SuiteSuccess Leading Practices

NetSuite AI Connector Service

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Document Version

NetSuite AI Connector Service 25.11.06

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Documentation Overview

Leading Practices are a set of systems, processes, activities that are known to be the foremost methods within a respective industry. The purpose of this document is to provide detailed flows and user stories that can be used as a reference when interacting with NetSuite Prospects and Customers.

Contents

Edition Overview

High-Level Overview: NetSuite has adopted the Model Context Protocol (MCP), which boosts its integration capabilities and enables secure interactions between AI models and data systems. This feature provides users, such as financial users, with a seamless integration that lets supported AI clients directly access and interact with NetSuite data and functionality.

When to Use the NetSuite AI Connector Service: The NetSuite AI Connector Service is ideal for tasks that require connecting insights, explaining variances, detecting data anomalies, and summarizing ERP data. It generates actionable summaries, recommendations, and scenario planning, as well as clear narrative explanations and root-cause analyses.

What is a Tool? A **tool** is a function or capability that AI models can use to perform specific actions or retrieve information beyond my built-in knowledge.

What is Prompting? Prompting is the process of optimizing instructions to effectively leverage the NetSuite AI Connector Service tools. In NetSuite, a finance-focused platform, achieving accurate and meaningful results depends on three key factors: a comprehensive understanding of your dataset, familiarity with the platform's available tools, and the ability to construct well-structured prompts to maximize the effectiveness of these tools.

Prompting Best Practices for the NetSuite AI Connector Service: Request that the model use data in your NetSuite account to avoid sample data in outputs.

Review selected tools and outputs for accuracy as LLMs are prone to hallucination. Hallucination occurs when an AI model generates false information which may be presented as factual.

Use Tool Execution Patterns (samples below) to establish response expectations. This is achieved by providing an example question, the expected process from the LLM (including tool calls), and the expected output.

Do not ask the model to create financial reports from scratch or via SuiteQL. Reports incorporate NetSuite's accounting and business logic, while SuiteQL simply queries raw transactional data. SuiteQL is best suited for complex use cases, such as joining multiple tables.

Establish Tool Selection Priority (guideline prompt provided below) as a guideline for Claude to prioritize ns_runReport and ns_runSavedSearch over ns_runCustomSuiteQL.

Utilize the Hyperlink Framework (guideline prompt provided below) to supercharge your model's analysis by adding links straight to reports, transactions, and records, allowing users to quickly navigate to records in NetSuite.

Instruct the model to respond using Error Recovery Patterns (guideline prompt provided below) to provide additional clarity while troubleshooting.

When creating records (ns_createRecord), always set the External ID (externalId) to help reduce duplicate record creation, tool failure or incorrect API response interpretation.

If you don't get the result you want on the first attempt and need to provide further clarification or instructions through multiple iterations, close the conversation by asking the model: *"It seems you struggled with a few steps or didn't fully meet my expectations at first. Taking my initial prompt, what prompt should I have given you from the start to get this final outcome that I'm satisfied with?"*

Prompting Framework:

Define your objective: (a) Clearly articulate the specific outcome or insight you want to achieve.

Reference Traditional Methods: (a) Consider how you would typically obtain this result (e.g. through a particular report, saved search or analysis)

Leverage available tools: (a) Identify which tools or features are most appropriate (e.g. standard reports, saves searches, SuiteQl when necessary); (b) When referring to reports or saved searches, specify their names explicitly within your prompt.

Structure your prompt thoughtfully: a) Instruction: Explicitly state the task or question: b) Role: Specify the role or perspective the model should adopt: c) Context: Provide relevant background or situational details; d) Input Data: Clarify the dataset, query or focus are; e) Output Format: Indicate the desired format, structure or level of detail for the response.

Roles

The below table lists the bundled (custom) roles in the NetSuite AI Connector Service Edition solution. These Leading Practices are written in the context of these roles.

ROLE NAME	ROLE DESCRIPTION
Controller	The Controller is the company's chief accounting officer and heads the accounting department. The Controller manages the company's financial statements, general ledger, cost accounting, payroll, accounts payable, accounts receivable, budgeting, tax compliance and any special analyses. They are responsible for the company's finances including financial planning, management of financial risks, record-keeping, and financial reporting.
Existing Roles	It is recommended to make a copy of a preferred SuiteSuccess delivered role and add the necessary permissions to allow users to access the NetSuite AI Connector Service. Building roles from scratch is not recommended, however please ensure administrators thoroughly review access for NS AI Connector Service-enabled role.

ROLE NAME	ROLE DESCRIPTION
	Administrators may create a “Read Only” role in which the access level for each permission is set to “View”. It is strongly recommended that highly sensitive access, such “View Unencrypted Credit Cards” should not be included in roles used for NetSuite AI Connector Service, without proper assessment and vetting of the impact on the customer’s obligations and certifications, such as PCI-DSS. Users accessing the NetSuite AI Connector Service via this role are unable to create or update records in NetSuite. Users may not utilize the NetSuite AI Connector Service via the Administrator role.

Process Areas

High-Level Overview

The NetSuite AI Connector Service Edition covers basic & simple use cases within the following business process areas.

Data and Security
Secure Access Management
Concurrency and Integration Limits
Solution Components
Tool Execution Patterns
Sample Prompts
Guideline Prompts

Data and Security

It is strongly recommended to review third-party agreements and/or terms and conditions prior to configuring a connection to NetSuite. When using the NetSuite AI Connector Service, customers authorize NetSuite to permit the third party to transfer customer data, including potentially personal information, from the customer's Cloud Services instance to the connected system.

Understand how the LLM of your choice process your data and act according to your security and privacy posture, including its impact on your audit obligations and certifications, such as Sarbanes Oxley requirements, PCI-DSS, etc.

Ensure secure access management by granting appropriate roles and permissions only to authorized users, as these users will have the ability to fully analyze any data accessible to them.

Read and review the access agreement, Application Terms of Use, and Application Privacy Policy presented during OAuth.

We recommend you get familiar with potential limitations or restrictions established in the regulations where you operate that may affect your use of existing tools or the use of new tools created by you. Certain geographies have restrictions and/or requirements for certain use cases such as use of AI in HR, financial reporting, etc. Some jurisdictions, industry standards, or even LLM providers require controls such as content moderation, human-in-the-loop, and other controls, where applicable. It is recommended that you thoroughly research and understand the regulatory and industry requirements for your use of AI tools and services.

Review the permissions of the role which is being granted permission to access data and perform actions.

Secure Access Management

The NetSuite AI Connector Service's access to your NetSuite data is managed through role-based authorization and permission allocations.

Administrators are responsible for thoroughly reviewing each user and their associated NetSuite AI Connector Service-enabled roles both prior to initial connection and on an ongoing basis.

Administrators retain the ability to review or revoke user access at any time.

Data access can be expanded or contracted by adding or removing permissions to roles with access to the NetSuite AI Connector Service.

Concurrency and Integration Limits

Review the NetSuite AI Connector Service and Concurrency Governance (SuiteAnswers ID 1021319) guidance.

Be aware that concurrency can be a limiting factor: excess traffic or multiple processes can exhaust these limits, potentially causing delays or automatic denial of requests. Take into consideration your NetSuite account's concurrency limits and integration licensing.

Regularly monitor concurrency usage and educate your teams about these constraints.

Solution Components

See the MCP Standard Tools SuiteApp and User Guide in NetSuite Help for more information about the feature and the general set up process.

When utilizing the Help Center, please review “Important” notices carefully as these are updated to reflect current feature specifications/limitations.

Netsuite Platform Components	Additional Components / Applications
Netsuite AI Connector Service (MCP)	MCP Standard Tools SuiteApp

Tool Execution Patterns

SAMPLE PATTERN	PROMPT
Revenue Analysis	"### Revenue Analysis **Request**: "Show me our revenue performance this quarter" **Execute**: 1. ns_listAllReports → find "Revenue by Month" or similar 2. ns_runReport → current quarter (e.g., 10/01/2024 to 12/31/2024) 3. ns_runReport → same quarter last year for comparison **Create**: React artifact with NetSuite branding - Metric cards: Total Revenue (Ocean 120), Growth % (Pine if positive, Rose if negative) - Bar chart: Monthly breakdown with previous year overlay - Table: Month-by-month with YoY comparison, striped rows **Respond**: "Q4 2024 revenue is $4.35M, up 12.3% vs Q4 2023 ($3.87M). October strongest at $1.6M. [Dashboard above shows monthly breakdown.]""
Pipeline Analysis	*"### Pipeline Analysis* ***Request**: "What's in our sales pipeline this month?"* ***Execute**:* *1. ns_listAllReports → find "Pipeline by Sales Rep" or "Open Opportunities"* *2. ns_runReport → current month date range* *3. Calculate total pipeline and weighted pipeline (probability × amount)* ***Create**: React artifact* *- Metric cards: Total Pipeline, Weighted Pipeline, Average Deal Size* *- Pie chart: Pipeline by stage (Ocean 120 → Pine → Yellow → Rose sequence)* *- Table: By sales rep with deal count, total value, striped rows* ***Respond**: "Current pipeline is $12.4M across 47 opportunities. Weighted pipeline (probability-adjusted) is $5.2M. Top stage is 'Proposal' with $4.8M.""*

SAMPLE PATTERN	PROMPT
Customer Analysis	"### Customer Analysis **Request**: "Analyze our top customers by revenue" **Execute**: 1. ns_listAllReports → find "Revenue By Customer" or "Customer Sales Summary" 2. ns_runReport → "This Fiscal Year to Period" 3. Sort by revenue descending, identify top 10 **Create**: React artifact - Metric card: Total revenue from top 10 customers - Bar chart: Top 10 customers ranked - Table: All customers with revenue, transactions, average order value, striped rows **Respond**: "Top 10 customers represent $8.2M (62% of total revenue). Leading customer is [Name] at $1.8M across 24 transactions.""

Sample Prompts

TITLE	ROLES	USER STORIES
Budget vs. Actual Reporting	Controller	"Build a comparative income statement showing actual vs. budget vs. prior year for each month of the current quarter with variance percentages highlighted."
Executive Dashboards	Controller	"Create a monthly executive dashboard showing revenue, gross profit margin, operating expenses, and net income for the last 12 months with trend lines and variance to budget."
Executive Dashboards	Controller	"Create a working capital dashboard tracking DSO (Days Sales Outstanding), DPO (Days Payable Outstanding), inventory turnover, and cash conversion cycle over time."
Cash Flow Analysis	Controller	"Show me our current cash position across all bank accounts and calculate how many days of operating expenses we can cover with available cash based on our previous 90-day burn rate."
Period Close	Controller	"Using data in my NetSuite account, generate a month-end close checklist dashboard showing status of bank reconciliations, sub-ledger reconciliations, accrual postings, and outstanding items with responsible parties based on employee roles."
Period Close	Controller	"Using data in my NetSuite account, build a journal entry audit report showing all manual entries posted in the last month, grouped by account type, with drill-down to entry details and supporting documentation. Please provide a master journal entry list of the entries including the internal ID, document number and date."
Vendor Master	Controller	"I need to clean up duplicate and inactive vendors in my NetSuite account. Identify: (1) vendors with similar names (potential duplicates like 'ABC Company' and 'ABC Co.'), (2) vendors with no transactions in the last 12 months, (3) vendors with multiple records sharing the same tax ID or address. Include vendor internal ID, name, last transaction date, and total transaction count."
Vendor Payment Analysis	Controller	"Generate a vendor payment analysis showing payment volume by vendor, on time payment percentage, early payment discount capture rate, and average payment cycle time."
A/R Aging Dashboard	Controller	"Create a collections dashboard showing total AR balance, aging distribution, top 10 overdue customers, collection effectiveness

TITLE	ROLES	USER STORIES
		index, and average days to payment."
Sales Report	Controller	“Generate a sales report for the last 30 days grouped by customer.”
Cost Analysis	Controller	“Show me my top 5 vendors and top 5 items and identify any opportunities for cost reduction.”

Guideline Prompts

<table>
<tr><th>GUIDELINE</th><th>PROMPT</th></tr>
<tr><td>Hyperlink Framework</td><td>“When presenting detailed NetSuite data (transactions, entities, etc.), **always include clickable hyperlinks** using internal IDs from tool responses (**Critical**: do not use `tranId` or `entityNumber` as a replacement for `internalId`). When using `ns_runReport`, provide a link back to the report using the format below as a quick reference. ### URL Patterns | Name	URL Pattern
Transactions	`https://system.netsuite.com/app/accounting/transactions/[TYPE].nl?id=[ID]`
Entities	`https://system.netsuite.com/app/common/entity/[TYPE].nl?id=[ID]`
Items	`https://system.netsuite.com/app/common/item/[TYPE].nl?id=[ID]`
Projects	`https://system.netsuite.com/app/accounting/project/[TYPE].nl?id=[ID]`
CRM	`https://system.netsuite.com/app/crm/calendar/[TYPE].nl?id=[ID]`
Custom Records	`https://system.netsuite.com/app/common/custom/custrecordentry.nl?rectype=[TYPE]&id=[ID]`
Reports| `https://system.netsuite.com/app/reporting/reportrunner.nl?cr=[ID]` | ### Type Fragments **Transactions**: `vendbill`, `custinvc`, `purchord`, `salesord`, `journal`, `vendpymt`, `custpymt`, `credmemo`, `vendcred`, `revarrng` (revenue arrangement), `workord`, `woissue`, `wodcomp`, `build`, `itemrcpt`, `itemfulf` **Entities**: `custjob` (customer, prospect, lead), `vendor`, `employee`, `contact` **Items**: `item` **Projects**: `project`, `projecttask`, `allocation` **CRM**: `task`, `event`, `call` **Custom Records**: (the TYPE should be the internal ID of the custom record itself) **Reports**: (the ID should be the ID of the report that was run by the ns_runReport tool) ### Output Format **In text responses**: ```markdown Vendor Bill [#8310](https://system.netsuite.com/app/accounting/transactions/vendbill.nl?id=8310) ```”</td></tr>
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GUIDELINE	PROMPT
Tool Selection Priority	"Use tools in this exact order: 1. **ns_listAllReports + ns_runReport** - ALWAYS try first for financial/sales data 2. **ns_listSavedSearch + ns_runSavedSearch** - For operational data (invoices, orders, cases) 3. **ns_getRecordTypeMetadata** - When creating/updating records to verify field names 4. **ns_runCustomSuiteQL** - LAST RESORT ONLY (complex joins, custom fields not in reports)"
Error Recovery Patterns	"### If Report Doesn't Exist: 1. Try alternate names ("Revenue by Month" → "Sales by Period" → "Income Statement") 2. Use ns_listSavedSearch as fallback 3. Ask user: "I don't see a [X] report. Do you have a custom report name, or should I try saved searches?" 4. Only try SuiteQL after user confirms ### If No Data Returned: 1. Verify date range is reasonable for their business 2. Check if filters are too restrictive 3. Report findings: "No transactions found for [period]. This could mean [business reason]. Would you like to try [alternative period/filter]?" ### If Tool Call Fails: 1. Don't show technical error details 2. Try alternative tool immediately 3. Acknowledge briefly: "Let me try a different approach..." 4. If multiple failures: "I'm having trouble accessing [data type]. Could you confirm the report/search name in your NetSuite instance?" ### If User Asks for Inaccessible Data: "I don't have access to [X] through standard reports. Options: (1) Check if you have a saved search for this, (2) I can try a custom query if you confirm, or (3) We could analyze [related alternative data].""