

# NetSuite Essentials | Agenda

| Day 1                              | Day 2                                   | Day 3                                   | Day 4                                   | Day 5                                   |
|------------------------------------|-----------------------------------------|-----------------------------------------|-----------------------------------------|-----------------------------------------|
| 12:00 pm - 4:00 pm<br>Lecture Hall | 12:00 pm - 4:00 pm<br>Lecture Hall      | 12:00 pm - 4:00 pm<br>Lecture Hall      | 12:00 pm - 4:00 pm<br>Lecture Hall      | 12:00 pm - 4:00 pm<br>Lecture Hall      |
|                                    | 8:00 am - 11:00 pm<br>Independent Study | 8:00 am - 11:00 pm<br>Independent Study | 8:00 am - 11:00 pm<br>Independent Study | 8:00 am - 11:00 pm<br>Independent Study |

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

| Number                                                        | Module Name                              | Walkthroughs                                                                                                                                                                                                                                                     | Exercises                                                                                                                                                                                                                                                                                                                            |
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| <b>06</b>                                                     | <b>Set Company Preferences</b>           | <ul style="list-style-type: none"> <li>• Initial Set Up Tasks</li> <li>• Additional Set Up Tasks</li> <li>• Define Preferences</li> <li>• OneWorld Classifications</li> <li>• Other Setup</li> </ul>                                                             | Ex. 01: Set Company Information<br>Ex. 02: Enable Features<br>Ex. 03: Rename Records and Transactions<br>Ex. 04: Turn Off Auto-Generated Numbers<br>Ex. 05: Set Company Preferences<br>Ex. 06: Set Printing, Fax & Email Preferences<br>Ex. 07: Create New Subsidiaries OneWorld<br>Ex. 08: Create Elimination Subsidiaries OneWorld |
| <b>07</b>                                                     | <b>NetSuite Data Model</b>               | <ul style="list-style-type: none"> <li>• Creating a Record</li> </ul>                                                                                                                                                                                            | Ex. 01: Create Customer Record and Enter Contact<br>Ex. 02: Create customer Record and Enter Contact OneWorld<br>Ex. 03: Create Vendor Record and Enter a Contact<br>Ex. 04: Create Vendor Record and Enter a Contact OneWorld<br>Ex. 05: Enter New Employees                                                                        |
| <b>08</b>                                                     | <b>Roles and Permissions</b>             | <ul style="list-style-type: none"> <li>• Review Standard Roles and Compare</li> <li>• Create Custom Role</li> <li>• Assign a Role and Global Permissions</li> <li>• Additional Administrator Tasks</li> <li>• Add an Employee</li> <li>• Login Audits</li> </ul> | Ex. 01: Rename Roles with Your Company's Prefix<br>Ex. 02: Customize a Sales Manager Role<br>Ex. 03: Show Role Differences<br>Ex. 04: Customize a Sales Administrator Role OneWorld<br>Ex. 05: Add a NetSuite User<br>Ex. 06: View the Login Audit Trail                                                                             |
| <b>Day 2 Lecture Hall – Customization and Data Management</b> |                                          |                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                      |
| <b>09</b>                                                     | <b>Getting Started: Recap and Review</b> | <ul style="list-style-type: none"> <li>• None</li> </ul>                                                                                                                                                                                                         | None                                                                                                                                                                                                                                                                                                                                 |
| <b>10</b>                                                     | <b>Create Subtabs, Lists and Fields</b>  | <ul style="list-style-type: none"> <li>• Create a Subtab for an Entity</li> <li>• Create a Custom List and List/Record Field</li> <li>• Review a Transaction Record and Add New Body Field</li> </ul>                                                            | Ex. 01: Create Subtabs and Lists<br>Ex. 02: Create and Apply Fields<br>Ex. 03: Custom Transaction Field – Validation & Defaulting – Sales Order<br>Ex. 04: Custom Transaction Field – Validation & Defaulting – Sales Order<br>Ex. 05: Custom Transaction Field – Validation & Defaulting – Purchase Order                           |
| <b>10A</b>                                                    | <b>Spotlight Topic: Data Migration</b>   | <ul style="list-style-type: none"> <li>• Import Assistant – Your Exercise</li> </ul>                                                                                                                                                                             | Intro to independent study time                                                                                                                                                                                                                                                                                                      |

| Independent Study: Customization and Data Management |                                                            |                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                            |
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| Number                                               | Module Name                                                | Walkthroughs                                                                                                                                                                                                                                               | Exercises                                                                                                                                                                                                                  |
| <b>11</b>                                            | <b>Create Custom Forms</b>                                 | <ul style="list-style-type: none"> <li>• Customize and Entry Form</li> <li>• Transaction Form Layouts</li> <li>• Customize Transaction Form – Layout and Form Elements</li> <li>• Customize Transaction Form – Action, Roles &amp; Linked Forms</li> </ul> | Ex. 01: Customize Entry Form<br>Ex. 02: Customize and Employee Form<br>Ex. 03: Custom Transaction Forms – PDF Layouts                                                                                                      |
| <b>12</b>                                            | <b>Create Custom Records</b>                               | <ul style="list-style-type: none"> <li>• Create a Custom Record Type</li> <li>• Add Fields and Assign Links for the Custom Record</li> <li>• Edit the custom Record and Form</li> </ul>                                                                    | Ex. 01: Create Custom Record<br>Ex. 02: <i>Create Dependent Dropdowns – OPTIONAL</i>                                                                                                                                       |
| <b>13</b>                                            | <b>Data Migration</b>                                      | <ul style="list-style-type: none"> <li>• Covered in Lecture Hall</li> </ul>                                                                                                                                                                                | Ex. 01: Review Auto Numbering Settings*<br>Ex. 02: Import Customers *<br>Ex. 03: Update Customer with Import<br>Ex. 04: Create Custom Import Template – <i>Optional</i>                                                    |
| <b>14</b>                                            | <b>Data Integrity</b>                                      | <ul style="list-style-type: none"> <li>• Inline Editing and Duplicate Detection</li> <li>• Mass Updates</li> <li>• Use Inline Editing</li> </ul>                                                                                                           | Ex. 01: Identify and Merge Duplicate Records<br>Ex. 02: Schedule a Mass Update<br>Ex. 03: Create a Saved Search<br>Ex. 04: Set Up and use Inline Editing<br>Ex. 05: Perform Mass update with Calculation - <i>Optional</i> |
| <b>Day 3 Lecture Hall – ERP Part 1</b>               |                                                            |                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                            |
| <b>15</b>                                            | <b>Customization and Data Management: Recap and Review</b> | <ul style="list-style-type: none"> <li>• None</li> </ul>                                                                                                                                                                                                   | None                                                                                                                                                                                                                       |

| Number    | Module Name                         | Walkthroughs                                                                                                                                                                                                                                                                 | Exercises                                                                                                                                                                                     |
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| <b>16</b> | <b>Set Up Accounting Management</b> | <ul style="list-style-type: none"> <li>• Chart of Accounts and General Ledger</li> <li>• Enable Features</li> <li>• Create Classifications</li> <li>• Define General Ledger Preferences</li> <li>• Accounting Periods</li> <li>• GL Accounts and Opening Balances</li> </ul> | Ex. 01: Enable Accounting Features and Define Preferences<br>Ex. 02: Set Up Multiple Warehouses Locations<br>Ex. 03: Create General Ledger (GL) Accounts<br>Ex. 04: Set Up Accounting Periods |

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

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

| Number                                         | Module Name                          | Walkthroughs                                                                                                                                                                            | Exercises                                                                                                                                                                                                                                                                                              |
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| <b>25</b>                                      | <b>Set Up Accounts Payable</b>       | <ul style="list-style-type: none"> <li>Covered in Lecture Hall</li> </ul>                                                                                                               | Students can now do the exercises<br>Ex. 01: View a Purchase Order to Bill in Reminders Portlet<br>Ex. 02: Define Accounting Preferences<br>Ex. 03: Bill a Purchase Order<br>Ex. 04: Enter and Approve a Bill<br>Ex. 05: Pay a Bill<br>Ex. 06: Print a Check                                           |
| <b>26</b>                                      | <b>Banking and GL</b>                | <ul style="list-style-type: none"> <li>General Ledger Functions</li> <li><i>OneWorld</i> GL Transactions</li> <li>Banking Transactions</li> <li>Manage Accounting Periods</li> </ul>    | Ex. 01: Make Journal Entries<br>Ex. 02: Make Elimination Subsidiary Journals – <i>OneWorld - Optional</i><br>Ex. 03: Memorize a Transaction<br>Ex. 04: Close Accounting Periods - <i>Optional</i>                                                                                                      |
| <b>27</b>                                      | <b>Reports and Searches</b>          | <ul style="list-style-type: none"> <li>User Needs and NetSuite Reports</li> <li>Gap Analysis</li> <li>Using the NetSuite Report Builder</li> <li>Creating a New Saved Search</li> </ul> | Ex. 01: Identify a Prebuilt Report<br>Ex. 02: Restrict Data included in a Prebuilt Report<br>Ex. 03: Add Data to Customer Record<br>Ex. 04: Add Custom Field to NetSuite Standard Report<br>Ex. 05: Create Search to identify Customers in Price Level<br>Ex. 06: Restrict Data Included in the Search |
| <b>28</b>                                      | <b>Design Dashboards for Users</b>   | <ul style="list-style-type: none"> <li>None</li> </ul>                                                                                                                                  | Ex. 01: Design a Dashboard for a Specific User - <i>Optional</i>                                                                                                                                                                                                                                       |
| <b>Day 5 Lecture Hall – CRM and Next Steps</b> |                                      |                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                        |
| <b>29</b>                                      | <b>ERP Part 2: Recap and Review</b>  | <ul style="list-style-type: none"> <li>None</li> </ul>                                                                                                                                  | None                                                                                                                                                                                                                                                                                                   |
| <b>30</b>                                      | <b>Set Up Sales Force Automation</b> | <ul style="list-style-type: none"> <li>Set Up Sales Force Automation</li> <li>Statuses, Rules and Territories</li> <li>Capture Lead Information</li> </ul>                              | Ex. 01: Enable Sales Force Automation<br>Ex. 02: Set Up an Employee as Sales Rep<br>Ex. 03: Set Sales Force Automation Preferences<br>Ex. 04: Create Customer Statuses<br>Ex. 05: Create a Sales Rule<br>Ex. 06: Create a Sales Territory<br>Ex. 07: Create an Online Form                             |

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

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