Teamfield Enterprises

BISP
Business Intelligence Solution Providers Inc.

Integration of NetSuite with Tableau for Data visualization

Sno	Date	Modification	Author	Verified By
1	2019/11/11	Initial Document	Sumit	Neeraj Soni

What is NetSuite?

NetSuite is a cloud based software platform that provides a single view of a business across financials, back office Operations, CRM and event marketing. Many companies are turning to the cloud for delivery of their business system to lower their operating costs and strengthen their competitive advantage.

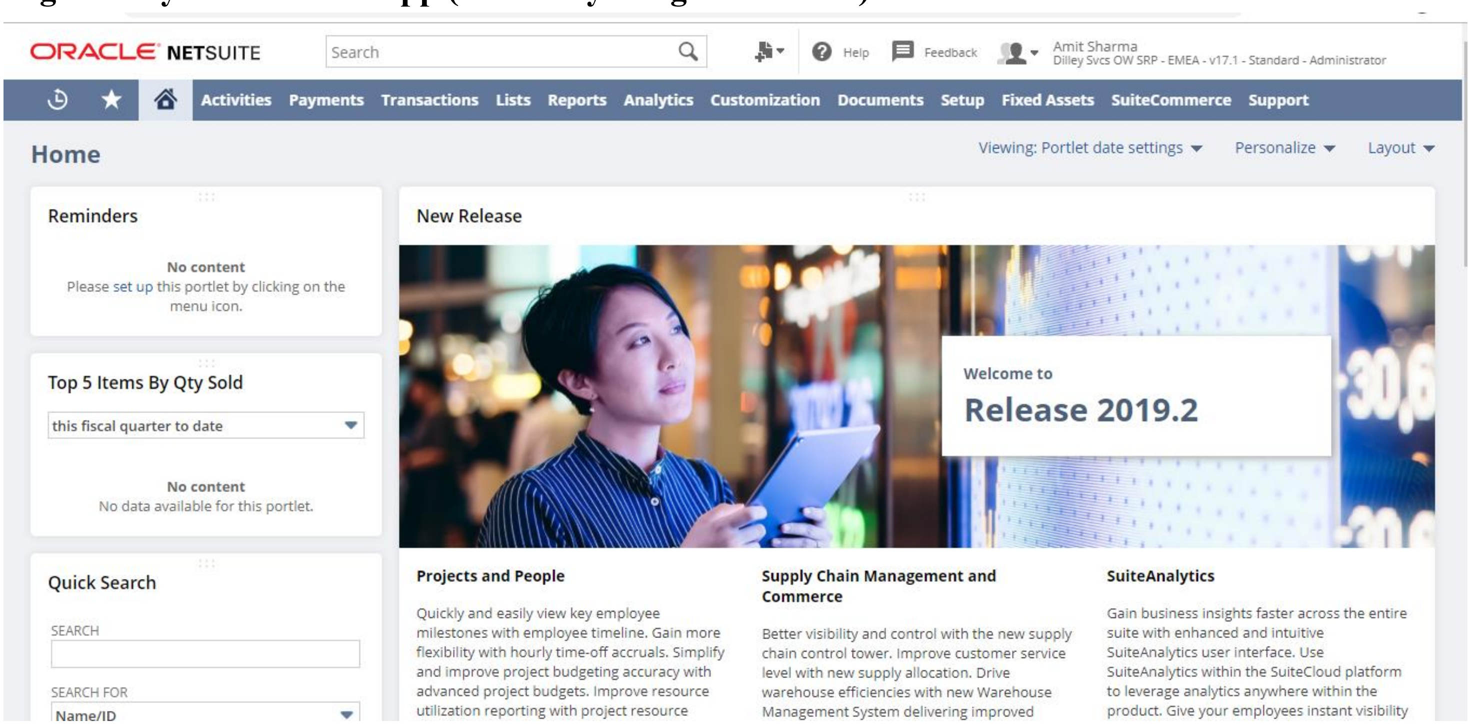
What is Tableau?

Tableau is a most powerful, secure, flexible and fastest growing data visualization tool used in the Business Intelligence Industry. It elevates people with the power of data. It is the best way to change or transform the raw set of data into an easily understandable format with zero technical skills and limited coding knowledge.

NetSuite Tableau Integration Steps:

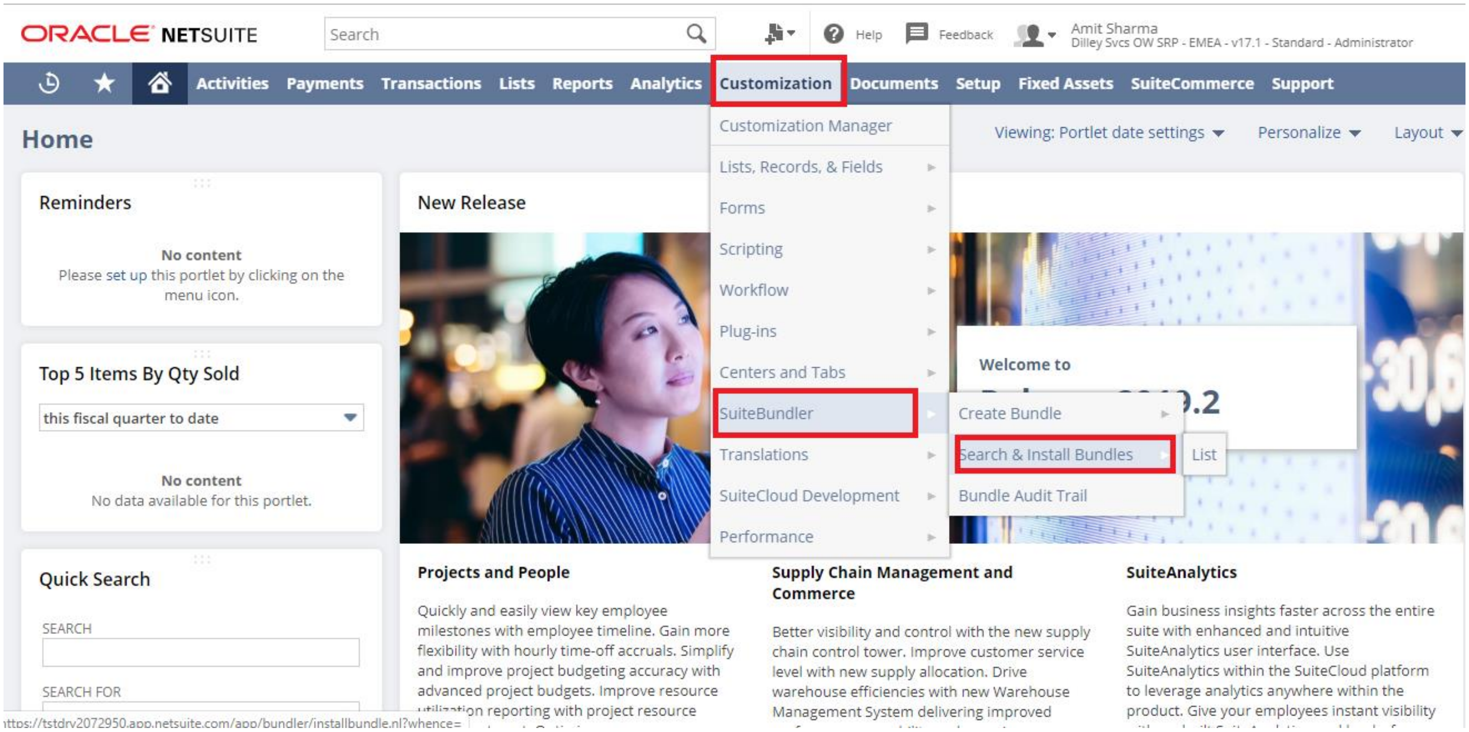
This document will provide you step by step Implementation how to integrate your NetSuite with Tableau and Import data from NetSuite into Tableau for visualization.

Login into your NetSuite App (If already a registered user)

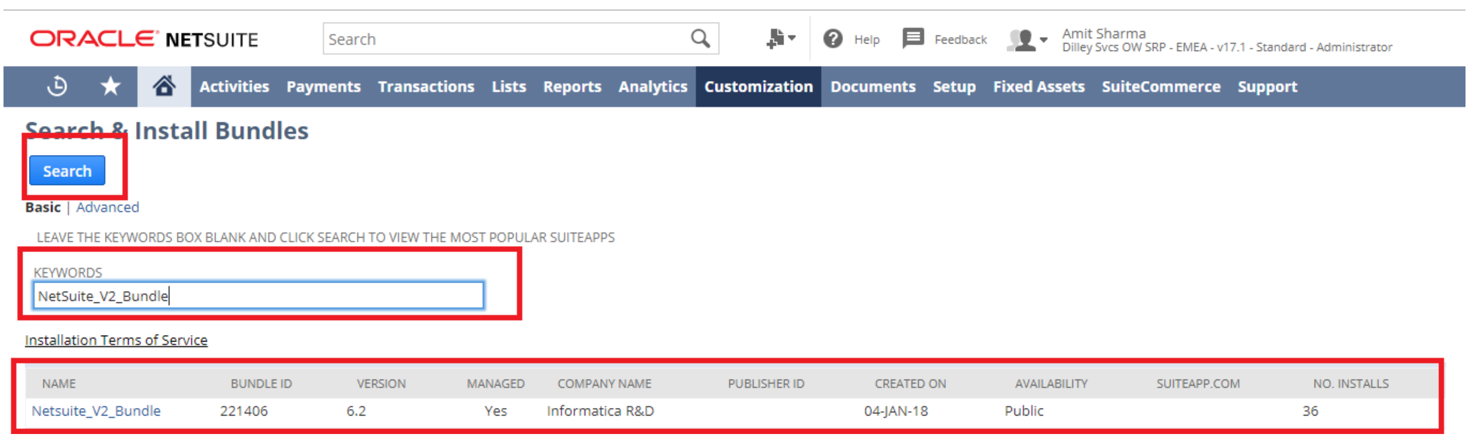


Once logged in, install a bundle which will help in Integration between NetSuite and Tableau

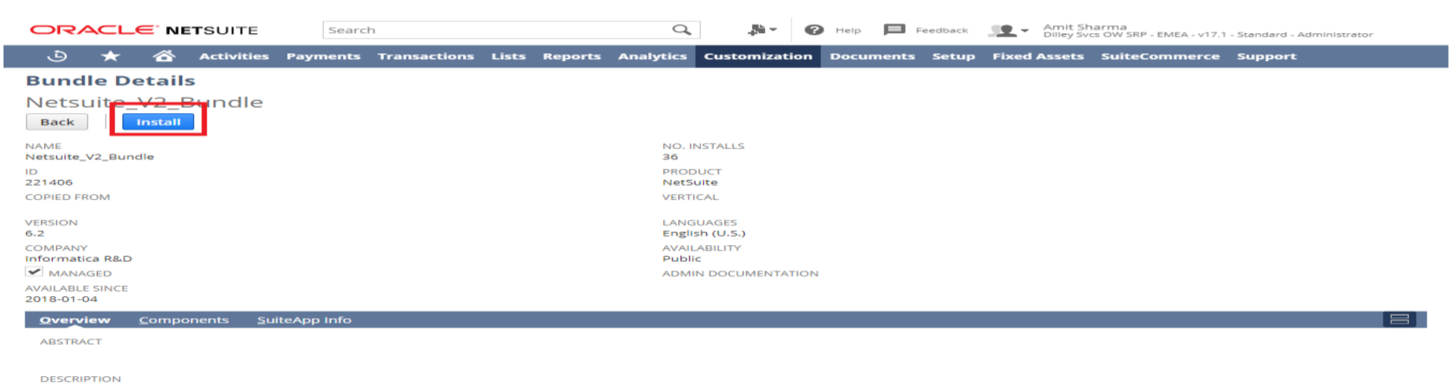
1 Steps to Install Bundle in NetSuite



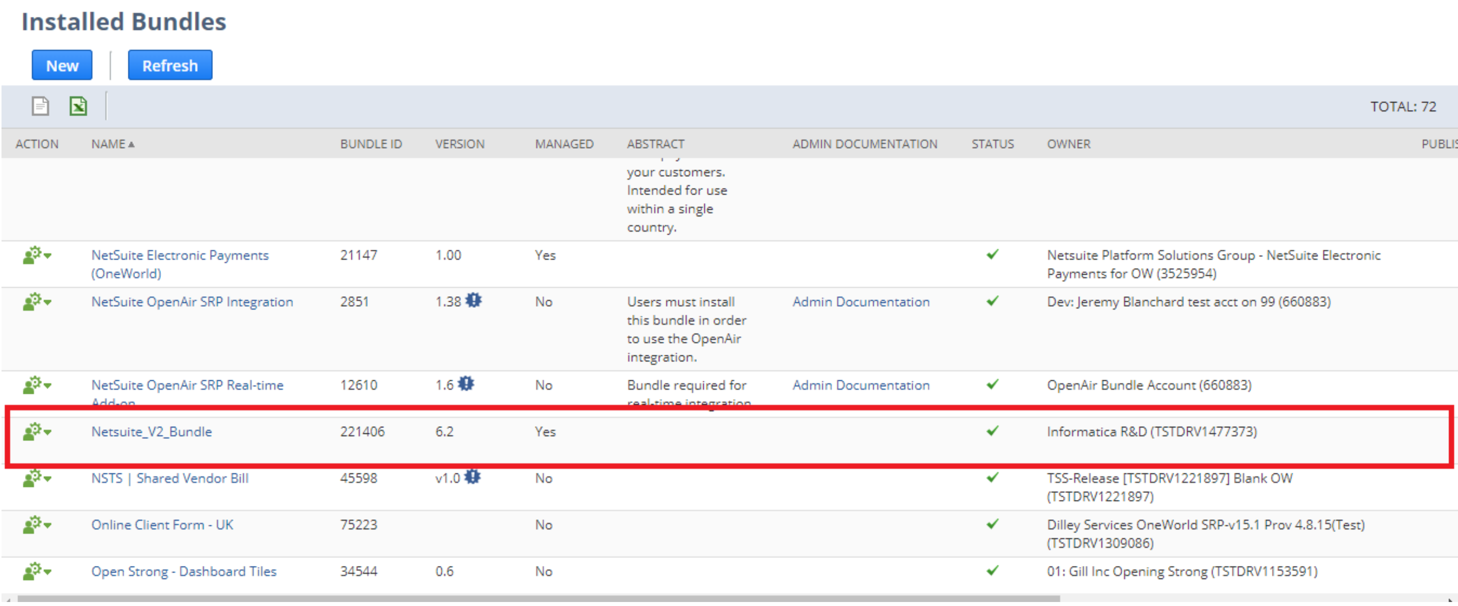
1.1 Click on Search and Install Bundle, Search for Bundle named as "NetSuite_V2_Bundle"



1.2 Click on Bundle name and click on Install in next window

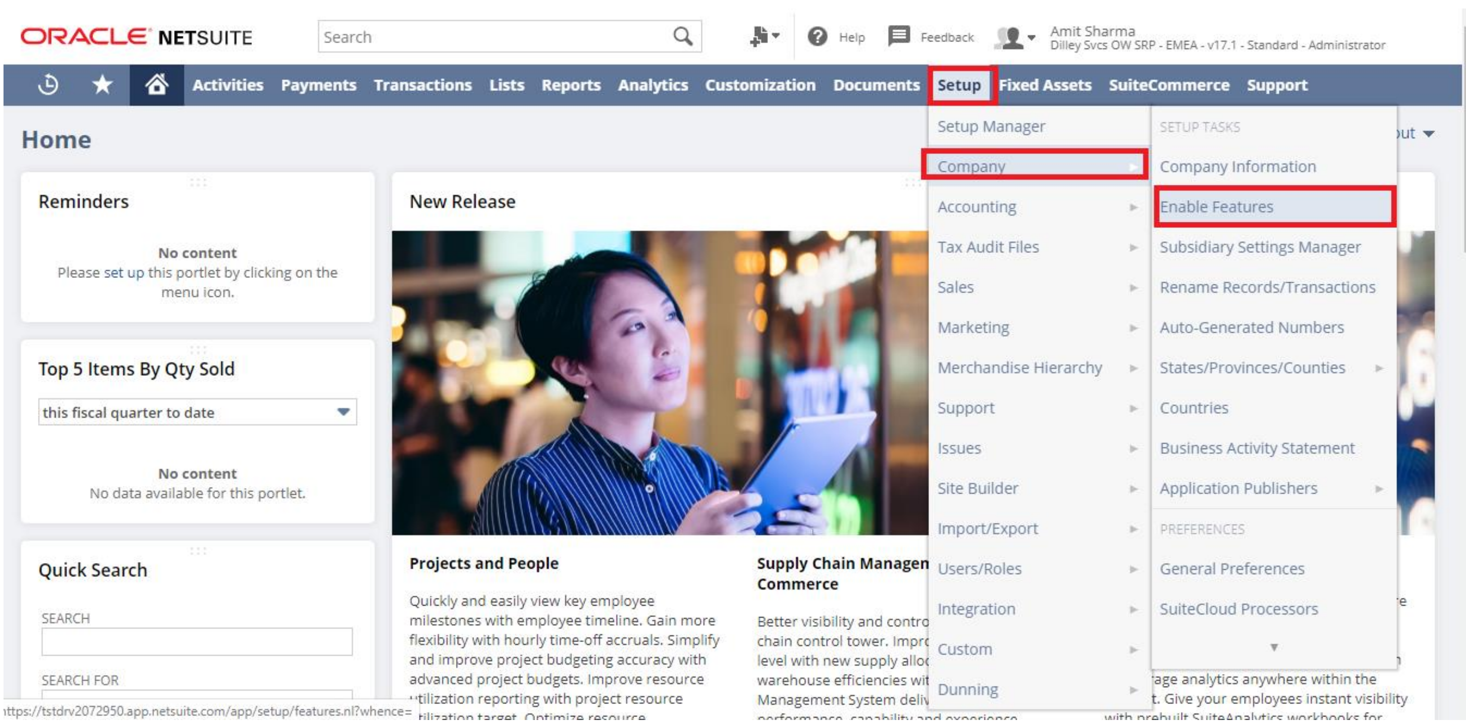


2 Installed Bundle can be checked from list

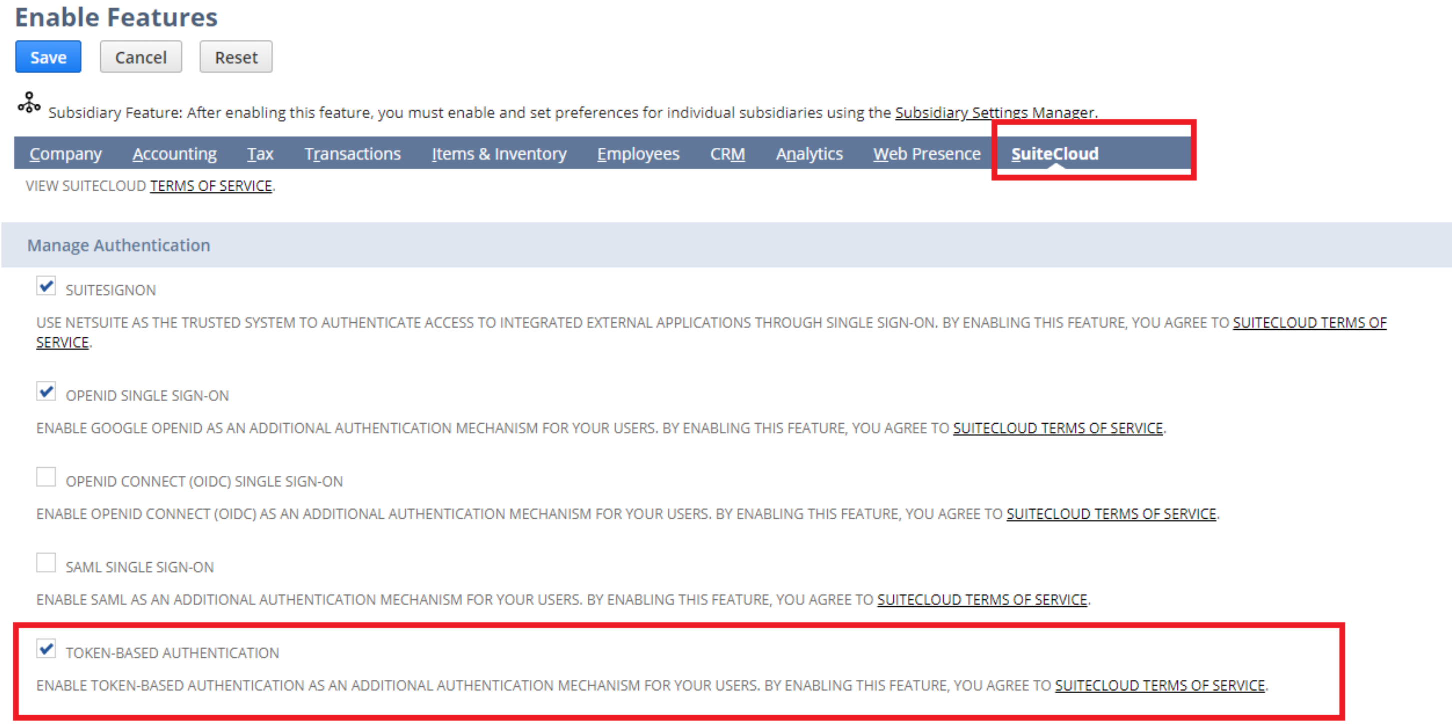


Once Bundle is installed, the next step is to generate Security Token, Setting up Token Roles, Creating a new Integration App and extracting Access Token Id for Integration.

3 Steps to Setup a new Token based Authentication



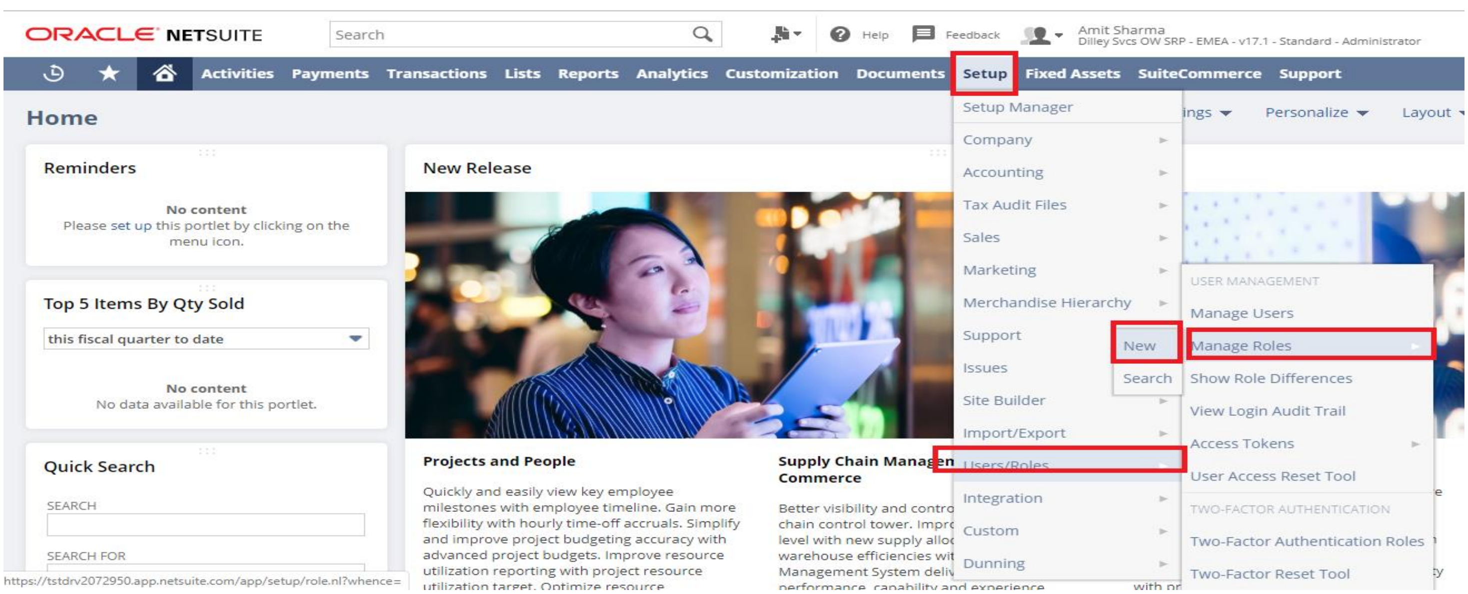
3.1 Click on Suite Cloud and Look for "Token Based Authentication", check that option and click on save button.



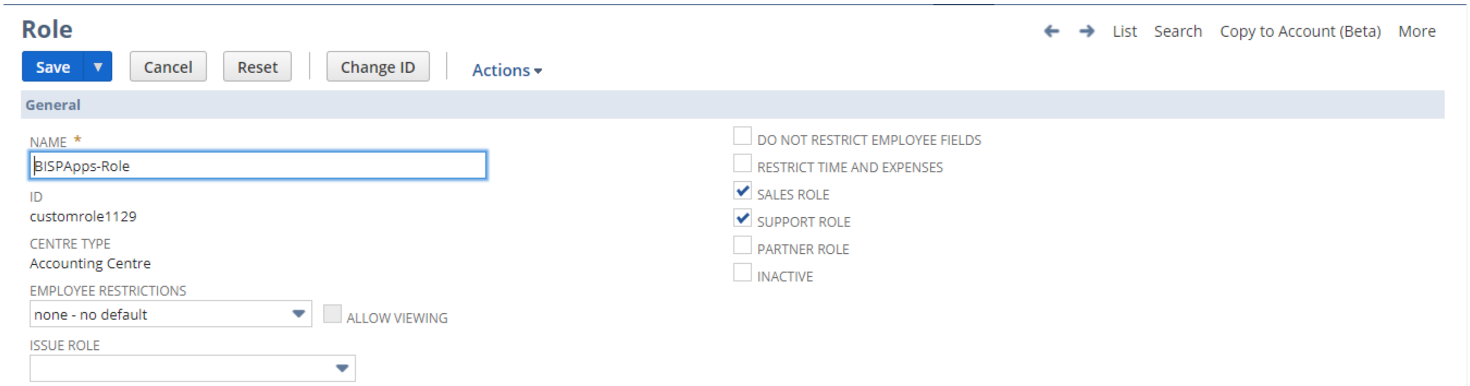
Step to setup a new Token Role

This step is required to create a new role and give permission to a user to generate and access token.

3.2 Click on Setup and select role to create a new role

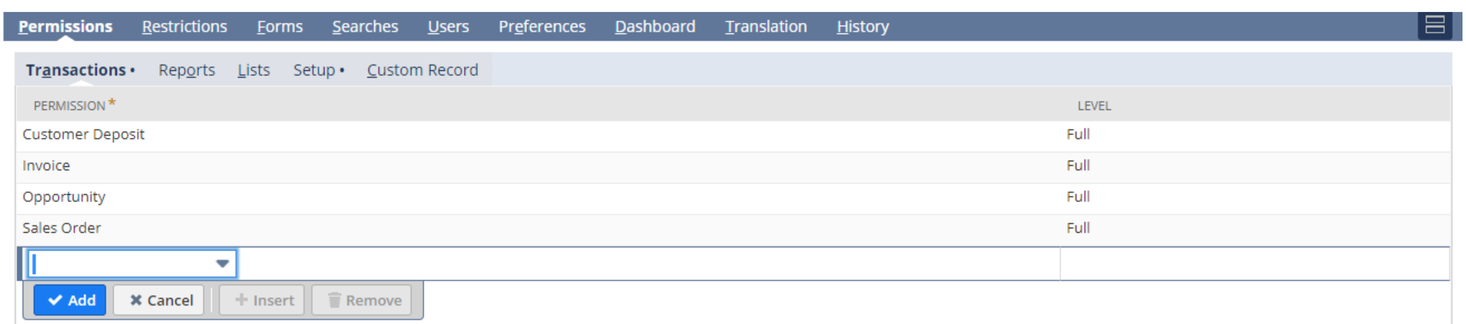


3.3 Add required values

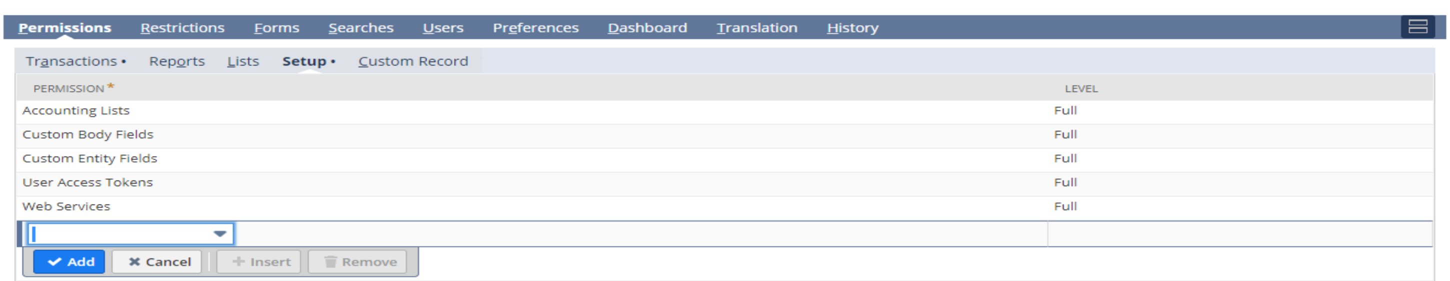


3.4 Set properties

3.5 Click on permission and add required permissions



3.6 Click on Setup to add additional transactions

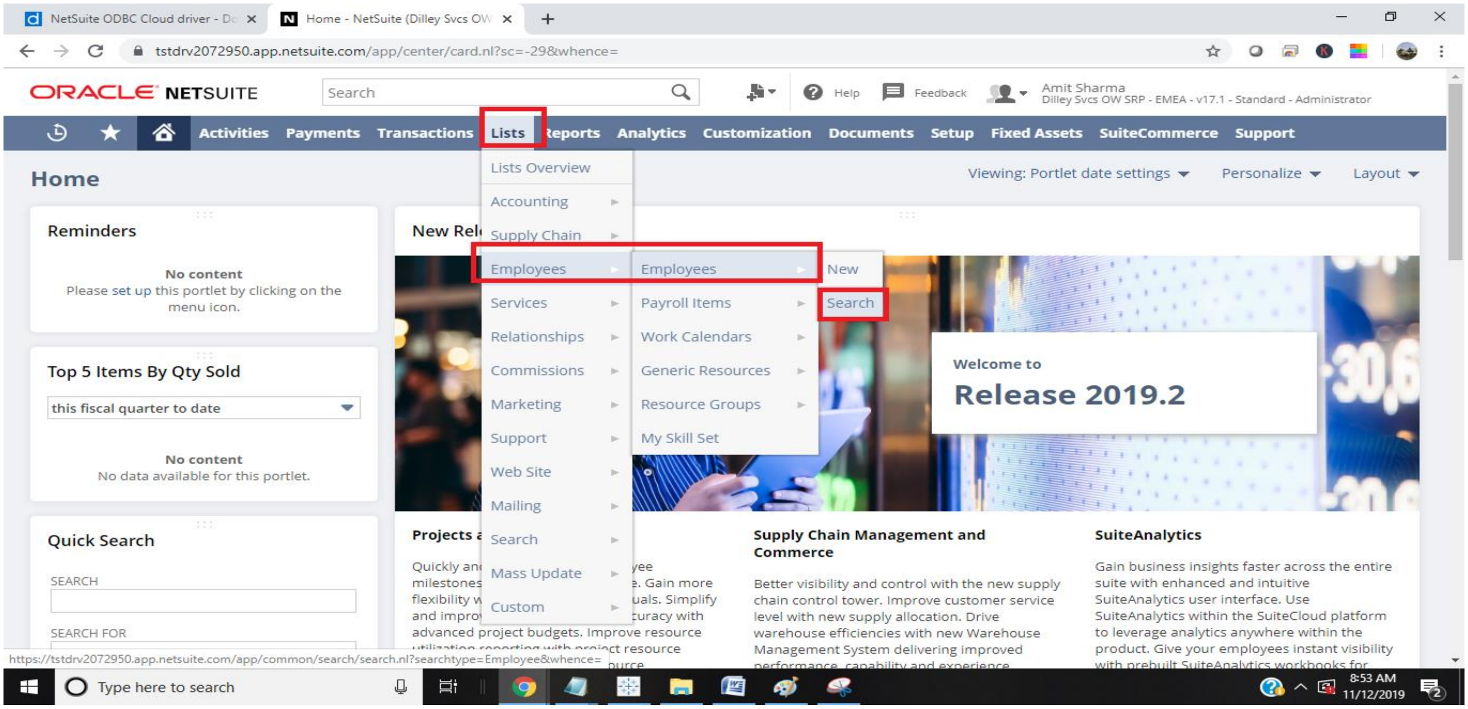


3.7 Once added all required permissions and transactions click on save. Role is created.

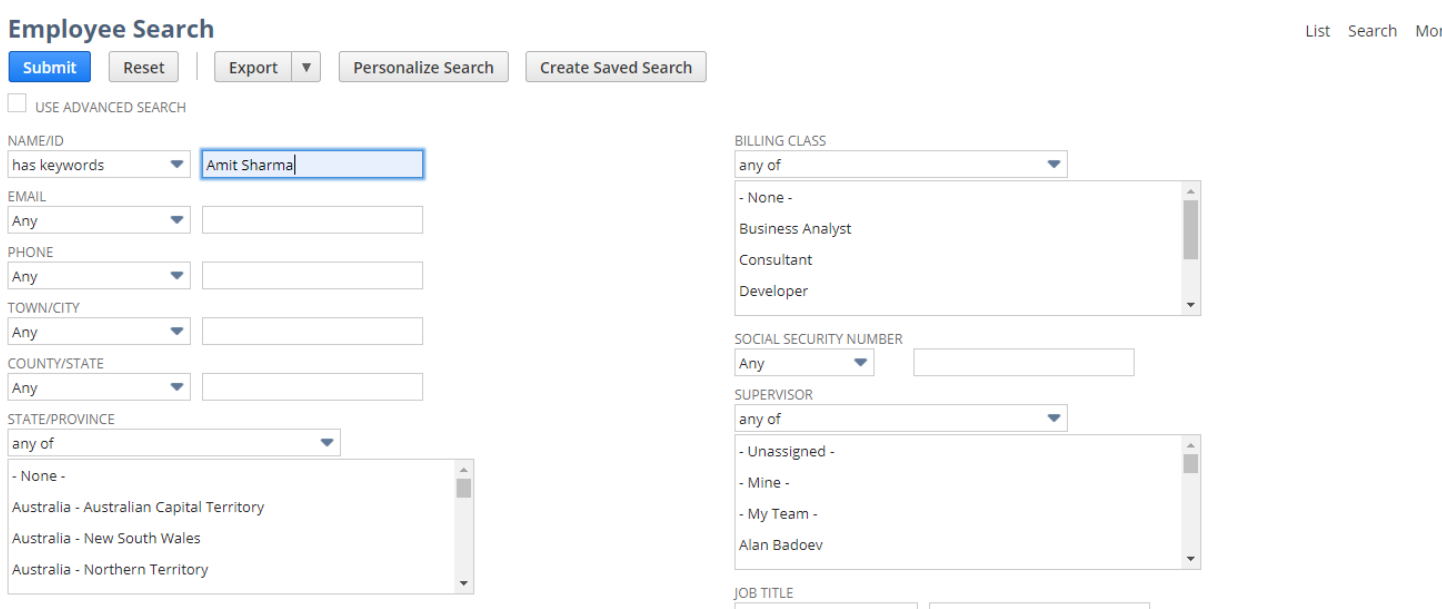
4 Step to Assign Role to existing User

In this step we will going to assign role to existing user that we created in previous step

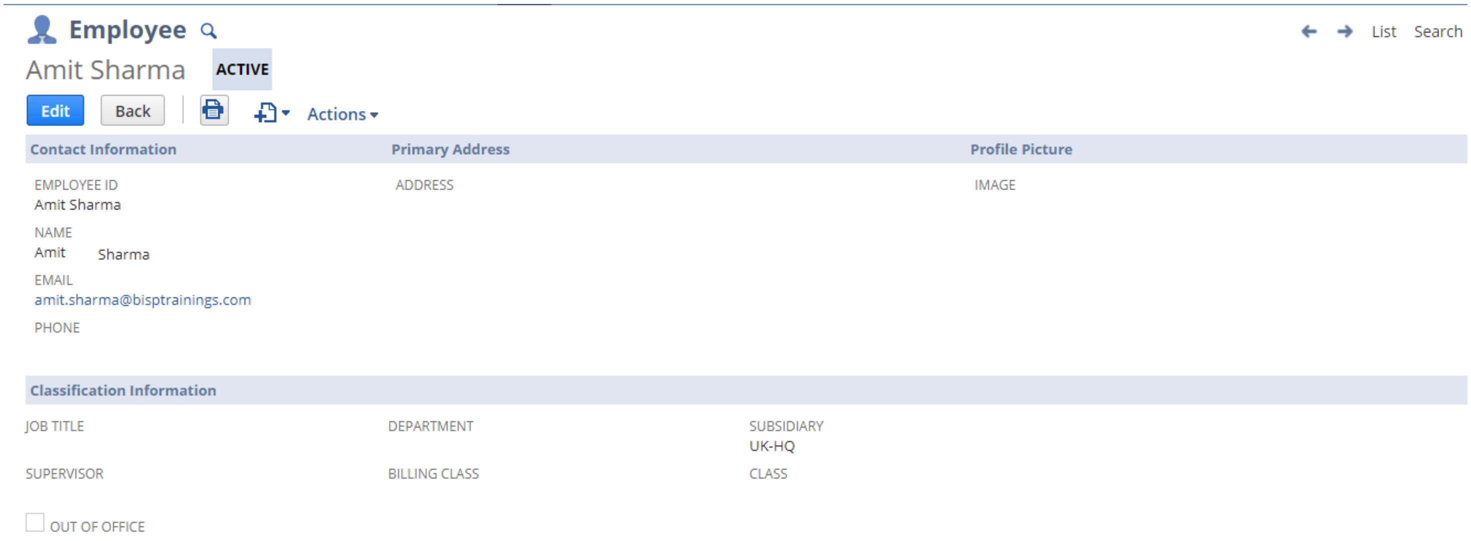
4.1 Search existing user following below step



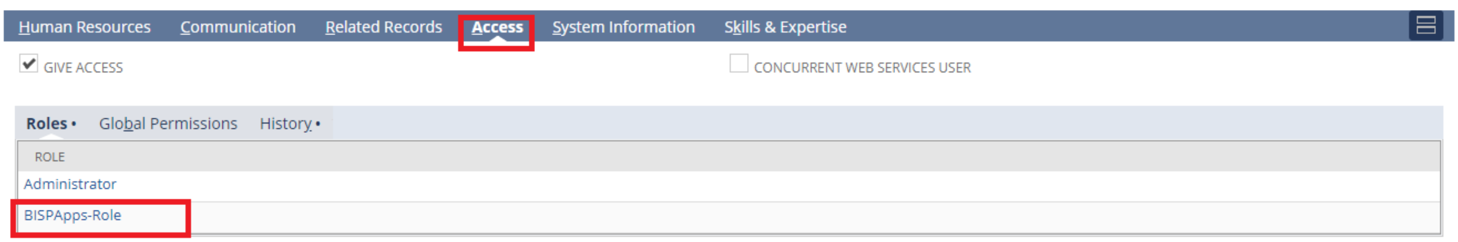
4.2 Enter Employee name in search box and click on Search button.



4.3 Once Employee record open click on edit button to add permission.



4.4 Add a new access to user for the role created in previous step

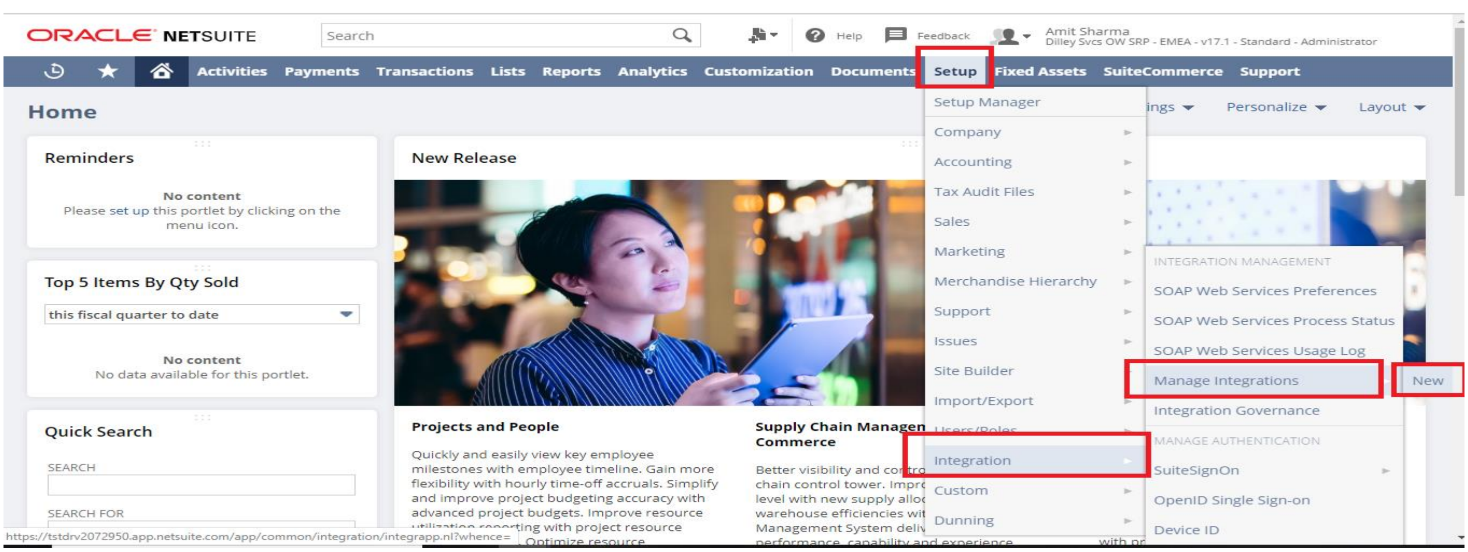


Finally click on save to save the changes

5 Steps to generate consumer secret and consumer key for integration

This step will help us to create new secret and key

5.1 Click on setup → Integration



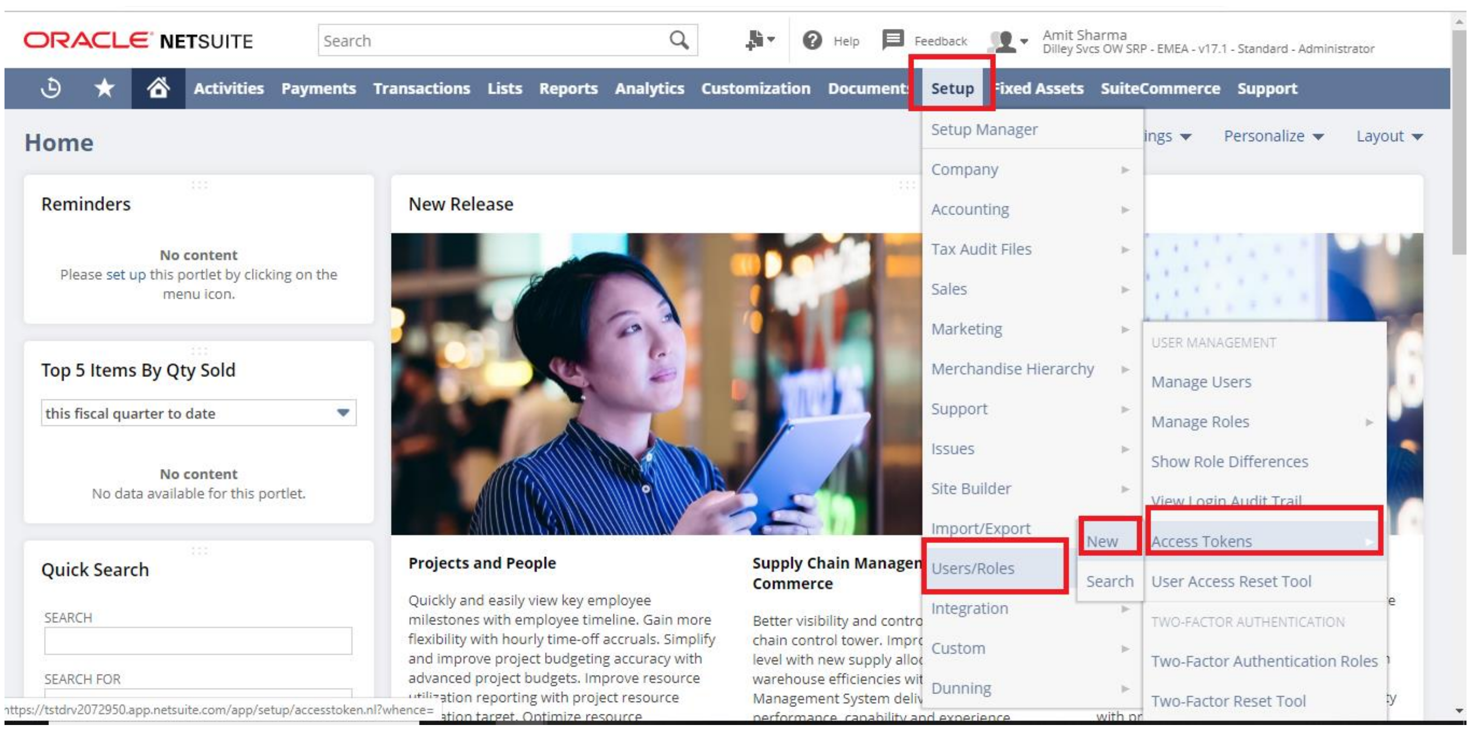
5.2 Fill required details and click on save

Note: Once saved a new consumer key and consumer secret will be generated. Save that for later user.

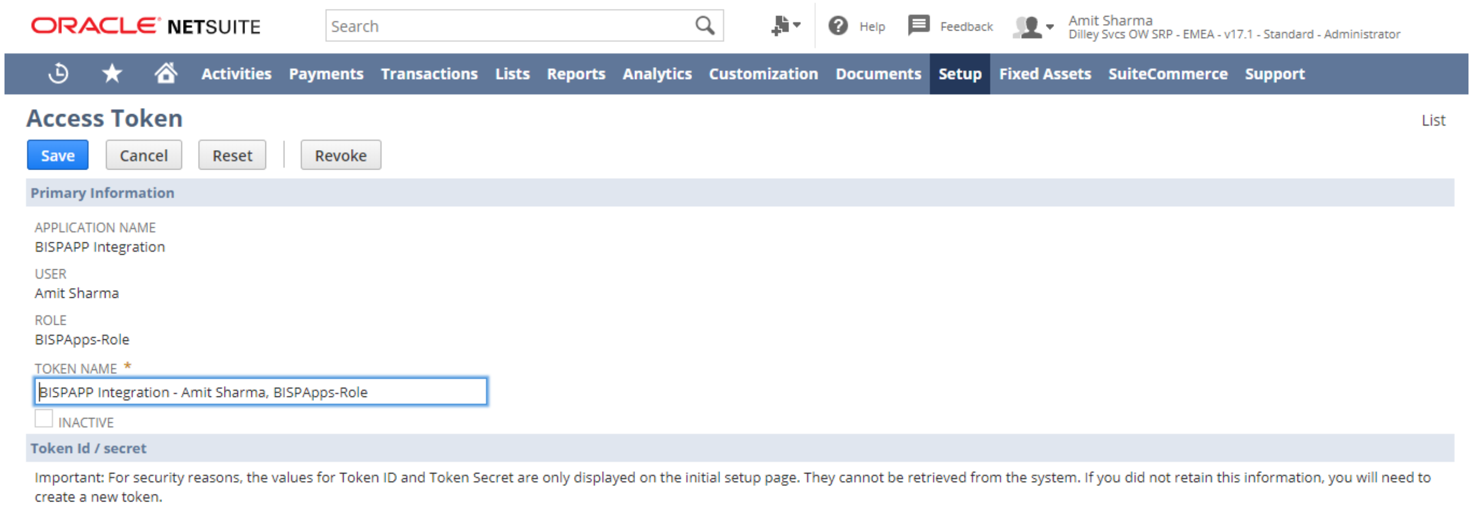
6. Steps to attach user role with Integration app to give permission to generate Access Token for Integration

In this step we will be going to attach role with Integration app we created in previous step to give permission to generate access token and Token ID

6.1 Click on setup and look for user roles

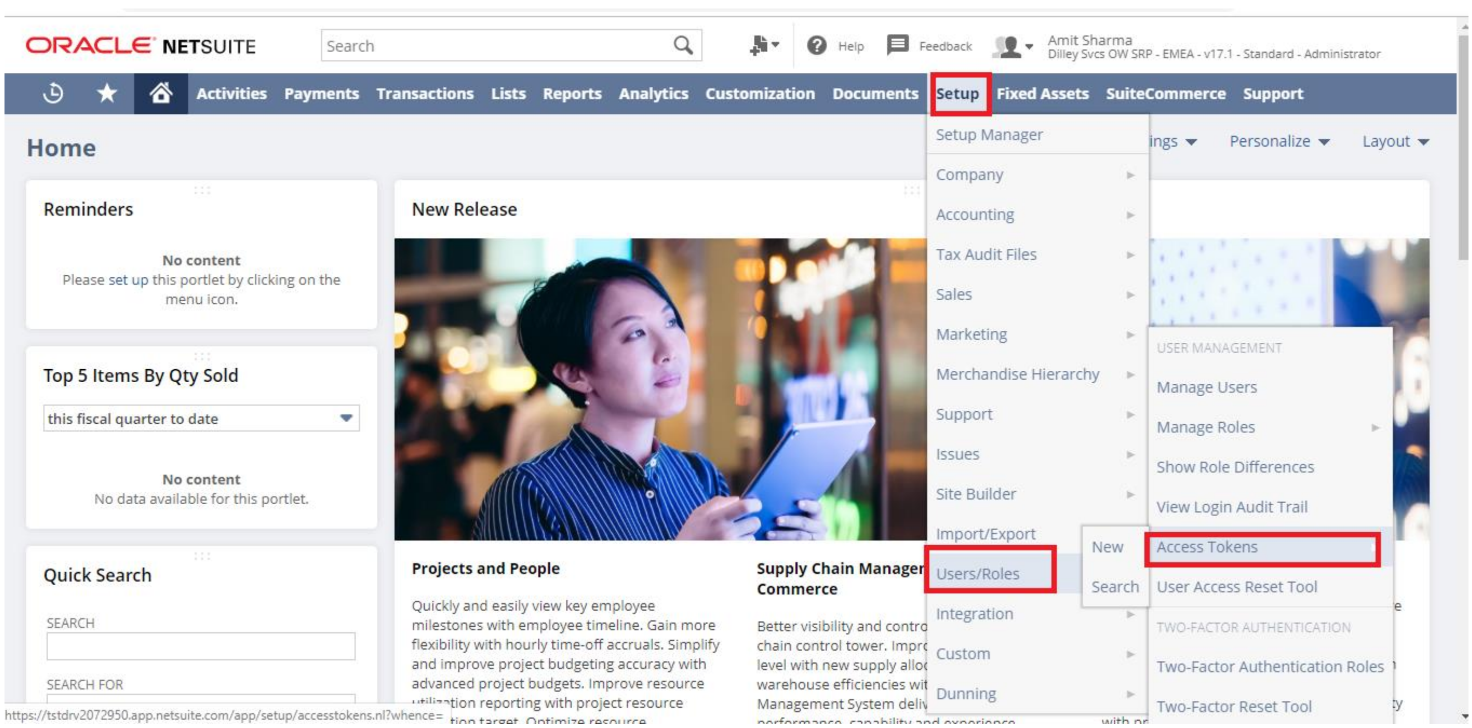


6.2 Add required settings and click on save

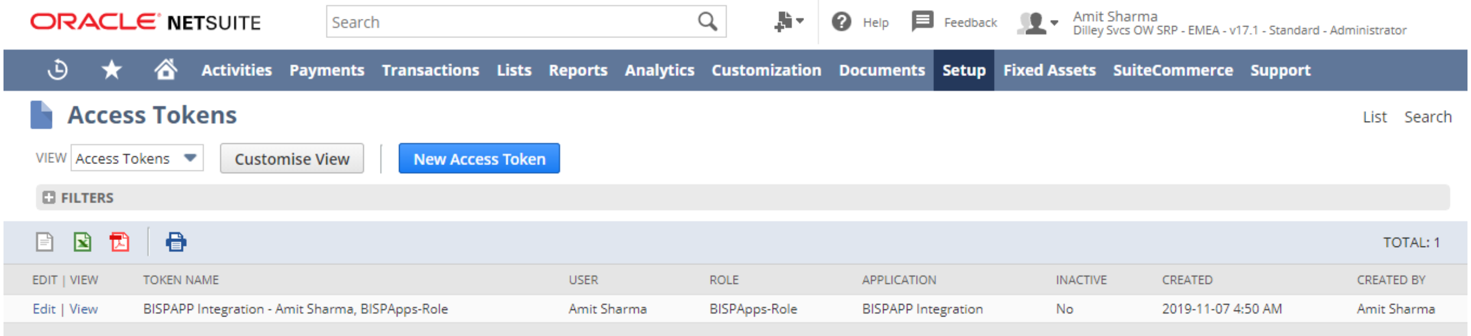


7 Step to generate Token Id and Token Secret

7.1 To generate new token id and Secret click on Setup→ user Roles→Access Token→ Click on view for desired token



7.2 Click on View



7.3 Token Id and Token Secret can be reset if already created

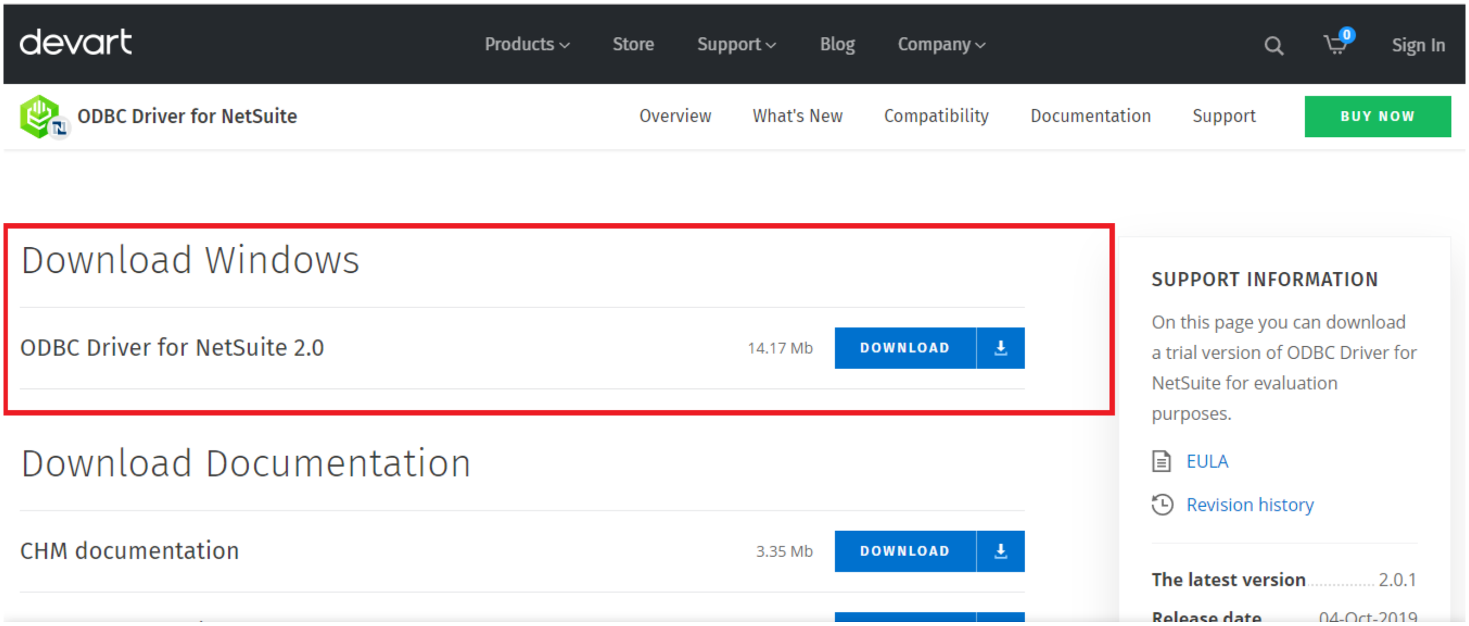
Now NetSuite environment is ready to integrate with Tableau.

8 Steps to Integrate NetSuite with Tableau for visualization

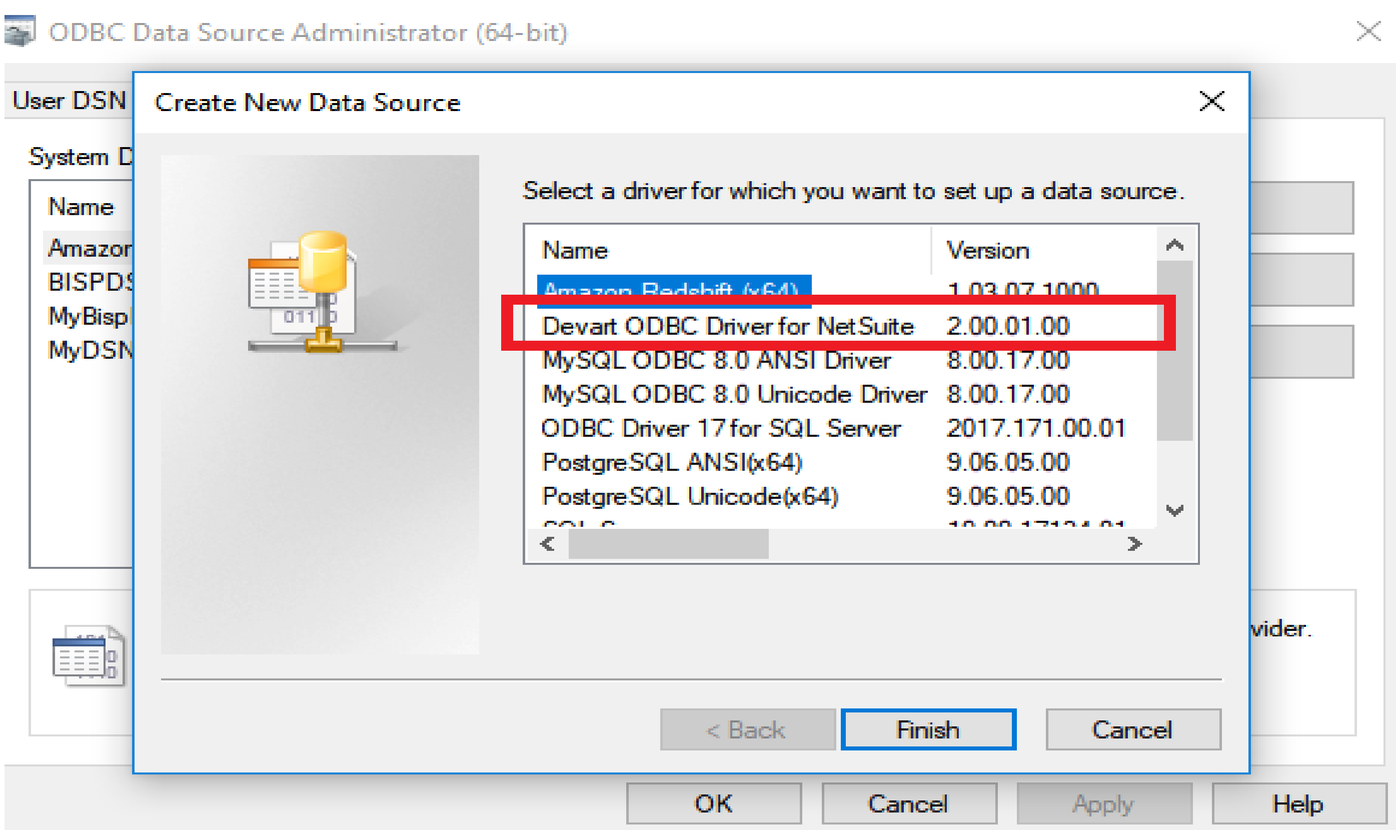
8.1 Download and install Tableau professional version as public version does not support Tableau Integration with NetSuite.

9 To Integrate Tableau with NetSuite an external ODBC driver will be required. You can download and install driver from below link

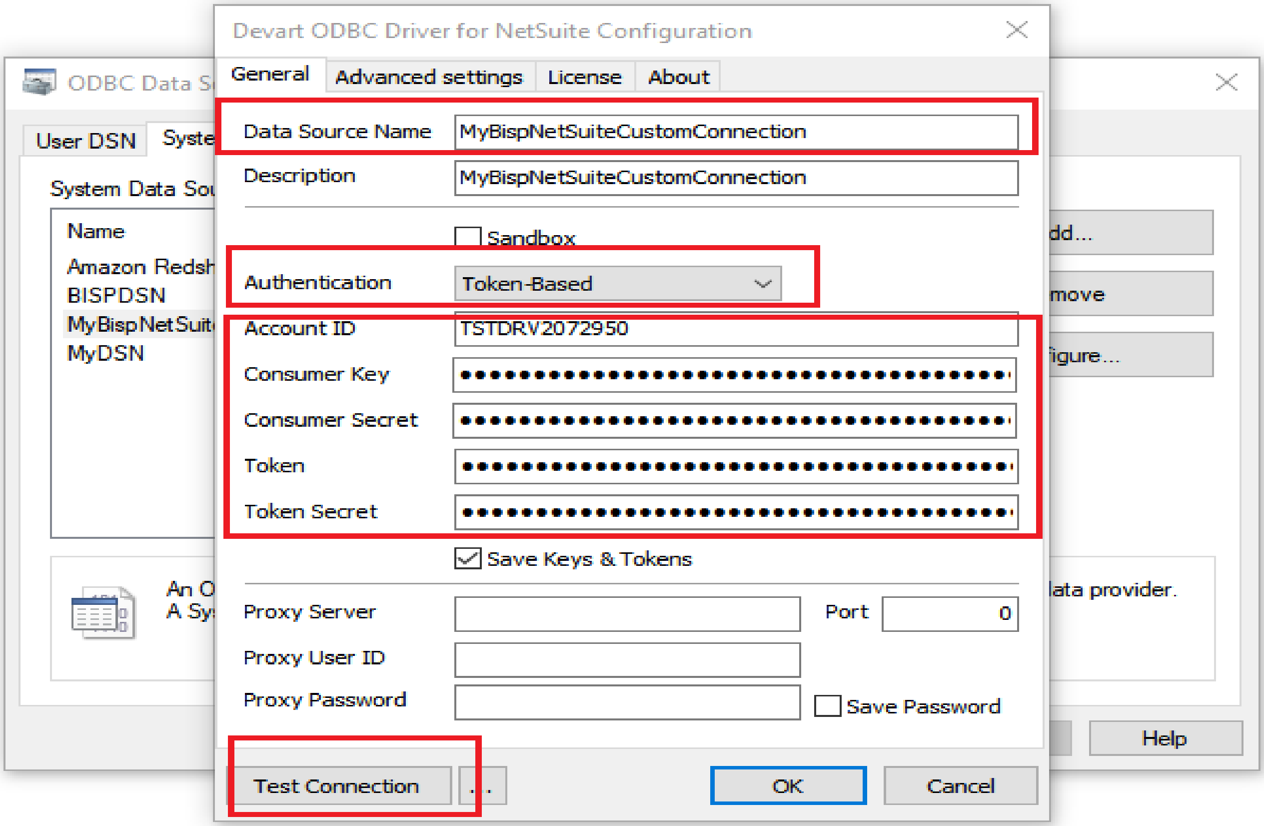
https://www.devart.com/odbc/netsuite/download.html



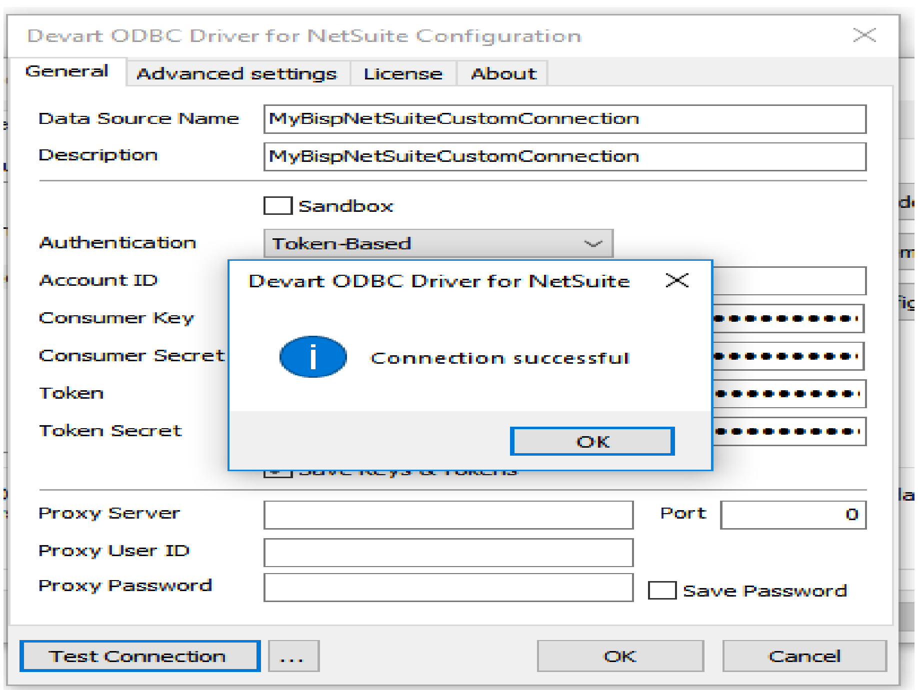
9.1 Download and install ODBC driver. Once installed you can find it in driver set.



9.2 Setup a new DSN using ODBC driver installed by providing required information

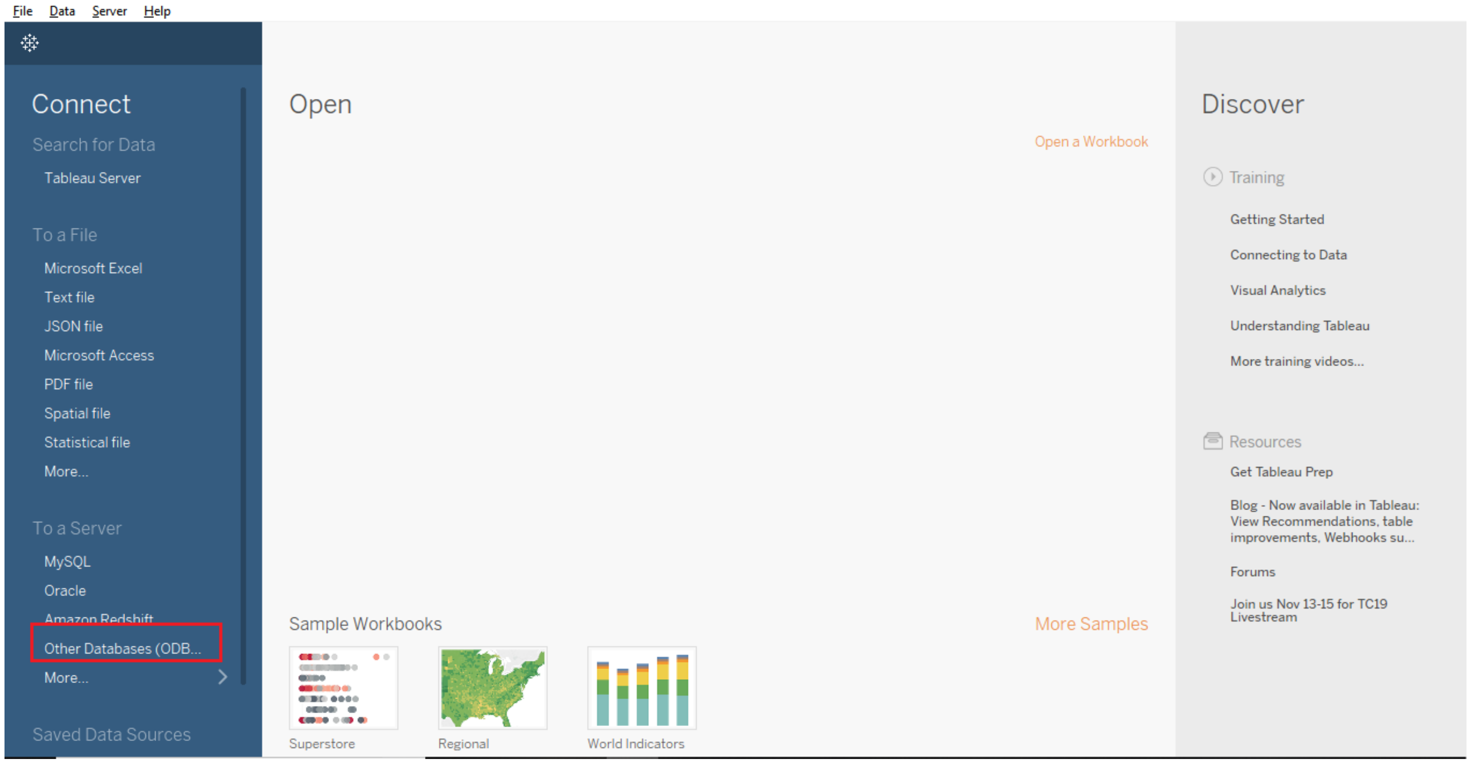


9.3 Once entered required details click on test connection

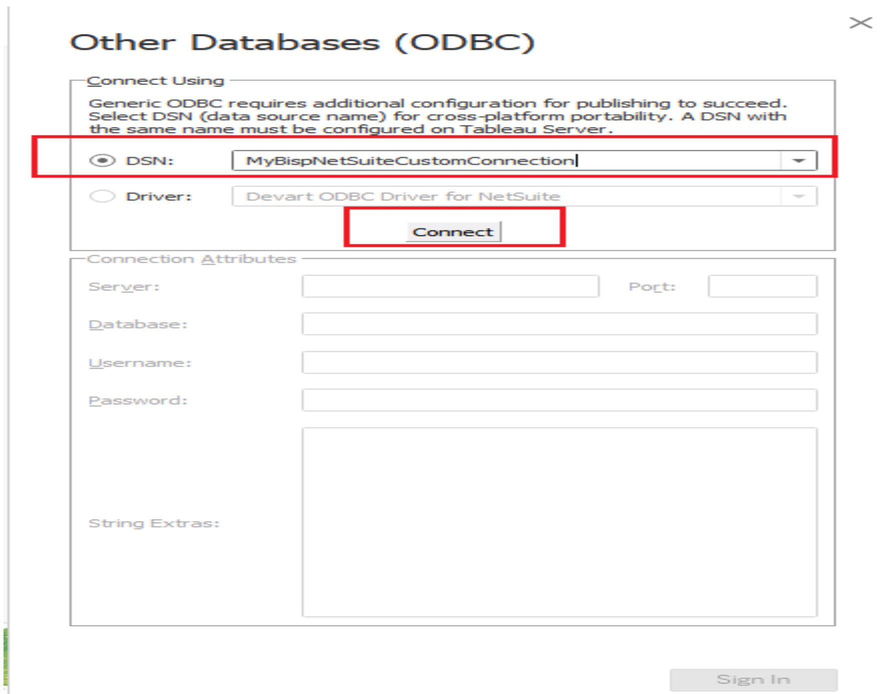


9.4 Steps to connect tableau with NetSuite using ODBC Driver

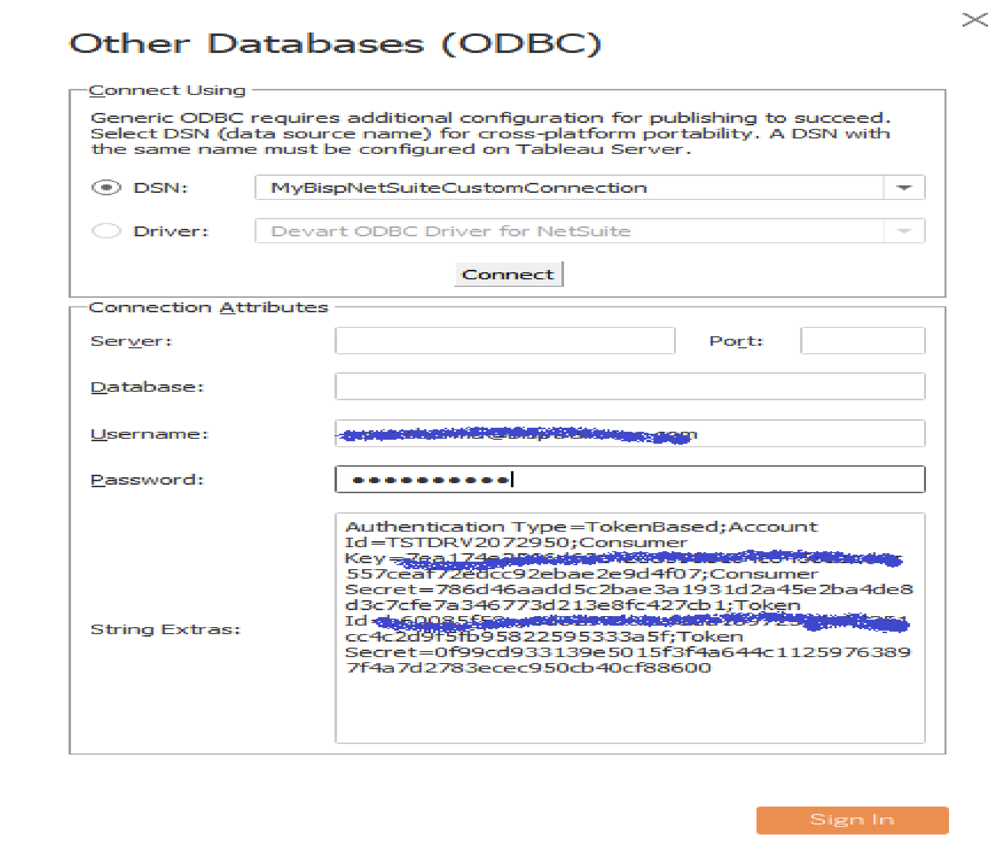
Open Tableau Desktop and click on other database (ODBC) option.



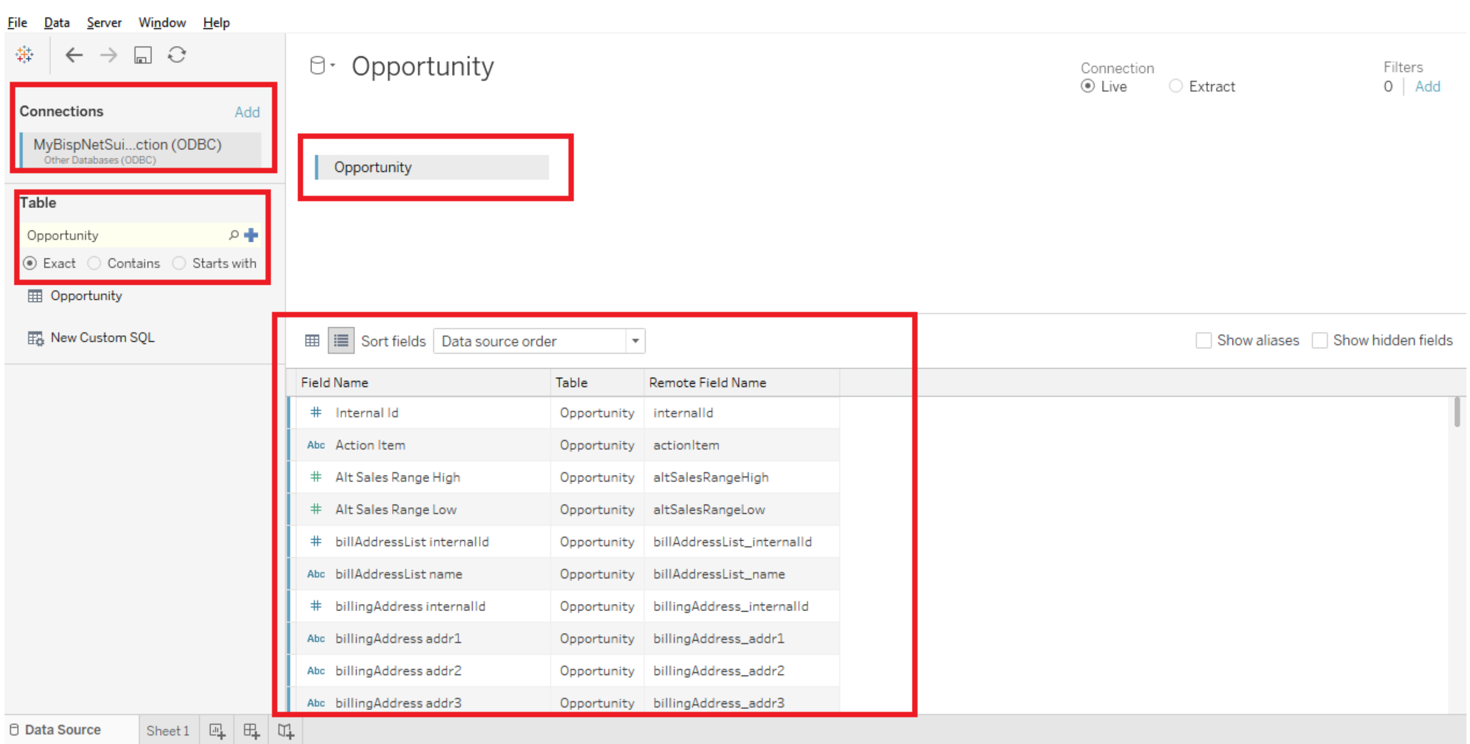
9.5 Select DSN created in previous step and click on connect



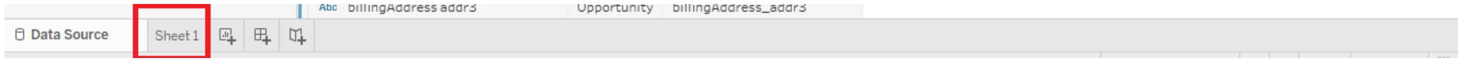
9.6 Provide user and password and click on signing



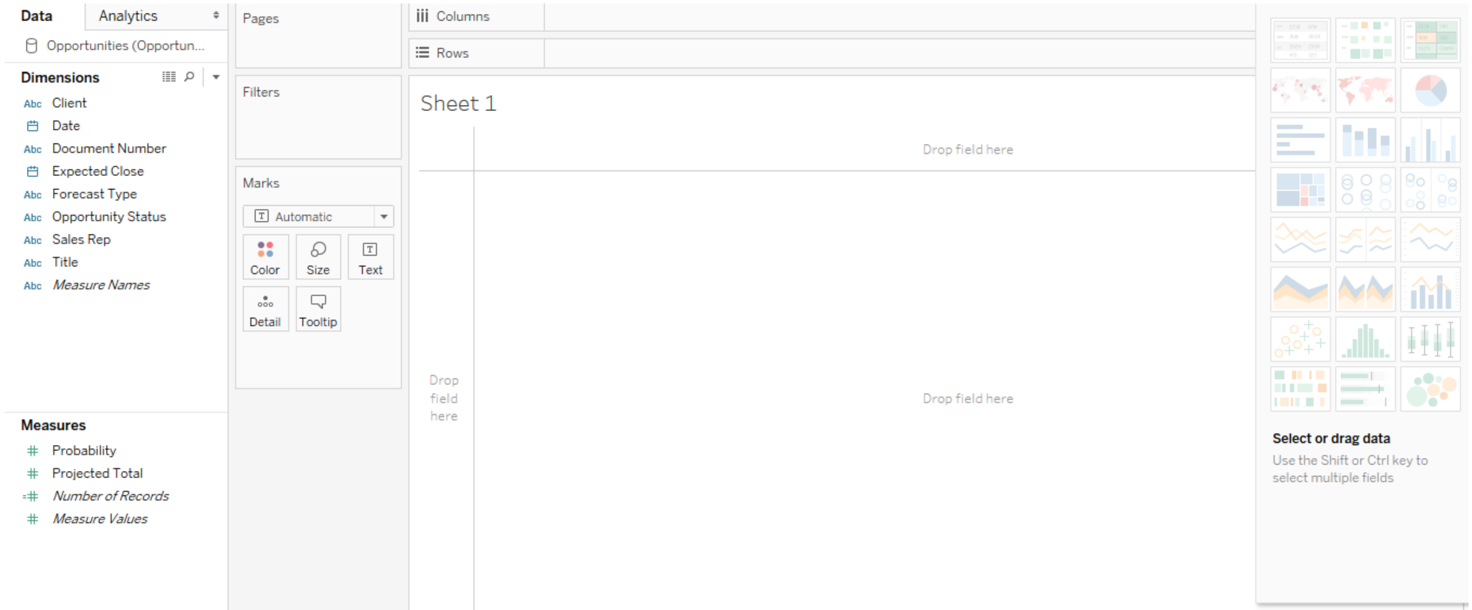
9.7 Once connected successfully select object name and drag it on query section. It will list all field from object. We can remove fields which are not required in visualization.



9.8 Once done click on sheet 1

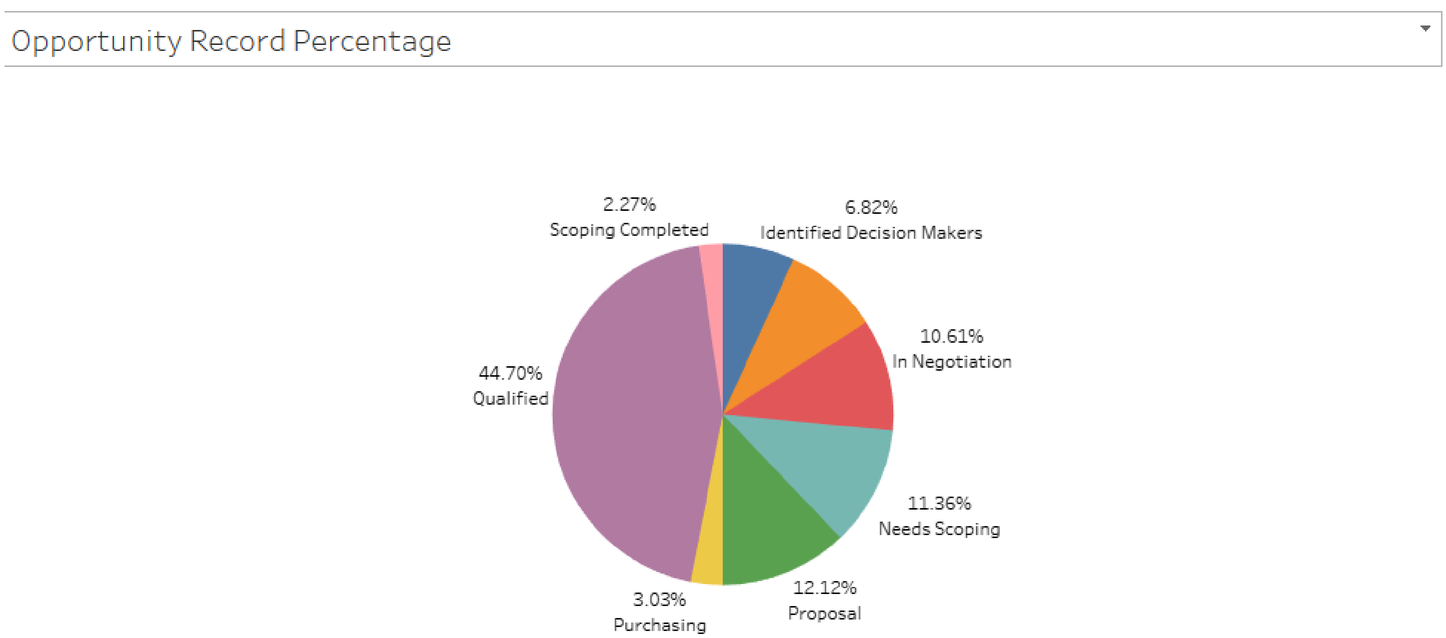


9.9 Sheet1 Look like this

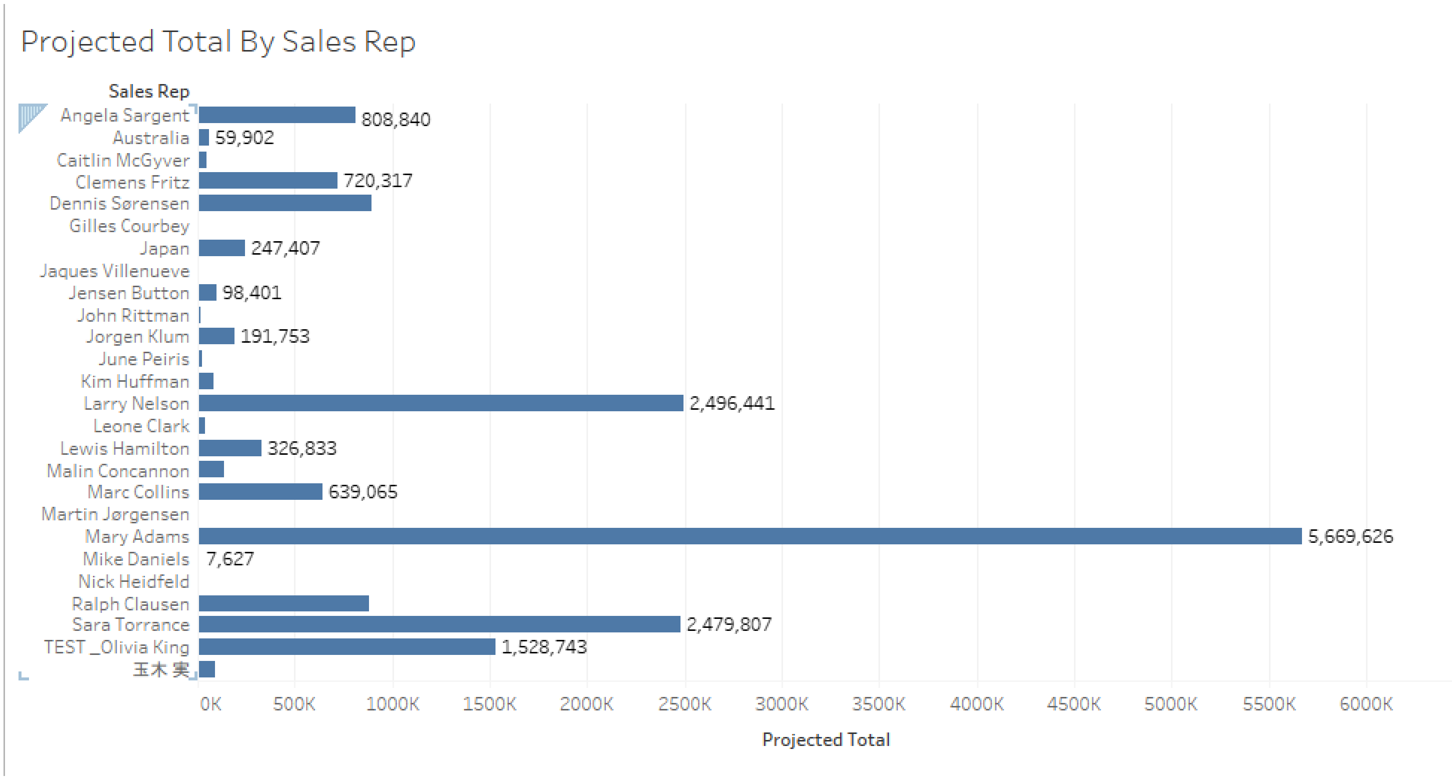


9.9 Now we are ready for visualization. For reference adding sample sheet

9.9.1) Report 1



9.9.2) Report 2



9.7.3) Report 3

Projected Total, Cumulative Total and %of Total Projected Total

Year of Date	Quarter of Date	Projected Total	Cumulative Projected Total	% of Total Projected Total
2018	Q1	82,965	82,965	0.47%
	Q2	134,251	217,216	0.77%
	Q4	7,496,678	7,713,894	42.84%
2019	Q1	9,697,452	17,411,346	55.42%
	Q2	41,134	17,452,480	0.24%
	Q3	45,906	17,498,386	0.26%