

NetSuite ERP Consultant Exam

Study Guide: October 2020

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About the NetSuite ERP Consultant Exam

This is the second exam required for NetSuite ERP Consultant Certification, to be taken after the SuiteFoundation Exam has been passed.

Passing both the NetSuite ERP Consultant Exam and the SuiteFoundation Exam certifies that you have the knowledge and skills necessary to be a NetSuite Certified ERP Consultant. See Description of a Qualified Candidate below.

Conditions:

- This will be a proctored examination.
- No written or online reference materials may be used during the exam.
- Complete all questions in the allotted time.

Description of a Qualified Candidate:

The candidate has the equivalent experience of performing 5-10 medium scale, or 2-3 enterprise NetSuite ERP implementations, which is roughly equivalent to at least 2 years' worth of NetSuite implementations in a consultant-related role. They can match NetSuite ERP solutions to business requirements. This person can advise on how to change standard ERP workflows, when to use scripting tools to meet the business needs, and when to extend use through integrations. This consultant can explain the implications and benefits of NetSuite configuration options.

Maintaining Your Certification

For details about retake policy and ongoing requirements to maintain your certification or examination status see the NS Certification Policy available on the [NS Certification webpage](#).

Recommended Training and Background:

Recommended Courses for CUSTOMERS:

- [ERP: Fundamentals](#) (3 days)
- [Inventory Item Costing](#) (1 day)
- [NetSuite: Administrator Fundamentals](#) (2 days)
- [NetSuite Certification: ERP Consultant Study Session](#) (2 days)
- [NetSuite: Financial Management](#) (2 days)
- [SuiteAnalytics: Financial Reports and Searches](#) (2 days)
- [SuiteAnalytics: Advanced Searches](#) (2 days)
- [SuiteCloud: Exploring the NetSuite Platform](#) (2 days)
- [SuiteFlow: Workflow Fundamentals](#) (2 days)
- [Using Accounts Receivable \(AR\)](#) (1/2 day)

Recommended Skill Level:

Equivalent to at least 2 years' worth of NetSuite implementations in a consultant-related role

Subject Areas and Objectives Covered by the Test:

The broad subject areas covered in the exam include:

- ERP
- Analytics
- OneWorld
- Platform
- Data Strategy

The table below provides each subject area in more detail. For suggestions on studying for each objective, proceed to the matching sections on the pages that follow.

| Subject | Objective |
|--|---|
| ERP: Record to Report (1) | Identify Accounting Preferences to be configured to support a customer specific requirement. |
| | Identify the implications of Chart of Accounts Setup. |
| | Identify where and how default financial segments (including accounts and subsidiaries) are set and used on transactions. |
| | Recognize NetSuite recommended practices around period close and accounting/tax period structure. |
| | Identify the constraints of features and functionality related to Journal Entries. |
| | Identify how exchange rates are used throughout NetSuite. |
| | Identify constraints of taxation functionality. |
| ERP: Order to Cash (2) | Identify considerations when setting up related Entity records. |
| | Given a requirement, determine the configuration/solution for an order process. |
| | Identify the implications of shipping setup and use. |
| | Determine the considerations for setup and execution of the fulfillment process. |
| | Given a scenario, determine appropriate invoicing configuration and setup. |
| | Compare the differences between the various revenue recognition functionalities. |
| | Identify recommended practices for customer payment setup and processing. |
| | Given a requirement, determine the configuration/solution for a customer return process. |
| Identify the constraints in configuring commissions. | |

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| ERP: Order to Cash (2) | Recognize the functionality differences between “Customer Center” and “My Account” in the webstore. |
| ERP: Design to Build (3) | Select the appropriate Item Type for a given use case. |
| | Given a scenario, determine appropriate inventory management options. |
| | Identify the transactions and records related to building Assemblies. |
| | Identify options in pricing. |
| | Recognize how various transactions affect item costing. |
| ERP: Procure to Pay (4) | Given a requirement, determine the configuration/solution for a purchase process. |
| | Given a requirement, determine the configuration/solution for a vendor return process. |
| | Recognize the elements in configuring the Fixed Assets Module. |
| Analytics and Dashboard (5) | Given a scenario, select the appropriate Dashboard portlet content. |
| | Recognize which SQL expressions will yield desired search results. (CASE, DECODE, NULLIF, Date functions) |
| | Identify configuration options available when customizing email alerts for saved searches. |
| | Using Expression Builder, select the expression which would yield the desired results. |
| | Recognize which record to use as the basis of a search to yield a desired result. |
| | Identify the feature in saved searches to obtain the described results. |
| | Given a scenario, determine whether to use a custom search or a report formula? |
| | Given a scenario, determine when the Alternate Date/Period Range feature should be used. |
| | Identify the advantages of various methods of publishing dashboards. |
| | Identify data security considerations when publishing custom records to Customer/Vendor/Partner Centers. |
| Platform (6) | Given a scenario, identify which script type to use. |
| | Identify tools for running and testing automations. |
| | Identify components of the workflow in a diagram. |
| | Recognize available SuiteFlow actions. |
| | Compare differences between custom form & field display options and uses cases where appropriate |
| | Identify implications of various methods of restricting users to an assigned custom form. |
| | Given a custom form layout requirement, determine which feature(s) should be used. |
| | Identify custom field settings for displaying data from other records. |
| | Recognize NetSuite recommended practices for creation and use of custom fields. |
| | Identify implications of changing field properties or values in a live environment. |

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| Platform (6) | Identify NetSuite account settings which can only be changed by sending a request to NetSuite Customer Support. |
| Data Strategy (7) | Determine the proper use of advanced options in CSV Import. |
| | Analyze an error in the CSV Import process to determine the appropriate resolution. |
| | Given a customer requirement, determine migration strategy for transaction history and opening balances. |
| | Organize the steps required to successfully complete an import of CSV records and sublist data. |
| Data Security (8) | Identify the implications of permissions related to accessing and manipulating data in bulk. |
| | Recognize recommended NetSuite practices for creating and assigning custom roles. |

Study Suggestions by Objective

ERP: Record to Report

Identify Accounting Preferences to be configured to support a customer specific requirement.

How to Study: Review all Accounting Preferences settings. Do not worry about which subtab the setting is on; do understand what the settings control. Questions may also contrast whether a configuration setting is under Enable Features | General preferences | Home > Set Preferences | Accounting Preferences.

Courses addressing this topic: ERP: Fundamentals, NetSuite: Financial Management

Identify the implications of Chart of Accounts Setup.

How to Study: Consider these factors when setting up the Chart of Accounts: Currency, Department | Class | Location settings, Importing the Chart of Accounts, how are expense accounts linked to Expense Reports, Subsidiary restriction.

Courses addressing this topic: ERP: Fundamentals, NetSuite: Financial Management

Identify where and how default financial segments (including accounts and subsidiaries) are set and used on transactions.

How to Study: Search SuiteAnswers keywords: Departments, Classes, Locations, Subsidiaries, Accounts. SuiteAnswers Topics: Restricting Access to Records by Department. Considerations to think about: What is unique about the D|C|L functions for reporting, and how do they work with NetSuite standard functions like: reports, searches, budgets, roles/permission, commissions. How do they work with each other?

Courses addressing this topic: ERP: Fundamentals, SuiteFoundation Exam Prep, ERP Consultant Exam Prep

Recognize NetSuite recommended practices around period close and accounting/tax period structure.

How to Study: SuiteAnswers topics: Closing Accounting Periods, Period and Yearend Closing Process FAQs, Tax Periods Overview

Courses addressing this topic: NetSuite: Financial Management

Identify the constraints of features and functionality related to Journal Entries.

How to Study: Research these topics: Journal Entry approvals, Expense Allocation, Automated Eliminations, Recurring Journals, Expense Amortization schedules

Courses addressing this topic: NetSuite: Financial Management

Identify how exchange rates are used throughout NetSuite.

How to Study: SuiteAnswers keywords: currency exchange rate, revaluation, consolidated exchange rate, currency-based pricing

Courses addressing this topic: ERP Consultant Exam Prep

Identify constraints of taxation functionality.

How to Study: Set up Taxes, Country Editions, tax codes vs. tax groups, shadow tax agencies, nexus vs. subsidiary, tax types as they vary by country edition.

Courses addressing this topic: ERP Consultant Exam Prep

ERP: Order to Cash

Identify considerations when setting up related Entity records.

How to Study: SuiteAnswers Topic: Records as Multiple Types; Consolidated Customer Payments; Accept Payment for a Subcustomer in Different Subsidiary; multi-subsidiary vendors.

Courses addressing this topic: ERP Consultant Exam Prep

Given a requirement, determine the configuration/solution for an order process.

How to Study: Topics to review: Drop-ship, Special Order, Multiple Shipping Routes. Review process of creating Purchase Order from Sales Order. Sales Order approval process. Credit Hold: General Preferences | Home>Set Preferences | Accounting Preferences. NOT ON EXAM: SuiteFlow Approvals.

Identify the implications of shipping setup and use.

How to Study: SuiteAnswers topics: Creating Shipping Items, Shipping Items, Charging for Shipping and Handling Per Item, Creating Shipping Items with UPS Integration, Associating Subsidiaries with Shipping Items

Determine the considerations for setup and execution of the fulfillment process.

How to Study: Advanced Shipping vs. Pick|Pack|Ship feature. Changing shipping methods on fulfillment, tracking numbers, label integration, Multi-location inventory.

Courses addressing this topic: ERP: Fundamentals

Given a scenario, determine appropriate invoicing configuration and setup.

How to Study: SuiteAnswers Topic: Invoice created from Sales Order posted GL impact on COGS, Global Invoicing Preferences, Billing Schedules

Courses addressing this topic: NetSuite: Financial Management

Compare the differences between the various revenue recognition functionalities.

How to Study: Know how to create and apply Revenue Recognition templates. Understand the difference between a revenue recognition template and a revenue recognition schedule. Understand functionality of Revenue Commitments and compare GL function in comparison to Revenue Recognition Schedules. Understand definition of VSOE. NOT ON ERP CONSULTANT EXAM: Advanced Revenue Recognition, Advanced Revenue Management, EITF 08-01

Courses addressing this topic: NetSuite: Financial Management

Identify recommended practices for customer payment setup and processing.

How to Study: Review all payment options available under Enable Features > Transactions > Payment Processing, noting companies we integrate with, and reading Help Text associated with turning these features on. SuiteAnswers topic: Consolidated Payments, Multiple Currencies and Customers, Accepting Credit Card Payments (through Payment Events subtopic), Accept Payment for a Subcustomer in Different Subsidiary, Customer Credit Card Processing

Courses addressing this topic: Using Accounts Receivable (AR)

Given a requirement, determine the configuration/solution for a customer return process.

How to Study: Understand how the customer return process varies depending on the originating transaction. SuiteAnswers Topic: Customer Returns Process, Customer Return Authorizations, Customer Return Item Receipts, Customer Credit Memos

Courses addressing this topic: ERP: Fundamentals

Identify the constraints in configuring commissions.

How to Study: Understand how employee commissions are set up. Understand how all fields on the Commission Schedule work. Recognize commission patterns that fit standard commission functionality, vs. those that may require scripting. Understand the differences when a Manager Schedule is applied.

Recognize the functionality differences between “Customer Center” and “My Account” in the webstore.

How to Study: This is referencing the "My Account" feature in the NetSuite webstore, not your regular NetSuite role. Understand that Customer Center is a Role, which can also be accessed from www.netsuite.com like any other login. My Account is only accessible through an ecommerce site. SuiteAnswers Topic: Customizing the Customer Center Role

ERP: Design to Build**Select the appropriate Item Type for a given use case.**

How to Study: Understand all the different Item Types, including Kits, Groups, Gift Certificates, Matrix Items, Service Items. Understand the different GL impacts of these Item Types. Understand these features: Serialized Inventory, Lot Numbered Inventory, Multiple Units of Measure.

Courses addressing this topic: ERP: Fundamentals; SuiteFoundation Exam Prep.

Given a scenario, determine appropriate inventory management options.

How to Study: Multi-Location Inventory, Inventory Transfers, Bin Management, reorder points, Adjust Inventory vs. Inventory Worksheet, Counting Inventory, Inventory count for go-live, CSV Import for Inv Worksheet. Understand impact on inventory of all transactions, including all Sales transactions and purchase transactions. Settings required for Drop Ship workflow, and impact of "Mark Shipped" function on inventory counts and costing. Intercompany drop ship feature. NOT ON EXAM: Demand Planning

Courses addressing this topic: Partner Bootcamp

Identify the transactions and records related to building Assemblies.

How to Study: Assemblies, work orders, build/unbuild process. NOT ON EXAM: Manufacturing

Identify options in pricing.

How to Study: Price Levels, Quantity Pricing, and various ways of totaling the quantity, such as quantity pricing schedules, Pricing Groups, and Currency Pricing. In Demo Account: Look at how to set up pricing in Europe, where different countries sharing a single currency, but want different pricing. If multiple pricing options are set on a Customer record, which price takes precedence? SuiteAnswers topic: Assigning a Custom Price Level to a Customer

Courses addressing this topic: ERP: Fundamentals

Recognize how various transactions affect item costing.

How to Study: Posting happens on Item Receipt, Item Fulfill, or standalone Vendor bill, Check, Cash sale. Item costing with Multi-Location Inventory, Landed Cost. NOT ON EXAM: Standard costing

Courses addressing this topic: Inventory Item Costing

ERP: Procure to Pay**Given a requirement, determine the configuration/solution for a purchase process.**

How to Study: Understand Purchase Request/Purchase Order standard approval process. Settings required for auto-creation of Special Order or Drop Ship Purchase Orders from Sales Orders. NOT ON EXAM: Approvals Workflow, Purchase Requisitions, Purchase Contracts

Courses addressing this topic: ERP: Fundamentals

Given a requirement, determine the configuration/solution for a vendor return process.

How to Study: Vendor Return Authorizations, Return Item Fulfillments, Vendor Credits, vendor refunds

Courses addressing this topic: ERP: Fundamentals

Recognize the elements in configuring the Fixed Assets Module.

How to Study: Understand installation, set up steps, and use of Fixed Asset Module. Understand available, and not available features. NOT ON EXAM: Multi-Book Accounting and FAM

Courses addressing this topic: ERP: Fundamentals

Analytics and Dashboard**Given a scenario, select the appropriate Dashboard portlet content.**

How to Study: Understand different types of portlets that can be configured for the dashboard, and how they might be used for customer use cases. Special attention to KPI Scorecard setup requirements.

Courses addressing this topic: SuiteAnalytics: Reports and Searches.

Recognize which SQL expressions will yield desired search results. (CASE, DECODE, NULLIF, Date functions)

How to Study: You might see any of these SQL commands: CASE, DECODE, TO_CHAR, ISNULL, NULLIF

Courses addressing this topic: SuiteAnalytics: Advanced Searches

Identify configuration options available when customizing email alerts for saved searches.

How to Study: Understand different ways that saved searches can be shared out with email alerts and how these need to meet a use case.

Courses addressing this topic: SuiteAnalytics: Reports and Searches.

Using Expression Builder, select the expression which would yield the desired results.

How to Study: SuiteAnswers Topics: Defining search filter expressions with AND/OR/() operators, Using And/Or Expressions in Search Criteria

Courses addressing this topic: SuiteAnalytics: Advanced Searches

Recognize which record to use as the basis of a search to yield a desired result.

How to Study: Know NetSuite standard record types and their relation to each other.

Courses addressing this topic: SuiteAnalytics: Financial Reports and Searches

Identify the feature in saved searches to obtain the described results.

How to Study: Know Saved Searches functionality: Review all checkboxes at top of saved search screen, and review features under all the subtabs.

Courses addressing this topic: SuiteAnalytics: Financial Reports and Searches

Given a scenario, determine whether to use a custom search or a report formula?

How to Study: Compare features of Reports vs. Searches.

Courses addressing this topic: SuiteAnalytics: Financial Reports and Searches

Given a scenario, determine when the Alternate Date/Period Range feature should be used.

How to Study: Understand the Alternate Date/Period feature in customizing NetSuite reports.

Courses addressing this topic: SuiteAnalytics: Financial Reports and Searches

Identify the advantages of various methods of publishing dashboards.

How to Study: Understand how Publish Dashboard permission is used, and steps to publish a dashboard. SuiteAnswers Training Video: Dashboards: Publishing Dashboards SuiteAnswers Topic: Verifying and Adding Publish Dashboards Permissions

Courses addressing this topic: SuiteAnalytics: Reports and Searches.

Identify data security considerations when publishing custom records to Customer/Vendor/Partner Centers.

How to Study: Review all checkboxes on Custom Record Types in context of this objective, Review SuiteAnswers topics: Populate Name of Customer in Online Form for a Custom Record accessed in the Customer Center, Restrict Custom Record Access by Customer in Customer Center, Using Custom Records

Platform

Given a scenario, identify which script type to use.

How to Study: Know when automation is appropriate, and when it is not needed. Understand the difference between Server vs client-side scripts. Understand these Event Types: line level, validate, before submit, etc. SuiteAnswers Topic: SuiteScript - The Basics including 6 topics: What is SuiteScript | Running a SuiteScript Script in NetSuite | SuiteScript API Overview | Script Types Overview | SuiteScript Reference | Setting Up Your SuiteScript Environment NOT ON EXAM: Coding not required

Courses addressing this topic: SuiteCloud: Exploring the NetSuite Platform

Identify tools for running and testing automations.

How to Study: Understand how SuiteScripts are deployed in a NetSuite account, and how these tools work: testing, log level, execute as role, status. Understand what a Scripted record is and how it is used. NOT ON EXAM: Coding not required

Courses addressing this topic: Covered in SuiteCloud courses

Identify components of the workflow in a diagram.

How to Study: Understand purpose of and how to create and use Available Actions vs. States vs. Transitions. NOT ON EXAM: Lead Nurturing, Approval Routing, No coding required

Courses addressing this topic: SuiteCloud: Exploring the NetSuite Platform

Recognize available SuiteFlow actions.

How to Study: SuiteAnswers Webinar: Webinar: Use SuiteFlow to Automate Business Workflows NOT ON EXAM: Coding not required

Courses addressing this topic: SuiteFlow: Workflow Fundamentals

Compare differences between custom form & field display options and uses cases where appropriate

How to Study: Understand differences between functionality of fields that are Hidden vs. Disabled vs. Normal vs. Inline text, vs. setting field width to 0 vs. hide field label. Understand implications of changing the field at the field itself, vs. on the form. Understand uses of Store Form With Record field, which only works on Entity records. Understand how Transaction Forms can be Linked. SuiteAnswers Topics: Setting Display Options for Custom Fields, Linking Transaction Forms

Courses addressing this topic: SuiteFlow: Workflow Fundamentals

Identify implications of various methods of restricting users to an assigned custom form.

How to Study: SuiteAnswers Topics: Restrict User from Editing Fields using Standard Permission and Customization, Setting Default Forms for Roles

Courses addressing this topic: NetSuite: Administrator Fundamentals

Given a custom form layout requirement, determine which feature(s) should be used.

How to Study: Understand how to customize transaction form layouts, which are intended for printed transactions

Courses addressing this topic: NetSuite: Administrator Fundamentals

Identify custom field settings for displaying data from other records.

How to Study: Know how to source data from one record to another record using custom fields. Know how to filter lists, and how to create dependent dropdowns. SuiteAnswers Video: Working With Lists
SuiteAnswers Topics: Setting Sourcing Criteria, Setting Filtering Criteria, Create Controlling and Dependent Dropdown Fields or Nested List,

Courses addressing this topic: NetSuite: Administrator Fundamentals; SuiteCloud: Exploring the NetSuite Platform

Recognize NetSuite recommended practices for creation and use of custom fields.

How to Study: Recognize NetSuite recommended practices for use of options when creating fields, such as: Store Value, field ID naming convention, Field Level Help, and Mandatory checkbox. SuiteAnswers Topic: Creating a Custom Field, Ways to Set Field Mandatory

Courses addressing this topic: Administrator Fundamentals; SuiteCloud: Exploring the NetSuite Platform

Identify implications of changing field properties or values in a live environment.

How to Study: Understand the impact of changing Accounts on Item records, impact on GL, drop ship/special order, COGS impact if editing transactions. Understand risks to data of changing field types after data has been saved. Understand Store Value setting.

Identify NetSuite account settings which can only be changed by sending a request to NetSuite Customer Support.

How to Study: COGS Recalc, Bulk Transaction Delete, Exceed 50 Inventory Locations, Display Unmasked Credit Card, Display Unmasked Employee Social Security Numbers

Data Strategy

Determine the proper use of advanced options in CSV Import.

How to Study: See all settings in Advanced Options of CSV Import tool

Courses addressing this topic: ERP Consultant Exam Prep

Analyze an error in the CSV Import process to determine the appropriate resolution.

How to Study: Recognize these common errors and how to address them in a CSV import: required field is null, read-only field, invalid reference

Courses addressing this topic: ERP Consultant Exam Prep, in Partner Training recordings

Given a customer requirement, determine migration strategy for transaction history and opening balances.

How to Study: Some transaction records can only be imported in an open or closed state and partial transactions can be challenging (i.e. open PO with some items received). Know different strategies for managing import of opening balances, and understand GL impact of any transactions being imported.

Courses addressing this topic: ERP Consultant Exam Prep, in Partner Training recordings

Organize the steps required to successfully complete an import of CSV records and sublist data.

How to Study: Sequence of data migration, csv import of sublists, and overwrite sublist function and risks thereof.

Courses addressing this topic: ERP Consultant Exam Prep

Data Security

Identify the implications of permissions related to accessing and manipulating data in bulk.

How to Study: Permissions to watch: CSV Import, CSV Export (web query included here), Delete All Data, Export Lists, File Cabinet Access, Storage of Scripts, searches and Reports, Custom Records, Run Unrestricted, Limit Results. SuiteAnswers keywords: Administrator Best Practices

Courses addressing this topic: SuiteFoundation Exam Prep

Recognize recommended NetSuite practices for creating and assigning custom roles.

How to Study: Roles vs. Job Titles. Usage of root Admin as everyday role. Global Permissions Best Practices.

Courses addressing this topic: ERP: Fundamentals, NetSuite: Administrator Fundamentals; ERP Consultant Exam Prep.

Sample Questions

Please see [ERP Consultant Sample Test](#).