Blended Learning: Essentials Course Agenda

Module	Agenda Topics and Exercises – Day One	
01 01A 05 01B	**Lecture Hall #1** • **Course Introduction – Welcome** • **Blended Learning Experience** • **NetSuite Navigation** • **Spotlight Lecture: Roles and Permission** • Introduction to Self-study topics, exercises and other training assets	
Independent Study: Getting Started		
02	**NetSuite Fits Your Business Model** • No exercises	
03	**OneWorld Overview** • No exercises	
04	**Introduction to the Implementation Project** • Review the Business Requirement Document (01-01)	
05	**Navigating the Application** • Login In To NetSuite (05-01)* • Set General Preferences (05-02) • Set Up Your Dashboard (05-03)* • User Global Search (05-04) • Use NetSuite Help (05-05)	
06	**Set up Company Preferences** • Set Company Information (06-01)* • Enable Features (06-02)* • Rename Records and Transactions (06-03)* • Turn off Auto Generated Numbers (06-04)* • Set Company Preferences (06-05)* • Set Printing, Fax & Email Preferences (06-06)* • Create New Subsidiaries – *OneWorld* – (06-07)* • Create Elimination Subsidiaries – *OneWorld* – (06-08)*	
07	**NetSuite Data Model** • Create Customer and Contact (07-01)* • Create Customer and Contact – *OneWorld* – (07-02)* • Create Vendor and Contact (07-03)* • Create Vendor and Contact – *OneWorld* – (07-04) • Enter New Employees (07-05)*	
08	**NetSuite Roles and Permissions** • Rename Roles (08-01) • Customize Sales Manager Role (08-02) • Show Role Differences (08-03) • Customize Sales Administrator Role – *OneWorld* – (08-04) • Add a NetSuite User (08-05) • View the Login Audit Trail (08-06)	
	Independent Study/Office Hours	

* Denotes required exercises

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Module	Agenda Topics and Exercises – Day Two	
09 10 10A	**Lecture Hall #2** • **Recap/Review Getting Started** • **Customization: Subtabs, Lists, and Fields** • **Spotlight Lecture: Data Migration** • Introduction to Self-study topics, exercises and other training assets	
Independent Study: Customization and Data Management		
10	**Customization: Subtabs, Lists, and Fields** • Create Subtabs and Lists • Create and Apply Fields • Custom Transaction Fields, Validation & Defaulting • Custom Transaction Field, Sourcing & Filtering • Custom Transaction Fields, Sourcing & Filtering	
11	**Create Custom Forms** • Edit Entry Forms • Internal Custom Form • Custom Transaction Form – PDF Layout	
12	**Create Custom Records** • Create Custom Records	
13	**Migrate Your Data** • Review Auto Numbering Settings • Import Customers • Update Customer with Import • Create Custom Import Template – *Optional*	
14	**Data Integrity** • Identify and Merge Duplicate Records • Schedule a Mass Update • Create a Saved Search • Set Up and Use Direct List Editing • Mass Update w/ Calculation – *Optional*	
	Independent Study/Office Hours	

* Denotes required exercises

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Module	Agenda Topics and Exercises – Day Three	
15 16 16A	**Lecture Hall #3** • **Recap/Review Customization and Data Management** • **Accounting Management** • **Spotlight Lecture: Items and Pricing Overview** • Introduction to Self-study topics, exercises and other training assets	
Independent Study: ERP Part 1		
16	**Accounting Management** • Enabling Accounting Features • Set Up Multiple Warehouses • Create GL Accounts • Set Up Accounting Periods	
17	**Multiple Currencies** • Create New Currencies and Subsidiaries – *OneWorld* – • Assign Currencies to Customer • Assign Currencies to Vendor	
18	**Tax** • Manage Tax Periods - *OneWorld*- • Set Up Tax Schedule NOTE: required for all classes	
19	**Items** • Enabling Transactions and Inventory Features • Create inventory Items • Create a Non-Inventory Item • Create a Service Item • Create Inventory Item – *OneWorld* – • Enter Inventory Quantities	
20	**Pricing** • Enabling Pricing Features • Create a Price Level • Add Price Level to Items • Set Up Quantity-Based Pricing • Set up Item Pricing on Customer Record • Use Sales Transactions to Demonstrate Pricing • Generate Price Lists	
21	**Order Management** • Define Order Management Preferences • Enter a Sales Order • Enter a Sales Order – *OneWorld* • Approve Sales Orders • Fulfill Sales Orders	
	Independent Study/Office Hours	

* Denotes required exercises

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Module	Agenda Topics and Exercises – Day Four	
22 23 23A 30 30A	**Lecture Hall #4** • **Recap/Review ERP Part 1** • **Accounts Receivable** • **Spotlight Lecture: Accounts Payable Overview** • **Sales Force Automation** • Introduction to Self-study topics, exercises and other training assets	
Independent Study: ERP Part 2		
23	**Accounts Receivable** • Invoice All Sales Orders • Create a Cash Sale • Create an Invoice • Accept Customer Payments • Issue a Return Authorization • Make a Bank Deposit	
24	**Set Up Purchasing** • Enter a Purchase Order • Receive A Purchase Order	
25	**Set Up Accounts Payable** • View a Purchase Order from Reminders • Define Accounting Preferences • Bill a Purchase Order • Enter and Approve a Bill • Pay a Bill • Print a Check	
26	**Banking and GL** • Make Journal Entries • Make Elimination Subsidiary Journals – *OneWorld* • Memorize a Transaction • Close Accounting Periods	
30	**Sales Force Automation** • Enable Sales Force Automation • Set Up an Employee as Sales Rep • Set Sales Force Automation Preferences • Create Customer Statuses • Create a Sales Rule • Create a Sales Territory • Create an Online Form	
27	**Reports and Searches** • Identify a Prebuilt Report • Restrict Data included in a Prebuilt Report • Add Data to Customer Record • Add Custom Field to NetSuite Standard Report • Create Search to identify Customers in Price Level • Restrict Data Included in the Search	
35	**Go Live and Maintain NetSuite**	

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	• **Please do the Online Evaluation: http://psu.netsuite.com/admin**	
	Independent Study/Office Hours	
Module	**Independent Study topics**	
Independent Study: SFA/CRM		
31	**Lead-to-Customer Management** • Work a lead • Generate a Quote from an Opportunity • Generate a Sales Order from a Quote	
32	**Customer Support and Case Management** • Enable Customer Service and Support Features • Set Up an Employee as Support Rep • Create a Case Status • Create a Case Priority • Create a Case Type • Create a Case Rule • Create a Case Territory	
28	**Design Dashboards for Users** • Design Dashboard for Specific Role - *Optional Exercise*	
33	**Incorporate Marketing Automation and Ecommerce** • no exercises	
34	**NetSuite on the Go** • no exercises	
36	**Summary / Wrap-up / Conclusion**	

* Denotes required exercises