

A photograph of a classroom or training session. In the foreground, a person's hands are visible, holding a pen and writing on a notepad. In the background, other people are seated at desks, also appearing to be in a learning environment. A semi-transparent blue horizontal band is overlaid across the middle of the image, containing the text 'Training Course Catalog'.

Training Course Catalog

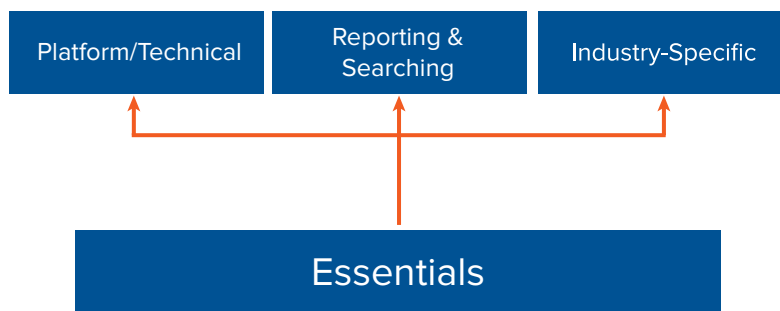
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All courses are delivered by virtual classrooms. Visit www.suitetraining.com to view the course schedule.

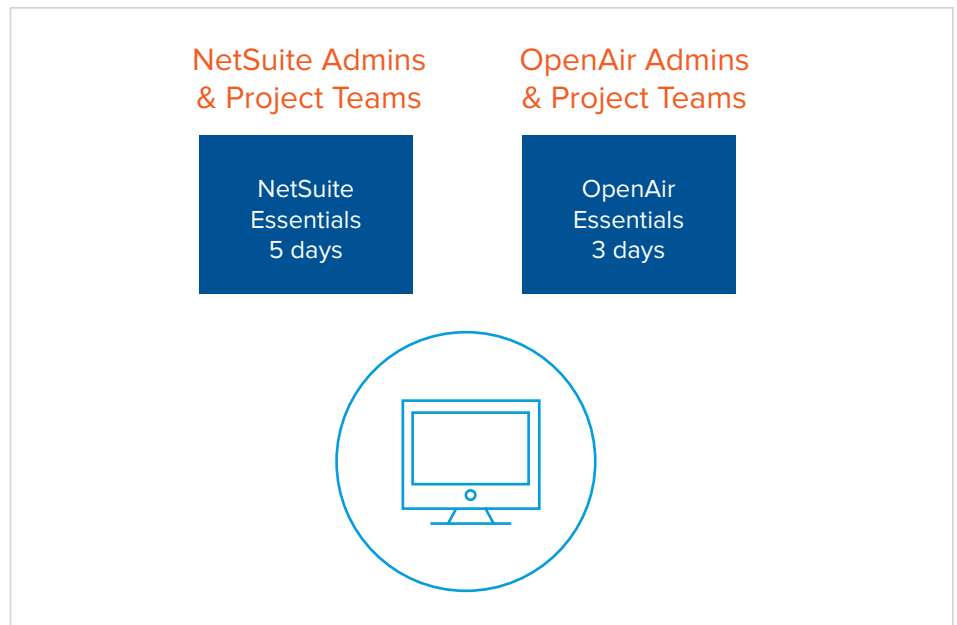
Courses are also available as private, dedicated events. Contact training@netsuite.com to arrange tailored training for your organization.

Project Team Training



Ensure a successful implementation, customize the application to meet your needs and maximize and extend your use of the system to achieve a better return on your investment.

Essentials



Prepare for your NetSuite and OpenAir implementations by learning configuration best practices and setup tasks.

NetSuite Essentials

Duration

- Five days

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.
- Other groups that benefit from this course include business analysts, project team members, and business process owners.

Course Description

To better ensure your implementation success, NetSuite Essentials is a targeted course for Administrators and anyone responsible for setting up NetSuite. 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.

This five-day course provides the critical information implementation teams need to make intelligent decisions before Go Live and provides a flexible learning environment. Through a series of hands-on exercises, you practice key tasks associated with setting up and enabling preferences for CRM and ERP in NetSuite, and in some cases, perform end-user tasks to better support their activities. Attendees are provided with:

- A training account populated with seed data in which to do their hands-on exercises; simulating the real-world experience of configuring a new NetSuite account.
- Student workbooks that include reading topics and hands-on exercises.
- Training videos developed specifically for this class.
- Daily knowledge checks.

After the class concludes, extended access to the materials listed above and the training account you set up during the training class enables you to continue to work with the concepts and examples presented during the course.

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.
- Manage data security; defining users' roles and permissions.
- Customize the user interface.
- Initial setup of Enterprise Resource Planning (ERP).
- Initial setup of Customer Relationship Management (CRM).
- Extract business intelligence.
- Consider ongoing maintenance of the NetSuite Account.

NetSuite OpenAir Essentials

Duration

- Three days

Who Should Attend

- Administrators, business analysts, project managers, and business process owners responsible for setting up, configuring and maintaining NetSuite OpenAir accounts.

Course Description

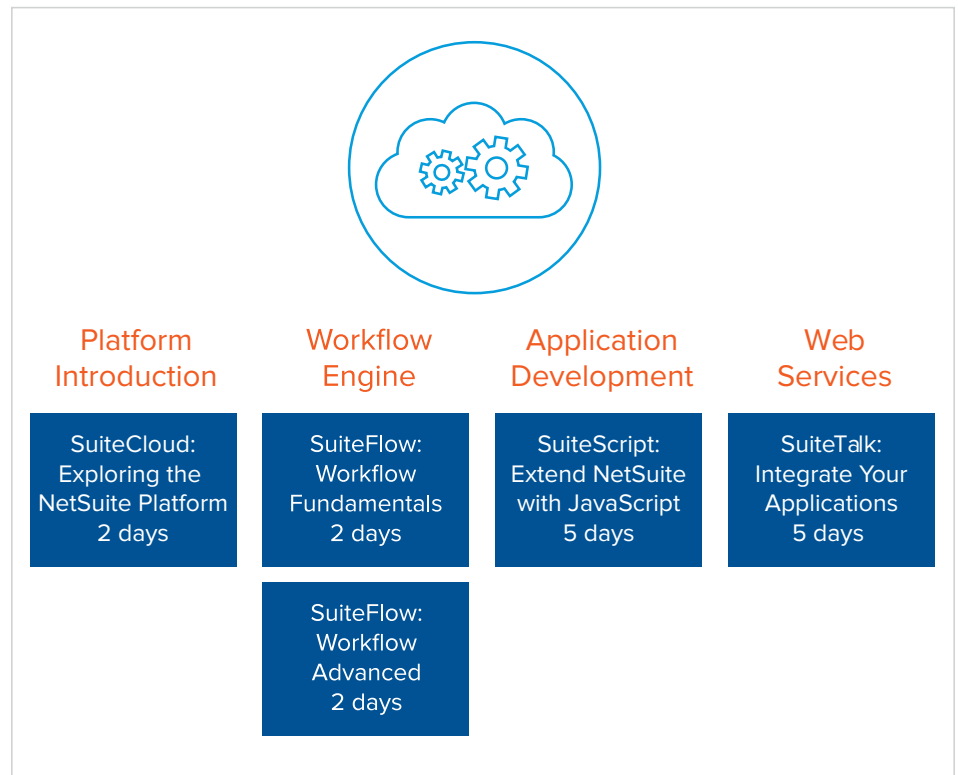
With NetSuite OpenAir, you have the tools necessary to gain real-time visibility into time tracking, resource utilization, project status, and financial metrics so you can improve efficiency and increase profits company-wide. In this comprehensive, three-day course, you study these and other key features vital to successful project management and delivery. Through interactive teaching and hands-on exercises, you practice configuring, customizing and maintaining a NetSuite OpenAir account.

While working in a demonstration account that simulates live, real-time data, you also look at the end user experience, project management, resourcing and time and expense tracking resulting in billed charges. Finally, you study reporting basics and acquire the core skills needed to perform custom calculations, create custom detail fields and publish dashboard charts so you can proactively identify resource utilization, project creep, or cost over-runs in time to get a project back on budget.

Course Objectives and Topics

- Define your configuration requirements and preferences.
- Describe the workflow chronologically and identify which NetSuite OpenAir applications accomplish which business processes.
- Understand basic data integration between NetSuite and NetSuite OpenAir applications.
- Set up users, create roles, skill profiles and define filter sets.
- Use access controls to define and restrict information to ensure account security.
- Create customer and contact demographic records.
- Create detailed project plans with correct project stages, work breakdown structures, assigned resources and financial parameters.
- Configure timesheets, set up expenses and define approval processes.
- Define project billing rules, invoicing and revenue recognition requirements.
- Identify future resource needs and simulate potential project profitability or loss through the use of generic resources.
- Configure customized fields for reporting needs.
- Analyze and extract NetSuite OpenAir data to obtain important company metrics through reporting and dashboards.

Technical/Platform



Take full advantage of the NetSuite SuiteCloud platform to customize and extend NetSuite to fit your needs or develop completely new applications.

SuiteCloud: Exploring the NetSuite Platform

Duration

- Two days

Who Should Attend

- Executives, project managers and business analysts composing a set of business requirements.
- Software architects, software developers, integrators and other technical roles implementing a set of business requirements.

Course Description

Orient yourself to the power of NetSuite. Having a fundamental knowledge of the SuiteCloud platform tools will help you determine how you can satisfy your business requirements for customizing NetSuite applications, building completely new applications, or integrating other applications with NetSuite.

In this two-day course, you examine when and why to use the six components of the SuiteCloud platform:

- SuiteBuilder
- SuiteAnalytics
- SuiteFlow
- SuiteScript
- SuiteTalk
- SuiteBundler

Through demonstrations and hands-on exercises, you study the capabilities of each tool, when each tool should be used based on use cases and business requirements, and the basics for using each tool.

Duration

- Two days

Who Should Attend

- NetSuite administrators, business analysts and software developers who need an introduction to SuiteFlow and the automated workflows that can be created and configured in NetSuite.
- You may be more interested in taking our Advanced Workflows course if you are a software developer and already have exposure to developing workflows using a majority of the skills presented in the course agenda for Workflow Fundamentals.

Duration

- Two days

Who Should Attend

- Software developers and consultants who are already comfortable creating business process flows and need to enhance their skills for more complex workflows.
- Others may be interested in taking the Workflow Fundamentals course.

Course Objectives and Topics

This course gives you a solid overview of the NetSuite architecture and all of the SuiteCloud platform tools. Through real-life use cases, you are exposed to developing and configuring NetSuite.

By the end of this course, you will have an understanding of the SuiteCloud toolset in order to properly manage the extension and integration of NetSuite applications, as well as pinpoint the technologies that should be investigated for further learning.

SuiteFlow: Workflow Fundamentals

Course Description

With fundamental workflow concepts, you have the tools to visually construct your business processes. SuiteFlow can automate your custom approval routing, apply validations, send email, create related records, direct the end user to appropriate forms in the user interface, and more. In this two-day course, you examine these key foundational features of SuiteFlow, including best practices around building custom business processes.

Through interactive teaching and hands-on exercises, you learn how to design and construct your automated business processes. Each new concept comes with a foundational exercise, and is then expanded to more complex use cases with one or more optional/take-home exercises..

SuiteFlow: Advanced Workflows

Course Description

With advanced SuiteFlow concepts, you have the tools to support advanced approval routing use cases including sequential and parallel approvals, incorporation of sub-workflows, altering your workflow based on other records, addition of service-level agreements, extension through formulas and SuiteScript, and more. In this two-day course, you examine more in-depth features of SuiteFlow to bring power to advanced use cases. Best practices remain a focus, just as in Workflow Fundamentals.

Through interactive teaching and hands-on exercises, you learn how to design and construct your automated business processes. Each new concept comes with a foundational exercise, and is then expanded to more complex use cases with one or more optional/take-home exercises.

Course Objectives and Topics

- Use standard reports for point-in-time analysis.
- Customize standard reports to match business requirements.
- Share NetSuite data with external stakeholders and applications.
- Use standard metrics to monitor business trends.
- Create searches to access and dynamically display key data.
- Apply expressions, functions and basic SQL formulas for more complex analysis.
- Create custom KPIs to display critical data in easy-to-read charts and graphs.
- Create personalized, real-time dashboards rich with tools to analyze operational performance.

Prerequisites

You should be comfortable with a majority of the skills presented in the Workflow Fundamentals course:

- Creating basic approval processes (e.g. single approver that can approve & reject)
- Sending email.
- Creating records.
- Solid experience using the Visual Builder to set up conditions.
- Setting default values on forms and performing validations.
- Effective knowledge of Workflow Triggers and their usage.

The following concepts and experiences will better equip you to build out workflows that support the complex use cases covered in this course:

- Exposure to programming concepts.
- Logic concepts in software development: if-then-else, looping.
- Modular software development principles.
- Experience with business process mapping.
- Hardware Requirements

Adobe Flash Player must be installed in your browser in order to work with the point-and-click diagramming component that is part of SuiteFlow. It is possible to build workflows without this, but is not optimal. Course instruction and materials are based on having access to the diagramming component.

Course Objectives and Topics

This course takes you beyond the fundamentals of workflow development to inspect all capabilities of SuiteFlow. By the end of this course, you will have extended a baseline business process with parallel processing, service-level agreements, conditional execution based on sublist data, enhanced automation capabilities through SQL formulas, extension with custom actions, transition based on changes to related records, modularization of your workflows, and more.

SuiteScript: Extend NetSuite with JavaScript

Course Description

You don't have to settle for a "one size fits all" hosted application. SuiteScript allows developers and administrators to create flexible business logic within NetSuite tailored to specific business needs—from sophisticated business processes to entirely new applications.

This five-day course provides developers the tools know-how and best practices to create and deploy many script types designed to satisfy a variety of business criteria. Students gain hands-on experience building an array of scripts to customize the functionality of NetSuite applications and then use troubleshooting tools to quickly diagnose and correct problems.

Duration

- Five days

Who Should Attend

- Developers who need to customize and automate their NetSuite application.

Prerequisites

- Software development experience in any programming language.
- Experience with JavaScript is recommended, but not required.
- Understanding of object oriented concepts is recommended, but not required.
- Knowledge of HTML is recommended, but not required.
- Course participants should be familiar with NetSuite navigation and features.

Course Objectives and Topics

- Automate forms through client, user event, and Suitelet scripts.
- Incorporate a foundational set of SuiteScript functions in your scripts.
- Manipulate sublists.
- Integrate searches with scripts.
- Implement batch processing through scheduled scripts.
- Create custom actions that extend workflows (SuiteFlow).
- Make use of back-end Suitelets.
- Customize your dashboard through portlet scripts.
- Test and debug scripts through client and server-side debugging tools.
- Develop scripts that incorporate a variety of best practices.

SuiteTalk: Integrate Your Applications

Duration

- Five days

Who Should Attend

- Integration Specialists or Developers who need to integrate NetSuite with external applications.
- Developers working with (or intending to work with) .Net, Java, or other object-oriented languages.

Course Description

Do you need to handle business operations outside of NetSuite? You can integrate NetSuite in unlimited ways with any external application that supports the industry standard SOAP-based web services protocol. SuiteTalk is the web services communication layer within NetSuite, enabling you to get, add, update, and delete records from/to NetSuite.

This five-day course provides integration specialists and developers the knowledge to execute web service operations against NetSuite data. Students work with the NetSuite WSDL, analyze SOAP messages, identify best practices, and execute web service operations using either Java or C#.

Note: This course is taught in Java and C#. The instructor can provide students with exercise solution code in PHP, if requested.

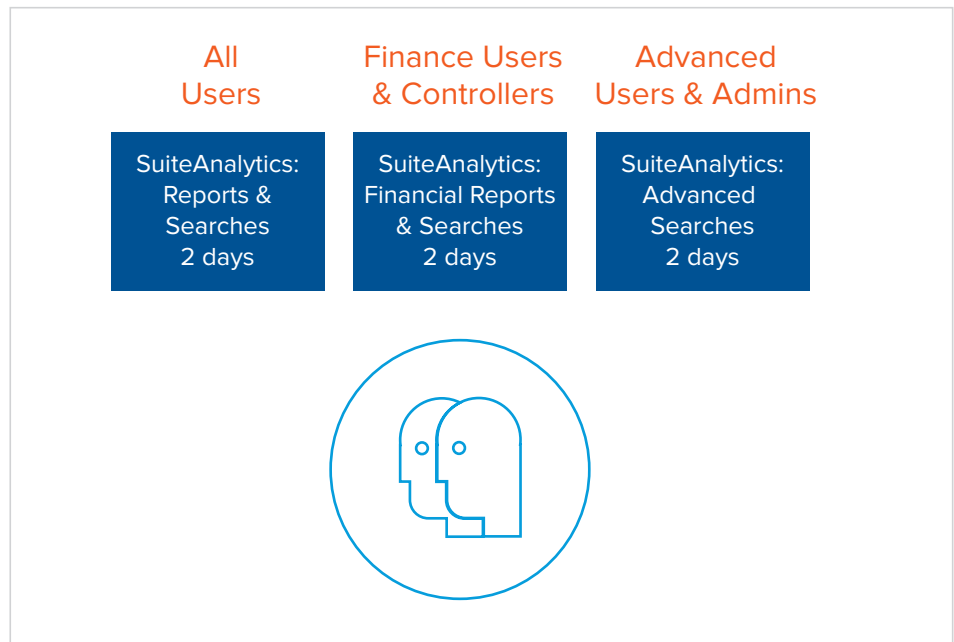
Prerequisites

- Software development experience, preferably in an object-oriented language.
- Note that a working knowledge of web services is NOT required.

Course Objectives and Topics

This course takes you on a tour of the core web service operations to query, add, update, and delete records in NetSuite, as well as best practices surrounding their use. By the end of this course, you will have worked with single and multi-record operations to process standard and custom record data. Other topics of investigation are integration with SuiteScript, authentication concerns, synchronization with external systems, and choosing the right operation from a performance perspective.

Reporting and Searching



Mine your NetSuite data for better business intelligence, diagnose issues on the fly, and get real-time views of sales, marketing, service and financial data.

SuiteAnalytics: Reports and Searches

Duration

- Two days

Who Should Attend

- NetSuite Administrators, super users, managers or executives who want to learn how to use reports, saved searches and KPIs more effectively.

Course Description

Why guess? Master the use of NetSuite reports, searches and key performance indicators (KPIs), so you can plan your company's next winning strategy.

This two-day instructor-led course will help you turn your data into knowledge and your knowledge into business strategies that take you where you want to go. Learn how to obtain actionable analysis, enforce business processes, and get real-time views into your company data across sales, marketing, service and fulfillment.

Through interactive teaching and hands-on exercises, completed in a provided demo account, you study how to create role-specific reports, saved searches and KPIs so you can empower all users with the key reports, information and measures they need to be successful.

Course Objectives and Topics

- Use standard reports for point-in-time analysis.
- Customize standard reports to match business requirements.
- Share NetSuite data with external stakeholders and applications.
- Use standard metrics to monitor business trends.
- Create searches to access and dynamically display key data.
- Apply expressions, functions and basic SQL formulas for more complex analysis.
- Create custom KPIs to display critical data in easy-to-read charts and graphs.
- Create personalized, real-time dashboards rich with tools to analyze operational performance.

Duration

- Two days

Who Should Attend

- NetSuite users who have an accounting or finance job role and want to learn how to create reports, financial statements, saved searches and KPIs more effectively.

SuiteAnalytics: Financial Reports and Searches

Course Description

Want to give your boss another reason to love your work? Learn how to access and analyze your finance and accounting data to better inform and influence your company's success.

With SuiteAnalytics: Financial Reports and Searches, you can replace your cumbersome spreadsheets and use NetSuite's real-time reports, saved searches and key performance indicators (KPIs) to get the critical information you need. During this two-day course, you learn how to use these tools to unlock your NetSuite data so you can continually monitor and analyze the financial health of your business.

Through interactive teaching and hands-on exercises, completed in a provided demo account, you learn how to create reports, financial statements, saved searches and KPIs to diagnose financial issues on-the-fly and drill-down to customer, employee or transactional details to help you and your management team make informed decisions.

Requirements

- Course participants should understand accounting concepts and terminology and should know their organizational reporting requirements.

Course Objectives and Topics

- Use standard reports for point-in-time analysis.
- Customize reports to match business requirements.
- Rearrange data in financial statements by classification, customer/project, item and account.
- Include additional fields in financial statements, including budget data.
- Apply custom formatting to financial statements.
- Create searches to access and dynamically display key data.
- Apply expressions, functions and grand totals to searches for more complex analysis.
- Create custom KPIs and scorecards to analyze and compare critical business metrics.

Duration

- Two days

Who Should Attend

- NetSuite administrators, super users, business analysts and software developers responsible for providing business intelligence.

SuiteAnalytics: Advanced Searches

Course Description

Do you want to take your Saved Search abilities to the next level? If so, in “SuiteAnalytics: Advanced Searches” you will acquire the final set of skills needed to effectively mine your NetSuite data for critical business intelligence.

This two-day, instructor-led course shows you how to dig deep into your NetSuite data by applying advanced Saved Search functionality to calculate and transform your search results. Through interactive teaching, real-life use cases and hands-on exercises you will learn to build searches using complex parenthetical expressions, joins to access data, and functions and summary types to format date and numeric values.

You then go even deeper into Saved Searches by learning how to incorporate formulas and structured query language (SQL) functions to calculate and transform search results, enabling you to: translate values and make calculations, generate matrix-style outputs, format dates and numbers, render results with embedded HTML and more.

Prerequisites

- Course participants should be familiar with NetSuite navigation and features.
- Course participants should be familiar with the basics of creating saved searches in NetSuite.
- A background in using SQL is helpful, but not required.

Course Objectives and Topics

This course introduces advanced techniques for creating Saved Searches including: expressions, HTML, formulas and SQL statements. You are taken on a tour of formulas from introductory to advanced, incorporating NetSuite fields and Oracle SQL functions. By the end of this course you will have applied formulas across a variety of use cases and acquired a firm foundation for further learning.

Industry-Specific: SuiteCommerce



Set up your web store or in-store POS to deliver superior shopping experiences and achieve an innovative ecommerce vision with sophisticated customizations.

SuiteCommerce: Running Your Web Store

Duration

- Two days

Who Should Attend

- NetSuite administrators, web store managers, marketing managers and merchandising managers responsible for managing NetSuite-generated web stores.

Course Description

“SuiteCommerce: Running Your Web Store” shows you how to track and monitor inventory and use a range of merchandising options to drive sales. Administrative responsibilities are covered for both SuiteCommerce Site Builder and SuiteCommerce Advanced web stores. Feature similarities between these two types of NetSuite web stores include item configuration, pricing, payment and shipping setup, SEO support, inventory management and more.

While working in a provided SuiteCommerce demo account, you will examine key NetSuite ecommerce features and best practices while learning to perform the day-to-day tasks of working in a web store. Through interactive teaching and hands-on exercises, you practice how to create and display items, set up pricing, shipping, and payment methods, apply SEO techniques to improve rankings, and analyze shopper behavior.

Requirements

- Course participants should be familiar with NetSuite navigation and features.

Course Objectives and Topics

Learn to use NetSuite’s unified ecommerce features to optimize operations and perform common merchandising and marketing tasks:

- Perform order and inventory management tasks.
- Identify web store item types and explain when to use them.
- Create and display items in the web store.
- Apply SEO methods to optimize items for searches and rankings.
- Set up item pricing options.
- Connect your merchant account and gateway to NetSuite.
- Set up credit card payment methods.
- Increase sales and brand awareness through targeted promotions and merchandising.
- Use standard website reports to analyze shopper behavior.

NetSuite Retail: Optimizing Your POS System

Course Description

NetSuite Retail is the only cloud-based business software solution that brings together every step of a multi-channel, multi-location retail business—point of sale (POS), ecommerce, CRM, marketing, merchandizing, inventory and order management, and financials.

In this introductory two-day class, you examine key POS features, capabilities and best practices while practicing important day-to-day tasks for managing your POS system. You will see how your clerks can deliver a superior in-store shopping experience by quickly and accurately processing transactions, reviewing customer information, performing item look-ups, determining quantity on-hand, and locating out of stock items to save the sale.

Through interactive teaching and hands-on exercises, you learn to navigate the POS user interface, complete key sale transaction functions, edit the user interface to reflect your unique branding, and use reports to analyze your stores’ key KPIs, transaction details, and shopper’s buying behaviors.

Requirements

- Course participants should have completed NetSuite Essentials.

Course Objectives and Topics

This course introduces the features and functions of NetSuite Retail POS while allowing you to master what you learn through hands-on practice.

Duration

- Two days

Who Should Attend

- NetSuite administrators, store managers and supervisors responsible for managing POS activities.

Duration

- Three days

Who Should Attend

- Developers who need to create unique and highly customized websites using SuiteCommerce Advanced or SuiteCommerce SiteBuilder.
- Developers tasked with implementing SuiteCommerce Advanced or SuiteCommerce SiteBuilder websites.

SuiteCommerce: Building Web Stores Part 1

Course Description

This three-day course shows you how to implement and extend prebuilt reference implementations for My Account, Cart, and Checkout that are all running on the same front-end web architecture utilizing Backbone, Underscore, Bootstrap, and jQuery. Take advantage of SuiteScript Server Pages technology to allow for a high degree of customization across your website.

This course is the first part of a two-course series. Part 1 should be taken by those implementing SuiteCommerce SiteBuilder or SuiteCommerce Advanced websites. Part 2 should be taken only by those implementing SuiteCommerce Advanced. SuiteCommerce Advanced customers should take both courses.

Requirements

Course participants should have a significant programming background:

- JavaScript is used in the customization of web stores, both on the client (browser) and server. It is recommended that you have some exposure to JavaScript, including syntax relevant to objects and anonymous functions. Exposure to the browser DOM and event model is also helpful, including use of CSS selectors.
- Prior experience with browser-based JavaScript libraries such as Backbone and jQuery is a plus.

Course Objectives and Topics

- Compare and contrast the NetSuite ecommerce development technologies.
- Build SuiteScript Server Page (SSP) applications utilizing the Commerce API.
- Create SSP libraries.
- Write request handlers with SS files (part of SSP) and Suitelets.
- Interact with NetSuite via a RESTful JSON interface.
- Customize My Account, Cart and Checkout reference implementations via JavaScript files (front-end and server-side), HTML templates and CSS.
- Extend reference implementations in a best practice manner to support installation of future upgrades.
- Plug in new modules to the reference implementations. This includes new application components with custom record types and request handlers (server-side), and Backbone Models-Views-Routers and Underscore HTML templates (front-end).
- Take advantage of the translation engine in the reference implementations to have your customizations support multiple languages.
- Deploy and manage your website assets.
- Use familiar browser debugging tools and NetSuite specific server-side troubleshooting capabilities to speed up development and your learning of the reference implementations.
- Discuss how other NetSuite technologies fit into your web store solution, such as SuiteFlow and SuiteTalk.
- Configure the shopping experience specific to SuiteCommerce Site Builder through the customization of website themes and item/category templates.
- Include custom request handlers. Note: this part of the course is completed through a set of take-home videos and hands-on exercises.

Duration

- Two days

Who Should Attend

- Software developers and other technical personnel tasked with implementing SuiteCommerce Advanced websites.

SuiteCommerce: Building Web Stores Part 2

Course Description

Do you need to create a unique and highly customized ecommerce shopping experience for SuiteCommerce Advanced web sites? Learn how to optimize NetSuite’s SuiteCommerce platform for SuiteCommerce Advanced shopping pages.

Note: This is the second course for those developing SuiteCommerce Advanced web sites. Take SuiteCommerce: Building Web Stores Part 1 as the first step in implementing a SuiteCommerce Advanced web site, or as the only course when implementing a SuiteCommerce SiteBuilder web site.

SuiteCommerce: Building Web Stores Part 1 showed you how to implement and extend prebuilt reference implementations for My Account, Cart, and Checkout that are all running on the same front-end web architecture. SuiteCommerce: Building Web Stores Part 2 shows you how to utilize the same architecture for the core shopping experience. All the best practices and skills from the first course will be used as you discover how to use a set of technologies that are specific to SuiteCommerce Advanced web sites.

Requirements

- Course participants should have previously taken SuiteCommerce: Building Web Stores Part 1.

Course Objectives and Topics

Through a series of practical skill building scenarios, you practice extending the shopping experience:

- Identify additional ecommerce development technologies in support of the shopping experience.
- Gain an understanding of the item search architecture and how search indexes are used.
- Build SuiteScript Server Page (SSP) applications utilizing the Item Search API.
- Customize the Shop Flow reference implementation via JavaScript files (front-end and server-side), html templates, and css.
- Adjust the way the ShopFlow reference implementation queries the Item Search API in support of your user interface requirements, for example, by having tabs on your shopping site that query the item search API to return a set of products specific for the tab.
- Set up fieldsets and automate through SuiteScript.
- Configure search and sorting capabilities.
- Set up faceted navigation, including custom facet fields and custom facet UI widgets.
- Create site categories and have them exposed as facets.
- Expose related and correlated items to the shopping site.
- Implement changes similar to those in SuiteCommerce: Building Web Stores Part 1, but for use cases applicable to Shop Flow.
- Configure advanced image options, including automatic image resizing.
- Incorporate a variety of static content onto the shopping and cart pages via the Content Delivery SuiteApp.
- Incorporate a variety of dynamic content onto the shopping and cart pages by utilizing the Product Merchandising SuiteApp, along with the Item Search API.

Power-User Training



Use NetSuite to its fullest! Develop power users who can perform key tasks and apply best practices to ensure the optimal use of NetSuite.

Marketing Automation: Energizing Sales

Duration

- One day

Who Should Attend

- Administrators who are responsible for setting up and maintaining NetSuite Marketing Automation.
- Marketing managers and power users who need to create and manage marketing campaigns in NetSuite.

Course Description

Making the most of marketing automation means using the right tools to successfully attract and keep customers; align marketing and sales processes; prime the sales pipeline with new leads; and gauge the effectiveness of your efforts in real time.

In this comprehensive one-day workshop, you work in a provided NetSuite account while studying how to set up Marketing Automation features and preferences. You also perform day-to-day tasks for creating and managing a multi-channel campaign.

A case study provides context and hands-on exercises to simulate real-world tasks, showing you how to design email templates; create online lead generating forms; import leads; identify opportunities with Upsell Manager; use workflows to support lead nurturing; and more.

Course Objectives and Topics

The goal of this course is to introduce the features and functions of NetSuite Marketing Automation, walking you through the three phases of creating and managing a multichannel campaign: Framing Campaign Automation, Building Campaign Components and Launching Campaigns.

Upon completing this course, you should be familiar with the capabilities of NetSuite Marketing Automation and confident that you can set up and perform day-to-day marketing operations successfully.

Duration

- Two hours

Who Should Attend

- Managers and executive assistants who support key decision makers and need to provide critical business intelligence to executives or other managers.

SuiteAnalytics: Building Executive Dashboards

Course Description

With the power of SuiteAnalytics, you can set up the NetSuite Home Dashboard to inform and empower your executive team.

During this two-hour course, you learn how an analytics-enabled Home Dashboard can be tailored for your executives and managers; providing business intelligence and easy management of activities. You join a virtual training session where the instructor guides you through a SuiteAnalytics overview, examines the relationship between metrics and reports and searches, and shares best practices for creating “smart dashboards” to provide critical insight into your business.

Demonstrations show you where the data comes from and how to add reports, saved searches and key performance indicators (KPIs) to Home Dashboards so your executives have critical insights into the business every time they log into NetSuite.

Requirements

- Participants should attend SuiteAnalytics: Reports and Searches or SuiteAnalytics: Financial Reports and Searches prior to attending this course.

Course Objectives and Topics

By the end of this session, you will be able to apply the techniques discussed to create “smart” dashboards: Apply best practices for setting up Home Dashboards for optimal relevance and performance; plan and personalize the Home Dashboard to meet the needs of your various executives and managers; align the Home Dashboard content with the key metrics by which you measure the success of your business; integrate business analysis and activities management; and provide real-time views to key information, enabling informed decisions.

NetSuite ERP: Period and Year-End Close

Course Description

This two-hour course walks you through the process and procedures for performing a typical period and year-end close. You join a virtual classroom where the instructor demonstrates how to use the Period Close Checklist, lock a fiscal period, manage multiple fiscal calendars, and perform other critical tasks! The session is interactive, providing opportunities for you to check your comprehension and ask questions.

By the end of this session, you will be able to apply best practices for closing periods and performing year-end tasks. You will be able to reference an easy-to-use job aid, provided during the session, to help close your books in your own NetSuite account.

Note: Demonstrations will be conducted in a NetSuite OneWorld account. NetSuite Payroll Services and related capabilities are not addressed in this course.

Course Objectives and Topics

By the end of this session, you should be able to lock a fiscal period to prevent non-accounting users from posting; perform the period-end checklist tasks; manage multiple fiscal calendars in a NetSuite OneWorld account; close a fiscal period and prevent any further data entry; and manage the fiscal year-end process in NetSuite.

Duration

- Two hours

Who Should Attend

- Accounting and finance users who need to learn period and year-end close tasks.