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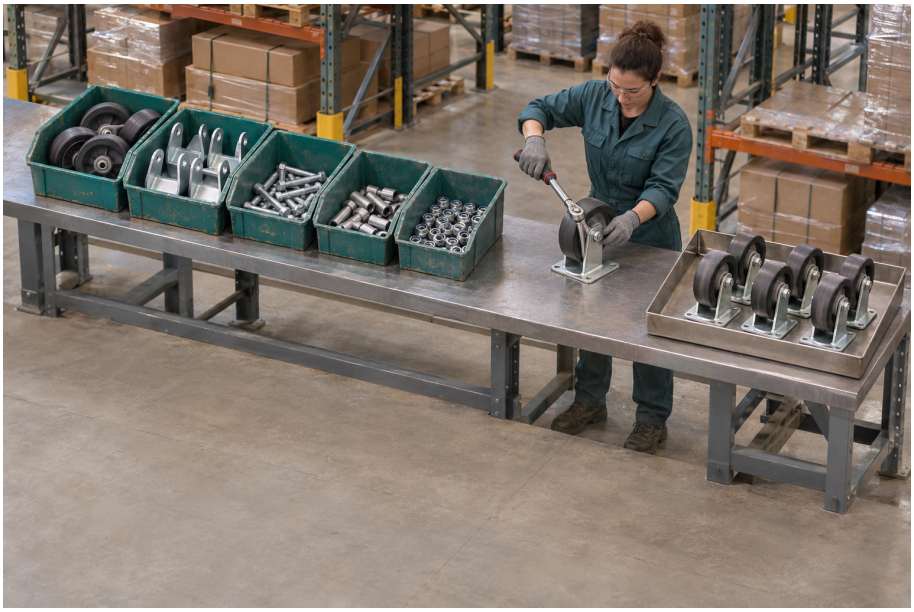
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# NetSuite Demo Script for Finance Leaders: 12 Scenarios

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## Executive Summary

**A NetSuite demo script is a buyer-written set of scenarios, input data, pass tests and scoring rules that replaces the vendor's default presentation.** The case for one is practical. Independent practitioners describe three formats: a recorded tour, a standard live demo and a scripted session of two to four hours on the buyer's own processes (www.erpresearch.com). The same sources note that curated demo environments almost never show data migration from the legacy system (www.erpresearch.com), and an independent guide published in November 2026 adds that the scripted round happens only if the buyer asks for it (www.business-software.com).

**This report supplies the script.** Twelve scenarios cover order-to-cash, procure-to-pay, close with consolidation, multi-currency intercompany, revenue recognition, a bank reconciliation exception, an integration failure and retry, permissions and segregation of duties, a live report, a migration load, approvals with audit trail, and sandbox and release handling. Each has input data, a pass test, a module or licence question and a 0 to 3 score, with editable weights totalling 100. The scoring rules follow independent advisers: give every vendor the same scenarios built from the buyer's own transactions (ultraconsultants.com), score against requirements and not presenter performance (www.panorama-consulting.com), and submit scores before any group debrief (www.panorama-consulting.com).

**The sizing questions are anchored on Oracle's documentation.** Oracle's service tiers cap users, file storage and monthly transaction lines, with the lines figure averaged over the most recent six months (docs.oracle.com). Oracle states that SuiteCloud Plus licences are not included in any service tier (docs.oracle.com). In the hypothetical worked example, 86,300 lines a month today grow to 168,555 in year 3 at 25 percent annual growth, or 84.3 percent of the 200K Standard cap, and a fourth year of growth crosses it. These are invented inputs, not benchmarks. Licence types, subsidiaries, sandbox entitlement and renewal should be settled in writing, because advisers report that scaling users back is not allowed until renewal (www.withum.com).

**Why this matters.** Panorama's 2025 ERP Report found data issues to be the most common reason projects ran over schedule (hs.panorama-consulting.com), and a Gartner analyst is quoted citing 54 percent of finance software buyers with moderate to high regret after an ERP purchase (www.gartner.com). The recommended path is to agree weights first, send the script and data, score in the room, collect written answers and re-check Oracle's limits on the day of signature.

## Introduction and Background

A NetSuite demo is usually the first moment at which a finance team sees the system it may run for years, and it is also the moment at which the buyer has the least control over what is shown. NetSuite describes its platform as used by more than 44,000 organizations (www.netsuite.com), and its SuiteSuccess programme packages the product into preconfigured industry editions that NetSuite markets as fixed-fee starting points (www.netsuite.com). A first demo therefore tends to show a tidy edition with tidy data, a fair way to introduce a product but a weak basis for a decision on an accounting system. Deloitte reports that 85% of clients in its Core Financial ERP Survey found marginal differences between leading platforms (www.deloitte.com), which shifts the decision toward fit with the buyer's own processes.

This report is written for CFOs, controllers, COOs and IT leads at venture-backed and mid-market companies that have booked, or are about to book, a NetSuite demo. It answers three questions. Should the buyer accept the standard demo or insist on a scripted one? What belongs in the script, with a pass or fail test for each scenario? And how should NetSuite, and any implementation partner, be scored before signing? An independent guide published in early November 2026 describes three rounds and says the scripted round happens only on request (www.business-software.com). This report adds twelve copyable scenarios with pass tests, plus sizing questions anchored on Oracle's help documentation rather than on marketing.

The position of the author is stated plainly. Houseblend is a Montréal NetSuite consultancy that implements, integrates and administers NetSuite for scale-ups and mid-market companies. It serves the platform and does not position itself against Oracle; this report is written from that vantage point and is not a vendor comparison. Oracle's help pages carry no publication dates, so every limit quoted should be re-read on the day of signature. No NetSuite prices are quoted. All figures are as of November 2026.

## The Three Demo Formats and What Each Can Prove

Buyers meet three formats, and each answers a different question. The useful discipline is to ask of each what it can prove and what it cannot.

### Recorded product tour

NetSuite's ERP page presents per-module product demonstrations under the heading "See NetSuite ERP in action." (www.netsuite.com). An independent directory puts a recorded tour at 5 to 15 minutes and calls it useful only for shortlisting (www.erpresearch.com). A recording can prove that a screen exists. It cannot prove that the screen works on the buyer's chart of accounts, subsidiaries or approval rules.

## Standard live demo

NetSuite's events page offers a guided walkthrough of a demo account by its technical experts and one-on-one product demonstrations (www.netsuite.com). The independent guide published in November 2026 observes that the first two rounds show a clean, preconfigured account and rarely cover licensing or add-on modules (www.business-software.com). A standard demo therefore proves breadth and polish, not fit. The ERP Research directory states that demo environments are curated and almost never show data migration from the legacy system (www.erpresearch.com). That directory operates a partner listing, so its statements are best read as practitioner opinion rather than measurement.

## Scripted demo

A scripted demo runs the buyer's own scenarios on data sent in advance. ERP Research puts it at two to four hours and says to request it once the field is down to two or three vendors (www.erpresearch.com). Panorama Consulting, an independent ERP advisory firm, recommends that each vendor run the same processes in the same amount of time, and Ultra Consultants advises giving every vendor the same scripted scenarios built from the buyer's own transactions (ultraconsultants.com). Panorama's guidance treats a vendor's refusal to follow the script as a red flag (www.panorama-consulting.com), and its selection guide says to send demo scripts at the same time as requests for proposal (www.panorama-consulting.com) and to write them in-house so that vendors personalise the demonstration (www.panorama-consulting.com). This is consultancy advice, not a measured result, but it is consistent across independent sources.

*Table 1* sets out what a standard demo typically leaves out and what a buyer can ask to receive in writing. The right-hand column names the Oracle help topic that gives each request a factual anchor.

| Topic | Standard demo usually shows | Request in writing before signing | Oracle help topic to anchor on |
|---|---|---|---|
| Data migration | Pre-loaded demo records | A sample load of the buyer's messy master data, with the error log | CSV Import Assistant limits |
| Integrations | A connector tile or a slide | A failed message, a retry and the licence needed for peak concurrency | SuiteCloud Plus Settings |
| Volume | A handful of records | Monthly transaction lines by type, today and in three years | NetSuite Service Tier Structure; Transaction Types Included in Monthly Transaction Lines Metric |
| Users | A few named roles | Every role mapped to a licence type | User Licenses |
| Renewal | Not discussed | The user count and tier at renewal, and the notice window | Contract terms (not in product help) |
| Environments | One demo account | Sandbox entitlement, refresh and Release Preview access | Sandbox accounts; Release Preview |

The pattern in *Table 1* is that the items a standard demo skips are the items that move the quote and the first two years of operating cost. Each can be answered with a document rather than a performance, which is why the scripted session and the written answers belong together. Where an item depends on contract terms, such

as renewal, the buyer should consult counsel and a licensing adviser, because product documentation cannot answer it.

A caution applies to SuiteSuccess editions. NetSuite describes them as preconfigured industry solutions on a lifecycle running from Build through Engage and Consume to Optimize (www.netsuite.com). The edition page names the editions without stating how many there are (www.netsuite.com). If the demo account is an edition, ask which features are switched on that would not be switched on in the buyer's own account.

## Who Attends and Who Owns Scoring

A scripted demo fails when it becomes a vendor presentation with a larger audience, so roles are assigned before the session. The allocation below uses the RACI convention (Responsible, Accountable, Consulted, Informed) and is a working proposal, not a standard.

- **Finance lead (CFO or controller): Accountable.** Owns the script, the pass tests, the weights and the final scorecard. Gartner's guidance is that vendor selection should begin only after leaders have aligned on desired business outcomes (www.gartner.com), and Deloitte advises concentrating decision-making on a smaller group of stakeholders (www.deloitte.com).
- **Process owners (AR, AP, GL, treasury, revenue accounting): Responsible.** Each owns one or two scenarios, supplies the input data and scores only those scenarios against the written pass test.
- **IT lead: Consulted.** Owns the integration, security, migration and environment scenarios, and attends every session so that technical answers are heard by finance.
- **Operations or supply chain lead: Consulted.** A demo attended only by IT and finance is likely to miss operational objections.
- **Executive sponsor: Informed.** Attends the opening and the debrief. Panorama's 2026 guidance recommends blocking portions of each functional workshop for process owners alone (www.panorama-consulting.com).

Three scoring rules keep results comparable. Evaluators should attend the same sessions for every vendor (www.panorama-consulting.com). They should score against the written requirements, not against how well the presenter performed. And they should submit scores immediately after each session, before any group debrief (www.panorama-consulting.com), a point Ultra Consultants makes as completing scorecards in the room while the session is fresh (ultraconsultants.com).

## The Twelve-Scenario Script for Finance Leaders

Three preparation rules come first. The script should be sent in advance as part of the request for proposal (erpfocus.com), and it should be short: Deloitte advises focusing on a handful of use cases rather than hundreds of requirements (www.deloitte.com). The buyer, not the vendor, should supply the data, because Panorama notes that data created on the fly by a vendor can derail a demo (www.panorama-consulting.com). And the data should keep its imperfections, since Ultra Consultants recommends a sample of the buyer's own master data with its flaws left in (ultraconsultants.com).

*Table 2* is the reusable asset. Each scenario has the data to send, what must be shown live, a pass test, the module or licence question it should trigger, and a blank score from 0 to 3 (the scale is defined in the scoring section). Copy it into a spreadsheet and edit the inputs to match the business.

| Scenario | Input data to send in advance | What must be shown live | Pass test | Module or licence question it triggers | Score 0 to 3 |
|---|---|---|---|---|---|
| **1. Order-to-cash** | 20 anonymised customers, 10 items including a kit or bundle, one partial shipment, one return, your tax setup | Sales order, approval, fulfilment, invoice, payment and application, with a partial shipment and a credit memo | Documents link end to end; ledger effect visible at each step; receivables aging ties to the ledger with no manual journal | Which features were enabled for the demo? Does a bundle multiply transaction lines? One Oracle example counts a sales order with one assembly item and five components as seven lines (docs.oracle.com) | __ |
| **2. Procure-to-pay** | 15 vendors, a three-line purchase order, a partial receipt, a bill with a price variance, your approval limits | Purchase approval, receipt, bill matching, discrepancy routing, payment run | A variance routes to the right approver without manual steps; the partial receipt is handled or the limitation is stated | Is three-way matching standard, or delivered through a SuiteApp that must be installed and maintained? | __ |
| **3. Month-end close with consolidation** | Trial balances for three subsidiaries, an accrual list, intercompany balances, your close checklist | Period close checklist, accruals, revaluation, consolidated rates, eliminations, consolidated statements with drill-down | Consolidated trial balance equals the sum of entities less eliminations; any figure drills to source; close time compares favourably with your current calendar | Is the account OneWorld? Which close tasks depend on features such as Advanced Revenue Management or intercompany elimination being enabled? | __ |
| **4. Multi-currency intercompany** | Three currencies, a rate table, one intercompany purchase and sales order pair | Intercompany transaction, revaluation of open balances, consolidated rate update, elimination entry | Both sides post in the correct currency; revaluation posts at period-end rates; elimination nets to zero without a hand-keyed journal | How many subsidiaries and elimination subsidiaries does the quote assume? Oracle states subsidiary fees do not include charges for elimination subsidiaries (docs.oracle.com) | __ |
| **5. Revenue recognition** | Five contracts: multi-element, ramped, usage-based, mid-term amendment, termination, with your standalone selling prices | Revenue arrangement, allocation, schedule, amendment, reclassification | Schedules match your spreadsheet to the cent on all five; the amendment does not overwrite history | Is Advanced Revenue Management enabled? Oracle directs classic Revenue Recognition users to a sales or account representative to find out how to get it (docs.oracle.com) | __ |

| Scenario | Input data to send in advance | What must be shown live | Pass test | Module or licence question it triggers | Score 0 to 3 |
|---|---|---|---|---|---|
| **6. Bank reconciliation exception** | One month of statements with a duplicate, a split deposit, a foreign-exchange fee and an unmatched item | Statement import, automatic matching, resolution of an ambiguous match, creation of a missing entry | Unmatched and ambiguous lines are surfaced; manual resolution is logged; the reconciled balance ties | Which bank-import SuiteApp and statement formats are assumed, and who creates the missing entry? | — |
| **7. Integration failure and retry** | A real payload from your billing, e-commerce or CRM system with one invalid record | A batch with a bad record, the visible error, the fix, a replay with no duplicate | A finance user can see the failed record without a developer; replay creates no duplicate; error history is retained | Which SuiteCloud Plus count and which integration tool licence are assumed for peak volume? | — |
| **8. Permissions and segregation of duties** | Your role matrix and the conflicts you prohibit, such as creating and paying the same vendor | Roles built live; an attempt to perform a prohibited combination; the approval record | The conflict is blocked or flagged; the audit log shows user, time and values | Which users need Full, Employee Center or Specialized licences? Is any access-review tooling extra? | — |
| **9. Report built live** | A board or lender report specification with six fields and two filters | The presenter builds the report from blank, without a developer, in a fixed time | Totals tie to the ledger; a dimension filter works; the report can be scheduled and exported | Which analytics tool was used, and is it in the buyer's licence? | — |
| **10. Data migration load** | 500 rows of customers, vendors and opening balances with duplicates and bad codes | Import, error handling, correction and reconciliation of counts and totals | Duplicates and errors are reported readably; counts and totals tie after correction | Who performs migration, and what are the record limits per import job? | — |
| **11. Approvals and audit trail** | Your approval matrix with thresholds for journals and purchases | Journal and purchase approval, an edit after approval, the history of changes | Thresholds route correctly; the history shows who, when, old and new values | Are approvals standard routing, a workflow or a SuiteApp, and who maintains them? | — |
| **12. Sandbox, release and change** | Your questions on refresh, test and promotion | The sandbox, a refresh request, Release Preview and the promotion of a change | The answer states what is and is not copied in a refresh, and the entitlement is in writing | Is a sandbox included in the quote, and how often can it be refreshed? | — |

*Table 2* is a minimum. A manufacturer will add work orders and a software company will add billing schedules, but a scenario that cannot be scored against a written pass test should be removed rather than left vague.

### Notes on running the finance scenarios

- **Revenue recognition.** Oracle describes Revenue Allocation as an add-on to Advanced Revenue Management (Essentials) (docs.oracle.com), so ask for written confirmation of which components the quote assumes, and compare schedules with a spreadsheet the revenue accountant already trusts.
- **Integration failure.** Ask which interface and authentication method the demonstrated integration uses. Oracle has published an end date for SOAP web services (see the implications section), so a scripted integration built on SOAP tests a retiring interface.
- **Data migration.** Armanino warns that risk rises significantly when imported data is not validated or verified correctly (www.armanino.com), and The Accounting Department names transferring all historical data as a common implementation error (www.accountingdepartment.com). The pass test should therefore include the reconciliation, and a question on how much history is loaded.
- **Segregation of duties.** Ask the presenter how prohibited role combinations are detected, to name any access-review tooling and whether it carries its own licence, and test with a role matrix supplied in advance.

## Sizing Questions the Demo Skips

A demo cannot show the quote. The quote is shaped by licence types, service tier, SuiteCloud Plus, OneWorld subsidiaries and sandbox entitlements, all documented in Oracle's help centre. Withum, an advisory firm, summarises NetSuite licensing as a named-user approach with one licence per user (www.withum.com), and RSM lists product configuration, add-on modules and total user count among the cost drivers (rsmus.com).

- **User licence types.** Oracle's licence overview lists Full Licensed User, Employee Center, Retail User, Specialized User and SuiteCloud Plus. Employee Center is limited to self-service tasks such as entering timesheets and expenses or viewing pay slips (docs.oracle.com). The useful question for the finance leader is which roles in the demo were Full roles and which could be self-service, because that mapping drives the user line of the quote. Oracle lists Employee Center, Customer Center, Partner Center, Vendor Center and several Specialized roles as not counting against the Full Licensed Users figure (docs.oracle.com), and Sikich reported the same for the four Center licences in 2021 (www.sikich.com). Withum notes that a full user licence is required for read-only access to reports and dashboards (www.withum.com), so ask who needs to see reports.
- **Service tiers.** Oracle's tier structure sets limits on users, file storage and monthly transaction lines (docs.oracle.com). The question is not whether the company fits today but whether it fits at the end of the term plus growth. Oracle applies a 90-day grace period to file storage only (docs.oracle.com), and the same page grants no equivalent grace period for the other limits. Citrin Cooperman, a CPA and advisory firm, describes the tiers as based on transaction volume, data storage and user count (cm.citrincooperman.com), and CrossCountry Consulting adds that tiers also dictate technical limits (www.crosscountry-consulting.com).
- **SuiteCloud Plus.** Oracle states these licences are not included in any service tier (docs.oracle.com), and Withum says they must be purchased separately (www.withum.com). Ask how many parallel integration operations are needed at peak, and whether that count fits within the licences the chosen tier allows.

- **OneWorld.** This is the multi-subsidiary edition. Ask for the number of subsidiaries, their country and currency combinations and the elimination subsidiaries the design needs. Ask also which reports in the demo support consolidation and which return one subsidiary at a time.
- **Sandbox and Release Preview.** Ask which environments the quote includes. Citrin Cooperman lists a complimentary sandbox among the benefits of a higher tier (cm.citrincooperman.com), so the answer may depend on the tier. Oracle states that production tokens are not copied to a sandbox during a refresh (docs.oracle.com). Ask also who tests customisations before each of the two yearly releases.
- **Renewal at grown user counts.** Withum's buyer guide says users can be added at any time but that scaling back is not allowed until renewal (www.withum.com), and a licensing consultancy reports that most NetSuite contracts renew automatically unless written notice is given in a defined window (oraclelicensingexperts.com) and that renewal is the realistic window to cut cost (oraclelicensingexperts.com). Both are advisory opinion, not contract terms, so the buyer should ask for the actual renewal clause, notice window and price basis in writing.

# Data Analysis and Evidence

## The service tier limits

Oracle's service-tier table sets these limits:

- **Standard:** up to 100 users, 100 GB of file storage, 200K monthly transaction lines, up to 1 SuiteCloud Plus licence.
- **Premium:** up to 1,000 users, 1,000 GB, 2M lines, up to 3 licences.
- **Enterprise:** up to 2,000 users, 2,000 GB, 10M lines, up to 6 licences.
- **Ultimate:** up to 4,000 users, 4,000 GB, 50M lines, up to 12 licences.

The lines figure is the total per month across all transaction types, averaged over the most recent six months (docs.oracle.com). Citrin Cooperman describes an upgrade as triggered when that six-month rolling average exceeds the allowance (cm.citrincooperman.com), and a consultancy reports that a new tier takes about three days to go live (www.crosscountry-consulting.com).

## What counts as a transaction line

Oracle lists the transaction types that contribute to the metric (docs.oracle.com). The list is broad: it includes sales orders, invoices, bills, journals, item fulfilments, purchase orders, expense reports, currency revaluations and revenue arrangements, so the close and revenue scenarios in *Table 2* generate lines of their own. One transaction usually has several lines, and the item type affects the number. Oracle's own worked example counts a sales order with one assembly item and five components as seven lines (docs.oracle.com). Because of this, the order count alone understates the metric.

## Worked sizing example (Hypothetical Example)

*Table 3* is illustrative arithmetic, not a benchmark. The monthly counts and average lines are invented inputs for a fictional mid-market distributor with no relation to any real company. The reader should replace every input with measured values and check each transaction type against Oracle's current list. Growth is set at 25

percent a year for three years, a factor of 1.953 (1.25 cubed).

| Transaction type | Monthly count (input) | Average lines (input) | Lines per month today | Lines per month in year 3 |
|---|---|---|---|---|
| Sales order | 3,000 | 6 | 18,000 | 35,156 |
| Item fulfilment | 3,000 | 6 | 18,000 | 35,156 |
| Invoice | 3,000 | 6 | 18,000 | 35,156 |
| Payment | 2,800 | 3 | 8,400 | 16,406 |
| Purchase order | 800 | 5 | 4,000 | 7,813 |
| Item receipt | 800 | 5 | 4,000 | 7,813 |
| Bill | 1,200 | 4 | 4,800 | 9,375 |
| Bill payment | 1,100 | 3 | 3,300 | 6,445 |
| Journal | 400 | 12 | 4,800 | 9,375 |
| Expense report | 600 | 5 | 3,000 | 5,859 |
| **Total** | | | **86,300** | **168,555** |
| **Share of the 200K Standard cap** | | | **43.2%** | **84.3%** |

In this fictional case the Standard tier fits today with 56.8 percent headroom and still fits in year 3 with 15.7 percent headroom, but a fourth year of the same growth reaches about 210,693 lines, above the 200K cap. The lesson is the method: convert counts to lines by type, apply the growth assumption, compare with the cap, then test whether the user count and the single SuiteCloud Plus licence also fit. A company with a seasonal peak should model the six-month window that contains the peak. The same inputs, run by a partner and by Oracle, should produce the same tier recommendation, and a difference is a question to ask, not a conclusion.

## Selection and implementation evidence

External evidence on ERP outcomes is general, not NetSuite-specific. Panorama's 2025 ERP Report found a median project timeline of 9 months (hs.panorama-consulting.com) and a median project cost of $450,000 (hs.panorama-consulting.com), and among projects over schedule the most common reason was data issues (hs.panorama-consulting.com). Panorama's 2026 release says more than a quarter of organisations exceeded their project budgets (www.panorama-consulting.com), although its 2025 report found that more than half stayed within their expected budget (hs.panorama-consulting.com). McKinsey's analysis, run with the University of Oxford, found that large IT projects ran on average 45 percent over budget and 7 percent over time (www.mckinsey.com.br), though that dataset is dated and concerns IT projects generally. A Gartner finance-technology survey of 383 finance executives, as reported by CFO Dive, placed cloud ERP third among technologies expected to draw the highest future investment (www.cfodive.com). A Gartner analyst is quoted citing 54 percent of finance software buyers reporting moderate to high regret after an ERP purchase

(www.gartner.com). Panorama sells ERP services and Gartner's figure is secondhand, so these figures indicate direction, not precision. Data, budget and contract terms are what standard demos leave out, and scenarios 10 and 12 and the sizing questions are built to expose them.

## The Scoring Sheet and Red Flags

A scorecard converts a long session into a comparable number. TechTarget suggests rating items on a five-point scale (www.techtarget.com) and weighting each section differently so that some items take precedence (www.techtarget.com). Meaden & Moore recommends one score card that everyone on the team uses for each demo (www.meadenmoore.com). This report uses a four-point scale from 0 to 3 because it forces a decision between "works" and "works with a caveat".

- **0:** not shown, or the presenter states it cannot be done. Panorama advises marking a capability that the vendor did not demonstrate accordingly (www.panorama-consulting.com).
- **1:** shown only through a workaround, on the vendor's data, through a third-party product, or as a roadmap item. Ultra Consultants states that roadmap items should never be scored as delivered functionality (ultraconsultants.com).
- **2:** shown on the buyer's data, with a minor gap or a configuration step described but not demonstrated.
- **3:** shown natively, live, on the buyer's data, and meeting the written pass test.

*Table 4* gives starting weights that total 100. They are editable and should be set by the finance lead before the first session, because locking priorities early stops vendors from steering the evaluation toward their strengths (www.erpresearch.com). ERP Research also treats failing a single must-have as disqualifying (www.erpresearch.com), so mark any must-have scenarios. A vendor's weighted score is the sum, across all criteria, of weight × score ÷ 3, which gives a result out of 100 when every criterion scores 3.

| Criterion | Weight (edit) | What a score of 3 looks like |
|---|---|---|
| 1. Order-to-cash | 10 | Pass test met on your data, including the partial shipment and return |
| 2. Procure-to-pay | 8 | Variance routed and approved with no manual step |
| 3. Close with consolidation | 10 | Consolidated trial balance ties; drill-down works; close time within your calendar |
| 4. Multi-currency intercompany | 8 | Both sides correct; revaluation and elimination automatic |
| 5. Revenue recognition | 8 | All five contracts match your schedules |
| 6. Bank reconciliation exception | 5 | Ambiguous and unmatched items surfaced and resolved with a log |
| 7. Integration failure and retry | 8 | Failure visible to finance; replay without duplicates |
| 8. Permissions and segregation of duties | 8 | Prohibited combination blocked or flagged |
| 9. Report built live | 5 | Built from blank in the allotted time and ties to the ledger |
| 10. Data migration load | 8 | Errors reported readably; totals tie after correction |

| Criterion | Weight (edit) | What a score of 3 looks like |
|---|---|---|
| 11. Approvals and audit trail | 5 | Correct routing and a complete change history |
| 12. Sandbox, release and change | 5 | Written entitlement; clear statement of what is not copied |
| 13. Sizing and commercial transparency | 7 | Tier, licence and renewal answers in writing, matching your arithmetic |
| 14. Implementation approach and references | 5 | Named team, plan and references with comparable scope |

The weights in *Table 4* lean toward close, procure-to-pay and order-to-cash because those are daily finance work, and toward sizing because it determines the quote. A subscription business might move weight to revenue recognition, and a multinational group would raise criterion 4. What matters is that weights are agreed before the sessions, because Panorama recommends scoring against requirements and not vendor performance (www.panorama-consulting.com).

### Red-flag list

These neutral process checks should reduce a score or trigger a written question.

- **The demo account is a preconfigured edition.** Ask for the list of enabled features and add-on modules (www.business-software.com).
- **No migration or integration is shown.** ERP Research identifies this as the usual gap.
- **The presenter creates data on the fly.**
- **The script is not followed.**
- **Answers are verbal only.** A sizing, licence or renewal answer that is not written is not an answer.
- **Roadmap items are presented as current.** Score them 1 at most.
- **Attendance changes between vendors.** Scores become non-comparable.

## After the Demo: References, Sandbox, Written Answers and Partners

The scripted session produces scores. These steps convert the scores into a decision.

- **Reference calls.** Panorama notes that checking references helps validate vendors' claims (www.panorama-consulting.com). Ask for references with a comparable subsidiary count, revenue model and integration landscape. Ask each which scenarios in *Table 2* took longest to configure, which add-on modules they bought after signing, and how the user count at first renewal compared with signature.
- **Sandbox walkthrough.** Before signing, ask whether the buyer's own users can run the pass tests in a trial or demo account, and after signing re-run scenarios 1 to 4 in a sandbox.
- **Written answers.** Send the sizing questions as a short questionnaire covering:
  - licence type per role;
  - tier at signature and at term end;

    - SuiteCloud Plus count;
    - subsidiaries and elimination subsidiaries;
    - sandbox entitlement and Release Preview access;
    - renewal clause and notice window.
- **Debrief.** Collect individual scores first.

### How a partner demo differs from an Oracle demo

A demo given by Oracle's solution consultants and one given by an implementation partner differ in what is on screen, not in what is true. A partner may show the same product with its own configuration, accelerators or third-party applications. The following is the author's reasoning, not a documented rule: for every item shown, ask whether it is standard NetSuite, an Oracle-delivered SuiteApp, a custom configuration or a third-party product, because each has a different licence, support owner and upgrade path. Where a scenario passes only with a customisation or third-party product, score it 1 until cost and ownership are written down.

### When to bring in outside help

A buyer can run a scripted session without outside help, and many do. An independent partner becomes useful when nobody on the team has configured NetSuite before, when the script includes consolidation, revenue recognition or integrations the internal team has not built, or when the buyer wants the sizing arithmetic in *Table 3* checked by someone who has done it. Consultancies and independent ERP selection advisers can prepare the script, sit in the session and score alongside the finance team. The role is to sharpen the questions, not to compete with Oracle's own team. Only 25.3% of organisations in Panorama's 2025 ERP Report sought guidance for contract negotiations, a figure that may mean many buyers agree commercial terms without independent review, although the report is published by an ERP consulting firm. Whoever is chosen should be held to the same scoresheet as every other participant, including criterion 14.

## Implications and Future Directions

Three developments should shape how a scripted demo is designed over the next 24 months.

**Integration interfaces are changing.** Oracle directs new integrations to REST web services with OAuth 2.0 and has published the SOAP end date (docs.oracle.com). The pass test should require the presenter to name the interface and authentication method.

**Release cadence affects testing.** With two releases a year, finance teams should expect to test close and revenue processes against each one. Scenario 12 establishes who does that and what it costs, because the work recurs.

**Sizing becomes a recurring discipline.** Because Oracle averages lines over six months, the *Table 3* spreadsheet built before signing is also the template for the annual review.

A scripted demo cannot show performance at full volume or the effect of years of customisation, and the independent sources used here are consultancies and directories, none of which offers a controlled measurement of whether scripted demos improve ERP outcomes. The advice rests on practitioner consensus plus Oracle's documentation.

# Frequently Asked Questions (FAQs)

## What is a NetSuite demo script and who writes it?

It is the buyer's written list of scenarios, input data, pass tests and scoring rules, sent to the vendor before the session. The finance lead owns it and process owners write their scenarios. *Table 2* is a template.

## What are the best NetSuite demo scenarios to test?

The twelve in *Table 2*, from order-to-cash through close with consolidation, multi-currency intercompany and revenue recognition to a bank reconciliation exception, an integration failure, permissions, a live report, a migration load, approvals and sandbox handling.

## Is there a NetSuite demo checklist for a CFO?

Yes, in four steps. Before the session, agree the weights and send the script and data. During it, require the same attendees as for other vendors and score immediately. After it, collect written answers to the sizing questions. Before signing, check the red flags.

## How to evaluate a NetSuite demo

Score each scenario 0 to 3 against its written pass test, then apply the formula in Table 4: weighted score = Σ(weight × score ÷ 3) across all criteria, giving a result out of 100 when every criterion scores 3. Evaluate against requirements and not presenter performance.

## What NetSuite demo questions to ask

Ask which features and add-on modules are enabled in the demo account (www.business-software.com), which licence type each role needs, what tier and SuiteCloud Plus count the quote assumes, whether a sandbox is included, and what happens at renewal when the user count has grown.

## Which evaluation criteria matter most for finance?

Close with consolidation and order-to-cash carry the highest individual weights in *Table 4* (10 each), followed by procure-to-pay, multi-currency intercompany, revenue recognition, integration, permissions and migration (8 each); sizing and commercial transparency carries 7.

## What are the key NetSuite implementation sizing questions?

Monthly transaction lines by type today and in year 3 against the tier cap, user count by licence type, SuiteCloud Plus licences needed at peak, subsidiaries and elimination subsidiaries, and sandbox entitlement. The method is in *Table 3*.

## What should a controller test in an ERP demo?

A controller should own scenarios 3, 4, 6 and 11: close with consolidation, intercompany, the reconciliation exception and the approvals trail. The pass tests are tie-outs to trial balances the team already trusts.

## Conclusion

A standard NetSuite demo is a fair introduction and a weak basis for a decision. It proves that screens exist, and it usually leaves out migration, integrations, volume and renewal. A scripted demo on the buyer's own processes reverses that, but only if the script is written in advance, the data is the buyer's, the attendees are constant, and each scenario has a pass test scored the same way for every vendor.

The twelve scenarios in this report are designed for finance leaders, and each links a pass test to a licence or module question, because a demo that goes well can still produce a quote that surprises. The sizing questions are anchored on Oracle's documentation: licence types, service tier limits and their six-month averaging, the separate purchase of SuiteCloud Plus licences, the subsidiary structure of OneWorld and sandbox entitlements. The worked example shows the method with invented inputs, and the reader's own volumes replace them.

The recommended path is short. Agree the weights before the first session. Send the script and the data. Score in the room. Collect written answers. Reconcile the sizing arithmetic against Oracle's current pages on the day of signature, since limits can change. Where in-house experience is thin, bring in an independent partner to help prepare and score the session, and hold that partner to the same scoresheet as everyone else.

## Source links

Links cited in this article, in order of first appearance. Full addresses are provided for readers using extracted text.


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# About Houseblend

Houseblend is a NetSuite consulting firm serving finance and operations teams. We help organizations implement ERP systems, connect business applications, improve existing configurations and maintain the systems that support everyday work. Our audience includes finance leaders, controllers, operations managers, NetSuite administrators and implementation teams.

### Implementation and architecture

Houseblend provides NetSuite implementation, architecture and data migration services. We help teams evaluate how business processes, reporting requirements and existing data should fit together in an ERP environment. Training supports the people responsible for adopting and operating the resulting system.

### Integrations, customization and AI

Our services include NetSuite integrations and customization, as well as AI integrations and AI transformation work. These engagements connect ERP data and workflows with the broader application landscape. The right design depends on the organization's systems, controls and operating needs.

### Improve and support an existing system

Houseblend offers NetSuite health checks, optimization, managed support and project rescue services. We also provide expertise for analytics and specialist workflows, including NetSuite Analytics Warehouse, warehouse management and field service management. Published educational material helps teams investigate options and prepare informed questions for their implementation or support work.

### Work with Houseblend

Explore NetSuite implementation, integrations, managed support and AI integrations. Contact Houseblend to discuss your current system and priorities.

Article examples explain concepts rather than promising a particular license, product capability, delivery schedule or outcome. Engagement scope is confirmed with the Houseblend team.

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