

The **InfoFiscus Finance Analytics** solution is a pre-built, comprehensive analytics tool available as a native application in the Snowflake Marketplace. Designed to empower customers, the InfoFiscus Finance Analytics Snowflake App offers robust insights in Finance, and Supply Chain analytics. It seamlessly integrates with industry-standard ERPs, CRMs, and forecasting applications.

Our Finance Analytics native application eliminates the need for customers to invest time and resources in designing and building an end-to-end data warehouse and visualization platform. Instead, InfoFiscus efficiently synchronizes data from NetSuite to Snowflake, computing critical metrics in near real-time. This provides in-depth, detailed, and cognitive analytics essential for Finance operations and executive decision-making.

Installation Process:

- Before Installation, make sure you have a paid Snowflake account and follow the instructions below
- <https://other-docs.snowflake.com/en/collaboration/consumer-listings-paying>
- After you finish all the prerequisites mentioned above. Go to Marketplace and search for “**INFOFISCUS FINANCE ANALYTICS**” then click on Get to install the application. Before that make sure to enable the anaconda package. Here is the link to help you with that <https://docs.snowflake.com/en/developer-guide/udf/python/udf-python-packages>
- Once the app is installed you can click on the application and navigate to the Home page

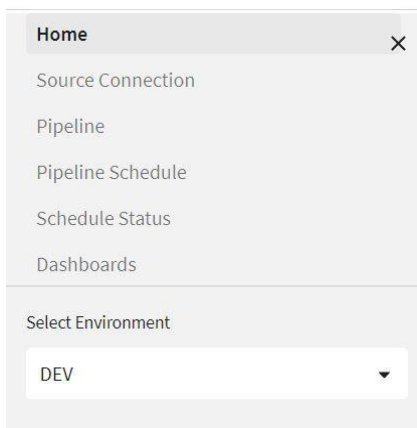
Home Page:

- When you will come to Home page for the very first time You need to select your Warehouse then click on “Save” button to provide the application access to your Warehouse.
- Then you need to click on the “Grant Privileges” (one time action) button to provide the application with account-level privileges.





- **Environment:** Choose a suitable environment (Such as QA, DEV, and PROD) because the selected environment will be carried forward to the subsequent stages in the application.



Source Connection:

- Navigate to Source Connection and select Create Source Connection from the left menu.
- In Create Source Connection select your desired Source and then fill all the corresponding connection attributes then click on Create button.
- Then select all the content and create a new SQL worksheet in your Snowflake account and execute all the commands at a time.

INFOFISCUS | Create Source Connection

Type
Netsuite

Connection Name*

Netsuite Account Id*

Client Id*

Client Secret*

Refresh Token*

Days to fetch data*

365

Role For Grant

Create Test Save

- Then go back to the application and click on the Test button to test your connection.
- Then click on the Save button to save your connection.
- You can select “Existing Source Connection” from the left menu to see all your pre-existing connections. Here you have the option to edit or delete connections.

INFOFISCUS | Existing Source Connections

Source Connection	Env	Application		
Netsuite_Cann	QA	Netsuite	edit	delete

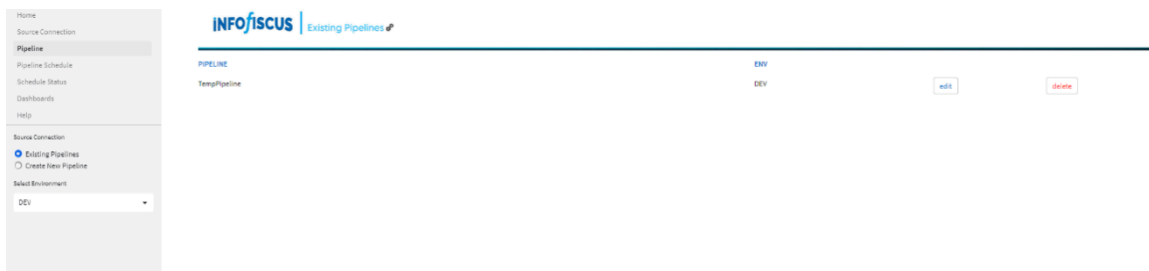
Pipeline:

- A data pipeline is a set of processes to automate data flow from a selected source connection to the destination.
- To create a pipeline, enter the appropriate pipeline name and select the source connection for which the pipeline will be created.

- The pipeline will help us to load historical and incremental data into Snowflake.



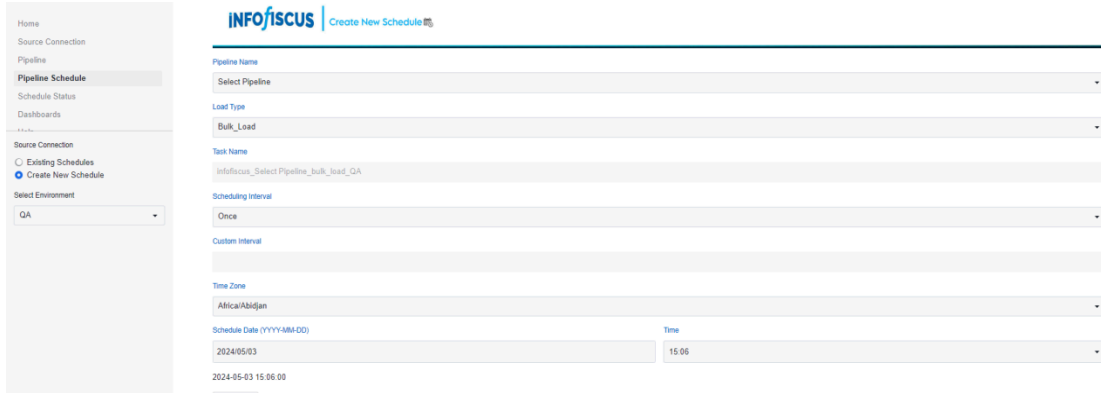
- In existing pipelines, we can see the already created pipelines, that we can edit or delete.



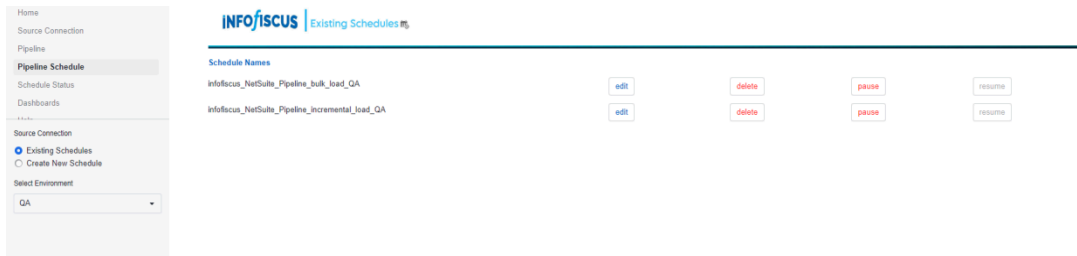
Pipeline Schedule:

In Pipeline Schedule you create Tasks which enable you to set up automated workflows and ensure that specific actions occur at scheduled times .

- **Pipeline Name:** Choose the Pipeline name for which the task should be scheduled.
- **Load Type:** Choose the appropriate load type (Bulk/Incremental).
- **Task Name:** Provide the appropriate task name.
- **Scheduling interval:** Select the appropriate interval (such as once, daily, monthly, etc.) for the task to be executed.
- **Time Zone:** Choose the suitable Time Zone from the given drop-down.
- **Schedule date and Schedule time:** Specify the date and time from when we want the task to be executed.

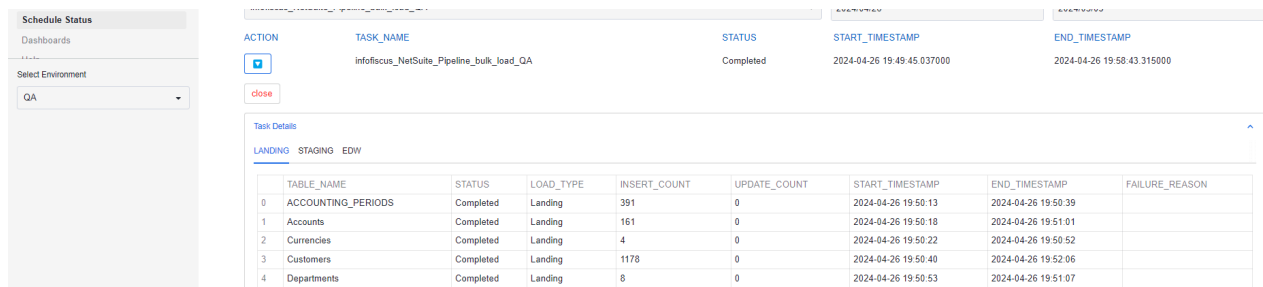


- In existing tasks, we can see the already created task names. Where you can have option to edit or delete, pause or resume task.



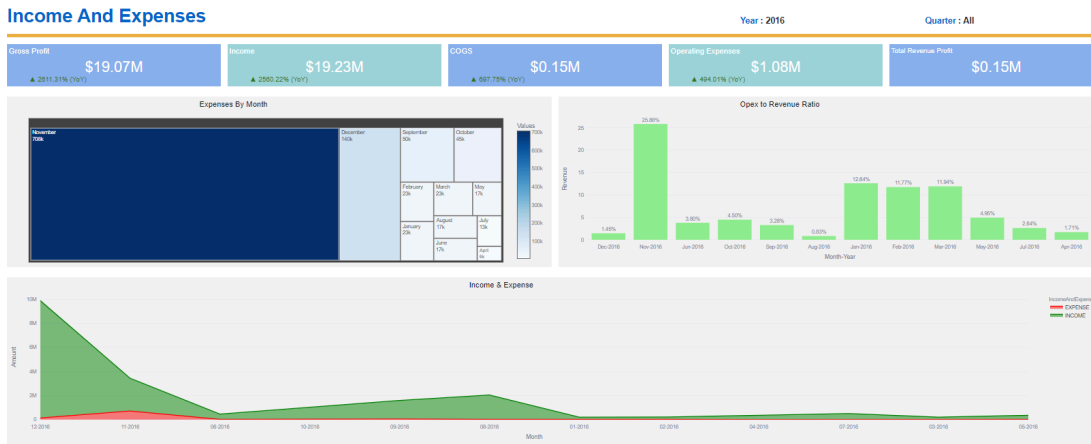
Schedule Status:

In Schedule Status section, you'll find comprehensive details about all your task. You can click on the drop-down and select your task. This dedicated page provides an overview of your Snowflake tasks, including their current status, scheduled timings, and pending actions. It serves as a centralized hub for monitoring and managing the execution of tasks, offering insights to help streamline your workflow and ensure efficient task completion.



Dashboards:

Dashboards provide a visual representation of data, making it easier to understand and interpret complex information. Visualizations, such as charts, graphs, and gauges, help users quickly grasp key insights.



Liquidity Analysis

Year : 2016

Quarter : All



Budget Details

Year : 2016

Quarter : All

