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	Walkthroughs	Exercises
Lecture Hall Day 1 – Getting Started			
01	**Course Introduction - Welcome**	• Initial Login and Training Account Review	Ex. 01: Login in to NetSuite Training Account
01A	**Blended Learning Experience**	• No demos	No exercises
05	**NetSuite Navigation**	• 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**	• 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**	• None	None
03	**OneWorld Overview**	• None	None
04	**Introduction to the Implementation Project**	• NetSuite One	01: Review the Business Requirements Document
05	**NetSuite Navigation**	• 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

Number	Module Name	Walkthroughs	Exercises
06	**Set Company Preferences**	• 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**	• 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**	• 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
Lecture Hall Day 2 – Customization and Data Management			
09	**Getting Started: Recap and Review**	• None	None
10	**Create Subtabs, Lists and Fields**	• 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**	• Import Assistant – Your Exercise	Intro to independent study time

Number	Module Name	Walkthroughs	Exercises
Independent Study: Customization and Data Management			
11	**Create Custom Forms**	• 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**	• 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: Create Dependent Dropdowns – OPTIONAL*
13	**Data Migration**	• 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 – *Optional*
14	**Data Integrity**	• 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 - *Optional*
Lecture Hall Day 3 – ERP Part 1			
15	**Customization and Data Management: Recap and Review**	• None	None
16	**Set Up Accounting Management**	• 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
16A	**Spotlight Topic: Items**	• 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**	• Enable Features and Accounting Preferences • Working with Currencies • Additional *OneWorld* 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**	• None	Ex. 01: Manage Tax Periods Ex. 02: Set Up Tax Schedule
19	**Set up Items**	• 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 *OneWorld* Ex. 06: Enter Inventory Quantities
20	**Set Up Pricing**	• 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
21	**Order Management**	• 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
Lecture Hall Day 4 – ERP Part 2			
22	**ERP Part 1: Recap and Review**	• None	None
23	**Accounts Receivable**	• 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**	• Set Up Features and Preference • Managing Vendor Bills • Processing Bills • Vendor Credits • Processing Payments	Intro to independent study time
Independent Study: ERP Part 2			
24	**Set Up Purchasing**	• Enable Features • Accounting Preferences • Set Up Purchase Approver • Processing a Purchase Request • Processing a Purchase Order	Ex. 01: Enter a Purchase Order Ex. 02: Receive A Purchase Order
25	**Set Up Accounts Payable**	• Covered in Lecture Hall	Students can now do the exercises Ex. 01: View a Purchase Order to Bill in Reminders Portlet Ex. 02: Define Accounting Preferences Ex. 03: Bill a Purchase Order Ex. 04: Enter and Approve a Bill Ex. 05: Pay a Bill Ex. 06: Print a Check

Number	Module Name	Walkthroughs	Exercises
26	**Banking and GL**	• General Ledger Functions • *OneWorld* GL Transactions • Banking Transactions • Manage Accounting Periods	Ex. 01: Make Journal Entries Ex. 02: Make Elimination Subsidiary Journals – OneWorld - *Optional* Ex. 03: Memorize a Transaction Ex. 04: Close Accounting Periods - *Optional*
27	**Reports and Searches**	• User Needs and NetSuite Reports • Gap Analysis • Using the NetSuite Report Builder • Creating a New Saved Search	Ex. 01: Identify a Prebuilt Report Ex. 02: Restrict Data included in a Prebuilt Report Ex. 03: Add Data to Customer Record Ex. 04: Add Custom Field to NetSuite Standard Report Ex. 05: Create Search to identify Customers in Price Level Ex. 06: Restrict Data Included in the Search
28	**Design Dashboards for Users**	• None	Ex. 01: Design a Dashboard for a Specific User - *Optional*
Lecture Hall Day 5 – CRM and Next Steps			
29	**ERP Part 2: Recap and Review**	• None	None
30	**Set Up Sales Force Automation**	• 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**	• User Adoption	• Access the NetSuite User Adoption Tools • Course Evaluation
36	**Summary and Wrap Up**	• None	• Course Evaluation reminder
30A	**Intro to Self-Study Topics**	• Share the Software Vertical Contracts Renewal Module –Introductory Guide file	Transition to self-study

Number	Module Name	Walkthroughs	Exercises
Independent Study: CRM and Next Steps			
31	**Lead-to-Qualified Lead**	• 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**	• 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**	• None	None
34	**NetSuite on the Go!**	• None	None