the report in Saved Reports

Step 17: Configure access permissions

The Access tab offers the same options as Audience but is more powerful. Selecting a user here overrides their typical permissions, allowing them to run the report even if they lack access to the underlying standard report.

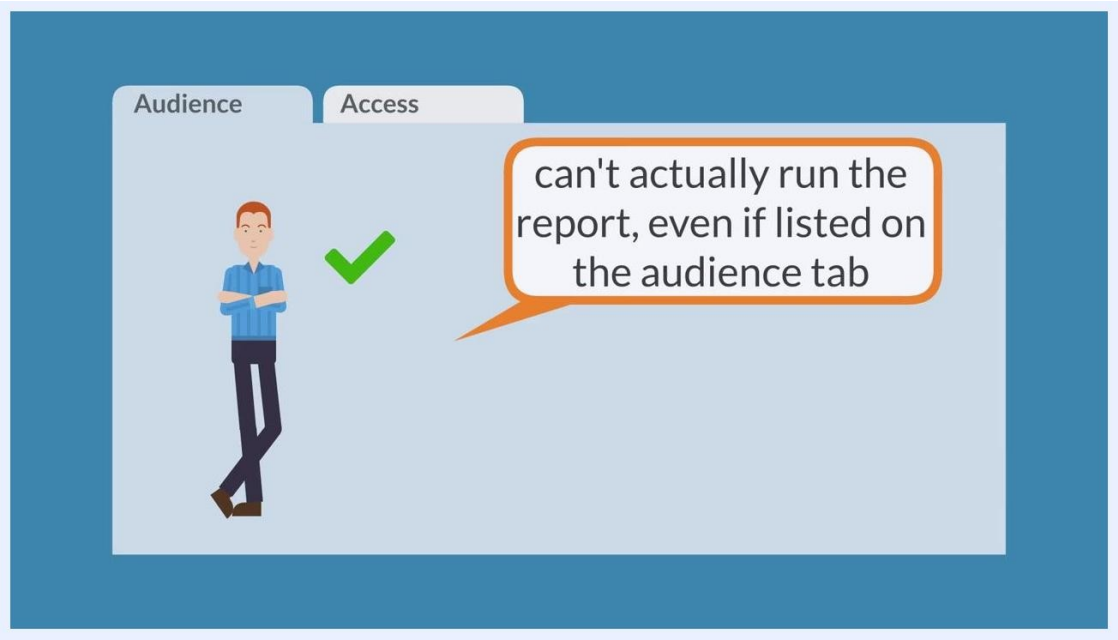


Report Builder More Options tab with the Access tab highlighted

Part 5: Understand Audience vs. Access

Step 18: Know the limits of the Audience tab

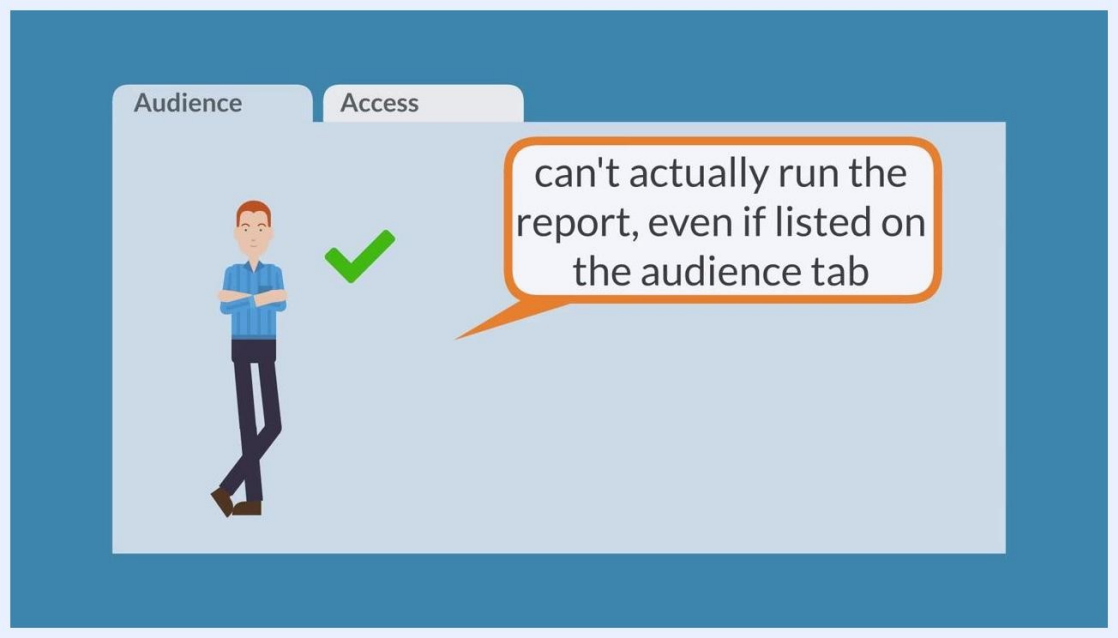
Users listed only on the Audience tab may not be able to actually run the report if their standard permissions don't allow it, even though the report appears in their Saved Reports list.



Audience and Access tabs with a user and a checkmark icon, noting that a user listed only on the Audience tab can't actually run the report

Step 19: Use the Access tab with caution

The Access tab is available only to account administrators. Granting access through this tab overrides a user's standard permissions, letting them run the report even without access to the underlying standard report. Use this capability carefully, since it grants elevated access beyond normal role-based permissions.



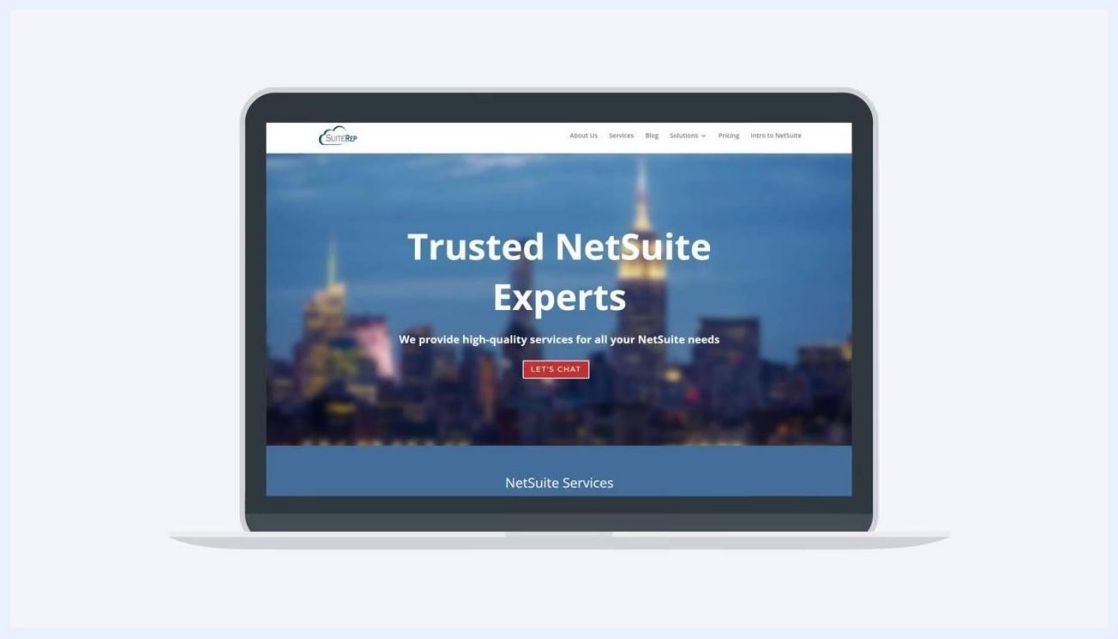
Audience and Access tabs with a user and a checkmark icon, noting that the Access tab overrides a user's permissions

Step 20: Save your customized report

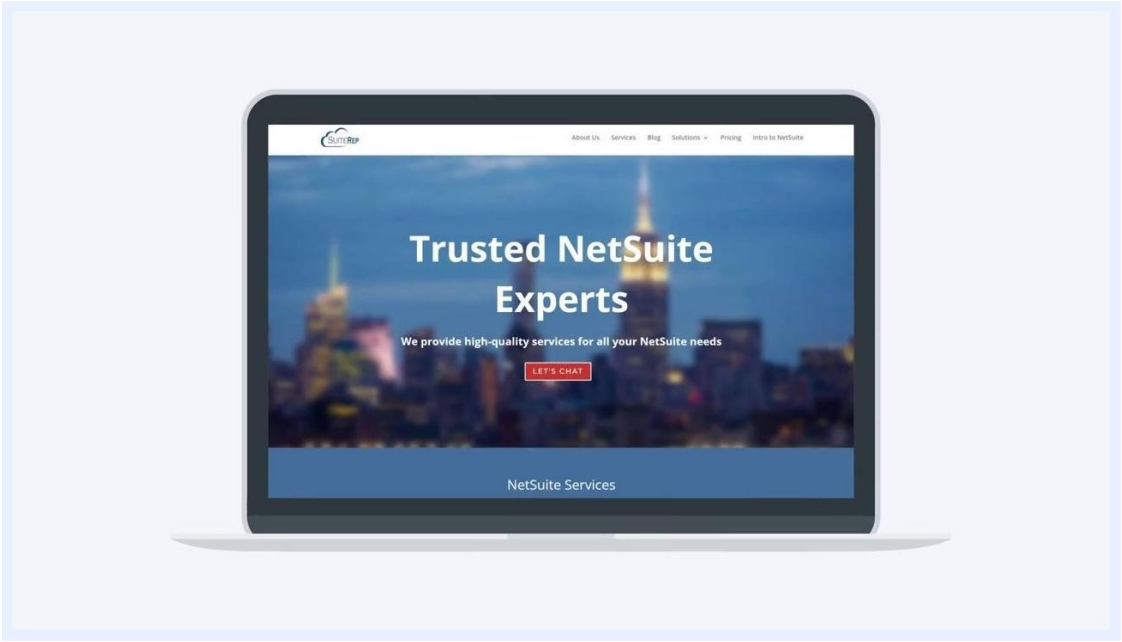
Once you've finished configuring columns, filters, sorting, and options, select Preview to review the report. If it looks correct, select Save to finalize your customized report.

What's next

With these steps, you now know how to create a custom report in NetSuite, from opening standard reports and building ad hoc reports to fine-tuning them with the Report Builder. Only account administrators or users with the necessary permissions can see and use the Access tab, so confirm your permissions before modifying access settings. For additional help with NetSuite reports or more advanced features, consult your NetSuite administrator or explore professional NetSuite services through SuiteRep.



Laptop displaying SuiteRep website with "Trusted NetSuite Experts" and "Let's Chat" button



SuiteRep logo on a white background