NETSUITE

Data Sheet

NetSuite Essentials

SuiteTraining™

Doing More Together!

Key Tasks

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 our NetSuite account.

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

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Related Courses

- SuiteFlow: Workflow Fundamentals
- SuiteAnalytics: Reports and Searches
- SuiteAnalytics: Financial Reports and Searches

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

Day 1 Agenda: Getting Started

How Does NetSuite Fit Your Business: Review business rules and processes. NetSuite as a 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.

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Suite Answers

Get answers to your support and training related 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 Webinars to get practical tips and tricks for using NetSuite better:

- Go to suitetraining.com > Training Webinars to view the schedule and register for an event.

Day 2 Agenda: Customization and Data Management

Customization: Subtabs, Lists and Fields: Introduction to SuiteCloud. 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. File formatting guidelines. Data handling options. 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 statements and credit card in NetSuite.

Reports and Searches: The Report Interface. Schedule reports. Review standard 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.

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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.

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