WHOLESALE/DISTRIBUTION: FUNDAMENTALS

Course Description

Do you need to learn how to manage a NetSuite Wholesale Distribution (WD) account? If so, this course will provide you with the foundational knowledge needed to implement and optimally maintain your NetSuite solution.

Wholesale/Distribution: Fundamentals examines key implementation tasks to provide the foundational knowledge needed to optimize NetSuite for your users' business needs.

This three-day course begins with a high-level introduction of NetSuite capabilities before turning to the tasks performed, based on leading practices, by business process owners and administrators. The course concludes by exploring best practices and techniques to ensure ongoing optimal use of your NetSuite system.

Demonstrations and hands-on exercises will be conducted in a NetSuite SuiteSuccess Wholesale Distribution account.

Key Tasks

How do I:

- Complete key initial implementation tasks?
- Add users and set access levels per role?
- Create additional customization to tailor the account to our needs?
- Perform key end-user tasks critical to the wholesale distribution industry?
- Use analytics to obtain important metrics?
- Evaluate additional access and account functionality?
- Prepare for the ongoing maintenance of the account?

Who Should Attend

- Project team members who need to understand the features and capabilities of the NetSuite Wholesale Distribution solution prior to implementation.
- New and experienced administrators and business process owners who are responsible for the day-to-day operations, maintenance and optimization of their organization's NetSuite account.

Prerequisite

- Course participants should be familiar with NetSuite navigation and features. To learn how to navigate NetSuite and perform common tasks, view the Getting Started tutorials on SuiteAnswers.

Course Objectives

Through real-life use cases, hands-on exercises and best practices discussions, you will learn how to:

- Confirm company-wide configuration settings and user-level preferences.
- Identify features and business processes built into the application.
- Identify specific business challenges and corresponding NetSuite solutions and processes.
- Perform key administrative and end-user tasks for specific workflows.
- Monitor and measure business performance with analytics.
- Leverage additional tools and resources to extend account functionality.

Related Courses

Take these courses for more training:

- NetSuite: Administrator Fundamentals
- NetSuite: Financial Management
- SuiteAnalytics: Reports and Searches

Day 1 Agenda: Getting Started

How NetSuite Fits Your Business: Identify how NetSuite addresses your business needs; identify the benefits of the database structure; consider the use of business rules and business processes.

Basic Navigation: Recognize NetSuite web page elements; personalize your Home Dashboard; identify the purpose of forms; use basic search option; leverage multiple Help resources.

Overview of Account Configuration and W&D Processes: Your NetSuite account has been configured to meet general business needs. We review the W/D process with a high-level overview, identify which features have been enabled and recommend additional features and preferences to set up.

Wholesale Distribution Data Model: Explore additional account personalization setting to fine tune the account to meet your needs and examine how NetSuite stores data in various record types and the relationships between those records.

NetSuite Roles and Permissions: Explain how roles are the foundation for data security in your NetSuite account; define user permissions and restrictions; set up users in your account.

Marketing-to-ROI: Discover how NetSuite combines all the tools you need to manage your marketing efforts in one integrated system.

Day 2 Agenda: Business Processes

Lead-to-Quote: Study Sales Force Automation (SFA) tools to help with lead assignment and lead/prospect/customer management throughout the sales process.

Order-to Cash: Validate, approve and convert orders per your business process to manage warehouse activities; ship orders in a timely manner; fulfill orders through the 'Pick/Pack/Ship' process; improve customer invoicing and payments and monitor results.

Return-to-Credit: Manage return authorizations, item receipts and credit memos.

Item Pricing and Basic Inventory: Create inventory and non-inventory items (including service items) and associate items with pricing costs and parameters.

Design-to-Build – Purchasing and Related Transactions: Set up the Purchase Approver; process a Purchase Order, Bill, Payment; analyze reports.

SuiteAnswers

Get answers to your support and training related questions:

- Go to Training Videos to access the Getting Started tutorials.
- Take New Feature Training to learn about the latest NetSuite release.

Day 3 Agenda: Business Processes and Go-Live

Design-to-Build – Demand Planning Solutions: Explore the NetSuite Demand Planning process; identify the item record setup steps; generate an Item Demand Plan and Supply Plan; review Gross Requirements inquiries for managing supply.

Fixed Assets (Optional): This module is optional for regions and customers not leveraging the Fixed Assets functionality.

- Investigate the automated management features for fixed assets; acquisition, depreciation, revaluation, and retirement. Review how to accurately track, control and depreciate assets and provide a single source of information for everything relating to an asset.

Return-to-Debit: Manage vendor returns and item fulfillment; create vendor credits; issue refunds; apply credits.

Call-to-Resolution: Examine customer support, discuss rules and territory options, identify case profiles and manage cases from creation to resolution.

Financial Tools: Explore financial options (Chart of Accounts, General Ledger, Financial Segmentation, Fiscal Year/Accounting Period management processes) and standard reporting options.

User Adoption: Discuss the importance of enabling end-users and the available tools to ensure user adoption; explore broad strategies to execute a plan for Change Management.

Additional Access and Functionality: Identify the SuiteApps and SuiteSolutions already installed in your account.

Live Training Webinars

Participate in free webinars to get practical tips and tricks for using NetSuite better:

- Go to suitetraining.com > Webinars and Events to view the schedule and register for an event.

NetSuite reserves the right to adjust the stated course content to reflect changes to the NetSuite application and to meet the expressed needs of course attendees.

Features and functions covered in this course might not reflect those in your purchased NetSuite account.