

What NetSuite Next Could Mean for Your Team

NetSuite Next: What is Changing and How to Prepare

November 2026

forvis mazars

Global Presence

Top 10
Global Network*

$5bn
Combined Revenue (2023)

100+
Combined Countries & Territories

400+
Combined Offices & Locations

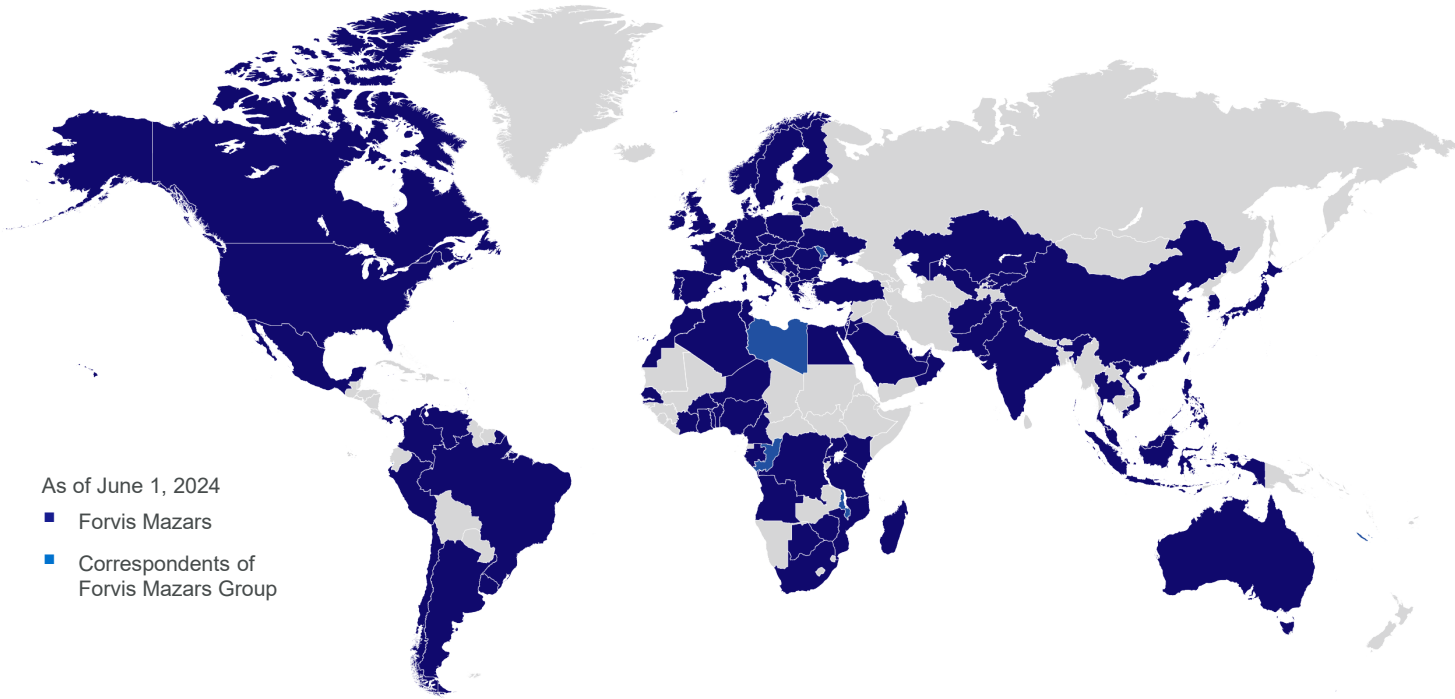
1,800+
Combined Partners

40,000+
Combined Employees

*Source: IAB World Network rankings, based on most recent rankings

2023 revenues: FORVIS $1.7bn (€1.6bn), Mazars (estimated) $3bn (€2.8bn)

Forvis Mazars is the brand name for the Forvis Mazars Global network (Forvis Mazars Global Limited) and its two independent members: Forvis Mazars, LLP in the United States and Forvis Mazars Group SC, an internationally integrated partnership operating in over 100 countries and territories.



- Afghanistan
- Albania
- Algeria
- Angola
- Argentina
- Australia
- Austria
- Bahrain
- Belgium
- Benin
- Bermuda
- Bosnia and Herzegovina
- Botswana
- Brazil
- Bulgaria
- Burkina Faso
- Cameroon
- Canada
- Cayman Islands
- Chile
- China
- Colombia
- Congo
- Côte d'Ivoire
- Croatia
- Cyprus
- Czech Republic
- Democratic Republic of the Congo (DRC)
- Denmark
- Egypt
- Finland
- France
- Gabon
- Germany
- Ghana
- Greece
- Hong Kong
- Hungary
- India
- Indonesia
- Ireland
- Israel
- Italy
- Japan
- Jordan
- Kazakhstan
- Kenya
- Korea
- Kosovo
- Kuwait
- Kyrgyzstan
- Latvia
- Lebanon
- Libya
- Lithuania
- Luxembourg
- Madagascar
- Malawi
- Malaysia
- Malta
- Mauritius
- Mexico
- Moldova
- Morocco
- Mozambique
- Netherlands
- New Caledonia
- Niger
- Nigeria
- North Macedonia
- Norway
- Oman
- Pakistan
- Palestine
- Panama
- Peru
- Philippines
- Poland
- Portugal
- Qatar
- Romania
- Rwanda
- Saudi Arabia
- Senegal
- Serbia
- Singapore
- Slovakia
- Slovenia
- South Africa
- Spain
- Sweden
- Switzerland
- Taiwan
- Tanzania
- Thailand
- Togo
- Tunisia
- Turkey
- Uganda
- Ukraine
- United Arab Emirates
- United Kingdom
- United States
- Uruguay
- Uzbekistan
- Venezuela
- Vietnam
- Zimbabwe

© 2026 Forvis Mazars, LLP. All rights reserved.

forvis mazars

U.S. Presence

Leading U.S. Firm

$2.24B
Revenue (FY 2025)[1]

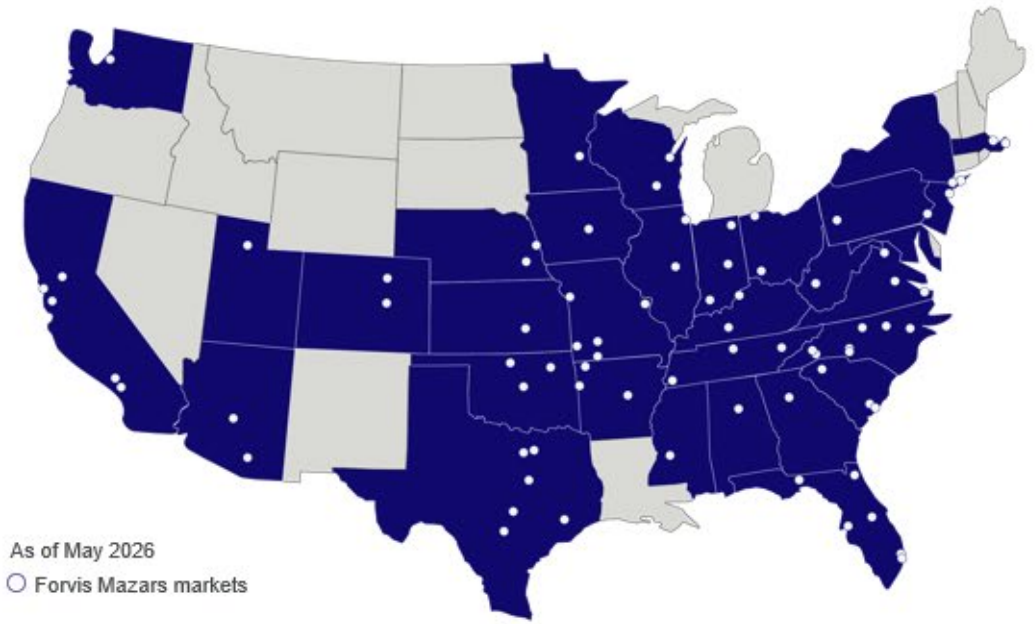
77
Markets

31
States

600+
Partners & Principals

7,000+
Employees

84 Net Promoter Score®[2]
("World-Class" Ranking)



As of May 2026
○ Forvis Mazars markets

Alabama
Birmingham

Arizona
Phoenix
Tucson

Arkansas
Fort Smith
Little Rock
Rogers

California
Irvine
Los Angeles
Sacramento
San Francisco
San Jose

Colorado
Colorado Springs
Denver

Florida
Boca Raton
Fort Lauderdale
Jacksonville
Orlando
Tallahassee
Tampa Bay

Georgia
Atlanta

Illinois
Chicago
Decatur

Indiana
Evansville
Fort Wayne
Indianapolis

Iowa
Des Moines

Kansas
Wichita

Kentucky
Bowling Green
Louisville

Massachusetts
Boston
Brewster

Minnesota
Minneapolis

Mississippi
Jackson

Missouri
Branson
Joplin
Kansas City
Springfield
St. Louis

Nebraska
Lincoln
Omaha

New Jersey
Iselin

New York
Long Island
New York City

North Carolina
Asheville
Charlotte SouthPark
Charlotte Uptown
Greensboro
Greenville
Hendersonville
Raleigh

Ohio
Cincinnati
Toledo

Oklahoma
Enid
Oklahoma City
Tulsa

Pennsylvania
Philadelphia-Metro Area
Pittsburgh

South Carolina
Charleston
Greenville
Summerville

Tennessee
Knoxville
Memphis
Nashville

Texas
Austin
Dallas
Fort Worth
Houston
San Antonio
Waco

Utah
Salt Lake City

Virginia
Norfolk
Richmond

Washington D.C. Metro Area

Washington
Seattle

West Virginia
Charleston

Wisconsin
Appleton
Madison

© 2026 Forvis Mazars, LLP. All rights reserved.
[1]FY 2025 revenue: period ending 5/31/25.
[2]FYE25 Relational Survey NPS results reflect responses from participating clients.
Updated 06/08/2026

forvis mazars

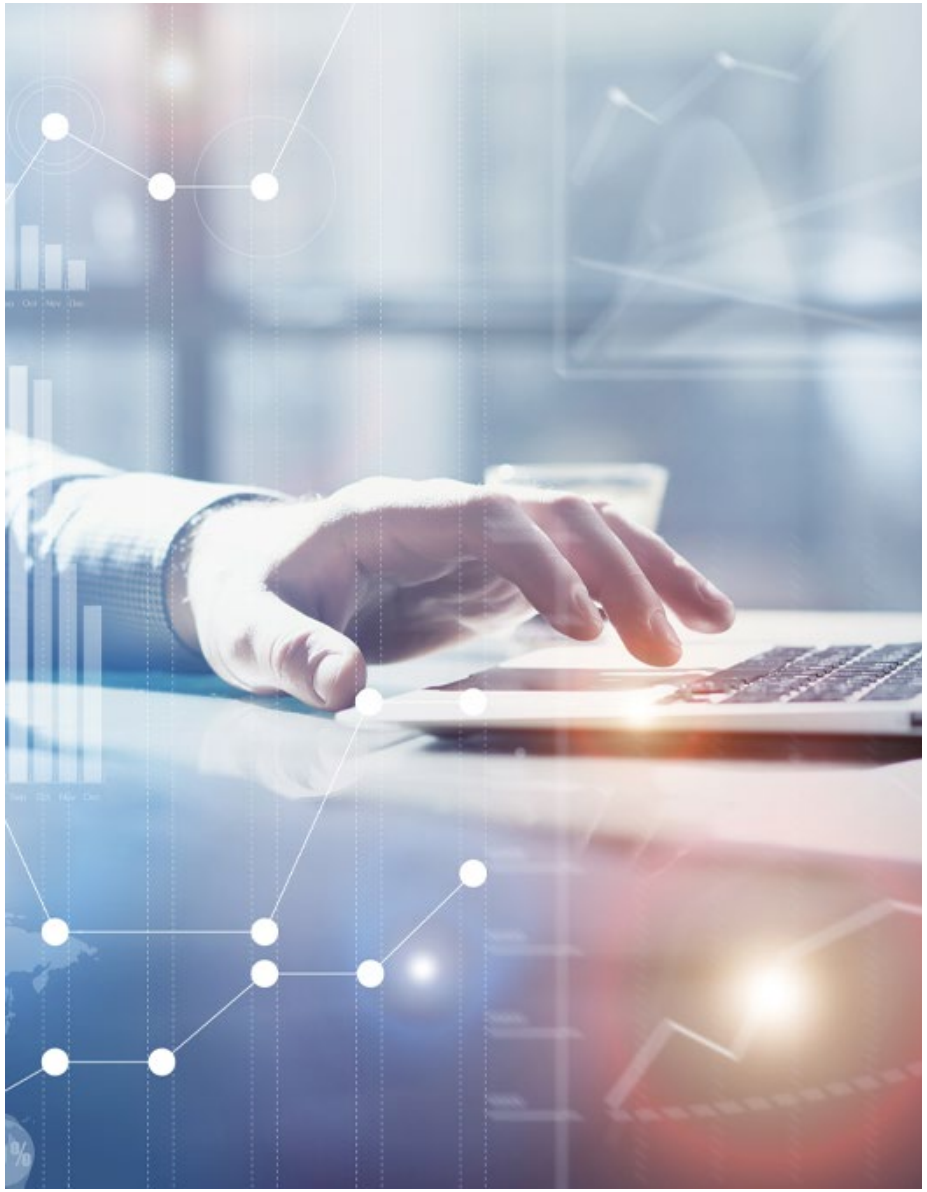
Business Technology Services

We solve for business challenges & support innovation through technology solutions.

Our toolbox is equipped with leading enterprise resource planning (ERP), customer relationship management (CRM), artificial intelligence (AI), automation, and business intelligence (BI) tools.

Our end-to-end technology solutions and managed services help clients achieve their digital transformation goals. Services include:

- Solution Assessment and Selection
- Implementation Project Rescues
- System Implementation and Integration
- Business Intelligence (BI) and Analytics
- Process and Technology Design
- Robotic Process Automation (RPA)
- Upgrades, Enhancements, and Automation
- Custom Application Development
- Training, Monitoring, and Support
- Managed Services for Business Applications



© 2026 Forvis Mazars, LLP. All rights reserved.

forvis mazars

Today’s Presenter



Sarah Emery

Senior Manager, NetSuite

sarah.emery@us.forvismazars.com

© 2026 Forvis Mazars, LLP. All rights reserved.

Objectives

1. Describe What NetSuite Next Is - And Is Not
2. Distinguish What Changes From What Remains Consistent
3. Compare The Four Practical Starting Points
4. Determine Which Areas Need Attention
5. Identify The Steps To Get Ready



© 2026 Forvis Mazars, LLP. All rights reserved.

forvis mazars

Agenda

- Understand: What Is NetSuite Next?
- Compare: What Changes And Stays Consistent
- Choose: Adoption Paths
- Prepare: Ask Oracle And Account Readiness
- Decide: Practical Next Steps



© 2026 Forvis Mazars, LLP. All rights reserved.

01

Understand

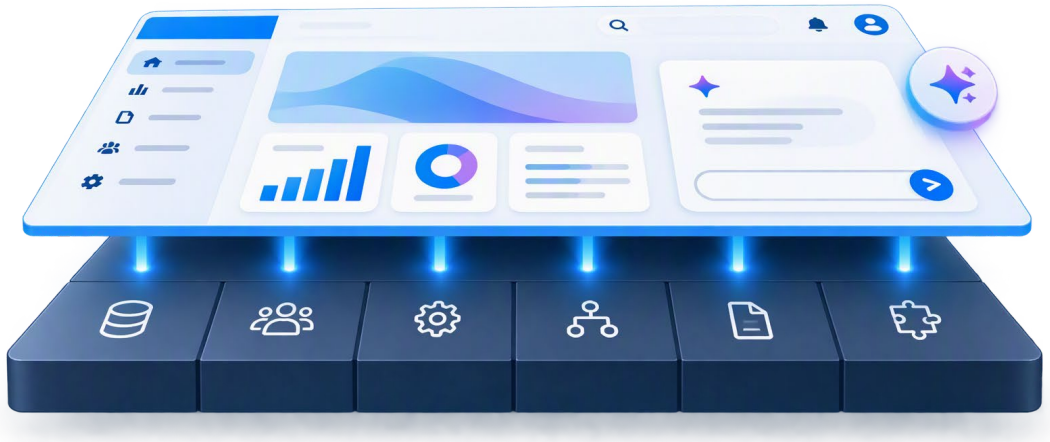
What is NetSuite Next?



NetSuite Next
Same account, new experience

NEW INTERACTION LAYER

- Redesigned experience: Updated navigation, records, lists, and reporting change how users move through their work.
- Ask Oracle: Use natural-language questions to explore business data, create reports, and perform supported actions.
- Embedded AI: Contextual insights and supported workflows bring AI into everyday processes.



CONTINUING FOUNDATION

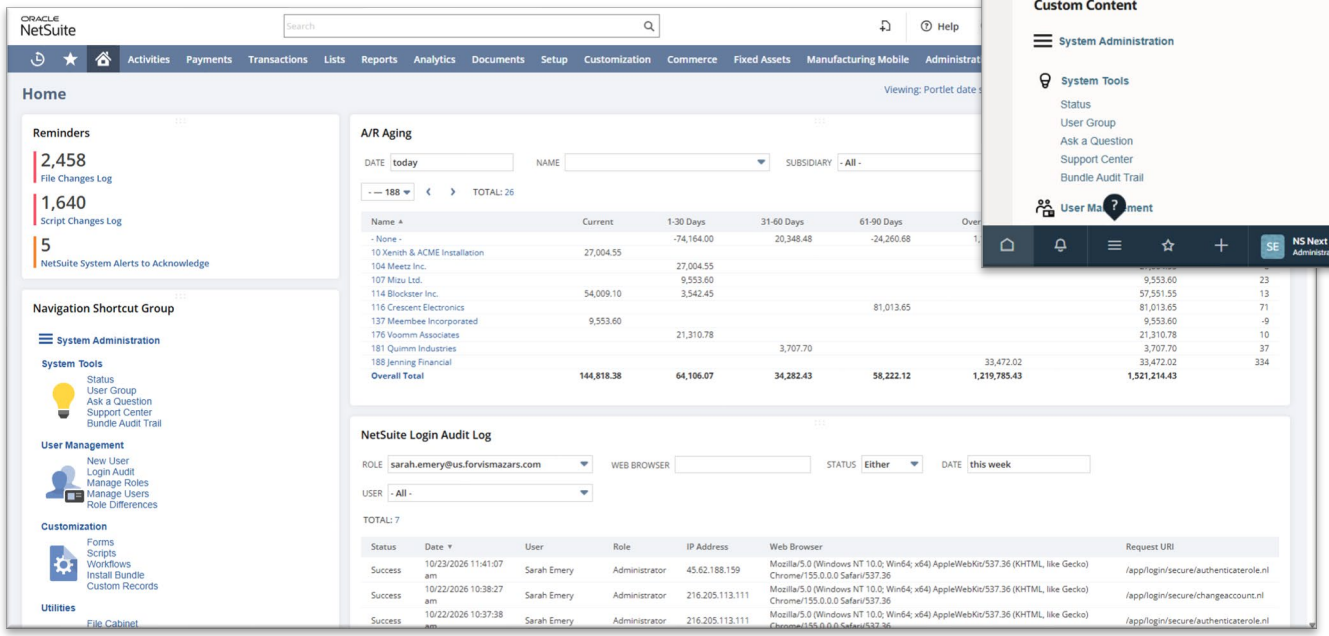
- Same account and data: Switching experiences does not require a data migration or reimplementation.
- Roles and permissions: Existing access rules remain the foundation for what users can see and do.
- Workflows and customizations: Existing account configuration continues. Test business-critical and experience-sensitive behavior.

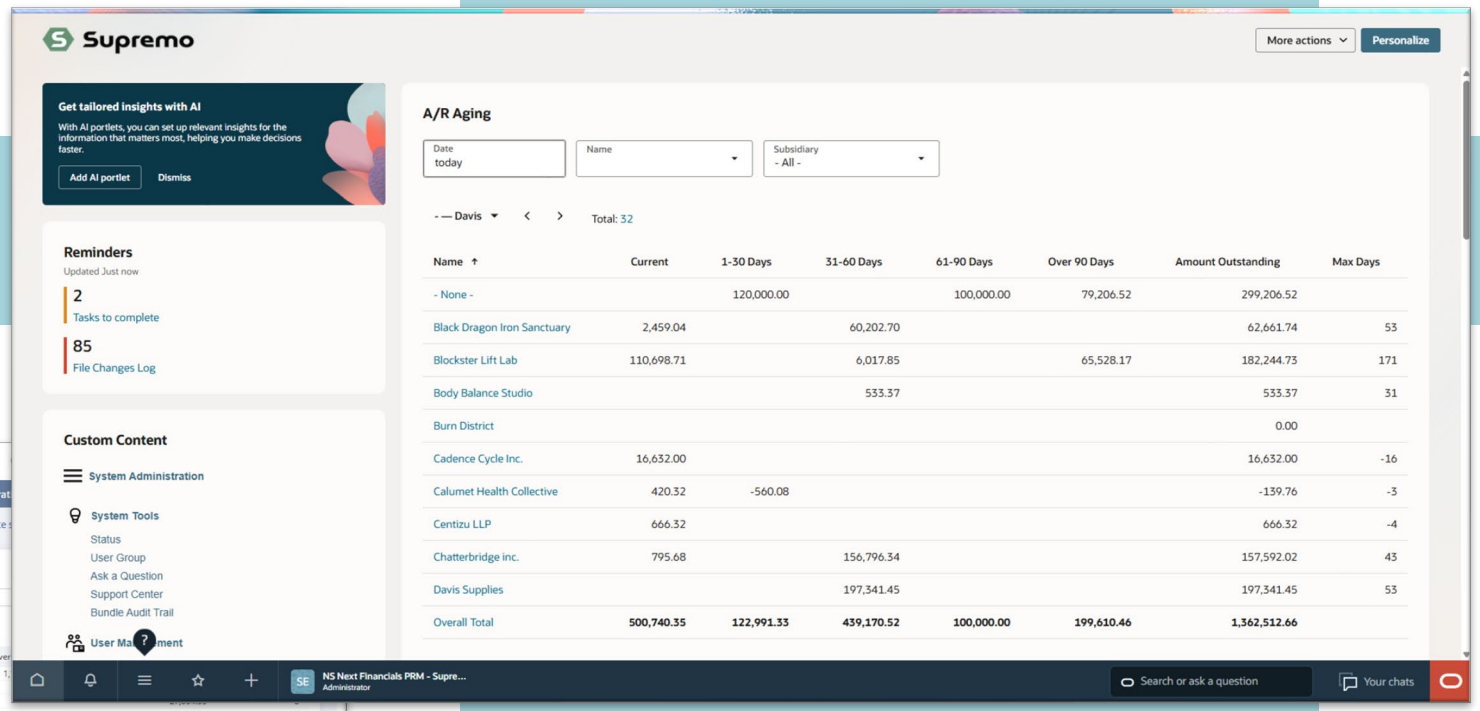
Practical takeaway: Prepare people for a different way of working and validate key processes in your account.

© 2026 Forvis Mazars, LLP. All rights reserved.

NetSuite Next Rollout
Updated user interface

A redesigned NetSuite experience built on the existing platform.





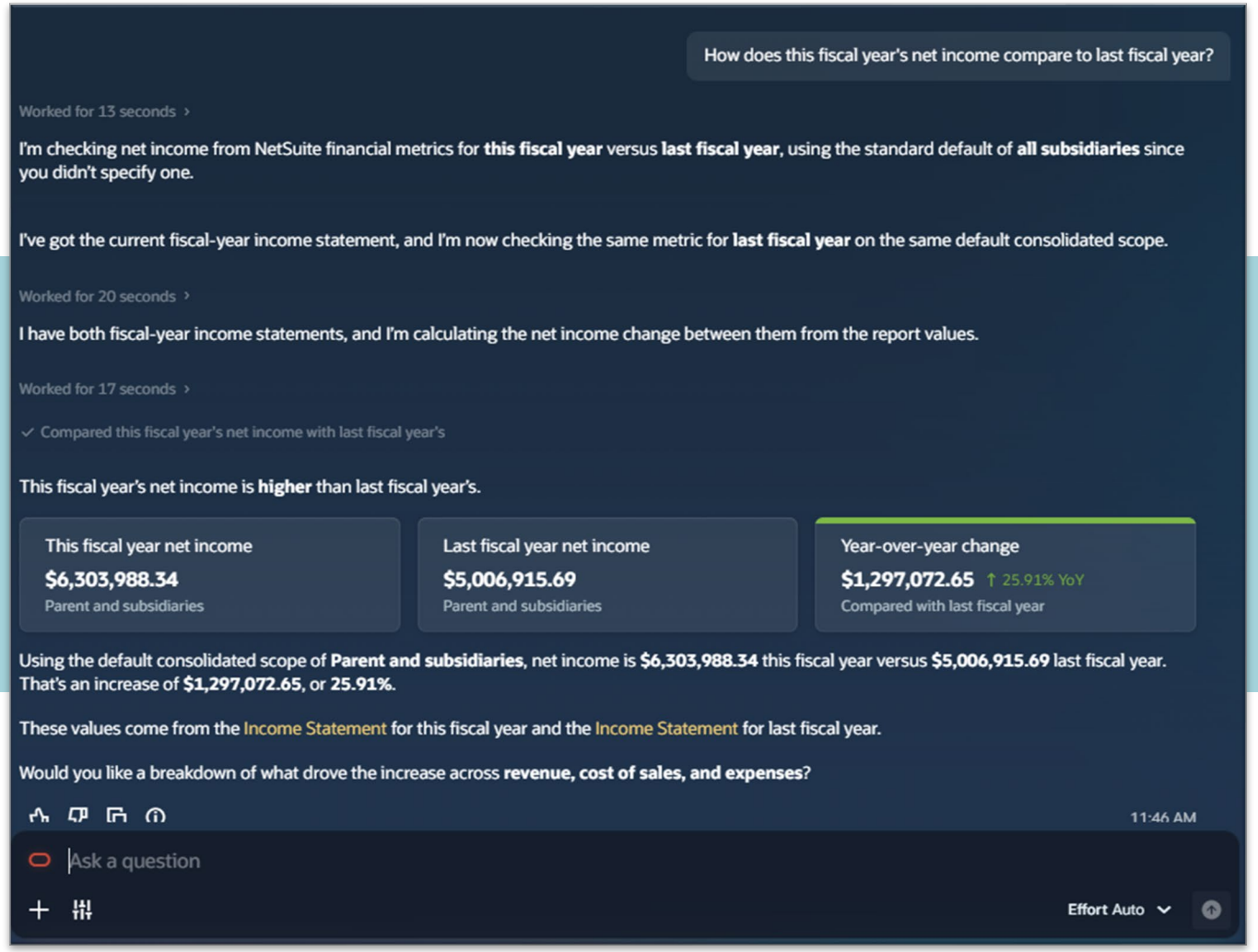
Updated navigation, records, lists, and reporting change how users work while keeping the same account foundation.

© 2026 Forvis Mazars, LLP. All rights reserved.

NetSuite Next Rollout
Embedded AI

Ask Oracle supports questions about business data, analysis, and supported actions.

Embedded AI adds contextual insights and agentic workflows across supported processes.



© 2026 Forvis Mazars, LLP. All rights reserved.

NetSuite Next Rollout
Initial rollout

Rollout began with NetSuite 2026.2 for eligible customers in the United States and Canada.

Availability is phased and account-specific, so confirm eligibility before planning your rollout.



© 2026 Forvis Mazars, LLP. All rights reserved.

02

Compare

What changes and stays consistent



What is Changing
Three connected shifts



© 2026 Forvis Mazars, LLP. All rights reserved.

Understand What Changes and What Stays the Same

Separate platform continuity from user and technical preparation

Area	Continuity	Readiness focus
Platform and data	Same underlying NetSuite platform and account data.	Confirm account eligibility and planned activation approach.
Roles and permissions	Existing roles and permissions continue to govern access.	Test representative roles and restricted data scenarios.
Workflows and customizations	Scripts, custom records, workflows, and other customizations are expected to continue working.	Focus on client scripts, form customizations, or portlets that manipulate HTML or page structure.
Navigation and experience	The interface, navigation, records, lists, and reporting experience are redesigned.	Prepare role-based navigation exercises and updated job aids.
AI capabilities	Ask Oracle and other AI capabilities are more deeply embedded.	Define approved use cases, human review, issue reporting, and consumption monitoring.
Transactions and records	Data is stored in the same underlying account and remains visible across experiences.	Confirm process behavior and outputs through representative scenarios.

Use a focused approach

Do not assume that platform continuity eliminates the need for testing. Prioritize areas where the user experience, page structure, custom behavior, or AI-assisted work changes how people complete a task.

© 2026 Forvis Mazars, LLP. All rights reserved.

What Users Encounter
More than a navigation change

NAVIGATION & RECORDS

- What to expect:
  - Find and move through work differently.
  - Updated record presentation and interaction.
- How to prepare:
  - Practice common tasks with representative user roles.
  - Check familiar routes through business-critical processes.

LISTS & REPORTS

- What to expect:
  - Updated ways to scan and work with lists.
  - A redesigned reporting experience.
- How to prepare:
  - Test high-use lists and reports with real business scenarios.
  - Validate outputs and downstream steps, not just screen appearance.

CONVERSATION & ACCESS

- What to expect:
  - Ask, analyze, navigate, and act.
  - Grant experience access by role.
  - The underlying account is not rebuilt.
- How to prepare:
  - Use natural-language questions to explore business data.
  - Review explanations and sources before relying on an answer.

© 2026 Forvis Mazars, LLP. All rights reserved.

03

Choose

Adoption paths



Adoption Paths at a Glance

Four ways to approach NetSuite Next

Path	Production change	Preparation focus
0. Continue	None	Monitor availability and future needs
1. Add Ask Oracle	Ask Oracle in current experience	AI use cases, access, data, and user guidance
2. Preview NetSuite Next	None to production	Hands-on evaluation of the Next experience
3. Enable NetSuite Next	NetSuite Next enabled in production	Readiness, user preparation, and rollout

Options, not required sequential phases
Production impact and organizational effort are different considerations.

© 2026 Forvis Mazars, LLP. All rights reserved.

Path 0: Continue with the current experience
No NetSuite Next activation

WHAT CHANGES

- Nothing related to NetSuite Next is activated.
- Continue operating in the current NetSuite experience.

PREPARATION

- Monitor account eligibility and Oracle communications
- Identify potential future use cases
- Revisit the decision as priorities change

POTENTIAL FIT

- A current ERP implementation or expansion
- Major integrations or customizations
- Other significant system initiatives
- Internal capacity constraints
- A later evaluation of NetSuite Next

Production impact: None from NetSuite Next
Change-management effort: Minimal

© 2026 Forvis Mazars, LLP. All rights reserved.

Path 1: Add Ask Oracle

Introduce conversational AI without changing the full experience

WHAT CHANGES

- Ask Oracle becomes available alongside the current NetSuite experience.
- Users can interact with NetSuite using natural language.

PREPARATION

- Define initial Ask Oracle use cases
- Confirm participating roles and permissions
- Examine supporting data and terminology
- Prepare relevant AI Descriptions
- Train users on prompting and source review
- Understand AI Unit consumption

POTENTIAL FIT

- Begin using documented AI capabilities
- Retain the familiar NetSuite experience
- Focus on a smaller group of users or use cases
- Build familiarity with Ask Oracle before considering the full NetSuite Next experience

Production change: Ask Oracle only
Preparation effort: Focused on AI readiness and users

© 2026 Forvis Mazars, LLP. All rights reserved.

Path 2: Explore NetSuite Next in a Preview Account

Explore the full experience without changing production

WHAT CHANGES

- A separate Preview Account provides the NetSuite Next experience using a copy of your current environment.
- Production remains unchanged.

PREPARATION

- Define what you want to learn
- Select representative users and roles
- Allow users time to learn the new experience
- Identify representative business scenarios
- Exercise critical workflows and customizations
- Examine records, lists, reports, and navigation
- Document results, questions, and follow-up actions

POTENTIAL FIT

- Experience NetSuite Next before enabling production
- Examine account-specific workflows and customizations
- Involve representative business users in evaluation
- Gather information before a production decision

Production impact: None
Organizational effort: Higher; evaluation requires dedicated participation

© 2026 Forvis Mazars, LLP. All rights reserved.

Path 3: Enable NetSuite Next in Production

Move the NetSuite Next experience into day-to-day use

WHAT CHANGES

- NetSuite Next is enabled in the production account.
- Administrators can configure access by role.
- The account retains the same data, roles, permissions, customizations, and workflows.

PREPARATION

- Complete applicable account-specific evaluation
- Define the initial rollout scope
- Confirm roles and access
- Prepare affected users
- Update training and job aids
- Examine critical workflows and customizations
- Define support and escalation procedures
- Monitor usage and issues after activation

POTENTIAL FIT

- Identified a business purpose for adoption
- Examined relevant workflows and customizations
- Prepared participating users
- Defined role-based access
- Documented open issues and decisions
- Planned the initial rollout and support approach

Production impact: NetSuite Next enabled for selected production roles
Organizational effort: Broadest of the four paths

© 2026 Forvis Mazars, LLP. All rights reserved.

04

Prepare

Ask Oracle and account readiness



Readiness Framework

The preparation profile changes by path

Readiness area	Continue	Ask Oracle	Preview	Production
Business use case	○	●	●	●
AI/data readiness	○	●	●	●
Roles & permissions	○	●	●	●
Customization examination	○	○	●	●
Business-process scenarios	○	○	●	●
End-user training	○	◐	◐	●
Change management	○	◐	◐	●
Post-activation support	○	◐	○	●

○ Limited/not generally driven by this path ◐ Focused ● Significant consideration

Educational framework, not an Oracle-defined scoring model.

© 2026 Forvis Mazars, LLP. All rights reserved.

Start with Your Data & Account Structure

Focus on the areas supporting your intended use cases

LOOK FOR

- Stale or outdated transactions
- Duplicate or obsolete master records
- Inconsistent field values
- Unclear naming or abbreviations
- Segments and classifications that no longer fit their intended use
- Important data stored primarily in free-form text

DECIDE

- Which data matters to your initial use cases?
- Who owns it?
- What should be addressed before the pilot?
- What known limitations can users work with initially?

Ask Oracle works with the information and terminology in your NetSuite account.

© 2026 Forvis Mazars, LLP. All rights reserved.

Give Custom Objects Business Context

Help AI understand what your custom objects mean

AI DESCRIPTION APPLIES TO

Custom record types

Custom transaction types

Custom fields

CUSTOM OBJECT

Project Funding Source

USEFUL CONTEXT

Identifies the funding source associated with a project, including the funding organization, award type, effective dates, and restrictions.

Used for project reporting, billing review, and funding compliance analysis.

Describe purpose, business use, relationships, and important context.

Inventory → **Prioritize** → **Describe** → **Confirm** → **Maintain**

© 2026 Forvis Mazars, LLP. All rights reserved.

Examine Access & Account-Specific Technology

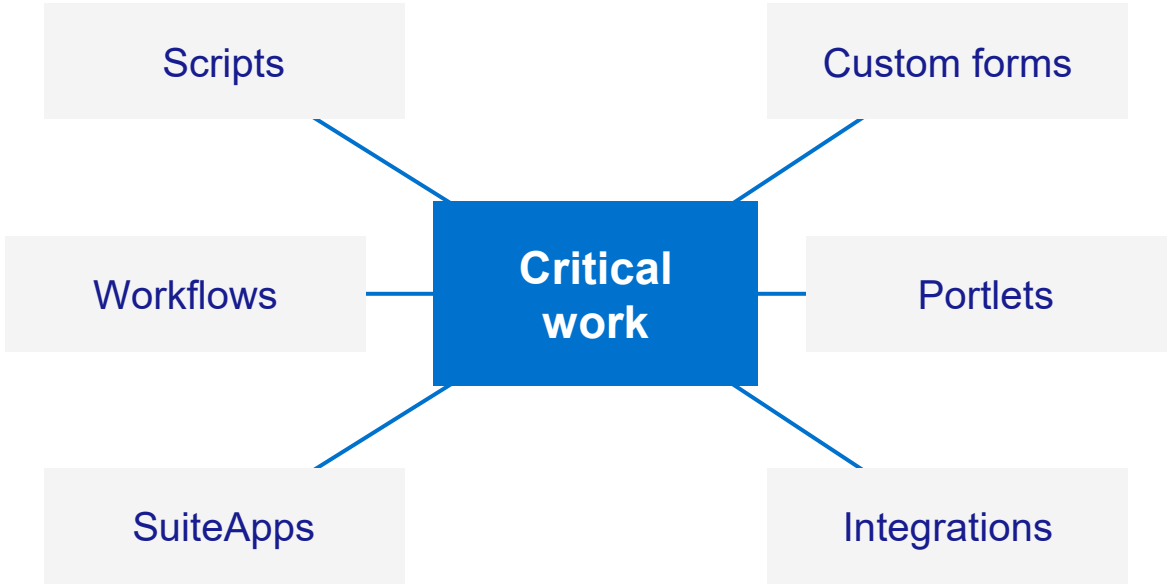
Focus on what supports critical work

ROLES & ACCESS



- Identify participating roles
- Confirm relevant subsidiary and segment restrictions
- Exercise representative restricted-data scenarios
- Confirm who receives access
- Document access questions before expansion

CUSTOMIZATIONS & INTEGRATIONS



Prioritize by business importance and relevance to the experience being introduced.

© 2026 Forvis Mazars, LLP. All rights reserved.

Confirm the Work Users Depend on
Move from feature testing to day-to-day work

Transactions

Can users complete representative transaction activities?

Approvals

Do critical approval paths behave as expected?

Period end

Can participants complete the activities included in the evaluation?

Reporting

Can users access the reports and saved searches they depend on?

Dashboards

Can users find and use important operational information?

Downstream work

Do relevant exports and connected activities behave as expected?

Document: Role • Scenario • Expected behavior • Observed behavior • Follow-up

© 2026 Forvis Mazars, LLP. All rights reserved.

Prepare Users For Ask Oracle & NetSuite Next

Build good interaction habits and prepare by role

USING ASK ORACLE

- Start with a clear objective
- Add relevant scope and context
- Use NetSuite terminology
- Ask focused follow-up questions
- Open related records and explanations
- Compare material facts before acting
- Provide response feedback where available

PREPARING PEOPLE FOR CHANGE

- Explain what is changing
- Demonstrate new navigation
- Use real process examples
- Update job aids where needed
- Identify internal support contacts
- Capture recurring user questions

Preparation should reflect the specific roles and activities included in your rollout.

© 2026 Forvis Mazars, LLP. All rights reserved.

Know How AI Units Will Be Used

AI adoption introduces a consumption model

Know your allowance → **Identify consuming features** → **Monitor actual usage** → **Adjust as adoption grows**

AI Units are shared across the organization

Eligible AI capabilities consume Units through use

Administrators have centralized usage visibility

Additional AI Units can be purchased

Understand the allowance, then use actual adoption to inform consumption decisions.

© 2026 Forvis Mazars, LLP. All rights reserved.

Turn Readiness into a Working Plan

You do not need to address everything at once

Data

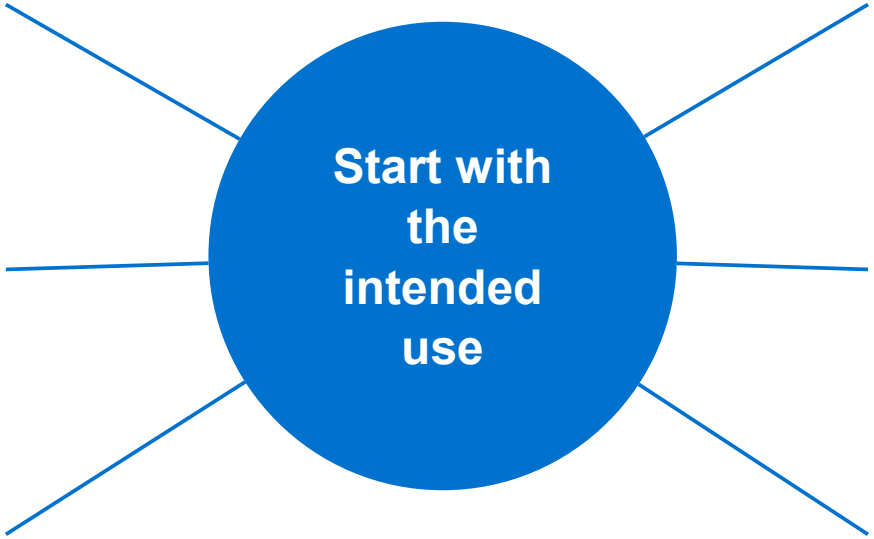
What information supports it?

Context

Which custom objects need clearer meaning?

Access

Which roles will participate?



Technology

What account components support the work?

Process

What representative scenarios will you exercise?

People

What do users need to know?

Consumption How will AI Unit use be monitored?

© 2026 Forvis Mazars, LLP. All rights reserved.

05

Decide

Practical next steps



Five Useful Actions Now
NetSuite Next readiness

Companion resource: Readiness Checklist

- Confirm current availability and account-specific guidance.
- Select one adoption path to explore.
- Choose two or three representative use cases.
- Map the roles, data, custom objects, processes, and technology involved.
- Use the NetSuite Next Readiness Checklist to record evidence, actions, owners, and decisions.



© 2026 Forvis Mazars, LLP. All rights reserved.

Turn Readiness Findings Into Decisions

Know what you need to decide

Adoption Path

What are you prepared to introduce now?

- Current experience
- Ask Oracle
- Preview Account
- Production activation

Initial Scope

Where will you begin?

- Approved use cases
- Participating roles
- Included users
- Initial business processes

Open Items

What requires follow-up?

- Data or access questions
- Account-specific behavior
- User-preparation needs
- Unresolved dependencies

Next Decision Point

What happens next?

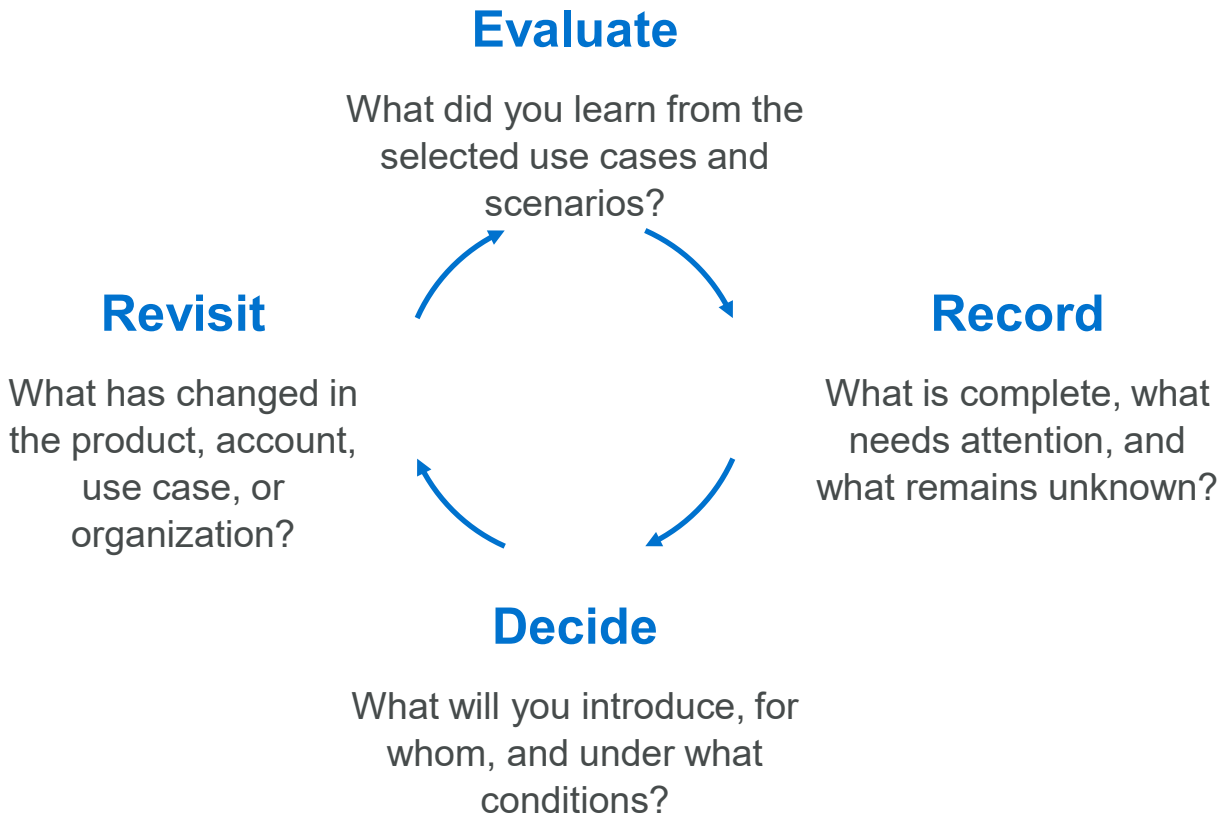
- Proceed
- Adjust the scope
- Continue preparation
- Revisit later

Readiness does not require every issue to disappear.

It requires you to understand what remains open and decide what to do next.

© 2026 Forvis Mazars, LLP. All rights reserved.

Make Readiness Repeatable
Keep a working record of what you learn



Your readiness record should answer:

Which adoption path are we pursuing?

What have we prepared?

What remains open?

Who is responsible for follow-up?

What did we decide?

When will we revisit the decision?

Use the NetSuite Next Readiness Checklist as the working record for your evaluation and decisions.

© 2026 Forvis Mazars, LLP. All rights reserved.

Key Takeaways
What to remember about NetSuite Next

1 NetSuite Next Changes the Experience, Not the Account Foundation

The experience changes, while existing data, roles, permissions, workflows, and customizations remain part of the NetSuite account.

2 Adoption Is Not a Single Yes-or-No Decision

Organizations can continue with the current experience, add Ask Oracle, explore NetSuite Next in a Preview Account, or enable NetSuite Next in production.

3 Preparation Should Match the Path and Use Case

The amount and type of preparation depend on what the organization plans to introduce, which users are involved, and which business activities are in scope.

4 Start Small and Use Representative Work

Begin with a limited number of meaningful use cases, then identify the supporting data, roles, custom objects, processes, and technology.

5 Document What You Learn and Decide

Use the readiness checklist to maintain a record of readiness, open questions, owners, actions, and organizational decisions.

© 2026 Forvis Mazars, LLP. All rights reserved.

Q&A



Business Technology Services

Questions?

© 2026 Forvis Mazars, LLP. All rights reserved.

forvis mazars

Contact

Forvis Mazars



Sarah Emery

Senior Manager, NetSuite

sarah.emery@us.forvismazars.com

The information set forth in this presentation contains the analysis and conclusions of the author(s) based upon his/her/their research and analysis of industry information and legal authorities. Such analysis and conclusions should not be deemed opinions or conclusions by Forvis Mazars or the author(s) as to any individual situation as situations are fact-specific. The reader should perform their own analysis and form their own conclusions regarding any specific situation. Further, the author(s)' conclusions may be revised without notice with or without changes in industry information and legal authorities.

© 2026 Forvis Mazars, LLP. All rights reserved.