Connect AI to NetSuite, **read-only.**

Start in a sandbox

The role rule. Never use the Administrator role, or any role with full access to NetSuite features. Build a separate read-only role (step 4).

Before you start

- An administrator for steps 1 to 5.
- A NetSuite account, ideally a sandbox.
- Claude (Pro or higher) or ChatGPT. Some ChatGPT plans need Developer Mode.
- Account ID: Setup > Company > Company Information.
- Not for electronic protected health information.

Check it worked

- **A permitted read works** on a record type the role holds.
- **An edit is refused.** Ask it to change a test record, then confirm nothing changed.
- **Payroll or compensation comes back empty.**
- Logs are kept **21 days** in production, **7** in a sandbox.

In NetSuite, as an administrator Steps 1 to 5

1. **Start in a sandbox.** Sign in as an administrator and copy the account ID from the address, including the **-sb1** suffix.

   Done when You have the full account ID.

2. **Turn on three features. Server SuiteScript, REST Web Services, OAuth 2.0.** Open the SuiteCloud subtab, then Save.

   Setup > Company > Enable Features

   Done when All three stay checked after you reopen the page.

3. **Install the free SuiteApp.** Search for **MCP Standard Tools**, click the icon, then Install.

   Customization > SuiteCloud Development > SuiteApp Marketplace

   Done when The SuiteApp shows as installed.

4. **Build the read-only role.** Name it plainly, such as "AI Analyst (read-only)".

   Setup > Users/Roles > Manage Roles > New

   Permissions > Setup: MCP Server Connection and Log in using OAuth 2.0 Access Tokens at **Full**. Then **View only** on records it needs. Leave REST Web Services off.
   Optional: System Notes for Analytics and REST (Lists subtab, View), only for audit questions.

   Done when Only those two permissions sit under Setup, and everything else is at View.

5. **Give the role to one person.** Edit the user, open the Access tab, add the role.

   Setup > Users/Roles > Manage Users

   Done when That user can pick the role from the role switcher.

In Claude or ChatGPT Steps 6/7 and 8

6/7. **Connect Claude or ChatGPT.** Search for "netsuite", choose the one from **Oracle NetSuite**, and sign in with the read-only role.

   Claude: Settings > Customize > Connectors > Connect
   ChatGPT: Settings > Integrations > Plugins > Browse directory > +

   Done when You chose the read-only role at sign-in.

8. **Set the controls in the client.** Read-only tools: **Needs approval.** Interactive tools and Write/delete tools: **Block.** In ChatGPT, switch the plugin's **Write tools off.**

   Claude: Settings > Customize > Connectors > NetSuite > Tool permissions

   Done when The tool list shows no write tools you did not choose.

Check Step 9

9. **Ask a test question and check the log.** Compare the answer with a report you trust.

   Setup > Integration > Manage Integrations > the record > Execution Log > AI Connector Service (MCP)

   Done when The integration is Enabled and the log shows your requests.

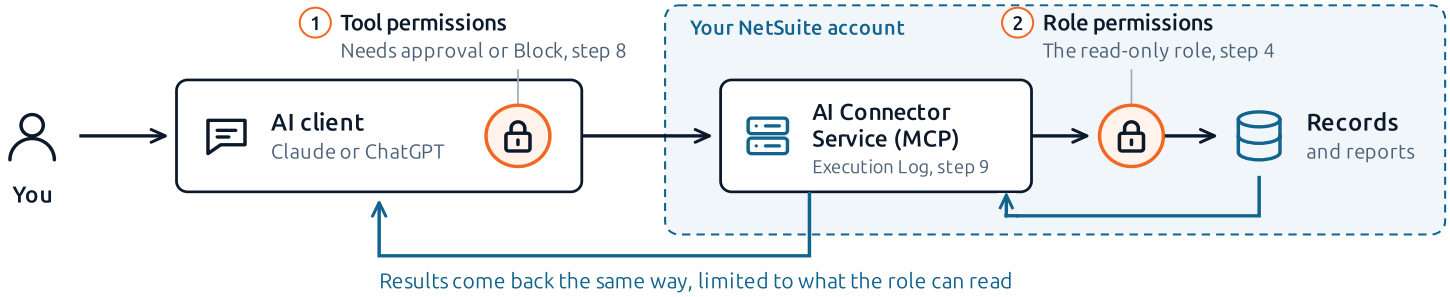
Oracle and NetSuite are trademarks of Oracle and/or its affiliates. Claude is a trademark of Anthropic. ChatGPT is a trademark of OpenAI. YTBE is not affiliated with them.

Common setup problems and how to fix them

Start in a sandbox

How a request travels

Two separate locks: your approval cannot grant what the role does not allow.



Before you connect

- **Sandbox first.** Try everything in a sandbox, then pilot with one person before production.
- **Features before the SuiteApp.** Nothing to connect to? Turn on Server SuiteScript, OAuth 2.0 and REST Web Services, then install MCP Standard Tools.
- **Not for health data.** Oracle has not assessed the service for HIPAA. No electronic protected health information.
- **Your data goes to the AI provider.** Tool results the role can read are processed in the provider's service. Check its data controls with whoever signs off.

Role and access

- **Never the Administrator role.** The connector does not run under Administrator or any full-access role. Sign in with the read-only role.
- **Pick the right permission.** Choose Log in using OAuth 2.0 Access Tokens, not the plain Log in using Access Tokens.
- **Records or subsidiaries missing.** Check Subsidiary Restrictions on the role. Add System Notes for Analytics and REST only for audits.
- **Seven tools can change data.** Keep the role at View. Block Claude's Write/delete and Interactive groups, or switch ChatGPT's Write tools off.

Connection

- **Built-in versus custom connector.** Built-in connectors set the address for you. A custom one needs the full SuiteTalk host, sandbox suffix included.
- **Connected, but nothing in NetSuite.** Wrong address or account. No rows in the Execution Log usually means the request never reached this account.
- **Integration stuck pending.** An administrator must enable the record under Setup > Integration > Manage Integrations.
- **"Too Many Requests" errors.** The concurrency limit is shared across integrations, often hit at month-end. Retry, or ask an administrator to review it.

Answers and limits

- **Query limits.** SuiteQL runs read-only queries. Reports take date and subsidiary filters only, no accounting periods.
- **Big answers fail.** Clients handle about 5,000 rows per call. Narrow by date, subsidiary or record type, or start a fresh chat.
- **Incomplete or empty answer.** Do not assume nothing exists. Ask which tool it called and what came back, then check the role.
- **Treat what it reads as hostile.** Memo fields, emails and web pages can carry instructions meant for the model (prompt injection). Keep approvals on.

21/7	0	Free	34
Days of log kept, production / sandbox. Export what you need to keep.	AI units consumed by the connector.	Connector. Your AI client may need a paid plan.	Standard tools with every permission. A narrower role shows fewer.

Oracle and NetSuite are trademarks of Oracle and/or its affiliates. Claude is a trademark of Anthropic. ChatGPT is a trademark of OpenAI. YTBE is not affiliated with them.