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# A New Way to Work With Your NetSuite Financial Data

Nine AI prompts to get you started

ORACLE  
NetSuite

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## Introduction

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Working with NetSuite data has traditionally meant knowing which reports to run, how to build saved searches, or where to find the right fields.

The NetSuite AI Connector Service changes that by securely connecting your favorite AI assistants, like Claude and ChatGPT, to your NetSuite data, making it easier to explore financial data using natural language prompts.

This ebook is designed for finance teams looking to work more efficiently with AI-powered reporting, summaries, and analysis using NetSuite data.

But this isn't about writing the "perfect" prompt.

It's about learning how to work interactively with AI:

- Start with a question.
- Review the result.
- Refine it.
- Explore further.

**CFO Dashboard  
Preview**

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## NetSuite AI Connector Service

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The NetSuite AI Connector Service provides a way to connect NetSuite to popular AI assistants, like Claude and ChatGPT, in a secure, governed way while controlling how those assistants access and interact with NetSuite data, workflows, and analytics. You'll need your own Claude or ChatGPT subscription, but once you have that, download the no-cost NetSuite MCP Standard Tools SuiteApp that provides a comprehensive set of tools that AI assistants can use to securely access data from NetSuite.

The NetSuite AI Connector Service Companion SuiteApp works alongside the NetSuite MCP Standard Tools to help you get started fast with over 100 pre-vetted prompt templates aligned to NetSuite data structures, terminology, workflows, and preconfigured roles that ensure AI interactions follow NetSuite's existing role-based permissions and governance policies.

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## What Makes a Prompt Work

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As you refine results, these elements help create more useful financial outputs:

1. **Data Source:** What NetSuite data should be analyzed
2. **Time Period:** Which reporting window matters
3. **Output Format:** Summary, dashboard, or table
4. **Flags:** Risks, anomalies, or exceptions to highlight
5. **Audience:** Leadership, finance teams, operations, etc.

You don't need all five upfront. Start simple and refine as you go.

Prompt  
Anatomy

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## Nine Prompts You Can Use

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From revenue analysis and cash flow monitoring to AR review, executive reporting, and operational forecasting, finance teams often spend significant time building reports, searching for data, and manually summarizing findings. The NetSuite AI Connector Service helps streamline these tasks by enabling more conversational, iterative access to live NetSuite data through your preferred AI assistant. As teams refine outputs and identify workflows that are valuable, they can save and standardize them through the NetSuite AI Connector Service Companion, which acts as a prompt library, making it easier to scale prompting for repeatable reporting, analysis, and decision-making processes across the organization.

### Executive Summaries

#### 1. Revenue Summary

*“Summarize what happened with our revenue last quarter compared to the previous one. Pull from NetSuite and explain it in plain language.”*

Refine by asking:

- Break down the drivers.
- Highlight anything off track.

- Make it appropriate for leadership.
- Turn this into a reusable prompt.

#### 2. AR Risk Overview

*“Look at our current AR in NetSuite and explain where we have the most collection risk.”*

Refine by asking:

- Add aging buckets.
- Call out highest-risk customers.
- Include a recommendation.
- Turn this into a reusable prompt.

AR Executive  
Summary

### 3. Business Performance Summary

*“Summarize how the business performed last month across revenue, expenses, and cash.”*

Refine by asking:

- Focus on major changes.
- Highlight risks or anomalies.
- Make it ready for executive review.
- Turn this into a reusable prompt.

### Dashboards

#### 4. Daily KPI Dashboard

*“Build a dashboard from NetSuite data showing the key metrics to review each morning.”*

Refine by asking:

- Add revenue, cash, and AR.
- Include trends over time.
- Flag anything outside targets.
- Turn this into a reusable prompt.

#### 5. Cash and Runway Dashboard

*“Create a dashboard showing current cash position and how long it will last based on spending.”*

Refine by asking:

- Add burn rate trends.
- Show runway in months.

- Flag risk thresholds.
- Turn this into a reusable prompt.

#### 6. AR Health Dashboard

*“Build a dashboard showing the health of accounts receivable.”*

Refine by asking:

- Add aging buckets.
- Highlight overdue accounts.
- Include DSO trends.
- Turn this into a reusable prompt.

AR Health  
Dashboard

## Tables

### 7. Top Customers

*“Show top customers this year based on revenue from NetSuite.”*

Refine by asking:

- Add prior year comparison.
- Include AR balances.
- Flag overdue accounts.
- Turn this into a reusable prompt.

### 8. Vendor Performance

*“Pull a table of vendors and show how they’ve performed over the last six months.”*

Refine by asking:

- Add spend and performance metrics.
- Rank vendors.
- Flag underperformance.
- Turn this into a reusable prompt.

### 9. AR Collections Table

*“Show a table of customers with outstanding invoices.”*

Refine by asking:

- Break out aging buckets.
- Sort by highest risk.
- Add status indicators (At Risk/OK).
- Turn this into a reusable prompt.

AR Collections  
Scorecard

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## Turn Outputs Into Reusable Prompts

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Once you get an output you like, save it by asking:

- “Turn this into a prompt I can reuse”.
- “Make this prompt more concise”.
- “Format this for leadership use”.

Start with exploration, then create structure from what works.

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## Quick Validation

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Before sharing or acting on results:

- Confirm the data source.
- Spot-check one key number.
- Ensure the output answers the original question.

If something is off, refine the prompt and iterate.

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## Conclusion

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This isn't about writing the perfect prompt.

It's about:

- Asking better questions.
- Exploring your data.
- Iterating quickly.

Start simple. Refine as you go. Save what works.

Prompt  
Comparison

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## Supporting You Along the Way

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If you want to learn more about building scalable AI integrations, check out these NetSuite resources:

- [Connect to NetSuite AI Connector Service](#)
- [Associated Risks, Controls, and Mitigation Strategies](#)
- [Creating Custom Tools for the NetSuite AI Connector Service](#)

### Join the NetSuite Support Community

The NetSuite Support Community is an online gathering place for NetSuite professionals to share information, experiences, and advice. Ask a Support Guru for help with how-to questions or start a public discussion with the community.

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