SuiteTraining

Training Courses

Course/s	Audience	Duration	Price/Per Person
CRM & SalesForce Automation	Sales Manager Sales Executive Sales Admin Marketing Manager	1 day	POA
NetSuite Finance Fundamentals	Finance Accounting Professionals responsible for AP/AR, Budgeting	1 day	POA
NetSuite Essentials	Administrators and project teams who are responsible for the setup, configuration and maintenance of the NetSuite application within their organization. IT managers, business analysts and business process owners	5 days	POA
NetSuite Administrator Course	Administrator and project team who are responsible for maintenance of NetSuite	2 days	POA

*If you require assistance around NetSuite process consulting, please contact sales@abvt.com.au to get a separate quote.

CRM & SalesForce Automations

Topics Covered

- Setup SFA and CRM options in NetSuite to optimize efficiency and reporting functionality
- Create and manage Sales Rules and Territories
- Set up Online Lead Forms to bring new leads directly into NetSuite
- Create CSV import mapping to make lead import easy and quick
- Understand the relationship and flow of Opportunities, Estimates, Sales Orders, Cash Sales and Invoices, and how these feed into the sales reports
- Create email campaigns so that sales reps can target their Customers directly
- Review the Forecasting and Pipeline setup and functionality, and impact of setup on the associated reports
- Review key sales and CRM activity reports to gain deeper understanding of my business
- Design sales manager and sales rep dashboards to facilitate daily tasks
- Relationships & Records
- Creating Leads/Prospects/Customers
- Creating Contacts
- Creating & Using Opportunities
- Creating Estimates, Sales Orders
- Sales Setup Sales Preferences
- Setting up Sales Rules
- Sales Territories Sales Quotas
- Forecasting and Tracking Setting up
- Sales Quotas Using the Forecast Editor Forecast Reports
- Duplicate Detection Settings
- Merging Duplicates
- Communication Tracking
- NetSuite Calendar
- Activity Management
- Activity Tracking
- Marketing Automation
- Categorising Customers and Setting up Groups
- Creating a Saved Search for Marketing
- Creating Groups Marketing Test Cells
- Subscription Categories
- Creating a new subscription category
- Managing contact subscriptions
- Email Templates and Bulk Merging from NetSuite
- Creating an Email Template Merging Data Campaigns
- Creating a Campaign Record
- Campaigns Tracking
- Campaign Revenue
- Online Customer Forms Creating an online customer form
- CRM mobile access

NetSuite Finance Fundamentals

Topics Covered

- Perform the day-to-day tasks associated with the AR, AP, Accountant and Controller roles.
- Set up the general ledger to facilitate segmenting of financial reporting
- Manage customer relationships to ensure my company is paid the money owed for providing goods or services?
- Manage vendor relationships to ensure my company reflects the debts owed for receiving goods or services?
- Identify and use general ledger functionality?
- Setup and use multiple budgets so that I can plan my future income and expenditure, then track how I am doing against the plan?
- Setup and use expense allocation so that my expenditure is automatically spread throughout my organization without the need to manually process journals? • Setup and use billing schedules to automate billing to my customers, so that my customers receive their bills in a timely manner?
- Subsidiaries, Classifications and Chart of Accounts
- AP/AR
- Billing Schedules
- Banking and Payment Processing
- Working with Journal Entries
- Expense Allocation
- Financial Reports and Standard KPIs
- Period and Year End Close
- Smart Dashboards

NetSuite Essentials

Topics Covered

- Describe the role and tasks of the implementation team.
- Use NetSuite basic functionality.
- Configure your account using the Setup Manager to enable features and define preferences.
- Manage data security; defining users' roles and permissions.
- Customize the user interface.
- Initial setup of enterprise resource planning.
- Extract business intelligence.
- Initial setup of customer relationship management.
- Consider ongoing maintenance of the NetSuite account

Day 1: Getting Started

Getting Started How Does NetSuite Fit Your Business: Review business rules and processes; NetSuite's Software-as-a-Service (SaaS) model and relational database.

Overview of OneWorld: High-level introduction to building subsidiary structure.

Introduction to the Implementation Team: Administrator responsibilities and tasks prior to "Go live;" ongoing and Post "Go live;" phases of an Implementation Project.

Navigate the Application: Log in to NetSuite; interface elements; settings portlet; personal preferences; customize your Home page; help options; terminology.

Set Up Company Preferences: Enter company information; set up subsidiaries; set general preferences; introduce enable features; rename records and transactions; set auto-generated numbers; set printing, fax and email.

Understand NetSuite Data Model: Study how NetSuite characterizes and classifies data, defines user access to data and the impact on reports; major record types and how related records are structured.

Roles, Permissions and Users: Standard roles; create custom roles; assign permissions to roles; use global permissions; Add new users to NetSuite application; view audit login trail.

Day 2 : Customisations and Data Management

Customization: Subtabs, Lists and Fields: Introduction to the SuiteCloud platform; use SuiteBuilder to create subtabs, lists and fields.

Create Custom Forms: Continue with SuiteBuilder to create custom forms to meet company requirements.

Create Custom Records: Create custom records to meet company requirements.

Migrate Your Data: Introduce Import Assistant; prepare data for import; consider file formatting guidelines; look at data handling options; investigate migrating customer, vendors and partners.

Data Integrity: Mass updates; duplicate detection and merge.

Day 3: ERP Part 1

Set Up Accounting Management: Set up accounting preferences; manage accounting periods; Chart of Accounts.

Multiple Currencies: Facilitate transactions and reporting in multiple currencies.

Tax Information: Introduce terminology and features that impact taxation in NetSuite.

Set Up Items: Review inventory process flow; set up items; types of items, kits, groups and assemblies; set inventory levels.

Set Up Pricing: Review pricing process flow; explore different pricing strategies and features.

Set Up Order Management: Introduce quote-to-order process and fulfillment flow; set up sales orders; transaction types; sales order forms; types of fulfillment.

Day 4: ERP Part 2

Set Up Accounts Receivable (A/R): Introduce invoice to payment process flow; review accounting preferences; set up A/R features and preferences; accept customer payments, issue customer refunds, return authorizations, credit memos; generate statements.

Set Up Purchasing: Review purchasing process flows (Inventory and Non Inventory); enter a purchase order (PO); receive items on PO; partial receipts; order items (monitoring inventory levels).

Set Up Accounts Payable: Review accounts payable process flow; set up accounts payable features and preferences; bill purchase orders; enter a bill; pay bills; print checks.

Perform Banking and General Ledger (GL) Tasks: Write checks; transfer funds; reconcile monthly bank and credit card statements in NetSuite.

Reports and Searches: The Report Interface; schedule reports; review Standard Reports; customize a report; create a new report; search for records; create a saved search; saved searches on the Home Dashboard.

Design Dashboards: Dashboard development process; dashboard layout considerations; home dashboard considerations.

Day 5: CRM, Go-Live and Course Summary

Set Up Sales Force Automation: Introduce Customer Relationship Management (CRM); introduce the sales process flow; customer statuses (probability for forecasting); set up sales preferences; sales teams; sales rules; sales territories; online customer forms.

Lead-to-Customer Management: Introduce sales lead-to-quote and estimate to sales order process flows; enter a lead; add an opportunity lead-to-prospect-to-customer lifecycle; opportunity-to-estimate; estimate-to-sales order; manage your activities. Set Up Customer

Support and Use Case Management: Set up support preferences; case statuses; case priorities; case types; case origin types; case rules; case territories; online case forms; standard reports; introduce standard support process flow; enter a case; grab a case; reassign a case; escalate a case; manage activities on your case.

NetSuite on the Go: Look at the available options for mobile access to your NetSuite Account and the related help resources.

Go Live and Maintain NetSuite: Ongoing maintenance activities; NetSuite Support; User Group; considerations around the “Go Live” event.

Course Summary: Review objectives, resources and wrap up course.

NetSuite Administrator Course

Topics Covered

The 2-day NetSuite Administrator training course has been designed for people who are responsible for the configuration, setup and/or daily administration of their NetSuite system.

Accessing NetSuite
Using Help in NetSuite : Using field help, screen help and user guides.
NetSuite Setup : Enable Features, General Preferences, Printing, Fax and Email Preferences, Set other administrative options
Creating Your Company Structure : Using departments, classes and locations
Employees, Roles, Access to NetSuite : Creating employees, Customising roles, Publishing Dashboards
Items : Item types, Creating New Items
The NetSuite Calendar : Setting Calendar Preferences, Using Your Calendar, Creating Events and Tasks, Setting up events and tasks
Emailing from NetSuite : Sending emails from NetSuite, Outlook Integration
Uploading Documents into NetSuite : Using the Filing Cabinet
Finding Records in NetSuite : Using Global search, quick search and saved searches.
Running Reports in NetSuite : Running and customising NetSuite reports
Managing Duplicate Records : Detecting duplicates and managing duplicate records
Customisation, Customising fields and forms and Searches
Customer, Partner and Employee Centres : Modifying the customer, partner and employee centre
Sales : Sales Preferences, Sales Rules and Territories
Support : Support preferences, Setting up case statuses, priorities, types, origin types, issues., Escalation process
Advanced Topics : Using custom records