RETAIL: FUNDAMENTALS

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

Retail: 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 Retail account.

Key Tasks

How do I:

- Effectively navigate and review the account configuration?
- Add users and assign the appropriate roles?
- Create additional customizations to tailor the account to our needs?
- Perform key end-user tasks critical to the Retail industry?
- Use analytics to obtain important metrics?
- Evaluate additional access and account functionality?

Who Should Attend

Project team members who need to understand the features and capabilities of the NetSuite Retail 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.

Prerequisites

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

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

Day 1 Agenda: Baseline

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 Configurations: Identify the features already enabled in your account; explore additional account personalization to fine tune the account to your needs.

Review NetSuite's Data Model: Identify how data is classified, sorted and recorded; what determines who can access the data.

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.

Day 2 Agenda: Business Processes

Items, Pricing and Inventory: Create inventory items and associate items with pricing costs and parameters; plan and adjust for inventory replenishment.

Procure-to-Pay: Process a Purchase Order, Bill and Payment; record landed costs; examine three-way match bill exceptions; analyze reports.

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

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

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

Day 3 Agenda: Business Processes and Go-Live

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

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

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

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.

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.

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.