NetSuite Essentials- North America Course Agenda

Mon	Tue	Wed	Thu	Fri
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

Module	Agenda Topics and Exercises – Day One	
01 **01A** **05** ****** **01B** ****** **File Push**	**Lecture Hall** • **Course Introduction – Welcome** • **Blended Learning Experience** then *Suggested 5-minute Break* • **NetSuite Navigation** • *Suggested 10-minute Break* • **Spotlight Lecture: Roles and Permission** • Introduce Self-study topics , exercises, and other training assets • **Use WebEx file transfer to share PodCast PDF document**	
Independent Study: Getting Started		
02	**NetSuite Fits Your Business Model** • Login In To NetSuite (01-01)*	
03	**OneWorld Overview** • No exercises	
04	**Introduction to the Implementation Project** • Review the Business Requirement Document (01-01)	
05	**Navigating the Application** • Set General Preferences (05-01) • Set Up Your Dashboard (05-02)* • User Global Search (05-03) • Use NetSuite Help (05-04)	
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)	

* Denotes required exercises

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Module	Agenda Topics and Exercises – Day Two	
	Study Hall/Office Hours	
09 ****** **10** ****** **10A** ******	**Lecture Hall #2 - Morning** • **Recap/Review Getting Started** • *Suggested 5-minute Break* • **Customization: Subtabs, Lists, and Fields** • *Suggested 10-minute Break* • **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** • Create Subtabs and Lists (10-01)* • Create and Apply Fields (10-02)* • Custom Transaction Fields, Validation & Defaulting (10-03)* • Custom Transaction Field, Sourcing & Filtering (10-04)* • Custom Transaction Fields, Sourcing & Filtering (10-05)	
11	**Create Custom Forms** • Edit Entry Forms (11-01)* • Internal Custom Form (11-02) • Custom Transaction Form – PDF Layout (11-03)	
12	**Create Custom Records** • Create Custom Records (12-01)	
13	**Migrate Your Data** • Review Auto Numbering Settings (13-01)* • Import Customers (13-02)* • Update Customer with Import (13-03) • Create Custom Import Template – *Optional* (13-04)	
14	**Data Integrity** • Identify and Merge Duplicate Records (14-01) • Schedule a Mass Update (14-02) • Create a Saved Search (14-03) • Set Up and Use Direct List Editing (14-04) • Mass Update w/ Calculation – *Optional* (14-05)	

* Denotes required exercises

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Module	Agenda Topics and Exercises – Day Three	
	Study Hall/Office Hours	
15 ****** **16** **16A** ******* **File Push**	**Lecture Hall #3 - Morning** • **Recap/Review Customization and Data Management** • *Suggested 5 or 10-minute Break* • **Accounting Management** then *Suggested 10-minute Break* • **Spotlight Lecture: Items Overview** • 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** • Enabling Accounting Features (16-01)* • Set Up Multiple Warehouses (16-02)* • Create GL Accounts (16-03)* • Set Up Accounting Periods (16-04)*	
17	**Multiple Currencies** • Create New Currencies and Subsidiaries – *OneWorld* – (17-01) • Assign Currencies to Customer (17-02) • Assign Currencies to Vendor (17-03)	
18	**Tax** • Manage Tax Periods - *OneWorld*- (18-01) • Set Up Tax Schedule NOTE: required for all classes (18-02)	
19	**Items** • Enabling Transactions and Inventory Features (19-01)* • Create inventory Items (19-02)* • Create a Non-Inventory Item (19-03)* • Create a Service Item (19-04)* • Create Inventory Item – *OneWorld* – (19-05)* • Enter Inventory Quantities (20-06)*	
20	**Pricing** • Enabling Pricing Features (20-01)* • Create a Price Level (20-02)* • Add Price Level to Items (20-03)* • Set Up Quantity-Based Pricing (20-04) • Set up Item Pricing on Customer Record (20-05) • Use Sales Transactions to Demonstrate Pricing (20-06) • Generate Price Lists (20-07)	
21	**Order Management** • Define Order Management Preferences (21-01)* • Enter a Sales Order (21-02)* • Enter a Sales Order – *OneWorld* – (21-03)* • Approve Sales Orders (21-04)* • Fulfill Sales Orders (21-05)	

* Denotes required exercises

NetSuite Essentials- North America Course Agenda

Module	Agenda Topics and Exercises – Day Four	
	Study Hall/Office Hours	
22 ****** **23** ****** **23A** ******	**Lecture Hall #4 - Morning** • **Recap/Review ERP Part 1** • *Suggested 5-minute Break* • **Accounts Receivable** • *Suggested 10-minute Break* • **Spotlight Lecture: Accounts Payable Overview** • Introduce Self-study topics , exercises, and other training assets	
Independent Study: ERP Part 2		
23	**Accounts Receivable** • Invoice All Sales Orders (23-01)* • Create a Cash Sale (23-02)* • Create an Invoice (23-03)* • Accept Customer Payments (23-04)* • Issue a Return Authorization (23-05)* • Make a Bank Deposit (23-06)	
24	**Set Up Purchasing** • Enter a Purchase Order (24-01)* • Receive A Purchase Order (24-02)	
25	**Set Up Accounts Payable** • View a Purchase Order from Reminders (25-01) • Define Accounting Preferences (25-02) • Bill a Purchase Order (25-03)* • Enter and Approve a Bill (25-04)* • Pay a Bill (25-05)* • Print a Check (25-06)	
26	**Banking and GL** • Make Journal Entries (26-01) • Make Elimination Subsidiary Journals – *OneWorld* – (26-02) • Memorize a Transaction (26-03) • Close Accounting Periods (26-04)	
27	**Reports and Searches** • Identify a Prebuilt Report (27-01) • Restrict Data included in a Prebuilt Report (27-02) • Add Data to Customer Record (27-03) • Add Custom Field to NetSuite Standard Report (27-04) • Create Search to identify Customers in Price Level (27-05) • Restrict Data Included in the Search (27-06)	
28	**Design Dashboards for Users** • Design Dashboard for Specific Role (28-01) *Optional Exercise*	

* Denotes required exercises

NetSuite Essentials- North America Course Agenda

Module	Agenda Topics and Exercises – Day Five	
	Study Hall/Office Hours	

29
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30
30A
File Push
	Lecture Hall #5 - Morning
	• **Recap/Review of ERP Part 2**
	• *Suggested 5-minute Break*
	• **Sales Force Automation**
	• Introduce Self-study topics , exercises, and other training assets
	• **Use WebEx file transfer to again offer sharing of the following files:**
	  o **Software Vertical Contract Renewals Module – Introductory Guide**
	• **Go Live and Maintain NetSuite**
	  o **Please do the Online Evaluation: http://psu.netsuite.com/admin**
	• **Summary/ Evaluations/Wrap Up**	

Independent Study: SFA/CRM		
30	**Sales Force Automation** • Enable Sales Force Automation (30-01)* • Set Up an Employee as Sales Rep (30-02)* • Set Sales Force Automation Preferences (30-03)* • Create Customer Statuses (30-04)* • Create a Sales Rule (30-05)* • Create a Sales Territory (30-06)* • Create an Online Form (30-07*)	
31	**Lead-to-Customer Management** • Work a lead (31-01)* • Generate a Quote from an Opportunity (31-02) • Generate a Sales Order from a Quote (31-03)	
32	**Customer Support and Case Management** • Enable Customer Service and Support Features (32-01) • Set Up an Employee as Support Rep (32-02) • Create a Case Status (32-03) • Create a Case Priority (32-04) • Create a Case Type (32-05) • Create a Case Rule (32-06) • Create a Case Territory (32-07)	
33	**Incorporate Marketing Automation and Ecommerce** • no exercises	
34	**NetSuite on the Go** • no exercises	

* Denotes required exercises