

Solution Brief

NetSuite SuiteAnalytics Saved Search vs. SuiteAnalytics Connect

How to choose which is best for you

NetSuite is one of the most popular ERP solutions on the market today and has impressive integration capabilities to sync data to a variety of popular financial reporting and forecasting tools like Mosaic. Here, we'll explain the two primary ways customers can set up their NetSuite integrations — NetSuite SuiteAnalytics Saved Search and NetSuite SuiteAnalytics Connect — and how to choose which option is best for you. You'll learn:

- The difference between SuiteAnalytics Saved Search and SuiteAnalytics Connect
- Pros and cons of each method
- Cost considerations
- Best-practice recommendations

Covering some basics

NetSuite has an entire module for reporting, analytics and data integration that gets paired with the core NetSuite platform. It's called NetSuite SuiteAnalytics and it's made up of six components — SuiteAnalytics Workbook, SuiteAnalytics Saved Search, SuiteAnalytics Reports, SuiteAnalytics KPI, SuiteAnalytics Dashboard, and SuiteAnalytics Connect.

Let's take a closer look at two of these — SuiteAnalytics Saved Search and SuiteAnalytics Connect — and figure out which is the best for you.

SuiteAnalytics Saved Search

SuiteAnalytics Saved Search is, first and foremost, a reporting capability used to create custom queries on NetSuite data such as transactions, customers, items, and custom records. Once you've built a Saved Search query and defined your data, parameters, filters etc., you can save it as a formal report to use over and over again.

But Saved Searches also serve a second purpose. They can be used as the data source for integrations with other tools — albeit with some technical and functional limitations we'll discuss below.

Pros	Cons
<ul style="list-style-type: none">✓ User-friendly. Easy for non-technical end-users to create and manage.✓ Accessible. Allows users to access information not readily available through the default NetSuite interface.✓ Configurable. Users can define search criteria and filter, sort, and group data fields to create unique reporting views.✓ Automated. Can be scheduled to run automatically or on demand.✓ Often No Additional Cost. Typically included as a standard feature in most NetSuite subscriptions. But be aware that Oracle's pricing plans and packages are always changing and are unique across customers, so be sure to confirm if this is included in your subscription.	<ul style="list-style-type: none">✗ Burden on Customer. Requires customers to manually create and maintain Saved Searches. As quantity grows, maintenance becomes challenging and time consuming.✗ SFTP Site Required. Customers have to set up and maintain a <u>third-party SFTP site</u> to make integrations between NetSuite and target systems actually work. Without this step, there is no integration. This requires technical know-how and time commitment from the customer.✗ Limited in Scope. The data captured in the integration is limited to the fields and filters defined by the user in the Saved Search. If additional data is needed or if the data changes, users have to update Saved Searches manually.✗ Limited Drill-down to Transaction Detail. A Saved Search is confined by what you define in the query parameters. If you don't define transaction level data in your Saved Search (which is often impractical given the large data volume), then you'll have to log back into NetSuite to access it.✗ Performance Issues at Scale. Oracle recommends keeping Saved Search data volumes small to maintain adequate performance. This risks leaving customers without the data they need.

SuiteAnalytics Connect

SuiteAnalytics Connect is the component that provides direct, automated integrations between NetSuite and other tools in your tech stack like Mosaic. Once the partner software provider builds the initial connection to NetSuite, it's available to all their customers in a simple plug-and-play fashion and can be run as an automated workflow.

Pros	Cons
<ul style="list-style-type: none">✓ Direct Connection. Connects directly to the underlying NetSuite database, which leads to the following three advantages.✓ Data Completeness. Direct access to all (not just some) data transactions, fields, properties, etc. This comprehensive approach is considered best-practice because syncing the lowest atomic level of data gives you more flexibility and customization once that data lands in your target system.✓ No Manual Maintenance. Users aren't required to build and maintain manual data queries or reports (like the Saved Search option) to tell the integration what data to pull.✓ No SFTP Required. Since the connection hooks in directly to the NetSuite database, customers aren't required to do the SFTP step mentioned above, saving time and technical expertise you might not have.	<ul style="list-style-type: none">✗ Additional Cost. SuiteAnalytics Connect is an add-on module that comes at an incremental cost of about \$3k/year (pricing terms vary by customer and are negotiable).

Best practices for integration with platforms like Mosaic

Our best-practice recommendation is to use SuiteAnalytics Connect. While there is an incremental cost to this option, the benefits of automation, completeness of data, and low effort for non-technical users far outweigh the added investment.

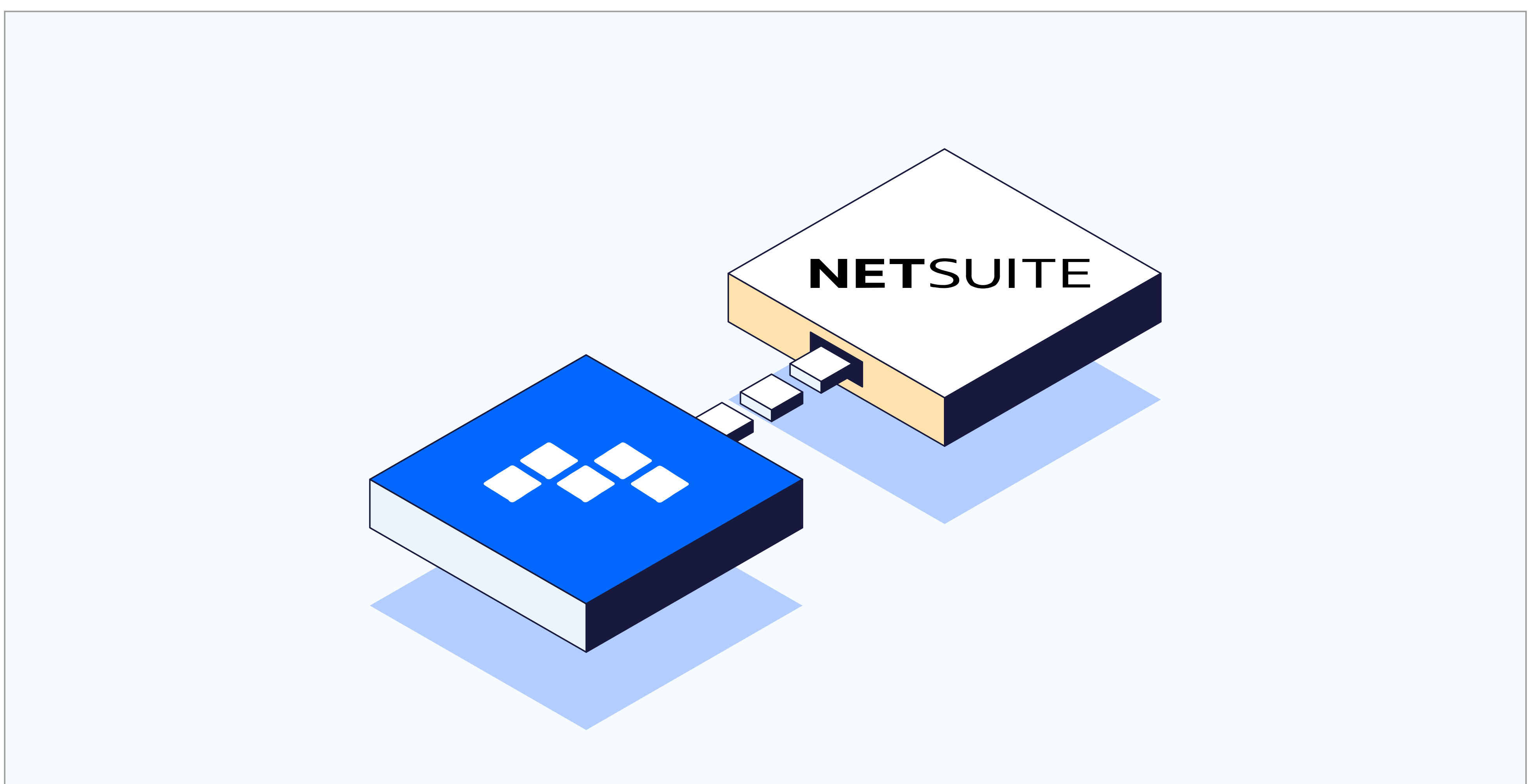
Be aware that a lot of strategic finance software providers today utilize Saved Search only. The reason for this often comes down to a strategic trade-off in development efforts. Almost all providers are capable of building integrations with SuiteAnalytics Connect, but many choose not to because 1) Saved Search is often pitched as a "good enough" shortcut, and 2) they don't want to commit the upfront development time, money, and effort to build the direct integration if they don't have to.

Mosaic, on the other hand, uses SuiteAnalytics Connect because we believe it's imperative to deliver a more complete set of value to our customers.

What questions should buyers be asking their strategic finance software providers?

As you evaluate different Strategic Finance Platforms like Mosaic, here are some tips and questions you can ask to make sure the solution you go with will set you up for success.

- Which NetSuite integration approach do you offer and why?
- If only one, why do you not support the other?
- If I change my chart of accounts, how will that get updated in the integration?
- If I add a new entity, how will that get pulled through in the integration?
- If Saved Search only, will you build the SFTP site for me or will I have to build that myself?
- If you do it for me, do you charge an additional fee? How much? And how long will it take?
- Will you help me build Saved Searches in NetSuite?
- Which one of the two options do the majority of your customers use, and why?
- Can I speak with one or two of your customers utilizing each approach to learn their perspective on pros and cons?



Meet Mosaic

Want to learn more about how the Mosaic platform helps SaaS companies integrate and unleash their NetSuite data? Request a personalized demo and start down the path of making your finance function more strategic.

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