



# SOFTWARE: FUNDAMENTALS

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

**Software: 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 Software account.

## Who Should Attend

Project team members who need to understand the features and capabilities

## 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 Software industry?
- Use analytics to obtain important metrics?
- Evaluate additional access and account functionality?
- Prepare for the ongoing maintenance of the account?

of the NetSuite Software 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.
- Apply the built-in leading practices to business workflows.
- 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.

## Day 1 Agenda: Baseline

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

## Related Courses

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

**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 and Software Processes:** Identify the high-level processes built into the application; 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

**Item Master and Pricing:** Explain the different types of items that can be set up; practice creating items suitable for the software business and look at simple pricing solutions.

**Order-to Cash:** Validate, approve and convert orders per your business process to manage your customers' orders in a timely manner; fulfill orders through a one-click process;

improve customer invoicing and payments and monitor results.

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

**Contract Renewals Overview:** Take a high-level look at the Software Contract Renewals Module functionality and how it facilitates the software license business.

**Revenue Recognition Overview:** Consider the use of Advanced Revenue Management to manage revenue recognition licenses, hardware and services that you sell.

**Revenue Month-end Processing and Reporting:** Identify the key tasks for recognizing revenue and reclassifying deferred revenue, as part of your month-end activities; utilize key reports to facilitate the month-end activities.

### **Day 3 Agenda: Business Processes and Go-Live**

**Procure-to-Pay:** Set up the Purchase Approver; process a Purchase Order, Bill, Payment; analyze reports.

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

#### **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](http://suitetraining.com) > Webinars and Events to view the schedule and register for an event.

**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.

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.

