

| Day 1 | Day 2 | Day 3 | Day 4 |
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| 9:00 am - 1:00 pm Lecture Hall | 9:00 am - 1:00 pm Lecture Hall | 9:00 am - 1:00 pm Lecture Hall | 9:00 am - 1:00 pm Lecture Hall |
| 2:00 pm – 5:00 pm Independent Study | 2:00 pm – 5:00 pm Independent Study | 2:00 pm – 5:00 pm Independent Study | 2:00 pm – 5:00 pm Independent Study |

| Number | Module Name | Walkthroughs | Exercises |
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| Day 1 Lecture Hall – Getting Started | | | |
| 01 | Course Introduction - Welcome | <ul style="list-style-type: none"> Initial Login and Training Account Review | Ex. 01: Login in to NetSuite Training Account |
| 01A | Blended Learning Experience | <ul style="list-style-type: none"> No demos | No exercises |
| 05 | NetSuite Navigation | <ul style="list-style-type: none"> Login and Security NetSuite Center and Web Page Elements Personalize the Home Dashboard Basic Search Options Using Help Resources Browser Functionality and NetSuite | Ex. 01: Set Your Preferences Ex. 02: Set Up Your Dashboard Ex. 03: Use Global Search Ex. 04: Use NetSuite Help |
| 01B | Spotlight Topic: Roles and Permissions | <ul style="list-style-type: none"> Review Standard Roles and Compare | Intro to independent study time |
| File Push | Use WebEx file transfer to share the Podcast PDF document | | |
| Independent Study: Getting Started | | | |
| 02 | NetSuite Fits Your Business Model | <ul style="list-style-type: none"> None | None |
| 03 | OneWorld Overview | <ul style="list-style-type: none"> None | None |
| 04 | Introduction to the Implementation Project | <ul style="list-style-type: none"> NetSuite One | 01: Review the Business Requirements Document |
| 05 | NetSuite Navigation | <ul style="list-style-type: none"> Covered in Lecture Hall | Students can finish the exercises Ex. 01: Set Your Preferences Ex. 02: Set Up Your Dashboard * Ex. 03: User Global Search Ex. 04: Use NetSuite Help |

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|---|--|--|--|
| 06 | Set Company Preferences | <ul style="list-style-type: none"> Initial Set Up Tasks Additional Set Up Tasks Define Preferences OneWorld Classifications Other Setup | Ex. 01: Set Company Information Ex. 02: Enable Features Ex. 03: Rename Records and Transactions Ex. 04: Turn Off Auto-Generated Numbers Ex. 05: Set Company Preferences Ex. 06: Set Printing, Fax & Email Preferences Ex. 07: Create New Subsidiaries OneWorld Ex. 08: Create Elimination Subsidiaries OneWorld |
| 07 | NetSuite Data Model | <ul style="list-style-type: none"> Creating a Record | Ex. 01: Create Customer Record and Enter Contact Ex. 02: Create customer Record and Enter Contact OneWorld Ex. 03: Create Vendor Record and Enter a Contact Ex. 04: Create Vendor Record and Enter a Contact OneWorld Ex. 05: Enter New Employees |
| 08 | Roles and Permissions | <ul style="list-style-type: none"> Review Standard Roles and Compare Create Custom Role Assign a Role and Global Permissions Additional Administrator Tasks Add an Employee Login Audits | Ex. 01: Rename Roles with Your Company's Prefix Ex. 02: Customize a Sales Manager Role Ex. 03: Show Role Differences Ex. 04: Customize a Sales Administrator Role OneWorld Ex. 05: Add a NetSuite User Ex. 06: View the Login Audit Trail |
| Day 2 Lecture Hall – Customization and Data Management | | | |
| 09 | Getting Started: Recap and Review | <ul style="list-style-type: none"> None | None |
| 10 | Create Subtabs, Lists and Fields | <ul style="list-style-type: none"> Create a Subtab for an Entity Create a Custom List and List/Record Field Review a Transaction Record and Add New Body Field | Ex. 01: Create Subtabs and Lists Ex. 02: Create and Apply Fields Ex. 03: Custom Transaction Field – Validation & Defaulting – Sales Order Ex. 04: Custom Transaction Field – Validation & Defaulting – Sales Order Ex. 05: Custom Transaction Field – Validation & Defaulting – Purchase Order |
| 10A | Spotlight Topic: Data Migration | <ul style="list-style-type: none"> Import Assistant – Your Exercise | Intro to independent study time |

| Independent Study: Customization and Data Management | | | |
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| Number | Module Name | Walkthroughs | Exercises |
| 11 | Create Custom Forms | <ul style="list-style-type: none"> • Customize and Entry Form • Transaction Form Layouts • Customize Transaction Form – Layout and Form Elements • Customize Transaction Form – Action, Roles & Linked Forms | Ex. 01: Customize Entry Form Ex. 02: Customize and Employee Form Ex. 03: Custom Transaction Forms – PDF Layouts |
| 12 | Create Custom Records | <ul style="list-style-type: none"> • Create a Custom Record Type • Add Fields and Assign Links for the Custom Record • Edit the custom Record and Form | Ex. 01: Create Custom Record Ex. 02: <i>Create Dependent Dropdowns – OPTIONAL</i> |
| 13 | Data Migration | <ul style="list-style-type: none"> • Covered in Lecture Hall | Ex. 01: Review Auto Numbering Settings* Ex. 02: Import Customers * Ex. 03: Update Customer with Import Ex. 04: Create Custom Import Template – <i>Optional</i> |
| 14 | Data Integrity | <ul style="list-style-type: none"> • Inline Editing and Duplicate Detection • Mass Updates • Use Inline Editing | Ex. 01: Identify and Merge Duplicate Records Ex. 02: Schedule a Mass Update Ex. 03: Create a Saved Search Ex. 04: Set Up and use Inline Editing Ex. 05: Perform Mass update with Calculation - <i>Optional</i> |
| Day 3 Lecture Hall – ERP Part 1 | | | |
| 15 | Customization and Data Management: Recap and Review | <ul style="list-style-type: none"> • None | None |
| 16 | Set Up Accounting Management | <ul style="list-style-type: none"> • Chart of Accounts and General Ledger • Enable Features • Create Classifications • Define General Ledger Preferences • Accounting Periods • GL Accounts and Opening Balances | Ex. 01: Enable Accounting Features and Define Preferences Ex. 02: Set Up Multiple Warehouses Locations Ex. 03: Create General Ledger (GL) Accounts Ex. 04: Set Up Accounting Periods |

| Number | Module Name | Walkthroughs | Exercises |
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| 16A | Spotlight Topic: Items | <ul style="list-style-type: none"> • Enable Features • Review an Item Record • Inventory and Matrix Items • Non-Inventory Items • Service Items • Assembly, Item Group, Kit/Package | Intro to independent study time Share the Software Vertical Contracts Renewal Module – Introductory Guide file through WebEx file transfer |
| Independent Study: ERP Part 1 | | | |
| 17 | User Multiple Currencies | <ul style="list-style-type: none"> • Enable Features and Accounting Preferences • Working with Currencies • Additional <i>OneWorld</i> Considerations • Multi-Currency Customers • Multi-Currency Vendors | Ex. 01: Confirm Features and Set Accounting Preferences Ex. 02: Create New Currencies/Subsidiaries and Update Time Zone Ex. 03: Assign Currencies to a Customer Ex. 04: Assign Currencies to a Vendor |
| 18 | NetSuite Tax Information | <ul style="list-style-type: none"> • None | Ex. 01: Manage Tax Periods Ex. 02: Set Up Tax Schedule |
| 19 | Set up Items | <ul style="list-style-type: none"> • Covered in Lecture Hall | Ex. 01: Enabling Transactions and Inventory Features Ex. 02: Create inventory Items Ex. 03: Create a Non-Inventory Item Ex. 04: Create a Service Item Ex. 05: Create Inventory Item <i>OneWorld</i> Ex. 06: Enter Inventory Quantities |
| 20 | Set Up Pricing | <ul style="list-style-type: none"> • Review an Item Record • Define Pricing Features and Preferences • Using Pricing Features • Set Up Item Pricing • Pricing on a Customer Record • Mass Update for Pricing | Ex. 01: Enabling Pricing Features Ex. 02: Create a Price Level Ex. 03: Add Price Level to Items Ex. 04: Set Up Quantity-Based Pricing Ex. 05: Set up Item Pricing on Customer Record Ex. 06: Use Sales Transactions to Demonstrate Pricing Ex. 07: Generate Price Lists |

| Number | Module Name | Walkthroughs | Exercises |
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| 21 | Order Management | <ul style="list-style-type: none"> Set Up Order Management Order-to-Invoice Process View Sales Order History | Ex. 01: Define Order Management Preferences Ex. 02: Enter a Sales Order Ex. 03: Enter a Sales Order OneWorld Ex. 04: Approve Sales Orders Ex. 05: Fulfill Sales Orders |
| Day 4 Lecture Hall– ERP Part 2 | | | |
| 22 | ERP Part 1: Recap and Review | <ul style="list-style-type: none"> None | None |
| 23 | Accounts Receivable | <ul style="list-style-type: none"> Set Up Account Receivable Sales Order-to-Payment Process Additional Accounts Receivable Tasks Analytics for Accounts Receivable | Ex. 01: Invoice All Sales Orders Ex. 02: Create a Cash Sale Ex. 03: Create an Invoice Ex. 04: Accept Customer Payments Ex. 05: Issue a Return Authorization Ex. 06: Make a Bank Deposit |
| 23A | Spotlight Topic: Accounts Payable | <ul style="list-style-type: none"> Set Up Features and Preference Managing Vendor Bills Processing Bills Vendor Credits Processing Payments | Intro to independent study time |
| 30 | Set Up Sales Force Automation | <ul style="list-style-type: none"> Set Up Sales Force Automation Statuses, Rules and Territories Capture Lead Information | Ex. 01: Enable Sales Force Automation Ex. 02: Set Up an Employee as Sales Rep Ex. 03: Set Sales Force Automation Preferences Ex. 04: Create Customer Statuses Ex. 05: Create a Sales Rule Ex. 06: Create a Sales Territory Ex. 07: Create an Online Form |
| 35 | Go Live and Maintain NetSuite | <ul style="list-style-type: none"> User Adoption | <ul style="list-style-type: none"> Access the NetSuite User Adoption Tools Course Evaluation |
| 36 | Summary and Wrap Up | <ul style="list-style-type: none"> None | <ul style="list-style-type: none"> Course Evaluation reminder |
| 30A | Intro to Self-Study Topics | <ul style="list-style-type: none"> Share the Software Vertical Contracts Renewal Module –Introductory Guide file | Transition to self-study |
| Independent Study: ERP Part 2 | | | |
| 24 | Set Up Purchasing | <ul style="list-style-type: none"> Enable Features | Ex. 01: Enter a Purchase Order Ex. 02: Receive A Purchase Order |

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| | | <ul style="list-style-type: none"> Accounting Preferences Set Up Purchase Approver Processing a Purchase Request Processing a Purchase Order | |
| 25 | Set Up Accounts Payable | <ul style="list-style-type: none"> Covered in Lecture Hall | <p>Students can now do the exercises</p> <p>Ex. 01: View a Purchase Order to Bill in Reminders Portlet</p> <p>Ex. 02: Define Accounting Preferences</p> <p>Ex. 03: Bill a Purchase Order</p> <p>Ex. 04: Enter and Approve a Bill</p> <p>Ex. 05: Pay a Bill</p> <p>Ex. 06: Print a Check</p> |
| 26 | Banking and GL | <ul style="list-style-type: none"> General Ledger Functions <i>OneWorld</i> GL Transactions Banking Transactions Manage Accounting Periods | <p>Ex. 01: Make Journal Entries</p> <p>Ex. 02: Make Elimination Subsidiary Journals – <i>OneWorld - Optional</i></p> <p>Ex. 03: Memorize a Transaction</p> <p>Ex. 04: Close Accounting Periods - <i>Optional</i></p> |
| 27 | Reports and Searches | <ul style="list-style-type: none"> User Needs and NetSuite Reports Gap Analysis Using the NetSuite Report Builder Creating a New Saved Search | <p>Ex. 01: Identify a Prebuilt Report</p> <p>Ex. 02: Restrict Data included in a Prebuilt Report</p> <p>Ex. 03: Add Data to Customer Record</p> <p>Ex. 04: Add Custom Field to NetSuite Standard Report</p> <p>Ex. 05: Create Search to identify Customers in Price Level</p> <p>Ex. 06: Restrict Data Included in the Search</p> |
| 28 | Design Dashboards for Users | <ul style="list-style-type: none"> None | <p>Ex. 01: Design a Dashboard for a Specific User - <i>Optional</i></p> |

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|--|--|--|--|
| Independent Study: CRM and Next Steps | | | |
| 31 | Lead-to-Qualified Lead | <ul style="list-style-type: none"> • Lead-to-Qualified Lead Process • Lead Conversion • Opportunity-to-Quote Process • Quote-to-Sales Order Process | Ex. 01: Work a lead Ex. 02: Generate a Quote from an Opportunity Ex. 03: Generate a Sales Order from a Quote |
| 32 | Customer Support | <ul style="list-style-type: none"> • Initial Setup • Support Case Values • Rules and Territories • Online Form and Preferences • Working a Case | Ex. 01: Enable Customer Service and Support Features Ex. 02: Set Up an Employee as Support Rep Ex. 03: Create a Case Status Ex. 04: Create a Case Priority Ex. 05: Create a Case Type Ex. 06: Create a Case Rule Ex. 07: Create a Case Territory |
| 33 | Incorporate Marketing and Ecommerce | <ul style="list-style-type: none"> • None | None |
| 34 | NetSuite on the Go! | <ul style="list-style-type: none"> • None | None |