

NetSuite Retail: Optimizing Your POS System

Key Tasks

How do I:

- Set up team members in NetSuite and verify their permission levels at POS?
- Set up users and security levels for my team while upholding Payment Application Data Security Standards?
- Create and edit customer information to gain insight into my customers while providing an added level of customer service?
- View and export available reports at POS to gain insight into my business and customers' buying habits?
- Manage the till functions?
- Process transactions, returns, apply discounts and enter sales orders?
- Customize the buttons on the user interface to reflect my business's unique branding?

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.

This course does not address specific design considerations for your Point of Sale.

Who Should Attend

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

Requirements

Course participants should have completed NetSuite Essentials.

Course Objectives

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

Related Courses

Take these courses for more training:

- SuiteAnalytics: Reports and Searches
- SuiteCommerce: Configuring NetSuite for Your Business

SuiteAnswers

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 > Webinars and Events to view the schedule and register for an event.

Day 1 Agenda

Set up POS and Components Checklist

Review Basic POS Setup Milestones: Describe what configuration is required for the POS setup; state when POS configuration can begin; identify when your POS is ready to ring up sales

NetSuite POS Solution Architecture: Identify your type of network; state the importance of replication across POS terminals

Introduction to POS and Basic Cashier Functions

Navigate the User Interface: Identify elements of the user interface; add customer information; find items and ring up sales; tender sales; apply discounts; void and cancel transactions; process returns; enter sales orders; perform miscellaneous functions such as reprint receipts.

Manager Functions and Considerations

Team and Store Management: Perform start and end-of-day functions; utilize built-in reports at POS to gain insight into your store's performance and customer buying habits; add team members; unlock accounts, manage user permissions and roles; transfer inventory in and out. Add and manage store team members, as well as manage permission levels.

Day 2 Agenda

Administrator and Customization Tasks

Customize the POS Look and Feel: Use the button edit function to rearrange buttons, add new buttons; create new color styles, create new pages for buttons.

Edit Tenders: Examine how individual tender type preferences can be set with the Edit Tender Function.

NetSuite POS Settings: Control how you want the POS system to behave with Flags and Settings; review recommended settings; identify helpful settings for your business.

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.