Blended Learning: Essentials Instructor Agenda - 2015v2

Module	Agenda Topics and Exercises – Day One	
01	**Lecture Hall** • **Course Introduction – Welcome**	
01A	• **Blended Learning Experience** then *Suggested 5-minute Break*	
05	• **NetSuite Navigation**	
01B	• **Spotlight Lecture: Roles and Permission** • Introduce Self-study topics , exercises, and other training assets	
File Push	• **Use WebEx file transfer to share PodCast PDF document**	
Independent Study: Getting Started		
02	**NetSuite Fits Your Business Model** • 01: Login In To NetSuite *	
03	**OneWorld Overview** • No exercises	
04	**Introduction to the Implementation Project** • 01: Review the Business Requirement Document)	
05	**Navigating the Application** • 01: Set General Preferences) • 02: Set Up Your Dashboard * • 03: User Global Search • 04: Use NetSuite Help	
06	**Set up 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 – *OneWorld* * • 08: Create Elimination Subsidiaries – *OneWorld* *	
07	**NetSuite Data Model** • 01: Create Customer and Contact * • 02: Create Customer and Contact – *OneWorld* * • 03: Create Vendor and Contact * • 04: Create Vendor and Contact – *OneWorld* • 05: Enter New Employees *	
08	**NetSuite Roles and Permissions** • 01: Rename Roles • 02: Customize Sales Manager Role • 03: Show Role Differences • 04: Customize Sales Administrator Role – *OneWorld* • 04: Add a NetSuite User • 05: View the Login Audit Trail	

* Denotes required exercises

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Module	Agenda Topics and Exercises – Day Two	
09	**Lecture Hall #2 - Morning** • **Recap/Review Getting Started**	
10	• **Customization: Subtabs, Lists, and Fields**	
10A	• **Spotlight Lecture: Data Migration** • Introduce Self-study topics , exercises, and other training assets	
Independent Study: Customization and Data Management		
10	**Customization: Subtabs, Lists, and Fields** • 01: Create Subtabs and Lists * • 02: Create and Apply Fields (10-02)* • 03: Custom Transaction Fields, Validation & Defaulting * • 04: Custom Transaction Field, Sourcing & Filtering * • 05: Custom Transaction Fields, Sourcing & Filtering	
11	**Create Custom Forms** • 01: Edit Entry Forms* • 02: Internal Custom Form • 03: Custom Transaction Form – PDF Layout)	
12	**Create Custom Records** • 01: Create Custom Records	
13	**Migrate Your Data** • 01: Review Auto Numbering Settings (13-01)* • 02: Import Customers * • 03: Update Customer with Import • 04: Create Custom Import Template – *Optional*)	
14	**Data Integrity** • 01: Identify and Merge Duplicate Records • 02: Schedule a Mass Update • 03: Create a Saved Search • 04: Set Up and Use Direct List Editing • 05: Mass Update w/ Calculation – *Optional*	

* Denotes required exercises

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Module	Agenda Topics and Exercises – Day Three	
15	**Lecture Hall #3 - Morning** • **Recap/Review Customization and Data Management**	
16	• **Accounting Management** then *Suggested 10-minute Break*	
16A	• **Spotlight Lecture: Items Overview**	
File Push	• Introduce Self-study topics , exercises, and other training assets • **Use WebEx file transfer to share Software Vertical Intro. Guide**	
Independent Study: ERP Part 1		
16	**Accounting Management** • 01: Enabling Accounting Features * • 02: Set Up Multiple Warehouses * • 03: Create GL Accounts * • 04: Set Up Accounting Periods *	
17	**Multiple Currencies** • 01: Create New Currencies and Subsidiaries – *OneWorld* • 02: Assign Currencies to Customer • 03: Assign Currencies to Vendor	
18	**Tax** • 08: Manage Tax Periods - *OneWorld-* • 09: Set Up Tax Schedule NOTE: required for all classes	
19	**Items** • 01: Enabling Transactions and Inventory Features * • 02: Create inventory Items * • 03: Create a Non-Inventory Item * • 04: Create a Service Item (19-04)* • 05: Create Inventory Item – *OneWorld* – * • 06: Enter Inventory Quantities *	
20	**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 – *OneWorld** • 04: Approve Sales Orders * • 05: Fulfill Sales Orders	

* Denotes required exercises

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Module	Agenda Topics and Exercises – Day Four	
22	**Lecture Hall #4 - Morning** • **Recap/Review ERP Part 1**	
23	• **Accounts Receivable**	
23A	• **Spotlight Lecture: Accounts Payable Overview** • Introduce Self-study topics , exercises, and other training assets	
Independent Study: ERP Part 2		
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	
24	**Set Up Purchasing** • 24: Enter a Purchase Order * • 25: Receive A Purchase Order	
25	**Set Up Accounts Payable** • 01: View a Purchase Order from Reminders • 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 (26-01) • 02: Make Elimination Subsidiary Journals – *OneWorld* • 03: Memorize a Transaction • 04: Close Accounting Periods	
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 Dashboard for Specific Role - *Optional Exercise*	

* Denotes required exercises

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Module	Agenda Topics and Exercises – Day Five	
29	**Lecture Hall #5 - Morning** • **Recap/Review of ERP Part 2**	
30	• **Sales Force Automation**	

30A File Push	• Introduce Self-study topics , exercises, and other training assets
	• **Use WebEx file transfer to again offer sharing of the following files:**
	  ○ **Software Vertical Contract Renewals Module – Introductory Guide**
	• **Go Live and Maintain NetSuite**
	  ○ **Please do the Online Evaluation: http://psu.netsuite.com/admin**
	• **Summary/ Evaluations/Wrap Up**	

Independent Study: SFA/CRM		
30	**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 *	
31	**Lead-to-Customer Management** • 01: Work a lead * • 02: Generate a Quote from an Opportunity • 03: Generate a Sales Order from a Quote	
32	**Customer Support and Case Management** • 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 Automation and Ecommerce** • no exercises	
34	**NetSuite on the Go** • no exercises	
35	**Go Live and Maintain NetSuite** • Evaluation	
36	**Summary / Wrap-up / Conclusion**	

* Denotes required exercises