SUITECOMMERCE INSTORE: FUNDAMENTALS

Course Description

Elevate your sales to new heights with NetSuite's omnichannel commerce solution, *SuiteCommerce InStore*.

This four-day **SuiteCommerce InStore: Fundamentals** course will provide you with the knowledge and skills necessary to effectively set up, configure and manage a SuiteCommerce InStore (SCIS) site to support common retail point-of-sale use cases. As part of this course, you will complete several hands-on exercises that will provide you with real-world experience configuring the necessary back-end ERP processes, SCIS custom records and related SCIS site preferences to support typical in-store, point-of-sale use cases.

Upon the completion of this course, you will be able to effectively manage all aspects of your SCIS implementation and overall omni-commerce sales strategy.

Key Tasks
How do I:

- Configure the required accounting and tax preferences in NetSuite to support an SCIS implementation?

- Configure a Web Site Setup record and customize the CustomConfiguration.js file to tailor the capabilities of the site to my business requirements?

- Establish the user roles and permissions required to effectively manage the day-to-day operations of an SCIS site and restrict user access to SCIS operations?

- Manage subsidiaries, locations and tax nexuses as they relate to the collection of taxes in each supported tax jurisdiction?

- Configure standard NetSuite records and SCIS custom records to support the foundational capabilities of SCIS?

- Configure the necessary accounts and effectively manage the assignment of employee cash drawer accounts at each location?

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Who Should Attend
- NetSuite Administrators who implement and manage SuiteCommerce InStore.

- Store Managers who are responsible for the configuration of mobile devices and other peripheral devices at individual store locations.

- Software developers who need to customize various aspects of SCIS to meet specific business requirements.

Prerequisites
- Participants should be able to navigate the NetSuite user interface and complete general administration tasks.

- Participants should have a foundational understanding of back-end NetSuite ERP processes, such as entity, transaction, location and item management.

- Participants should be familiar with common retail, point-of-sale use cases.

Course Goal
The goal of this course is to provide you with the knowledge and skills necessary to effectively set up, configure and manage a SuiteCommerce InStore (SCIS) point-of-sale site by focusing on the technical configuration tasks and functional areas of ERP configuration that must be performed to support SCIS.

Day 1 Agenda
SuiteCommerce InStore Overview:
Gain an overview of the foundational terminologies, concepts, products and installation components associated with the implementation of SuiteCommerce InStore,

- Perform SCIS point-of-sale transactions, such as accepting various payment methods, applying discounts, markups and promotions, processing returns and exchanges, updating customer information, and running saved searches and sales reports?

- Support orders for delivery and store pickup and effectively manage the fulfillment of each type of order?

- Customize the SCIS receipt templates generated during sales transactions using NetSuite's Advanced PDF/HTML Templates feature?

- Approach the localization of an SCIS site for use in multiple geographic locales?

including the required features, bundles and records that must be configured to support SCIS.

Installation and Web Site Setup: Learn about the initial installation and configuration tasks required to successfully log in to SCIS, as well as the required peripheral devices supported by SCIS, such as barcode scanners, receipt printers, cash drawers and mobile POS devices. Learn how to create a Web Site Setup record and configure the necessary settings to host a SCIS site.

User Roles and Permissions: Examine the delivered user roles and permissions installed with the SCIS SuiteApp bundle and configure authorization overrides, which allow administrators to grant or restrict access to specific SCIS operations based on user role.

Subsidiaries, Locations and Taxes: Learn about the importance of locations and subsidiaries in a typical SCIS implementation, as well as the various tax settings that ensure the proper tax calculations for specific geographic locations.

Day 2 Agenda

Record Configuration (Parts 1 & 2): Learn about the configuration of both standard NetSuite records and SCIS custom records to support the various capabilities of SCIS.

Cash Drawer Management: Learn how NetSuite handles cash management and the assignment of cash drawers by default, and how to configure a more flexible approach that streamlines initial loan operations, sales transactions and end-of-day operations.

Day 3 Agenda

Entering SCIS Transactions: Learn about many of the point-of-sale capabilities of SCIS, such as adding customers and items to a sales transaction, processing payments, returns, refunds and exchanges, working with customer information, and viewing saved searches and sales reports.

Ship From Store/Store Pickup: Examine the transactional workflows associated with ship-from-store and store pickup and configure the necessary back-end NetSuite components to support each omnichannel commerce use case.

Day 4 Agenda

Advanced Receipt Templates: Learn about the process of customizing receipts generated by your SCIS site using NetSuite's Advanced PDF/

HTML Templates feature. Learn how to modify these delivered receipt templates to create your own custom receipts for both print and email.

Processing Offline Sales Transactions: Learn about the configuration tasks required to support offline processing of sales transactions in SCIS Fallback mode. You will also learn about the transaction delivery, consolidation and reconciliation processes.

SCIS Localization: Learn about the various configuration tasks that must be completed to successfully localize SCIS for a specific geographic locale.

NetSuite reserves the right to adjust the stated course content to reflect changes to the NetSuite application and to meet the expressed needs of course attendees.

Features and functions covered in this course might not reflect those in your purchased NetSuite account.