SuiteTraining™

NetSuite Essentials

KEY TASKS

How do I:

- Organize the implementation plan to “go live” for my company
- Determine user roles and permissions
- Set up initial controls for CRM
- Set up initial controls for ERP
- Configure NetSuite functionality to meet our business requirements
- Plan for data migration
- Plan for ongoing maintenance of our NetSuite account

RELATED COURSES

Take these courses for more training:

- SuiteAnalytics
- Ecommerce Workshop
- Marketing Automation Workshop
- Implementing Advanced Financials
- Creating Custom Financial Statements

Course Description

To help ensure your success, NetSuite Essentials is the first course that administrators and anyone responsible for setting up NetSuite should take. This five-day course provides critical information that implementation teams need to make intelligent decisions before going live. By understanding core NetSuite capabilities, how standard ERP and CRM business processes work in NetSuite and implementation best practices, you can more accurately map your business requirements to the application and work with your implementation team to set up NetSuite for your company.

For hands-on exercises, attendees are provided with a blank account and a business requirements document to simulate the real-world experience of configuring a new NetSuite account, practice setting up and enabling preferences for CRM and ERP, and in some cases, perform end-user tasks to better support their activities. Course materials include a student guide, exercise book and extended access to the same account you set up during the training class after the class concludes, enabling you to continue to work with the concepts and examples presented during the course.

Who Should Attend

NetSuite Essentials is designed for application administrators who are responsible for the setup, configuration and maintenance of the NetSuite application within their organization. Others who benefit from this course include business analysts, project team members and business process owners.

Prerequisites

Complete the following self-paced training courses available on SuiteAnswers > Self-Paced Learning.

- Logging In and Setting Passwords
- Getting Help
- Finding Your Records: Using Global Search
- Working with Lists

Course Objectives and Topics

- Describe the role and tasks of the implementation team
- Use NetSuite basic functionality
- Configure your account using the Set Up Manager to enable features and define preferences
- Customize the user interface
- Extract business intelligence
- Plan next steps

To find out more, contact NetSuite Inc. at 1-877 NETSUITE or visit www.netsuite.com/training

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SUITEANSWERS

Get answers to your support and training questions:

- Go to the Learning Center to find related self-paced training videos
- Take New Feature Training to learn about the latest NetSuite release

LIVE TRAINING WEBINARS

Participate in free monthly training webinars to get practical tips and tricks:

- Go to www.netsuite.com to register for an event: Services > SuiteTraining > Training Webinar Series

Day 1 Agenda

NetSuite Foundation

- **Role of the Administrator:** Administrator responsibilities and tasks prior to "go live." Ongoing and post-go live. Phases of an implementation project.
- **How Does NetSuite Fit Your Business:** Review business rules and processes. NetSuite as a Software as a Service (SaaS) model and relational database.
- **Navigate the Application:** Log in to NetSuite. Interface elements. Settings portlet. Personal preferences. Customize your home page. Help options and terminology.
- **Set Up Company Preferences:** Enter company information. Set up subsidiaries. Set general preferences. Introduce enable features. Rename records and transactions. Set auto-generated numbers. Set printing, fax and email.
- **Understand NetSuite Data Model:** Study how NetSuite characterizes and classifies data, defines user access to data and the impact on reports. Major record types and how related records are structured.

Enterprise Resource Planning

- **Roles, Permissions and Users:** Standard roles. Create custom roles. Assign permissions to roles. Use global permissions. Add new users to NetSuite application. View audit login trail.

Day 2 Agenda

- **Set Up Accounting Management:** Set up accounting preferences. Manage accounting periods. Chart of accounts.
- **Use Multiple Currencies:** Set up multiple currencies to transact business in different currencies
- **Set Up Items:** Review inventory process flow. Set up items. Types of items, kits, groups and assemblies. Auto-calculate inventory levels. Standard reports.
- **Set Up Pricing:** Review pricing process flow. Explore different pricing strategies and features. Standard reports.
- **Set Up Purchasing:** Review purchasing process flows (inventory and non-inventory). Enter a purchase order (PO). Receive items on PO. Partial receipts. Order items (monitoring inventory levels). Standard reports.
- **Set Up Accounts Payable:** Review accounts payable process flow. Set up accounts payable features and preferences. Bill purchase orders. Enter a bill. Pay bills. Print checks. Standard reports.

Day 3 Agenda

User Interface Customization

- **Customization:** Subtabs, Lists and Fields: Introduction to SuiteFlex. Use SuiteBuilder to create subtabs, lists and fields.
- **Create Custom Forms:** Continue with SuiteBuilder to create custom forms to meet company requirements.
- **Create Custom Records:** Create custom records to meet company requirements.

Customer Relationship Management

- **Set Up Sales Force Automation:** Introduce CRM and the sales process flow. Customer statuses (probability for forecasting). Set up sales preferences. Sales teams. Sales rules. Sales territories. Online customer forms. Standard reports.
- **Lead to Customer Management:** Introduce sales lead to quote and estimate to sales order process flows. Enter a lead. Add an opportunity. Lead to prospect to customer lifecycle. Opportunity to estimate. Estimate to sales order. Manage your activities. Standard reports.

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NetSuite Essentials

Day 4 Agenda

- **Set Up Order Management:** Introduce quote to order process and fulfillment flow. Set up sales orders. Transaction types. Sales order forms. Types of fulfillment. Standard reports.

Setting Up Accounts Receivable and General Ledger

- **Set Up Accounts Receivable (A/R):** Introduce invoice to payment process flow. Review accounting preferences. Set up A/R features and preferences. Accept customer payments, credit card transactions, issue customer refunds, return authorizations, credit memos. Statements and finance charges. Standard reports.
- **Perform Banking and General Ledger (GL) Tasks:** Write checks. Transfer funds. Use credit card. Reconcile monthly bank and credit card statements in NetSuite. Standard reports.

Data Migration

- **Migrate Your Data:** Introduce Import Assistant. Prepare data for import. File formatting guidelines. Data handling options. Migrating customers, vendors and partners.
- **Data Integrity:** Mass updates. Duplicate detection and merge.

Day 5 Agenda

Setting Up Customer Support

- **Set Up Customer Support and Case Management:** Set up support preferences: Case statuses. Case priorities. Case types. Case origin types. Case rules. Case territories. Online case forms. Standard reports. Introduce standard support process flow. Enter a case. Grab a case. Reassign a case. Escalate a case. Manage activities on your case.

Next Steps

- **Reports and Searches:** The report interface. Schedule reports. Customize a report. Create a new report. Search for records. Advanced search for records. Create a saved search. Saved searches on the home dashboard.
- **Design Dashboards:** Dashboard development process. Dashboard layout considerations. Home dashboard considerations.
- **Incorporate Marketing Automation and Ecommerce:** Introduce NetSuite Marketing Automation and Ecommerce features. Identify resources to assist in implementation of marketing and ecommerce.
- **Go Live and Post-Go Live Activities:** Ongoing maintenance activities. NetSuite support and user groups. Considerations around the “go live” event.

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.

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