

POSSIBLE (RE)DEFINED

Predict What is Next - AI Powered NetSuite

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OVERVIEW

Agenda

- Introductions
- Understanding AI
- NetSuite Next
- Live Demo: NetSuite MCP
- Q&A

Today's Presenters



Stacy Okyne

Marketing Manager
Armanino NetSuite Practice

Stacy has over 20 years' experience in the Marketing Profession. She brings experience in an array of industries including advertising, education, production, hospitality, and technology. She has a good grasp and understanding of consumer insights and needs. Strategic thinking and leadership skills are among her qualities.



Russell Fulling

Director Technical Operations
Armanino NetSuite Practice

Russell demonstrates expert-level skills in technology management, team management and project management. He is a results-driven Financial Systems Expert and Management Consultant. He is responsible for providing project leadership, direction and mentorship to Armanino's development team.

He identifies project needs, participates in setting goals and objectives and manages technical schedules and budgets. Russell possesses a high technical aptitude and has strength in communication skills and engineering best practices.



Eric Jozwiak

Partner
Armanino NetSuite Practice

Eric is a partner with extensive experience and a proven track record in the business solutions sector; Eric has excelled in various key leadership roles throughout his career. His expertise in strategic planning, marketing, and business development has been instrumental in driving companies towards significant growth and innovation. Under Eric's leadership, businesses have thrived, cultivating a culture of innovation and prioritizing customer-centric solutions. His strategic vision and commitment to excellence have earned him respect in the industry, as he is recognized for delivering outstanding results and ensuring long-term business success.



WHO WE ARE

A Best-in-Class NetSuite Partner

- **Our Established Track Record:**
 - Cloud Computing Integrator
 - 20+ years of computing in the cloud
 - Hundreds of cloud computing clients
 - Experienced NetSuite Veterans, Certified Consulting and Development team
 - Trusted NetSuite Solution Provider

Armanino NetSuite consultants are committed to delivering excellence in service, responsiveness, and results, earning us a reputation as a trusted NetSuite partner.

WHO WE ARE

Firm Overview

OUR PROMISE

Armanino delivers **impactful, bold solutions** that **increase clarity and spark success** for today and tomorrow.

When it comes to your success, we know addressing today's challenges is just as important as planning for the future. Our teams bring deep industry experience to help organizations reach peak performance today, and to help you prepare for the future.

Recognition & Awards



Firm Overview



Employees
2700+

Team Members in
41 States

Firm Ranking
20th Largest

Canada
Vancouver

India
Ahmedabad
Hyderabad

California San Ramon Century City El Segundo Irvine Los Angeles San Francisco San Jose Woodland Hills	Florida Boca Raton	Missouri St. Louis St. Charles	Tennessee Nashville
Colorado Denver	Idaho Boise	New York New York City Garden City	Texas Austin Dallas
	Illinois Chicago	Pennsylvania Philadelphia Scranton	Washington Bellevue

The Conversation Has Changed

Denial & Skepticism

“Should we be using these tools?”

“Let’s block Chat GPT.”

“Is Gen AI another tech fad?”

“I think we should wait a while.”

Realization and Optimistic

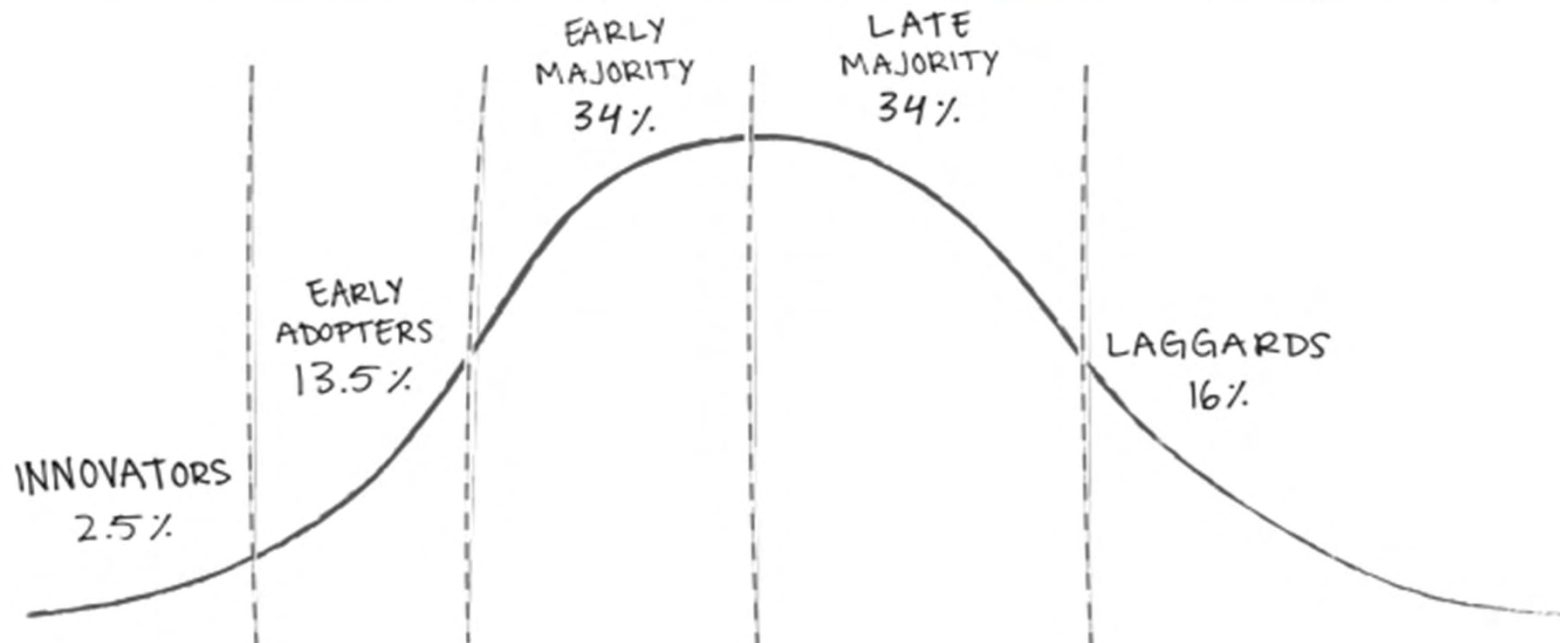
“How can we use AI today?”

“People are using it without permission.”

“This is how we work moving forward?”

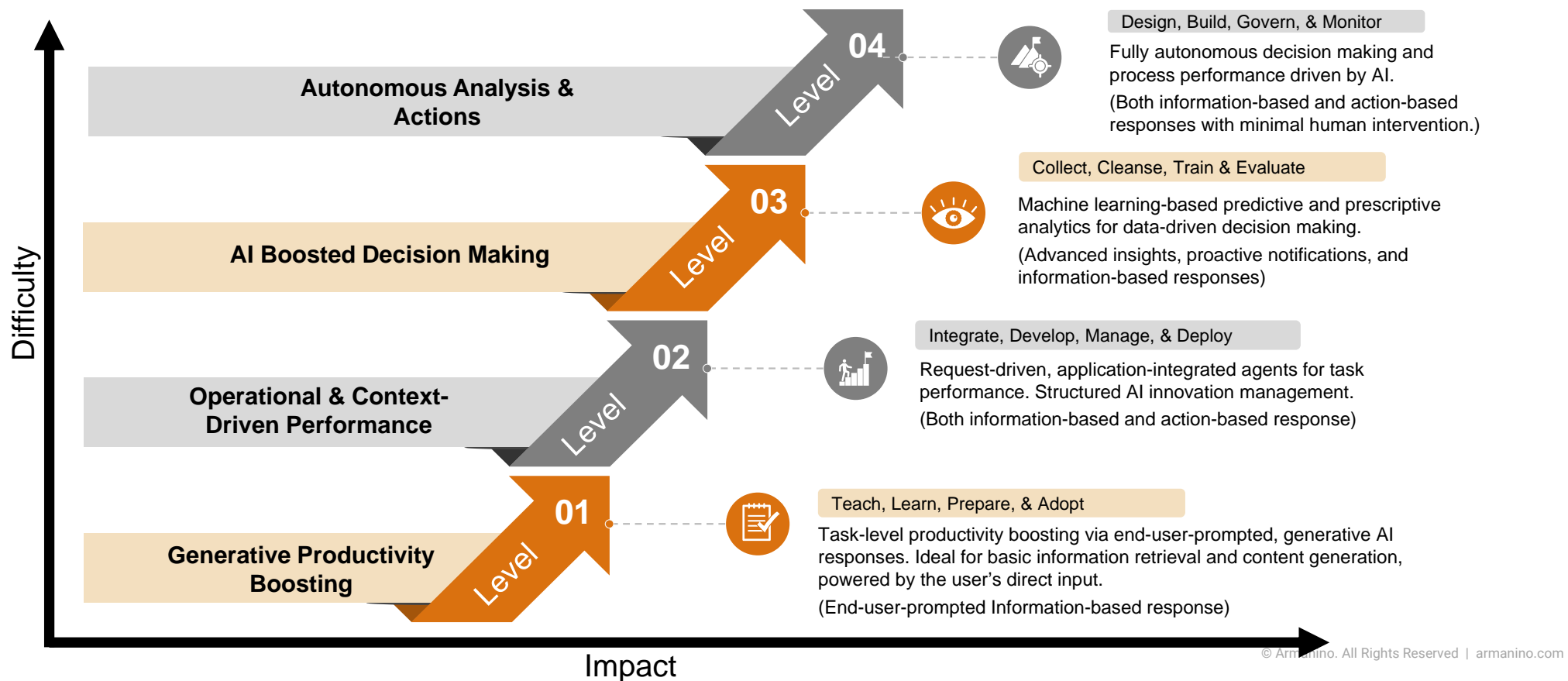
“We can’t afford to wait.”

Everyone will not adopt AI at the same time.



	Innovators	Early Adopters	Early Majority	Late Majority	Laggards
Mindset	Love being first, curious, embrace AI experimentation.	Strategic, influential, willing to lead with some evidence.	Practical, want proof before changing.	Skeptical, need hand-holding, fear disruption.	Resistant, traditional, last to adopt.
How to Lead	Give them tools, autonomy, and let them pilot new AI ideas.	Engage them in shaping AI vision and driving buy-in across teams.	Show clear business wins and case studies; offer training.	Focus on ease-of-use, peer pressure, and ongoing support.	Address fears slowly; may only adopt when required to stay viable.

AI Maturity is a Journey: from *productivity boosts* to *autonomous operations*



GenAI *thinks with* you. Agentic AI *acts for* you.

GenAI

Creative Intelligence

Supports innovation by generating new ideas, content, or solutions

Example: Brainstorming loss-prevention campaign ideas tailored to top claim drivers

Context-Driven Content Creation

Produces written, visual, or data summaries from prompts

Example: Drafting a broker-ready renewal brief

Human-Like Personalization

Tailors responses to fit audience, tone, and context

Example: Personalizing injured-worker communications

Agentic AI

Goal-Oriented Automation

Executes tasks with clear objectives, often with minimal human involvement

Example: First notice of loss intake to claim setup

Task & Workflow Execution

Follows defined workflows to complete repetitive, high-volume processes

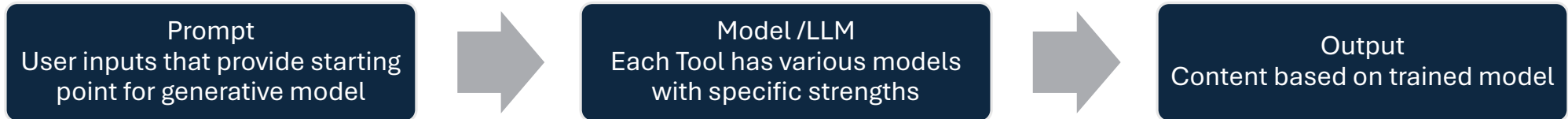
Example: Auto-generating a weekly large-loss and reserve-change report

End-to-End Process Automation

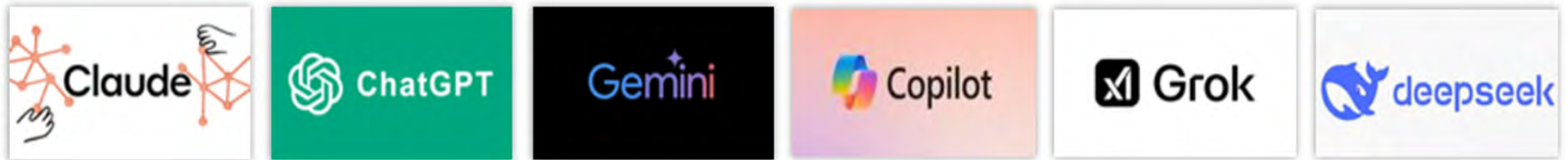
Manages complex operations from input to action

Example: Policy endorsement flow from broker request to rule checks, draft issuance, approvals, billing, etc.

Generative AI?



1
Platform



2
Version



3
Models





OVERVIEW

NetSuite Next

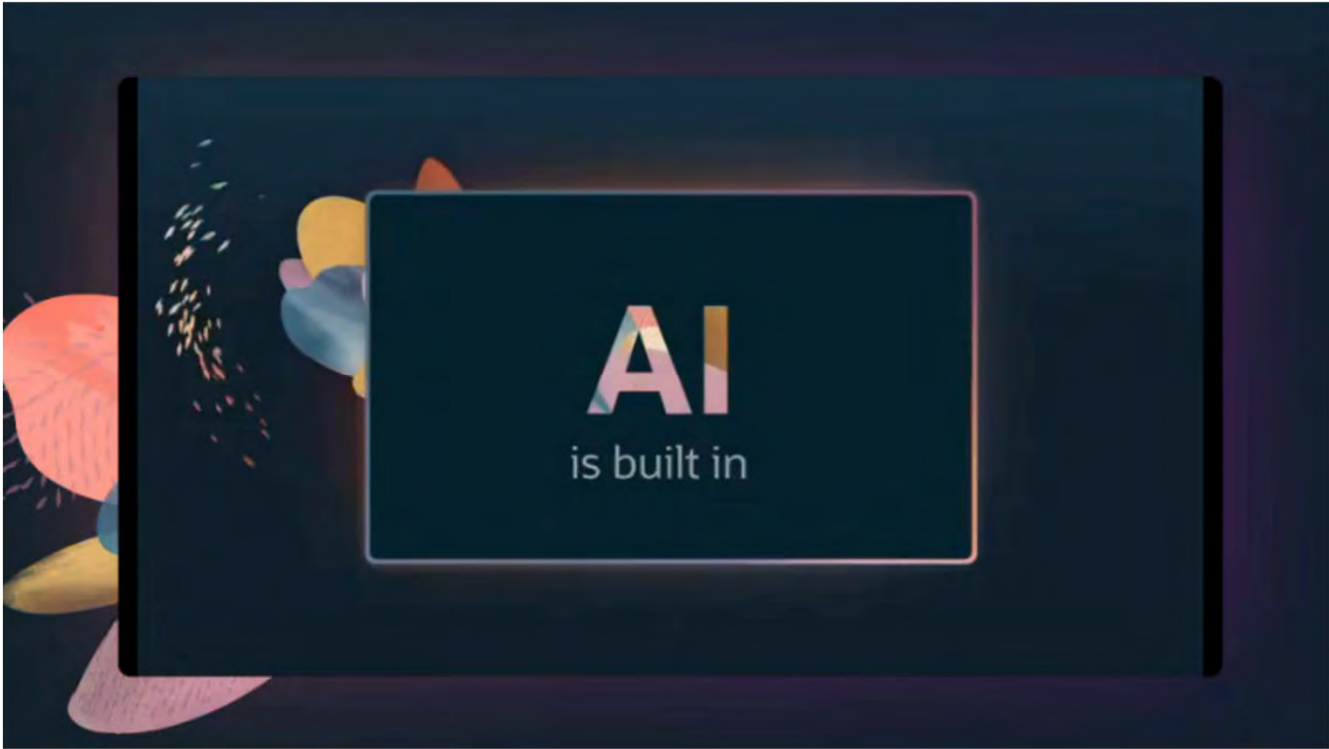
- What is NetSuite Next
- NetSuite Next in Action
- Preparing for NetSuite Next

NetSuite Next

CORE NETSUITE NEXT COMPONENTS

USER INTERFACE	<ul style="list-style-type: none">• A REFINED, INTUITIVE INTERFACE WITH IMPROVE SEARCH AND LAYOUT CAPABILITIES
ASK ORACLE	<ul style="list-style-type: none">• A CONVERSATIONAL AI TOOL THAT ACTS AS AN INTELLIGENT COPILOT, ALLOWING USERS TO ANALYZE DATA
AGENTIC WORKFLOWS	<ul style="list-style-type: none">• AI AGENTS THAT CAN HANDLE COMPLEX, MULTI-STEP TASKS LIKE VENDOR SELECTION AND PAYMENT RECONCILIATION
AI CANVAS	<ul style="list-style-type: none">• A COLLABORATIVE WORKSPACE FOR MODELING SCENARIOS
NARRATIVE SUMMARIES	<ul style="list-style-type: none">• AUTOMATED, PLAIN ENGLISH EXPLANATIONS OF DATA TRENDS AND INSIGHTS

NetSuite
Next
In Action



NetSuite Next Dashboard

Your to-do list
You've got 13 tasks due today

Today 13

- Pay 3 vendor bills \$2,847.25

FIDQuick Compliments

Overdue
- Fulfill sales order \$49,428.70

SO-007839

New
- Approve return authorization \$17,900.60

RA-000126

New
- Approve 2 sales orders \$183,025.80

Awesome Fit, Mind Cycle

Submitted 2 days ago
- Approve 3 expense reports \$245.09

Amita Patel, Beth Hernandez, John Sarkis
- Invoice 3 sales orders \$254,309.20

Body by Bob, Katya's Cycling

Coming up 7 >

Hide | K

Updated just now

Personalize view

Sales orders

\$1.46M

This month

Invoiced sales

\$812.71K

This month

Net income

\$163.15K

This month

Cash accounts

\$548K

Today

Unpaid invoices

\$55.31K

Today

Fulfillment lead time

2.5 days

12 weeks

Top 10 selling item

\$1.05M

Last 30 days

Compared with this time last year, sales are up 11.4%

In September 2025, sales increased by \$95,457.18 (+7.03% growth) compared to September 2024.

View details

■ Retail ■ Partner ■ Online
- - - - Retail predicted - - - - Partner predicted - - - - Online predicted

New customers

Customers acquired each month over the past year.

View all

Top recent sales orders

Based on open and completed sales orders in the last 30 days.

View all

Sales order	Customer	Status	Total
SO-001315	Awesome Fit	Open	\$296,203.85
SO-001312	Mind Cycle	Open	\$205,850.21
SO-001295	Davidsons	Completed	\$102,100.75
SO-001286	Body by Bob	Open	\$95,401.54
SO-001275	Katya's Cycling	Open	\$67,234.44

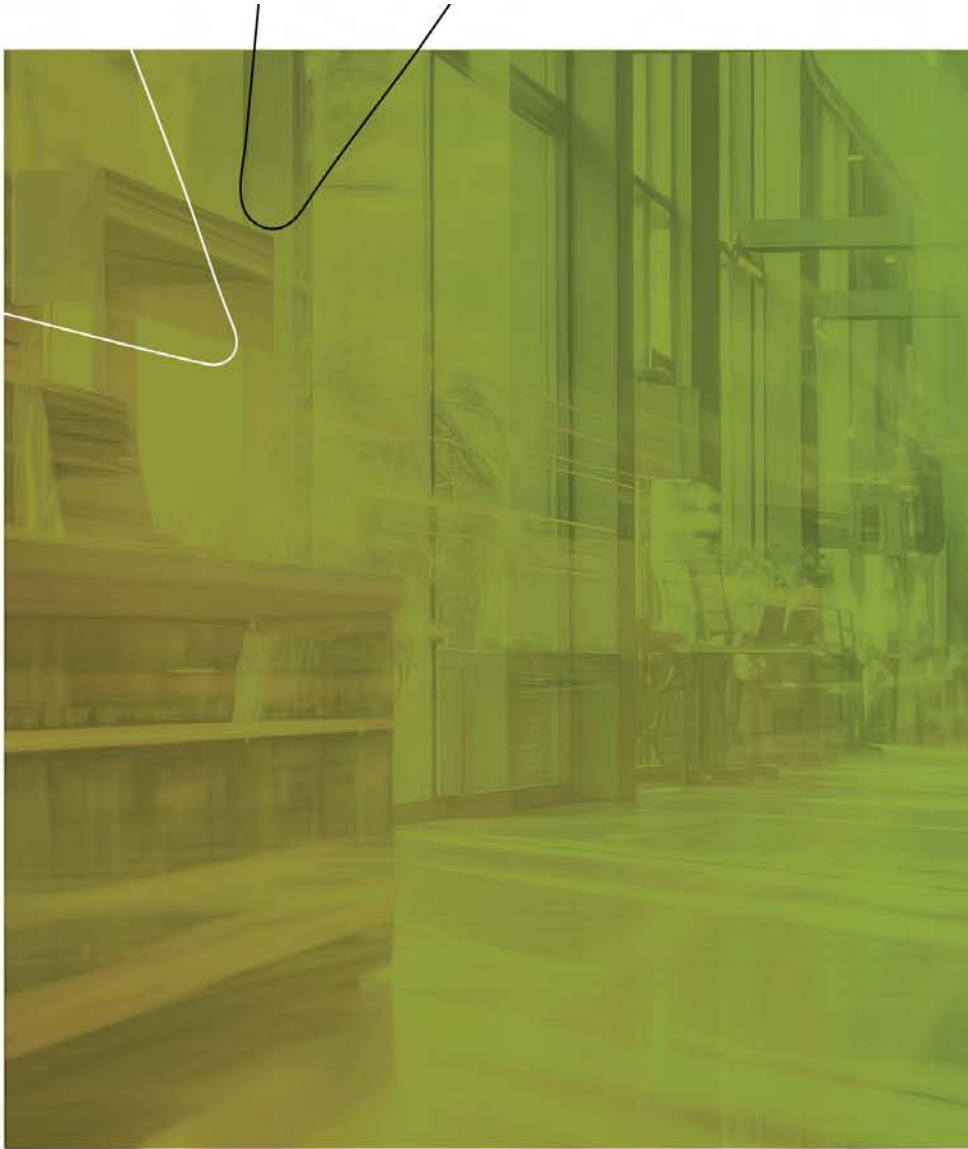
Search or Ask Oracle

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What Organizations Should Be Doing Now to Prepare for NetSuite Next

- ❑ Build Familiarity with Prompting
- ❑ Review and Refine Account Customizations
- ❑ Improve Data Consistency and Quality
- ❑ Revisit Roles and Permissions
- ❑ Refresh Navigation Menus and Role Centers





NetSuite **MCP**

Oracle NetSuite **MCP** (Model Context Protocol) is an AI integration framework that allows external AI assistants and intelligent agents to securely interact with NetSuite data, workflows, and business processes in real time.

NetSuite MCP Server

NetSuite MCP refers to the Model Context Protocol integrated within the NetSuite ERP ecosystem.

- The feature is available in all accounts
- NetSuite has released the Companion Service to assist with using the feature

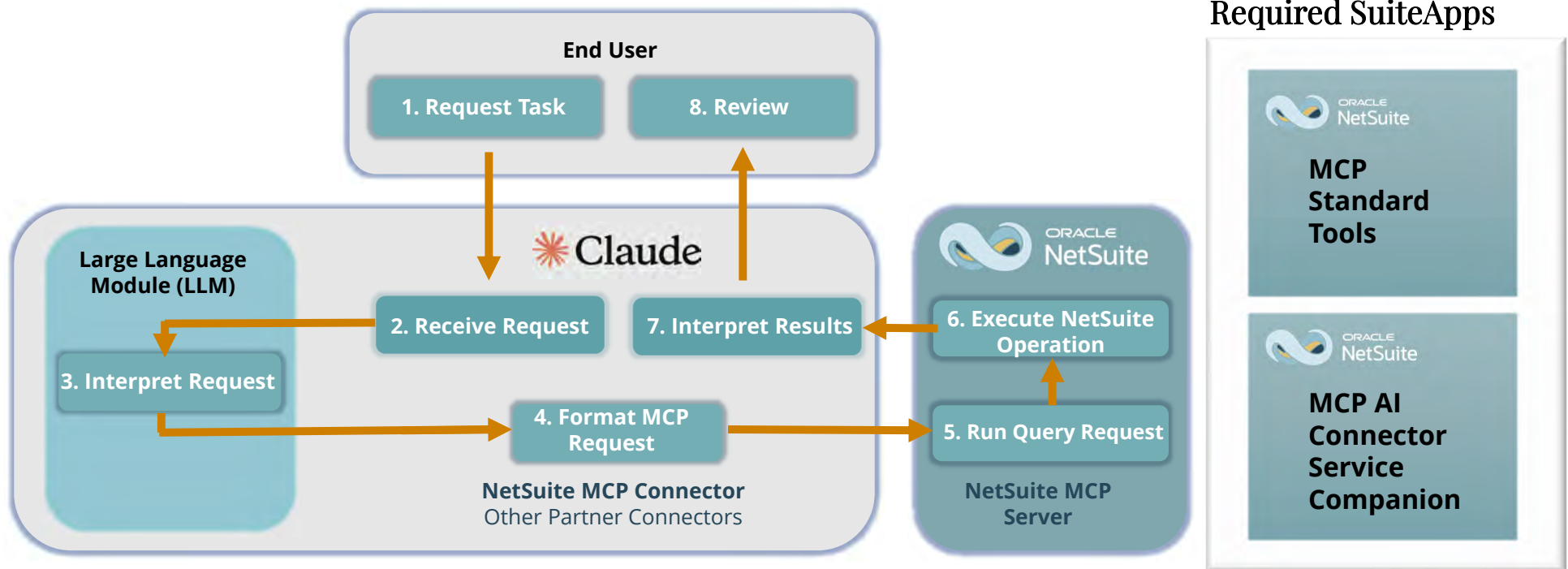
How NetSuite MCP Works

- **Universal Standard:** MCP standardizes how AI models communicate with software.
- **One-Way or Two-Way Interaction:** AI assistants (clients) can retrieve live data, fetch documents, and trigger operations inside NetSuite (via the MCP server) using natural language.
- **Security & Governance:** NetSuite MCP is built to respect your existing NetSuite roles, permissions, and security guardrails.

Why Businesses Use MCP

- **Flexibility:** Instead of being locked into a single embedded AI provider, you can "bring your own assistant" and connect it directly to your financials, supply chain, and CRM.
- **Speed:** Users can ask an AI client to perform complex inventory checks, draft SuiteQL queries, or review customer records instantly.
- **Automation:** Agentic AI can be set up to reason through business processes directly within NetSuite.

NetSuite MCP Data Flows



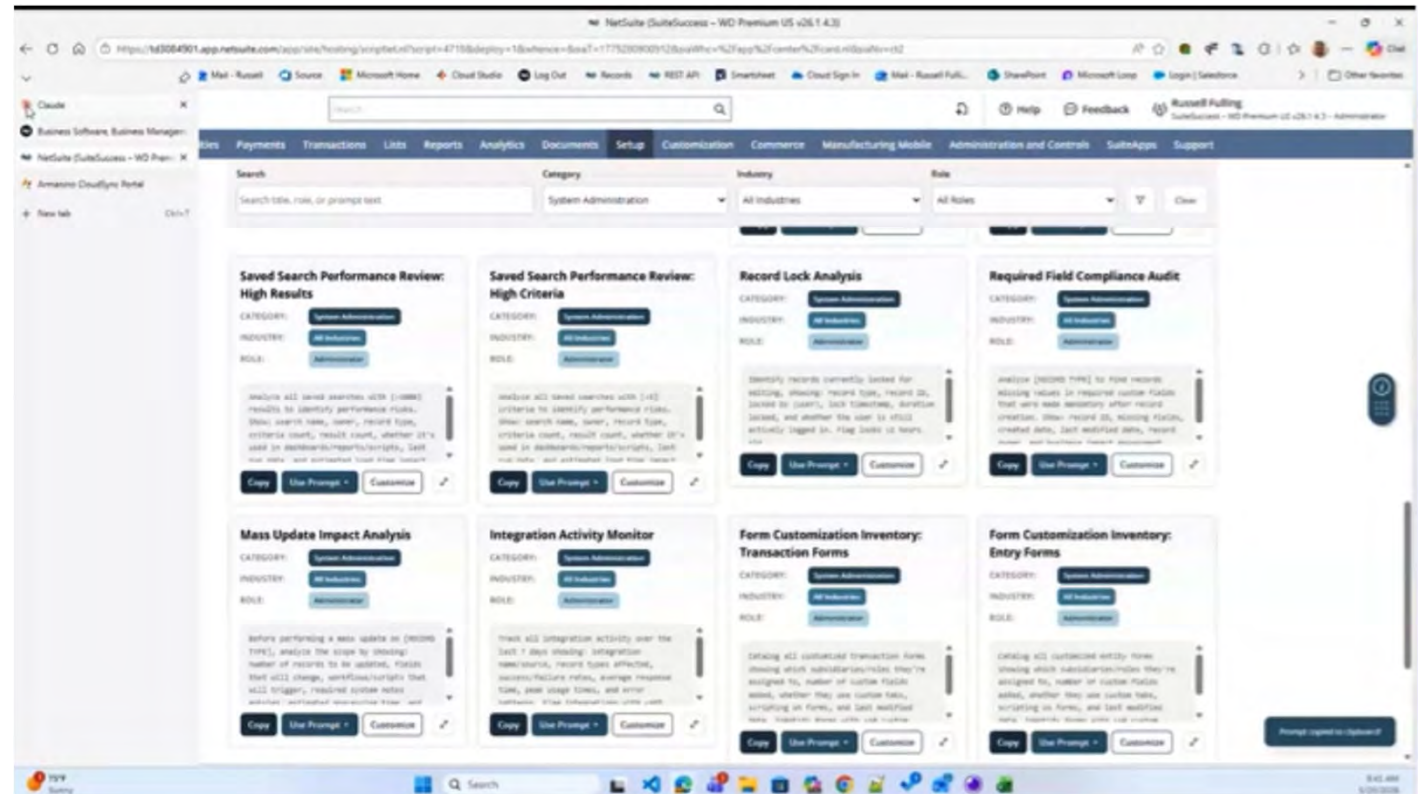
NetSuite AI Connector Service

Best Practices

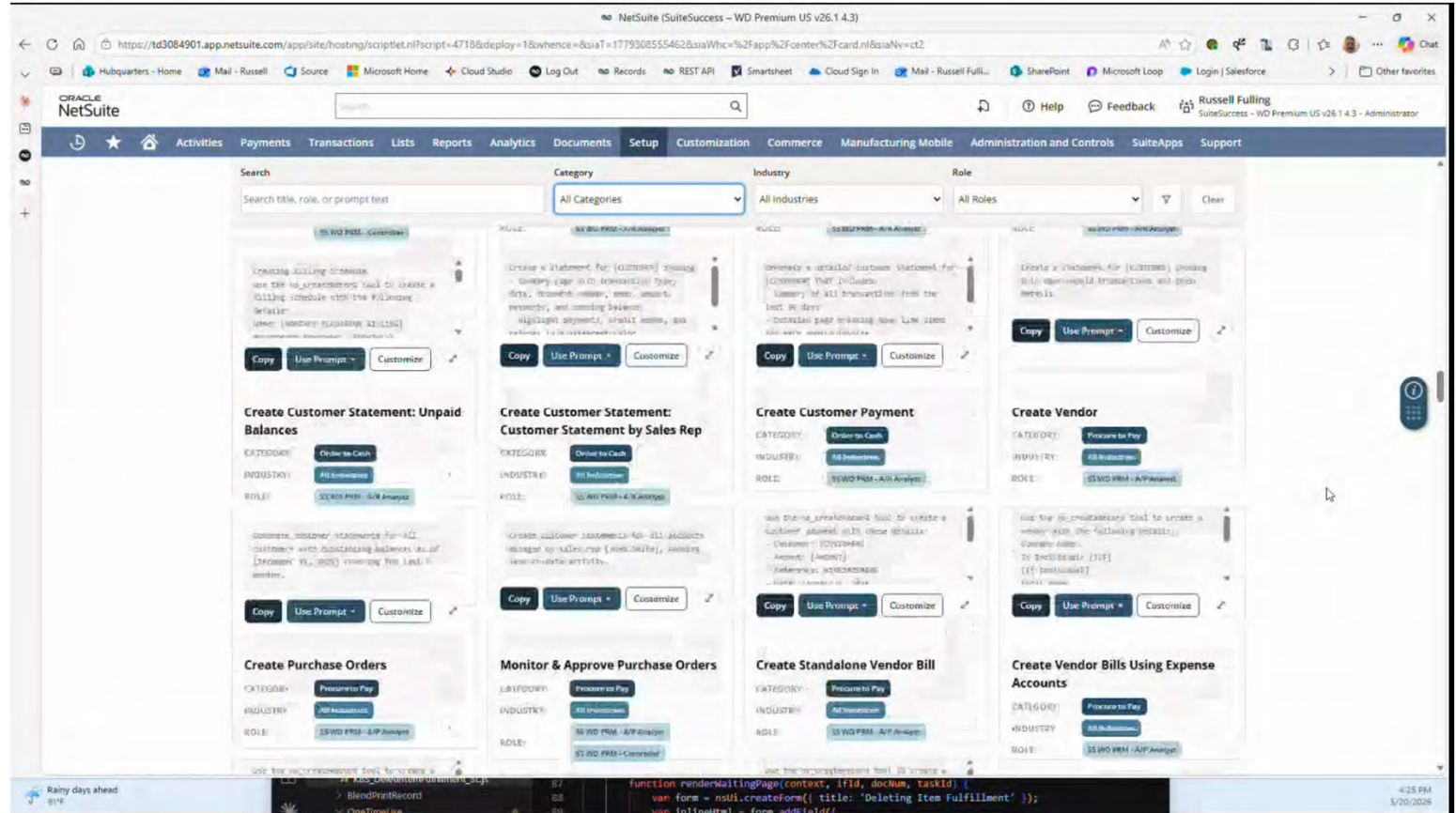
- ❑ Start with a clear business use case
- ❑ Use role-based access
- ❑ Apply least-privilege permissions
- ❑ Test in sandbox first
- ❑ Create approved prompt templates
- ❑ Keep humans in the approval loop
- ❑ Document governance rules
- ❑ Monitor usage and outcomes
- ❑ Train users on good prompts
- ❑ Focus messaging on trust and control

MCP Demo

CONFIGURATION
ANALYSIS



NETSUITE NEXT
MCP
Demo
BOARD
SYNTHESIS



Thank You

Can't Spell Armanino Without "AI"

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