ART08 - NetSuite Workflow Training Course

Course Overview

This is a comprehensive course designed for senior users who will have as part of their responsibilities the continual improvement process that enhances the effectivity and efficiency of Netsuite operations.

You should be sending someone if ...

- You are embarking on a new NetSuite implementation; as having at least one project team member attend this course prior to the implementation will deliver substantial in-house opportunities to identify instances where simplifying or automating a day to day process that can facilitate the critical improvements that are the goals of the NetSuite implementation; or,
- You have had staff changes that have resulted in a new NetSuite Administrator who needs to become fully aware of the administrative functionality and capabilities of NetSuite.
- You feel you should be taking advantage of more of the exceptional business functions of NetSuite and need the System Administrator to be one of the lead agents for this.

The person will emerge from this course capable of translating business improvement opportunities needs into a NetSuite configuration that will continue to evolve in the years following the original implementation.

The attendee will be learning:
- How to analyse business issues and identify opportunities for the deployment of a workflow to the company's advantage.
- Design of the required workflow and presentation for key user sign off
- Construction and unit testing of the workflow
- Assisting the User team with testing and end-user training
- Assisting the User team with monitoring of the Establishing process for the

Leading the users through the hands-on experience, the Trainer will ensure that the participant will become well versed in the array of workflow configuration elements of NetSuite, where they can be found, and how they should be implemented or modified on an on-going basis.
The course involves one day of direction by the Trainer with extensive instructor-led assignments that will provide a practical, hands-on experience that will reinforce the knowledge gained.

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
AUD $2,000 per attendee for a minimum of two attendees for client specific courses.

Agenda

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Workflows
      What is a Workflow?
      How are Workflows Used?
      Types of Workflow.
          -   Event-based workflows
          -   Scheduled workflows
      Workflow Design
          -   Flowcharting
          -   Use Cases
      Workflow Construction - Getting it Started
          -   Triggering the Start
          -   Scheduling Options
          -   Conditional Starts
      Workflow States and Actions
          -   Purpose of States
          -   State Transitions
          -   Action Types/Triggers
          -   Action Conditions
      Workflow Exercises
          -   Adding Functions to Entry Forms
          -   Creating New Records
          -   Conditional Transitions
          -   Using Workflow Fields
          -   Automating Updates
          -   Automating Emails e.g. Reminders to Customers, Sales Reps
          -   Automating Escalation