| Day 1 | Day 2 | Day 3 | Day 4 | Day 5 |
|---|---|---|---|---|
| **9:00 am - 1:00 pm**<br><br>Lecture Hall | **9:00 am - 1:00 pm**<br><br>Lecture Hall | **9:00 am - 1:00 pm**<br><br>Lecture Hall | **9:00 am - 1:00 pm**<br><br>Lecture Hall | **9:00 am - 1:00 pm**<br><br>Lecture Hall |
| **2:00 pm – 5:00 pm**<br><br>Independent Study | **2:00 pm – 5:00 pm**<br><br>Independent Study | **2:00 pm – 5:00 pm**<br><br>Independent Study | **2:00 pm – 5:00 pm**<br><br>Independent Study | **2:00 pm – 5:00 pm**<br><br>Independent Study |

| Number | Module Name | Walkthroughs | Exercises |
|---|---|---|---|
| **Day 1 Lecture Hall – Getting Started** | | | |
| **01** | **Course Introduction - Welcome** | • Initial Login and Training Account Review | Ex. 01: Login in to NetSuite Training Account |
| **01A** | **Blended Learning Experience** | • No demos | No exercises |
| **05** | **NetSuite Navigation** | • Login and Security<br>• NetSuite Center and Web Page Elements<br>• Personalize the Home Dashboard<br>• Basic Search Options<br>• Using Help Resources<br>• Browser Functionality and NetSuite | Ex. 01: Set Your Preferences<br>Ex. 02: Set Up Your Dashboard<br>Ex. 03: Use Global Search<br>Ex. 04: Use NetSuite Help |
| **01B** | **Spotlight Topic: Roles and Permissions** | • 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** | • None | None |
| **03** | **OneWorld Overview** | • None | None |
| **04** | **Introduction to the Implementation Project** | • NetSuite One | 01: Review the Business Requirements Document |
| **05** | **NetSuite Navigation** | • Covered in Lecture Hall | 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 |
|---|---|---|---|
| **06** | **Set Company Preferences** | • Initial Set Up Tasks<br>• Additional Set Up Tasks<br>• Define Preferences<br>• OneWorld Classifications<br>• Other Setup | 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 |
| **07** | **NetSuite Data Model** | • Creating a Record | 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 |
| **08** | **Roles and Permissions** | • Review Standard Roles and Compare<br>• Create Custom Role<br>• Assign a Role and Global Permissions<br>• Additional Administrator Tasks<br>• Add an Employee<br>• Login Audits | 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 |
| **Day 2 Lecture Hall – Customization and Data Management** | | | |
| **09** | **Getting Started: Recap and Review** | • None | None |
| **10** | **Create Subtabs, Lists and Fields** | • Create a Subtab for an Entity<br>• Create a Custom List and List/Record Field<br>• Review a Transaction Record and Add New Body Field | 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 |
| **10A** | **Spotlight Topic: Data Migration** | • Import Assistant – Your Exercise | Intro to independent study time |

| Independent Study: Customization and Data Management | | | |
|---|---|---|---|
| **Number** | **Module Name** | **Walkthroughs** | **Exercises** |
| **11** | **Create Custom Forms** | • Customize and Entry Form<br>• Transaction Form Layouts<br>• Customize Transaction Form – Layout and Form Elements<br>• Customize Transaction Form – Action, Roles & Linked Forms | Ex. 01: Customize Entry Form<br>Ex. 02: Customize and Employee Form<br>Ex. 03: Custom Transaction Forms – PDF Layouts |
| **12** | **Create Custom Records** | • Create a Custom Record Type<br>• Add Fields and Assign Links for the Custom Record<br>• Edit the custom Record and Form | Ex. 01: Create Custom Record<br>Ex. *02: Create Dependent Dropdowns – OPTIONAL* |
| **13** | **Data Migration** | • Covered in Lecture Hall | 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 – *Optional* |
| **14** | **Data Integrity** | • Inline Editing and Duplicate Detection<br>• Mass Updates<br>• Use Inline Editing | 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 - *Optional* |
| **Day 3 Lecture Hall – ERP Part 1** | | | |
| **15** | **Customization and Data Management: Recap and Review** | • None | None |
| **16** | **Set Up Accounting Management** | • Chart of Accounts and General Ledger<br>• Enable Features<br>• Create Classifications<br>• Define General Ledger Preferences<br>• Accounting Periods<br>• GL Accounts and Opening Balances | 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 |

| Number | Module Name | Walkthroughs | Exercises |
|---|---|---|---|
| **16A** | **Spotlight Topic: Items** | • Enable Features<br>• Review an Item Record<br>• Inventory and Matrix Items<br>• Non-Inventory Items<br>• Service Items<br>• Assembly, Item Group, Kit/Package | Intro to independent study time<br>Share the Software Vertical Contracts Renewal Module – Introductory Guide file through WebEx file transfer |
| **Independent Study: ERP Part 1** | | | |
| **17** | **User Multiple Currencies** | • Enable Features and Accounting Preferences<br>• Working with Currencies<br>• Additional *OneWorld* Considerations<br>• Multi-Currency Customers<br>• Multi-Currency Vendors | 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 |
| **18** | **NetSuite Tax Information** | • None | Ex. 01: Manage Tax Periods<br>Ex. 02: Set Up Tax Schedule |
| **19** | **Set up Items** | • Covered in Lecture Hall | 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 *OneWorld*<br>Ex. 06: Enter Inventory Quantities |
| **20** | **Set Up Pricing** | • Review an Item Record<br>• Define Pricing Features and Preferences<br>• Using Pricing Features<br>• Set Up Item Pricing<br>• Pricing on a Customer Record<br>• Mass Update for Pricing | 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 |
|---|---|---|---|
| **21** | **Order Management** | • Set Up Order Management<br>• Order-to-Invoice Process<br>• View Sales Order History | 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 |
| **Day 4 Lecture Hall – ERP Part 2** | | | |
| **22** | **ERP Part 1: Recap and Review** | • None | None |
| **23** | **Accounts Receivable** | • Set Up Account Receivable<br>• Sales Order-to-Payment Process<br>• Additional Accounts Receivable Tasks<br>• Analytics for Accounts Receivable | 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 |
| **23A** | **Spotlight Topic: Accounts Payable** | • Set Up Features and Preference<br>• Managing Vendor Bills<br>• Processing Bills<br>• Vendor Credits<br>• Processing Payments | Intro to independent study time |
| **Independent Study: ERP Part 2** | | | |
| **24** | **Set Up Purchasing** | • Enable Features<br>• Accounting Preferences<br>• Set Up Purchase Approver<br>• Processing a Purchase Request<br>• Processing a Purchase Order | Ex. 01: Enter a Purchase Order<br>Ex. 02: Receive A Purchase Order |
| **25** | **Set Up Accounts Payable** | • Covered in Lecture Hall | 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 |

| Number | Module Name | Walkthroughs | Exercises |
|---|---|---|---|
| **26** | **Banking and GL** | • General Ledger Functions<br>• *OneWorld* GL Transactions<br>• Banking Transactions<br>• Manage Accounting Periods | Ex. 01: Make Journal Entries<br>Ex. 02: Make Elimination Subsidiary Journals – OneWorld - *Optional*<br>Ex. 03: Memorize a Transaction<br>Ex. 04: Close Accounting Periods - *Optional* |
| **27** | **Reports and Searches** | • User Needs and NetSuite Reports<br>• Gap Analysis<br>• Using the NetSuite Report Builder<br>• Creating a New Saved Search | 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 |
| **28** | **Design Dashboards for Users** | • None | Ex. 01: Design a Dashboard for a Specific User - *Optional* |
| **Day 5 Lecture Hall – CRM and Next Steps** | | | |
| **29** | **ERP Part 2: Recap and Review** | • None | None |
| **30** | **Set Up Sales Force Automation** | • Set Up Sales Force Automation<br>• Statuses, Rules and Territories<br>• Capture Lead Information | 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 |
| **35** | **Go Live and Maintain NetSuite** | • User Adoption | • Access the NetSuite User Adoption Tools<br>• Course Evaluation |
| **36** | **Summary and Wrap Up** | • None | • Course Evaluation reminder |
| **30A** | **Intro to Self-Study Topics** | • 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** | • Lead-to-Qualified Lead Process<br>• Lead Conversion<br>• Opportunity-to-Quote Process<br>• Quote-to-Sales Order Process | Ex. 01: Work a lead<br>Ex. 02: Generate a Quote from an Opportunity<br>Ex. 03: Generate a Sales Order from a Quote |
| **32** | **Customer Support** | • Initial Setup<br>• Support Case Values<br>• Rules and Territories<br>• Online Form and Preferences<br>• Working a Case | 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 |
| **33** | **Incorporate Marketing and Ecommerce** | • None | None |
| **34** | **NetSuite on the Go!** | • None | None |