

**NETSUITE SUITEANALYTICS SETUP GUIDE**

**The Below requirements are needed to establish a connection netsuite suiteanalytics.**

**Prerequisites**

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To connect NetSuite SuiteAnalytics to Fivetran, you need the following:  
  
A NetSuite administrative account  
The SuiteAnalytics Connect Service enabled  
A NetSuite login email  
A NetSuite password  
A list of permissions required for the NetSuite tables you want to sync  
  
NOTE: Gathering these permissions is often complex. We recommend that you work with your NetSuite administrator to determine which ones are relevant for your needs. Alternatively, you can use the Excel spreadsheet found on the NetSuite Permission Documentation page to generate this list yourself.

**Setup Guide**

1. Create a role

* On the menu bar at the top of your NetSuite dashboard, select Setup -> Users/Roles -> Manage Roles -> New to create a new role for Fivetran.
* Enter a memorable name in the Name input field for the role. (We recommend "Fivetran.")

1. Set system-wide permissions for the role

* In your NetSuite dashboard, after you have named the role, scroll down to the bottom of the page to set permissions for the role. You must first set system-wide permissions.
* Select Permissions -> Setup near the bottom of the page and expand the drop-down menu to set system-wide permissions.
* To add the required system-level permissions, select each of the following permissions from the drop-down menu and click Add:
* Custom Body Fields
* Custom Column Fields
* Custom Entity Fields
* Custom Event Fields
* Custom Item Fields
* Custom Record Types
* Deleted Records
* SOAP Web Services
* SuiteAnalytics Connect

1. Set table permissions

* In your NetSuite dashboard, select Setup -> Users/Roles -> Manage Roles, and then click Edit beside the relevant role's name on the Manage Roles page displayed.
* Select the permissions for the tables you wish to add. You will find these permissions under either the Transactions, Lists, Setup or Custom Record subcategories, depending on the types of tables.
* Select the required permissions and click Add. By default, table permissions should have the View permission level, that is, be read-only.
* After you have added the permissions, click Save.
* NOTE: After Fivetran completes the initial sync, look under your NetSuite connection's Status tab in your Fivetran dashboard. It will list all the available tables. It will display the name of the required permission for any table that it could not access. Add the required permissions.

1. Set additional table permissions (optional)

* Some tables, such as Accounts, are tied to multiple permissions. You must add these additional permissions for the role to see all the content in the table. As an example, you can do the following to determine the additional permissions you need for Accounts:
* In your NetSuite dashboard, go to the Chart of Accounts page by selecting Lists -> Accounting -> Accounts.
* Find the Account you want to add and note its Type. In the example screenshot, Accumulated Depreciation has a type of Deferred Expense.
* Select Setup -> Users/Roles -> Manage Roles, and then click Edit beside the relevant role's name on the Manage Roles page displayed.
* Select Deferred Expense Registers from the Lists drop-down menu of the Permissions tab.
* Click Add to add the permission.
* You can check if you added the right permissions by logging in as a user with the new role and checking if you see all the data that you want.

1. Get the Role ID

* On the menu bar at the top of the NetSuite dashboard, select Setup -> Users/Roles -> Manage Roles.
* Find the Internal ID of the role in the role list table on the Manage Roles page and make a note of it. You will need it to configure Fivetran.
* NOTE: The Internal ID column may be not displayed in the role list table. In this case, you need to customize the table view by clicking Edit View and adding the Internal ID field to the displayed field set in the similar way as you add table permissions in step 2 .

1. Connect the Role to a user

* Decide which NetSuite user you want to connect to Fivetran. It is best to create a dedicated user for the Fivetran role because only one connection at a time is allowed by a given user. A connection conflict will cause your Fivetran sync to fail.
* On the menu bar at the top of the NetSuite dashboard, select Setup -> Users/Roles -> Manage Users.
* Select the user you would like Fivetran to use.
* Click Edit.
* Scroll-down slightly and select the Access tab.
* Make sure the Give Access box is checked.
* Expand the Role drop-down list on the Roles tab and select the Fivetran role. Then click Add and Save.

1. Find your service host, port and account ID

* From the homepage of your NetSuite account, find the Settings module and select Set Up SuiteAnalytics Connect.
* Click on Your Configuration, and your service host, port and account ID information will appear.
* Make a note of your host, port and account ID. You will need them to configure Fivetran.

1. Finish Fivetran configuration

* Enter your chosen destination schema name in the connector setup form.
* Fill in the following information:
* Service Host
* Service Port
* Account ID
* Role ID
* Email
* Password
* Click Save & Test. Fivetran will take it from here and sync your data from your NetSuite SuiteAnalytics account.

