

Day 1	Day 2	Day 3	Day 4
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	Exercises
Lecture Hall Day 1 – Getting Started		
01	Course Introduction - Welcome	
01A	Blended Learning Experience	
05	NetSuite Navigation	01: Set Your Preferences 02: Set Up Your Dashboard 03: Use Global Search 04: Use NetSuite Help
01B	Spotlight Topic: Roles and Permissions	
Independent Study: Getting Started		
02	NetSuite Fits Your Business Model	none
03	OneWorld Overview	None
04	Introduction to the Implementation Project	01: Review the Business Requirements Document
05	NetSuite Navigation	01: Set General Preferences 02: Set Up Your Dashboard * 03: User Global Search 04: Use NetSuite Help
06	Set Company Preferences	01: Set Company Information 02: Enable Features 03: Rename Records and Transactions 04: Turn Off Auto-Generated Numbers 05: Set Company Preferences 06: Set Printing, Fax & Email Preferences 07: Create New Subsidiaries <i>OneWorld</i> 08: Create Elimination Subsidiaries <i>OneWorld</i>

Number	Module Name	Exercises
07	NetSuite Data Model	01: Create Customer Record and Enter Contact 02: Create customer Record and Enter Contact <i>OneWorld</i> 03: Create Vendor Record and Enter a Contact 04: Create Vendor Record and Enter a Contact <i>OneWorld</i> 05: Enter New Employees
08	Roles and Permissions	01: Rename Roles with Your Company's Prefix 02: Customize a Sales Manager Role 03: Show Role Differences 04: Customize a Sales Administrator Role <i>OneWorld</i> 05: Add a NetSuite User 06: View the Login Audit Trail
Lecture Hall Day 2 – Customization and Data Management		
09	Getting Started: Recap and Review	
10	Create Subtabs, Lists and Fields	01: Create Subtabs and Lists 02: Create and Apply Fields 03: Custom Transaction Field – Validation & Defaulting – Sales Order 04: Custom Transaction Field – Validation & Defaulting – Sales Order 05: Custom Transaction Field – Validation & Defaulting – Purchase Order
10A	Spotlight Topic: Data Migration	
Independent Study: Customization and Data Management		
11	Create Custom Forms	01: Customize Entry Form 02: Customize and Employee Form 03: Custom Transaction Forms – PDF Layouts

Number	Module Name	Exercises
12	Create Custom Records	01: Create Custom Record 02: Create Dependent Dropdowns – <i>OPTIONAL</i>
13	Data Migration	01: Review Auto Numbering Settings* 02: Import Customers * 03: Update Customer with Import 04: Create Custom Import Template – <i>Optional</i>
14	Data Integrity	01: Identify and Merge Duplicate Records 02: Schedule a Mass Update 03: Create a Saved Search 04: Set Up and use Inline Editing 05; Perform Mass update with Calculation - <i>Optional</i>
Lecture Hall Day 3– ERP Part 1		
15	Customization and Data Management: Recap and Review	none
16	Set Up Accounting Management	01: Enable Accounting Features and Define Preferences 02: Set Up Multiple Warehouses Locations 03: Create General ledger (GL) Accounts 04: Set Up Accounting Periods
16A	Spotlight Topic: Items	Software Vertical Contracts Renewal Modules – Introductory Guide file

Number	Module Name	Exercises
Independent Study: ERP Part 1		
17	User Multiple Currencies	01: Confirm Features and Set Accounting Preferences 02: Create New Currencies/Subsidiaries and Update Time Zone 03: Assign Currencies to a Customer 04: Assign Currencies to a Vendor
18	NetSuite Tax Information	01: Manage Tax Periods 02: Set Up Tax Schedule
19	Set up Items	Students can now do the exercises 01: Enabling Transactions and Inventory Features * 02: Create inventory Items * 03: Create a Non-Inventory Item * 04: Create a Service Item* 05: Create Inventory Item <i>OneWorld</i> * 06: Enter Inventory Quantities *
20	Set Up Pricing	01: Enabling Pricing Features * 02: Create a Price Level * 03: Add Price Level to Items* 04: Set Up Quantity-Based Pricing 05: Set up Item Pricing on Customer Record 06: Use Sales Transactions to Demonstrate Pricing 07: Generate Price Lists
21	Order Management	01: Define Order Management Preferences * 02: Enter a Sales Order * 03: Enter a Sales Order <i>OneWorld</i> * 04: Approve Sales Orders * 05: Fulfill Sales Orders

Number	Module Name	Exercises
Lecture Hall Day 4– ERP Part 2, CRM and Next Steps		
22	ERP Part 1: Recap and Review	
23	Accounts Receivable	01: Invoice All Sales Orders * 02: Create a Cash Sale * 03: Create an Invoice * 04: Accept Customer Payments * 05: Issue a Return Authorization * 06: Make a Bank Deposit
23A	Spotlight Topic: Accounts Payable	
30	Set Up Sales Force Automation	01: Enable Sales Force Automation * 02: Set Up an Employee as Sales Rep * 03: Set Sales Force Automation Preferences * 04: Create Customer Statuses * 05: Create a Sales Rule * 06: Create a Sales Territory * 07: Create an Online Form *
35	Go Live and Maintain NetSuite	
36	Summary and Wrap Up	
30A	Intro to Self-Study Topics	
Independent Study: ERP Part 2		
24	Set Up Purchasing	01: Enter a Purchase Order * 02: Receive A Purchase Order
25	Set Up Accounts Payable	01: View a Purchase Order to Bill in Reminders Portlet 02: Define Accounting Preferences 03: Bill a Purchase Order* 04: Enter and Approve a Bill * 05: Pay a Bill * 06: Print a Check

26	Banking and GL	01: Make Journal Entries 02: Make Elimination Subsidiary Journals – OneWorld - <i>Optional</i> 03: Memorize a Transaction 04: Close Accounting Periods - <i>Optional</i>
27	Reports and Searches	01: Identify a Prebuilt Report 02: Restrict Data included in a Prebuilt Report 03: Add Data to Customer Record 04: Add Custom Field to NetSuite Standard Report 05: Create Search to identify Customers in Price Level 06: Restrict Data Included in the Search
28	Design Dashboards for Users	01: Design a Dashboard for a Specific User - <i>Optional</i>
Independent Study: CRM and Next Steps		
31	Lead-to-Qualified Lead	01: Work a lead * 02: Generate a Quote from an Opportunity 03: Generate a Sales Order from a Quote

Number	Module Name	Exercises
32	Customer Support	01: Enable Customer Service and Support Features 02: Set Up an Employee as Support Rep 03: Create a Case Status 04: Create a Case Priority 05: Create a Case Type 06: Create a Case Rule 07: Create a Case Territory
33	Incorporate Marketing and Ecommerce	
34	NetSuite on the Go!	