

# NetSuite Functional Training

*COURSE CONTENT*

## GET IN TOUCH



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## About Multisoft

Train yourself with the best and develop valuable in-demand skills with Multisoft Systems. A leading certification training provider, Multisoft collaborates with top technologies to bring world-class one-on-one and certification trainings. With the goal to empower professionals and business across the globe, we offer more than 1500 training courses, which are delivered by Multisoft's global subject matter experts. We offer tailored corporate training; project Based Training, comprehensive learning solution with lifetime e-learning access, after training support and globally recognized training certificates.

## About Course

NetSuite Functional Training by Multisoft Systems is designed to equip professionals with comprehensive knowledge of cloud-based ERP solutions and their practical implementation in business environments. This training focuses on core functional areas such as financial management, customer relationship management (CRM), order management, and business process automation.

## Module 1: Introduction to ERP & NetSuite

- ✓ Overview of ERP systems and business benefits
- ✓ Introduction to Oracle NetSuite
- ✓ NetSuite product suite and modules
- ✓ Cloud ERP vs traditional ERP
- ✓ Key business processes in NetSuite

## Module 2: NetSuite Navigation & User Interface

- ✓ Logging into NetSuite
- ✓ Dashboard overview and personalization
- ✓ Navigation menus and global search
- ✓ Working with centers (Accounting, Sales, etc.)
- ✓ Shortcuts, portlets, and UI customization

## Module 3: Company Setup & Configuration

- ✓ Setting up company information
- ✓ Managing subsidiaries (OneWorld basics)
- ✓ Fiscal calendars and accounting preferences
- ✓ Multi-currency setup
- ✓ Tax configuration basics

## Module 4: Financial Management (Core Module)

- ✓ Chart of Accounts setup
- ✓ General Ledger (GL) overview
- ✓ Journal entries and adjustments
- ✓ Accounts Payable (AP) processes
- ✓ Accounts Receivable (AR) processes
- ✓ Bank reconciliation
- ✓ Financial close process

## **Module 5: Procure-to-Pay (P2P) Process**

- ✓ Vendor creation and management
- ✓ Purchase requisitions and approvals
- ✓ Purchase orders (PO)
- ✓ Receiving goods/services
- ✓ Vendor bills and payments
- ✓ Procurement workflow automation

## **Module 6: Order-to-Cash (O2C) Process**

- ✓ Customer setup and management
- ✓ Sales order processing
- ✓ Fulfillment and shipping
- ✓ Invoicing customers
- ✓ Cash receipts and collections
- ✓ Revenue recognition basics

## **Module 7: Inventory Management**

- ✓ Item types in NetSuite
- ✓ Inventory setup and tracking
- ✓ Warehousing concepts
- ✓ Inventory adjustments and transfers
- ✓ Demand planning basics

## **Module 8: CRM & Sales Management**

- ✓ Lead and opportunity management
- ✓ Customer lifecycle tracking
- ✓ Sales forecasting
- ✓ Campaign management
- ✓ Customer communication tracking

## Module 9: Reporting & Saved Searches

- ✓ Standard reports in NetSuite
- ✓ Creating and customizing reports
- ✓ Introduction to Saved Searches
- ✓ Building custom searches
- ✓ KPIs and dashboards

## Module 10: Workflows & Automation

- ✓ Introduction to NetSuite workflows
- ✓ Creating approval workflows
- ✓ Automating business processes
- ✓ Alerts and notifications
- ✓ Best practices for workflow design

## Module 11: Security & Role Management

- ✓ Role-based access control
- ✓ Creating and assigning roles
- ✓ Permissions and restrictions
- ✓ Audit trails and compliance
- ✓ Data security best practices

## Module 12: Integration & Data Management

- ✓ Importing and exporting data (CSV import)
- ✓ Data migration basics
- ✓ Integration overview (APIs, middleware)
- ✓ Third-party integrations
- ✓ Data governance

## Module 13: Advanced Features

- ✓ Multi-subsidiary management (OneWorld)
- ✓ Multi-currency transactions
- ✓ Budgeting and forecasting
- ✓ Fixed assets management
- ✓ Suite Analytics overview

## Module 14: Testing, Deployment & Support

- ✓ Testing business processes
- ✓ UAT (User Acceptance Testing)
- ✓ Go-live strategies
- ✓ Post-go-live support
- ✓ Issue resolution and troubleshooting