

NetSuite Essentials | Agenda

Day 1	Day 2	Day 3	Day 4	Day 5
1:00 pm - 5:00 pm Lecture Hall	1:00 pm - 5:00 pm Lecture Hall	1:00 pm - 5:00 pm Lecture Hall	1:00 pm - 5:00 pm Lecture Hall	1:00 pm - 5:00 pm Lecture Hall
	9:00 am - 12:00 pm Independent Study	9:00 am - 12:00 pm Independent Study	9:00 am - 12:00 pm Independent Study	9:00 am - 12:00 pm Independent Study

Number	Module Name	Walkthroughs	Exercises
Day 1 Lecture Hall – Getting Started			
01	Course Introduction - Welcome	<ul style="list-style-type: none"> Initial Login and Training Account Review 	Ex. 01: Login in to NetSuite Training Account
01A	Blended Learning Experience	<ul style="list-style-type: none"> No demos 	No exercises
05	NetSuite Navigation	<ul style="list-style-type: none"> Login and Security NetSuite Center and Web Page Elements Personalize the Home Dashboard Basic Search Options Using Help Resources Browser Functionality and NetSuite 	Ex. 01: Set Your Preferences Ex. 02: Set Up Your Dashboard Ex. 03: Use Global Search Ex. 04: Use NetSuite Help
01B	Spotlight Topic: Roles and Permissions	<ul style="list-style-type: none"> Review Standard Roles and Compare 	Intro to independent study time
File Push	Use WebEx file transfer to share the Podcast PDF document		
Independent Study: Getting Started			
02	NetSuite Fits Your Business Model	<ul style="list-style-type: none"> None 	None
03	OneWorld Overview	<ul style="list-style-type: none"> None 	None
04	Introduction to the Implementation Project	<ul style="list-style-type: none"> NetSuite One 	01: Review the Business Requirements Document
05	NetSuite Navigation	<ul style="list-style-type: none"> Covered in Lecture Hall 	Students can finish the exercises Ex. 01: Set Your Preferences Ex. 02: Set Up Your Dashboard * Ex. 03: User Global Search Ex. 04: Use NetSuite Help

06	Set Company Preferences	<ul style="list-style-type: none"> • Initial Set Up Tasks • Additional Set Up Tasks • Define Preferences • OneWorld Classifications • Other Setup 	<p>Ex. 01: Set Company Information Ex. 02: Enable Features Ex. 03: Rename Records and Transactions Ex. 04: Turn Off Auto-Generated Numbers Ex. 05: Set Company Preferences Ex. 06: Set Printing, Fax & Email Preferences Ex. 07: Create New Subsidiaries OneWorld Ex. 08: Create Elimination Subsidiaries OneWorld</p>
07	NetSuite Data Model	<ul style="list-style-type: none"> • Creating a Record 	<p>Ex. 01: Create Customer Record and Enter Contact Ex. 02: Create customer Record and Enter Contact OneWorld Ex. 03: Create Vendor Record and Enter a Contact Ex. 04: Create Vendor Record and Enter a Contact OneWorld Ex. 05: Enter New Employees</p>
08	Roles and Permissions	<ul style="list-style-type: none"> • Review Standard Roles and Compare • Create Custom Role • Assign a Role and Global Permissions • Additional Administrator Tasks • Add an Employee • Login Audits 	<p>Ex. 01: Rename Roles with Your Company's Prefix Ex. 02: Customize a Sales Manager Role Ex. 03: Show Role Differences Ex. 04: Customize a Sales Administrator Role OneWorld Ex. 05: Add a NetSuite User Ex. 06: View the Login Audit Trail</p>

Number	Module Name	Walkthroughs	Exercises
Day 2 Lecture Hall – Customization and Data Management			
09	Getting Started: Recap and Review	<ul style="list-style-type: none"> • None 	None
10	Create Subtabs, Lists and Fields	<ul style="list-style-type: none"> • Create a Subtab for an Entity • Create a Custom List and List/Record Field • Review a Transaction Record and Add New Body Field 	<p>Ex. 01: Create Subtabs and Lists Ex. 02: Create and Apply Fields Ex. 03: Custom Transaction Field – Validation & Defaulting – Sales Order Ex. 04: Custom Transaction Field – Validation & Defaulting – Sales Order Ex. 05: Custom Transaction Field – Validation & Defaulting – Purchase Order</p>

10A	Spotlight Topic: Data Migration	<ul style="list-style-type: none"> • Import Assistant – Your Exercise 	Intro to independent study time
Independent Study: Customization and Data Management			
11	Create Custom Forms	<ul style="list-style-type: none"> • Customize and Entry Form • Transaction Form Layouts • Customize Transaction Form – Layout and Form Elements • Customize Transaction Form – Action, Roles & Linked Forms 	Ex. 01: Customize Entry Form Ex. 02: Customize and Employee Form Ex. 03: Custom Transaction Forms – PDF Layouts
12	Create Custom Records	<ul style="list-style-type: none"> • Create a Custom Record Type • Add Fields and Assign Links for the Custom Record • Edit the custom Record and Form 	Ex. 01: Create Custom Record Ex. 02: <i>Create Dependent Dropdowns – OPTIONAL</i>
13	Data Migration	<ul style="list-style-type: none"> • Covered in Lecture Hall 	Ex. 01: Review Auto Numbering Settings* Ex. 02: Import Customers * Ex. 03: Update Customer with Import Ex. 04: Create Custom Import Template – <i>Optional</i>
14	Data Integrity	<ul style="list-style-type: none"> • Inline Editing and Duplicate Detection • Mass Updates • Use Inline Editing 	Ex. 01: Identify and Merge Duplicate Records Ex. 02: Schedule a Mass Update Ex. 03: Create a Saved Search Ex. 04: Set Up and use Inline Editing Ex. 05: Perform Mass update with Calculation - <i>Optional</i>
Day 3 Lecture Hall – ERP Part 1			
Number	Module Name	Walkthroughs	Exercises
15	Customization and Data Management: Recap and Review	<ul style="list-style-type: none"> • None 	None
16	Set Up Accounting Management	<ul style="list-style-type: none"> • Chart of Accounts and General Ledger • Enable Features • Create Classifications • Define General Ledger Preferences • Accounting Periods • GL Accounts and Opening Balances 	Ex. 01: Enable Accounting Features and Define Preferences Ex. 02: Set Up Multiple Warehouses Locations Ex. 03: Create General Ledger (GL) Accounts Ex. 04: Set Up Accounting Periods

16A	Spotlight Topic: Items	<ul style="list-style-type: none"> • Enable Features • Review an Item Record • Inventory and Matrix Items • Non-Inventory Items • Service Items • Assembly, Item Group, Kit/Package 	Intro to independent study time Share the Software Vertical Contracts Renewal Module – Introductory Guide file through WebEx file transfer
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Number	Module Name	Walkthroughs	Exercises
Independent Study: ERP Part 1			
17	User Multiple Currencies	<ul style="list-style-type: none"> • Enable Features and Accounting Preferences • Working with Currencies • Additional <i>OneWorld</i> Considerations • Multi-Currency Customers • Multi-Currency Vendors 	Ex. 01: Confirm Features and Set Accounting Preferences Ex. 02: Create New Currencies/Subsidiaries and Update Time Zone Ex. 03: Assign Currencies to a Customer Ex. 04: Assign Currencies to a Vendor
18	NetSuite Tax Information	<ul style="list-style-type: none"> • None 	Ex. 01: Manage Tax Periods Ex. 02: Set Up Tax Schedule
19	Set up Items	<ul style="list-style-type: none"> • Covered in Lecture Hall 	Ex. 01: Enabling Transactions and Inventory Features Ex. 02: Create inventory Items Ex. 03: Create a Non-Inventory Item Ex. 04: Create a Service Item Ex. 05: Create Inventory Item <i>OneWorld</i> Ex. 06: Enter Inventory Quantities
20	Set Up Pricing	<ul style="list-style-type: none"> • Review an Item Record • Define Pricing Features and Preferences • Using Pricing Features • Set Up Item Pricing • Pricing on a Customer Record • Mass Update for Pricing 	Ex. 01: Enabling Pricing Features Ex. 02: Create a Price Level Ex. 03: Add Price Level to Items Ex. 04: Set Up Quantity-Based Pricing Ex. 05: Set up Item Pricing on Customer Record Ex. 06: Use Sales Transactions to Demonstrate Pricing Ex. 07: Generate Price Lists

21	Order Management	<ul style="list-style-type: none"> • Set Up Order Management • Order-to-Invoice Process • View Sales Order History 	Ex. 01: Define Order Management Preferences Ex. 02: Enter a Sales Order Ex. 03: Enter a Sales Order OneWorld Ex. 04: Approve Sales Orders Ex. 05: Fulfill Sales Orders
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Number	Module Name	Walkthroughs	Exercises
Day 4 Lecture Hall – ERP Part 2			
22	ERP Part 1: Recap and Review	<ul style="list-style-type: none"> • None 	None
23	Accounts Receivable	<ul style="list-style-type: none"> • Set Up Account Receivable • Sales Order-to-Payment Process • Additional Accounts Receivable Tasks • Analytics for Accounts Receivable 	Ex. 01: Invoice All Sales Orders Ex. 02: Create a Cash Sale Ex. 03: Create an Invoice Ex. 04: Accept Customer Payments Ex. 05: Issue a Return Authorization Ex. 06: Make a Bank Deposit
23A	Spotlight Topic: Accounts Payable	<ul style="list-style-type: none"> • Set Up Features and Preference • Managing Vendor Bills • Processing Bills • Vendor Credits • Processing Payments 	Intro to independent study time
Independent Study: ERP Part 2			
24	Set Up Purchasing	<ul style="list-style-type: none"> • Enable Features • Accounting Preferences • Set Up Purchase Approver • Processing a Purchase Request • Processing a Purchase Order 	Ex. 01: Enter a Purchase Order Ex. 02: Receive A Purchase Order

25	Set Up Accounts Payable	<ul style="list-style-type: none"> Covered in Lecture Hall 	Students can now do the exercises Ex. 01: View a Purchase Order to Bill in Reminders Portlet Ex. 02: Define Accounting Preferences Ex. 03: Bill a Purchase Order Ex. 04: Enter and Approve a Bill Ex. 05: Pay a Bill Ex. 06: Print a Check
26	Banking and GL	<ul style="list-style-type: none"> General Ledger Functions <i>OneWorld</i> GL Transactions Banking Transactions Manage Accounting Periods 	Ex. 01: Make Journal Entries Ex. 02: Make Elimination Subsidiary Journals – <i>OneWorld - Optional</i> Ex. 03: Memorize a Transaction Ex. 04: Close Accounting Periods - <i>Optional</i>
27	Reports and Searches	<ul style="list-style-type: none"> User Needs and NetSuite Reports Gap Analysis Using the NetSuite Report Builder Creating a New Saved Search 	Ex. 01: Identify a Prebuilt Report Ex. 02: Restrict Data included in a Prebuilt Report Ex. 03: Add Data to Customer Record Ex. 04: Add Custom Field to NetSuite Standard Report Ex. 05: Create Search to identify Customers in Price Level Ex. 06: Restrict Data Included in the Search
28	Design Dashboards for Users	<ul style="list-style-type: none"> None 	Ex. 01: Design a Dashboard for a Specific User - <i>Optional</i>

Number	Module Name	Walkthroughs	Exercises
Day 5 Lecture Hall – CRM and Next Steps			
29	ERP Part 2: Recap and Review	<ul style="list-style-type: none"> None 	None
30	Set Up Sales Force Automation	<ul style="list-style-type: none"> Set Up Sales Force Automation Statuses, Rules and Territories Capture Lead Information 	Ex. 01: Enable Sales Force Automation Ex. 02: Set Up an Employee as Sales Rep Ex. 03: Set Sales Force Automation Preferences Ex. 04: Create Customer Statuses Ex. 05: Create a Sales Rule Ex. 06: Create a Sales Territory Ex. 07: Create an Online Form

35	Go Live and Maintain NetSuite	<ul style="list-style-type: none"> User Adoption 	<ul style="list-style-type: none"> Access the NetSuite User Adoption Tools Course Evaluation
36	Summary and Wrap Up	<ul style="list-style-type: none"> None 	<ul style="list-style-type: none"> Course Evaluation reminder
30A	Intro to Self-Study Topics	<ul style="list-style-type: none"> Share the Software Vertical Contracts Renewal Module –Introductory Guide file 	Transition to self-study

Number	Module Name	Walkthroughs	Exercises
Independent Study: CRM and Next Steps			
31	Lead-to-Qualified Lead	<ul style="list-style-type: none"> Lead-to-Qualified Lead Process Lead Conversion Opportunity-to-Quote Process Quote-to-Sales Order Process 	Ex. 01: Work a lead Ex. 02: Generate a Quote from an Opportunity Ex. 03: Generate a Sales Order from a Quote
32	Customer Support	<ul style="list-style-type: none"> Initial Setup Support Case Values Rules and Territories Online Form and Preferences Working a Case 	Ex. 01: Enable Customer Service and Support Features Ex. 02: Set Up an Employee as Support Rep Ex. 03: Create a Case Status Ex. 04: Create a Case Priority Ex. 05: Create a Case Type Ex. 06: Create a Case Rule Ex. 07: Create a Case Territory
33	Incorporate Marketing and Ecommerce	<ul style="list-style-type: none"> None 	None
34	NetSuite on the Go!	<ul style="list-style-type: none"> None 	None