ART07 - NetSuite Data Migration Training Course

Course Overview

A critical component of all NetSuite projects is the extraction, cleansing, formatting and migration of that data into NetSuite with the highest level of accuracy and in time for testing, training and the live operation of NetSuite.

The course will equip your team team with the knowledge and practical experience required to ensure that this critical part of your project runs smoothly.

You should be sending someone if ...

- You are embarking on a new NetSuite implementation and want to understand what opportunities exist within NetSuite to make the transition of the existing system data as smooth and effective as possible.

The attendee will be learning:
- How to ensure that legacy system data is properly prepared and organised for migration to NetSuite.
- How to design and execute the importation process and how to manage results as they emerge.

- How to supervise the post-migration review required to ensure that all the data that was migrated is correct in NetSuite.

Course Location

The course can be held:
- On the client site, with a minimum of two attendees.
- At the AVT Training facility as part of a private course with a minimum of two attendees.
- At the AVT Training facility as part of a public course.

Prerequisites

Each attendee will be provided with:
- A digital Workbook to be used during the course.

Please note that users should bring their own laptops for the course; WiFi access will be provided.

Fees

Upon Request

Related Courses

- **Administrator - 5 days** - This is a comprehensive course designed for senior users who will have as their primary responsibility the maintenance of NetSuite Configuration and who will be the **'go to'** person for users with broader functional issues such as form customisations, reporting guidance and potential automations.

Agenda

Day 1 (Techniques for Importing/Updating Data)	Day 2 (Data Extraction and Preparation)

Migration Tools and Concepts
    Overview of Elements
NetSuite Data Model
    What records and fields
Introduction to NetSuite Data
    Designing and executing a Search
    Practical Exercises
Transaction Records -
    Review of Types and Statuses
Transaction Record Structure
    Summary vs Detail
    Practical Exercises
CSV Mechanics
    Process steps
    Error Management
    Practical Exercises
Customers and Contacts
    Practical Exercises
NetSuite Methods
    Where/When to Use
    Connecting the Files
    Practical Exercises
Data Migration Management
      Managing Inputs
      Tracking Results
	Migration Planning Strategies
	Options for efficient and timely migration
	
	Review of Legacy Base Data
	    Companies
	    Chart of Accounts
	    Items
	    Customers
	    Leads/Prospects
	    Vendors
	    Sales Pricing
	    Procurement
	    Employees
	Review of Legacy Transaction Data
	    GL Balances
	    Open AR/AP
	    Bank Accounts/Credit Cards
	    Sales History
	    Inventory balances
	    Practical Exercises
	Data Cleansing
	    Likely Issues
	    Managing Incomplete Data
	    Practical Exercises
	SuiteSuccess Tools
	    Templates for Key Records
	    Practical Exercises

Day 3 (Case Study)

Case Study - Part A - Migration
The Enterprise has purchased a new Subsidiary and need to merge it into the existing NetSuite environment.
Attendees will be provided with an opportunity to participate in a full data migration project
The objective is to import the following data:
Employees
Items Data including:
        Inventory Items
        Non-Inventory Items
        Assemblies
        Purchasing Details
        Planning
        Bills of Material
Customers
Leads
Prospects
Open Opportunities
Open Quotes
Open Sales Orders
Open Purchase Orders
Open AR
Open AP
Opening Balance Sheets
Trial Balances for two months
Historical Exchange rates

The day will cover
Data Preparation
        Selecting Relevant Old Data
        Mapping Old Values to New Values
        Formatting and other issues
Reconciliation Plan
        How to measure and record results
Class Migration Project
        Hands on exercises to complete the migration project

Day 2 (Data Extraction and Preparation)

Review of Legacy Base Data
- Companies
- Chart of Accounts
- Items
- Customers
- Leads/Prospects
- Vendors
- Sales Pricing
- Procurement
- Employees

Review of Legacy Transaction Data
- GL Balances
- Open AR/AP
- Bank Accounts/Credit Cards
- Sales History
- Inventory balances

Data Cleansing
- Likely Issues
- Managing Incomplete Data

SuiteSuccess Tools
- Templates for Key Records