NetSuite Essentials

Key Objectives

How do I:

- Configure NetSuite to meet business requirements?
- Determine user roles and permissions?
- Customize the user interface to align with business needs?
- Plan for data migration and ongoing data integrity?
- Set up initial controls for ERP?
- Examine avenues for extracting business intelligence?
- Plan for the ongoing maintenance of my NetSuite account?

Course Description

NetSuite Essentials is the first course you should take to better ensure your implementation success. This course provides the foundational information that implementation teams need to make intelligent decisions before Go Live.

NetSuite Essentials is designed for Administrators and anyone responsible for setting up NetSuite. This five-day course will help you understand core NetSuite capabilities, how standard ERP and CRM business processes work, and implementation best practices, so you can more accurately map your business requirements to the application and work with your implementation team to set up NetSuite for your company.

Through a series of hands-on exercises, you practice key tasks associated with setting up and enabling preferences for ERP and CRM, customizing the user interface to meet your company's requirements and in some cases perform end-user tasks so you can 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.
- Extended access to the training account used in class so you can continue hands-on practice of concepts and examples presented during the training.

Related Courses

- SuiteCloud: Exploring the NetSuite Platform
- SuiteFlow: Workflow Fundamentals
- SuiteAnalytics: Reports and Searches
- SuiteAnalytics: Financial Reports and Searches

Who Should Attend?

NetSuite Essentials is designed for application Administrators and project teams who are responsible for the setup, configuration and maintenance of the NetSuite application within their organization. Other groups who benefit from this course include IT managers, business analysts and business process owners.

Prerequisites

Participants should be familiar with NetSuite navigation and functionality prior to class. To ensure you have the necessary skills, watch the Getting Started tutorials available in the SuiteAnswers Training Videos library.

Course Objectives

- 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.
- Extract business intelligence.
- Initial setup of customer relationship management.
- Consider ongoing maintenance of the NetSuite account.

Day 1 Agenda: Getting Started

How Does NetSuite Fit Your Business: Review business rules and processes; NetSuite's Software-as-a-Service (SaaS) model and relational database.

Overview of OneWorld: High-level introduction to building subsidiary structure.

Introduction to the Implementation Team: Administrator responsibilities and tasks prior to "Go live;" ongoing and Post "Go live;" phases of an Implementation Project.

Navigate the Application: Log in to NetSuite; interface elements; settings portlet; personal preferences; customize your Home page; help options; 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.

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: Customization and Data Management

Customization: Subtabs, Lists and Fields: Introduction to the SuiteCloud platform; 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.

Migrate Your Data: Introduce Import Assistant; prepare data for import; consider file formatting guidelines; look at data handling options; investigate migrating customer, vendors and partners.

Data Integrity: Mass updates; duplicate detection and merge.

Day 3 Agenda: ERP Part 1

Set Up Accounting Management: Set up accounting preferences; manage accounting periods; Chart of Accounts.

Multiple Currencies: Facilitate transactions and reporting in multiple currencies.

Tax Information: Introduce terminology and features that impact taxation in NetSuite.

Set Up Items: Review inventory process flow; set up items; types of items, kits, groups and assemblies; set inventory levels.

Set Up Pricing: Review pricing process flow; explore different pricing strategies and features.

Set Up Order Management: Introduce quote-to-order process and fulfillment flow; set up sales orders; transaction types; sales order forms; types of fulfillment.

Day 4 Agenda: ERP Part 2

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, issue customer refunds, return authorizations, credit memos; generate statements.

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).

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.

Perform Banking and General Ledger (GL) Tasks: Write checks; transfer funds; reconcile monthly bank and credit card statements in NetSuite.

Reports and Searches: The Report Interface; schedule reports; review Standard Reports; customize a report; create a new report; search for records; create a saved search; saved searches on the Home Dashboard.

Design Dashboards: Dashboard development process; dashboard layout considerations; home dashboard considerations.

Day 5 Agenda: CRM, Go-Live and Course Summary

Set Up Sales Force Automation: Introduce Customer Relationship Management (CRM); introduce the sales process flow; customer statuses (probability for forecasting); set up sales preferences; sales teams; sales rules; sales territories; online customer forms.

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.

Set Up Customer Support and Use 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.

NetSuite on the Go: Look at the available options for mobile access to your NetSuite Account and the related help resources.

Go Live and Maintain NetSuite: Ongoing maintenance activities; NetSuite Support; User Group; considerations around the "Go Live" event.

Course Summary: Review objectives, resources and wrap up course.

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.