

# ORACLE NETSUITE FUNCTIONAL

## COURSE CURRICULUM

### Topic

#### 1. NetSuite Basics

- Getting Help
- Navigating NetSuite
- Logging in to NetSuite
- Setting Personal Preferences
- Working with Email
- Working with the File Cabinet

#### 2. NetSuite navigation

- Login to NetSuite
- Set your preferences
- Setup your dashboard
- Use global search
- Use NetSuite help

#### 3. Setup company preferences

- Set company information
- Enable Features
- Rename Records & Transactions
- Turn off Auto Generated number
- Set company preferences
- Set printing, Fax, and Email Preferences

#### 4. Locations, Subsidiaries, etc.

- How to Create a Location and Subsidiary, Importance of Subsidiaries?

#### 5. Employee

- Adding an Employee Record
- Giving an Employee Access to NetSuite
- Assigning the Employee as Sales Rep
- How To View List Of Employees?

## 6. Entities and Create Entity Records

- Create customer records
- Create vendor records

## 7. SuiteAnalytics

- Dashboards
- Search
- Reports

## 8. Dashboards

- Dashboards Overview
- Key Performance Indicators Overview
- KPI Scorecards Overview
- Report Snapshots Overview
- Publishing Dashboards Overview
- FAQ: Dashboards

## 9. Search

- Search Overview
- Finding Records
- Saved Searches
- Defining a Saved Search
- Exploring and accessing a saved search
- Permissions for saved search
- Displaying saved search results in dashboards
- Saved Search Examples
- Reporting Overview

## 10. Reports

- Working with Standard Report Results
- Standard Report Customization
- Managing Reports
- FAQ: Reports

## 11. Other Core Functionalities

- Overview of OneWorld
- Roles, Permissions and Users
- Customization: Subtabs, Lists and Fields, Forms and Records
- Migrate Your Data

- Data Integrity
- Multiple Currencies
- Tax Information
- Items
- Pricing
- Order Management
- Fixed Assets
- Accounts Receivable (AR)
- Purchasing
- Customer Support and Case Management

## **12. CRM**

- Leads, Transaction related to Lead
- Prospect, Transaction related to Prospect
- Customer, Transaction related to Customer
- Importance of CRM

## **13. Order Management**

- Define order management preference
- Enter a sales order
- Approval
- Fulfill sales order
- Pick
- Pack
- Ship
- Invoice
- Cash Sales
- Accept customer payment
- Issue a return authorization
- Make a bank Deposit

## **14. Purchasing & Receiving**

- Enter Purchase Order
- Enter and approve a purchase order
- Receive all items on a purchase order
- Bill a purchase order
- Pay a Bill
- Vendor Return Authorization

## **15. Inventory Management**

- Setup Items
- Create Inventory Items

- Create a Non-Inventory Items
- Service Items
- Other types of Item
- Enter Inventory Quantities
- Inventory Transfer
- Inventory Adjustment

## **16. Accounting**

- Creating Accounts, what are General Ledgers?
- Uploading Bills and Payments
- Bank Reconciliation
- Make Journal Entries
- Memorize a transaction
- Financial Reports

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