Day 1	Day 2	Day 3	Day 4	Day 5
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	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	2:00 pm – 5:00 pm Independent Study

Number	Module Name	Exercises
Lecture Hall – 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**	Intro to independent study time
Independent Study: Getting Started		
02	**NetSuite Fits Your Business Model**	
03	**OneWorld Overview**	
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

Number	Module Name	Exercises

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 *OneWorld*
		08: Create Elimination Subsidiaries *OneWorld*
07	NetSuite Data Model	01: Create Customer Record and Enter Contact
		02: Create customer Record and Enter Contact *OneWorld*
		03: Create Vendor Record and Enter a Contact
		04: Create Vendor Record and Enter a Contact *OneWorld*
		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 *OneWorld*
		05: Add a NetSuite User
		06: View the Login Audit Trail

Lecture Hall – 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		

Number	Module Name	Exercises
11	**Create Custom Forms**	01: Customize Entry Form 02: Customize and Employee Form 03: Custom Transaction Forms – PDF Layouts
12	**Create Custom Records**	01: Create Custom Record *02: Create Dependent Dropdowns – OPTIONAL*
13	**Data Migration**	01: Review Auto Numbering Settings* 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 Inline Editing 05; Perform Mass update with Calculation - *Optional*
Lecture Hall – ERP Part 1		
15	**Customization and Data Management: Recap and Review**	
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

Number	Module Name	Exercises
16A	**Spotlight Topic: Items**	Software Vertical Contracts Renewal Modules – Introductory Guide file
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**	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 *OneWorld* * 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

Number	Module Name	Exercises
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
Lecture Hall – ERP Part 2		
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	
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

Number	Module Name	Exercises
26	Banking and GL	01: Make Journal Entries 02: Make Elimination Subsidiary Journals – OneWorld - *Optional* 03: Memorize a Transaction 04: Close Accounting Periods - *Optional*
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 - *Optional*
Lecture Hall – CRM and Next Steps		
29	ERP Part 2: Recap and Review	
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	

Number	Module Name	Exercises
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
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!**	