

# NetSuite ERP Consultant Exam

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*Study Guide: February 2023*

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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.

### Exam Fee

- \$250
- \$150 (retake)

### Taking the Exam

- This will be a live 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](#)
- [Inventory Item Costing](#)
- [NetSuite: Administrator Fundamentals](#)
- [NetSuite Certification: ERP Consultant Exam Preparation](#)

- [NetSuite: Financial Management](#)
- [SuiteAnalytics: Financial Reports and Searches](#)
- [SuiteAnalytics: Advanced Searches](#)
- [SuiteCloud: Exploring the NetSuite Platform](#)
- [SuiteFlow: Workflow Fundamentals](#)
- [Using Accounts Receivable \(AR\)](#)

**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.

<b>Subject</b>	<b>Objective</b>
<b>ERP: Record to Report (1)</b>	Identify the Features and Preferences which need to be configured to support a customer specific requirement.
	Identify the Best Practices of setting up the NetSuite Chart of Accounts.
	Identify how NetSuite Segments are handled in NetSuite, and when to use custom segments.
	Recognize NetSuite recommended Best Practices around period end close, including when Multi-Book is used.
	Identify the constraints of features and functionality related to Journal Entries.
	Identify how exchange rates are used throughout NetSuite.
	Identify how NetSuite taxes are configured.
<b>ERP: Order to Cash (2)</b>	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 and when consolidated invoicing feature is appropriate.
	Understand the different components of the ARM or Basic Rev Rec module and be able to set it up to adapt to the recognition method elected by the user.
Identify recommended practices for customer payment setup and processing.	

	Given a requirement, determine the configuration/solution for a customer return process.
<b>ERP: Design to Build (3)</b>	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.
<b>ERP: Procure to Pay (4)</b>	Given a requirement, determine the configuration/solution for a purchase and receiving process.
	Given a requirement, determine the configuration/solution for a Vendor Bill, Bill Payments.
	Given a requirement, determine the configuration/solution for a vendor return process.
	Recognize the elements in configuring the Fixed Assets Module.
<b>Analytics and Dashboard (5)</b>	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.
	Identify the advantages of various methods of publishing dashboards.
<b>Platform (6)</b>	Given a situation identify whether a SuiteScript or SuiteFlow required to meet a customer requirement.
	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 various methods of restricting users to a particular custom form.
	Given a custom form layout requirement, determine which feature(s) should be used, including Advanced PDF.
	Given a situation identify when to use SuiteBundler.
	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.
	<b>Data Strategy (7)</b>
Understand the use of CSV templates and saved mappings.	
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 and inventory counts.	

	Organize the steps required to successfully complete an import of CSV records and sublist data.
<b>Data Security (8)</b>	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 the Features and Preferences which need to be configured to support a customer specific requirement.**

**How to Study:** Review all Accounting Preferences and Enable Features 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 Best Practices of setting up the NetSuite Chart of Accounts.**

**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 how NetSuite Segments are handled in NetSuite, and when to use custom segments.**

**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, Custom Segments, Benefits of Custom Segments.

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

**Recognize NetSuite recommended practices around period close, including when Multi-Book is used.**

**How to Study:** SuiteAnswers topics: Closing Accounting Periods, Period and Yearend Closing Process FAQs, Using the Period Close Checklist.

**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 how NetSuite taxes are configured.

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

SuiteAnswers topics: Tax Setup Overview, Taxation Features Provided by SuiteApps from NetSuite

**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, Inbound Shipment Management Tool. 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 and when consolidated invoicing feature is appropriate.

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

**Courses addressing this topic:** NetSuite: Financial Management

### Understand the different components of Advanced Revenue Management and be able to set it up to use the recognition method elected by the user.

**How to Study:** Know how to create and apply revenue recognition rules. Understand the difference between a revenue arrangement and a revenue recognition plan. Understand functionality of fair value pricing and revenue allocations. Compare GL impact of revenue recognition and revenue deferral. Understand definition of VSOE.

**Courses addressing this topic:** Revenue Management Essentials

### 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, EFT for customer payments

**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

## 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

### 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 Quantity Discounts, and various ways of totaling the quantity, such as quantity pricing schedules, Pricing Groups, Currency Pricing and Marginal Rates. 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. Standard costing. Average Costing.

**Courses addressing this topic:** Inventory Item Costing

## ERP: Procure to Pay

### Given a requirement, determine the configuration/solution for a purchase and receiving process.

**How to Study:** Understand Purchase Request/Purchase Order standard approval process. Blanket Purchase Orders. 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 Bill, Bill Payments.**

**How to Study:** Identify recommended practices for Vendor Payment Setup and Processing. Understand how Vendor Prepayments work. Know Electronic Bank Payment for Vendors. Know Amortization templates.

SuiteAnswers keywords: Electronic Bank Payments, Vendor Prepayments Overview, Amortization Feature Overview

**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. Know depreciation methods. Understand available, and not available features. NOT ON EXAM: Multi-Book Accounting.

**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.**

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

**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.

## Platform

**Given a situation identify whether SuiteScript or SuiteFlow is required to meet a customer requirement.**

**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 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 various methods of restricting users to a particular custom form.**

**How to Study:** Know how to restrict user from Editing Fields using Standard Permission and Customization

SuiteAnswers Topics: Setting Default Forms for Roles; Defining Preferred Forms; Setting Default and Restricted Forms

**Courses addressing this topic:** NetSuite: Administrator Fundamentals

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

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

**Courses addressing this topic:** NetSuite: Administrator Fundamentals

**Given a situation identify when to use SuiteBundler.**

**How to Study:** Understand when and how to use the SuiteBundler feature to package customization objects or configuration settings into a bundle or SuiteApp and then distribute the bundle (SuiteApp) into other NetSuite accounts. Identify the difference between Customization and Configuration bundles. Be aware of the benefit of using SuiteCloud Development Framework for the creation of new bundles.

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

### 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.

## 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

SuiteAnswers Keywords: Set Advanced CSV Import Options

**Courses addressing this topic:** ERP Consultant Exam Prep

### Understand the use of CSV templates and saved mappings.

**How to study:** Understand how to create CSV templates for import and how to save them for future usage. Review the Import Tool to learn what sublists can be uploaded by selecting the Multiple files to upload option.

**SuiteAnswers keywords:** Working with Saved CSV Imports

**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

SuiteAnswers Keywords: Tips for Successful CSV Imports, CSV Import Error Messages

**Courses addressing this topic:** ERP Consultant Exam Prep

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

**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

### 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. Review the Import Tool to learn what sublists can be uploaded by selecting the Multiple files to upload option.

**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:** Understand the difference between Roles vs. job titles. Understands risks of usage of Administrator role as everyday role. Global Permissions Best Practices.

**SuiteAnswers keywords:** Customizing and Creating Roles, Using the Global Permissions Feature

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

## Sample Questions

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