NetSuite SuiteFoundation Exam

Study Guide: March 2022

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General information about SuiteFoundation Exam:

Passing this exam confirms that you have the foundational knowledge necessary to navigate around the NetSuite system and understand core NetSuite functionality. The credential awarded for passing this exam is SuiteFoundation Certified.

Conditions:

- This will be a proctored examination.
- No written or online reference materials may be used during the exam.
- 80 minutes allotted to complete 65 multiple-choice questions.

Description of a Qualified Candidate:

The candidate can work with the NetSuite product and has a basic understanding of the following concepts and features covered in the ERP: Fundamentals and NetSuite: Administrator Fundamentals courses:

- Features and standard modules (i.e., CRM, ERP)
- Company and user preferences
- Relationship of users, roles, and permissions
- Customization options of the user interface
- Dashboards, reports, and searches
- Standard record types and how they are structured
- NetSuite product release process

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 Training Courses:

- ERP: Fundamentals (3 days)
- NetSuite: Administrator Fundamentals (2 days)
- NetSuite Certification: SuiteFoundation Exam Preparation (2 days)
- Sales Force Automation: Fundamentals (2 days)

- SuiteAnalytics: Financial Reports and Searches (2 days)
- Marketing Automation Workshop (2 days)

Recommended Skill Level:
Three to six months' experience administering the NetSuite application or equivalent knowledge.

Subject Areas and Objectives Covered by the Exam:

Below is a detailed list of test topics:

Subject	Objective
Setup and Administration (1)	Identify the general functionality that can be controlled under Enable Features.
	Identify the constraints and benefits with renaming records/transactions.
	Identification of NetSuite features requiring NetSuite Support Intervention.
	Identify the general functionality of classifications/subsidiaries on both transactions and reporting.
	Define the uses of these SuiteBuilder elements: Custom Forms, Custom Fields, Custom Record Types (Intro), Subtabs.
	Probe high level knowledge of tools and enable features.
NetSuite User Interface (2)	Identify the different navigation options within NetSuite.
	Identify options for optimizing browser experience and NetSuite system performance.
	Identify user-level preferences which modify the UI experience.
	Identify differences in the Shortcut dashboard portlet over the Shortcut menu icon.
	Identify tools for organizing daily activities, communicating, and sharing documents.
Standard NS process flows (3)	Identify how to set up Sales Force Automation.
	Identify elements in progressing through the sales cycle.
	Identify fields and settings which affect quota and forecast reporting.
	Identify how to set up and use Case Management.
	Identify how to set up and use Marketing Campaigns and SuitePromotions.
	Identify how Sales Order form impacts downstream transactions and future GL impact.
	Identify impact of controls on steps in order fulfillment.
	Identify supported payment methods.
	Identify how Return Authorization form impacts downstream transactions and future GL impact.
	Identify impact of controls on steps in Return Management and issuing refunds.
	Identify Item Types and best uses.
	Identify the impact of inventory transactions on inventory levels.
	Identify the functionality of advanced inventory features and potential impacts of enabling them.
	Define sales pricing strategy options.
	Identify how billable items, time, and expenses flow to Invoice.
	Identify setup of approval and routing options for purchasing.
	Identify controls and steps in Accounts Payable transactions processes and their GL impacts.

SuiteAnalytics (4) **SuiteAnalytics (4)**	Identify options for finding records.
	Define elements of building a saved search.
	Understand uses of different types of Portlet types.
	Define the use of the following data management tools: Inline Editing, Mass Updates, CSV imports, CSV export, Duplicate Detection.
Maintenance, Resources, and Data Security (5)	Identify best practices in working with NetSuite Support.
	Identify the resources to use to locate information on help, functionality, SuiteApp, enhancements, or "Best Practices", user discussion.
	Identify resources to learn about NetSuite Release Cycles and New Features.
	Select options for controlling access to data when creating custom roles.
	Identify strategies in creating custom roles.
	Identify importance of setting up security questions.
	Identify what can be controlled from Settings Portlet.
	Define user authentication functionality.
	Identify ways of tracking changes to records in NetSuite.

Study Suggestions

Setup and Administration (1)

Identify the general functionality that can be controlled under Enable Features.

How to Study: Review functionality that is turned on under Enable Features. Understand the impact of turning each feature on or off. Do not worry about which subtab specifically. Contrast Enable Features | General Preferences| Home > Set Preferences | Accounting Preferences.

Courses addressing this topic: ERP: Fundamentals, NetSuite Certification: SuiteFoundation Exam Preparation

Identify the constraints and benefits with renaming records/transactions.

How to study: Search SuiteAnswers keywords: Renaming Record/Transactions. Review Topic in ERP Fundamentals Course: Best practices: Renaming Records and Transactions, Naming conventions.

Courses addressing this topic: ERP Fundamentals: Module: Overview of Account Configuration and Processes, SuiteFoundation Exam Preparation

Identification of features requiring NetSuite Support intervention.

How to study: Review these SuiteAnswers topics: Enabling the Multi-Location Inventory Feature; other SuiteAnswers topic titles related to Enabled Features, or check the questions for features referenced, then look for the matching SuiteAnswers topic

Courses addressing this topic: Administrator Fundamentals, SuiteFoundation Exam Preparation

Identify the general functionality of classifications/subsidiaries on both transactions and reporting.

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, NetSuite Certification: SuiteFoundation Exam Preparation

Define the uses of these SuiteBuilder elements: Custom Forms, Custom Fields, Custom Record Types (Intro), Subtabs.

How to Study: Review steps to create Custom Forms, Custom Fields, Custom Record Types (Intro), Subtabs.

Courses addressing this topic: ERP: Fundamentals, NetSuite: Administrator Fundamentals, NetSuite Certification: SuiteFoundation Exam Preparation

Probe high level knowledge of tools and enable features.

How to study: Review: Installed Bundles, SuiteApps, SuiteFlow. Not asking about specific subtabs on Enable features.

Courses addressing this topic: ERP Fundamentals, Administrator Fundamentals, SuiteFoundation Exam Preparation

NetSuite User Interface (2)

Identify the different navigation options within NetSuite.

How to Study: Understand how NetSuite Roles and Centers affect the top-level tab navigation in NetSuite. Know these navigation tools within NetSuite: Shortcuts | Recent Records | Centers | Portlets | Global Search | Quick Search

Courses addressing this topic: ERP: Fundamentals, NetSuite: Administrator Fundamentals, NetSuite Certification: SuiteFoundation Exam Preparation

Identify options for optimizing browser experience and NetSuite system performance.

How to Study: SuiteAnswers Topics: Identifying Performance Issues; Improving Server Performance; Improving Client Performance; Using a Trace Route to Troubleshoot Performance Issues; Adjusting Browser Settings

Courses addressing this topic: ERP: Fundamentals, NetSuite: Administrator Fundamentals, NetSuite Certification: SuiteFoundation Exam Preparation

Identify user-level preferences which modify the UI experience.

How to Study: SuiteAnswers Topics: Enabling the Show Internal IDs Preference; Setting Preferences for Appearance; Improving Server Performance; Using Popup and Dropdown Lists

Courses addressing this topic: NetSuite Certification: SuiteFoundation Exam Preparation

Identify differences in the Shortcut dashboard portlet over the Shortcut menu icon.

How to study: Search SuiteAnswers Keyword: Shortcuts Portlet, Portlet Types Table. Review differences between Shortcuts menu icon and Shortcuts dashboard portlet. Review Shortcuts dashboard portlet. Review different types of portlets and their possibilities.

Courses addressing this topic: SuiteAnswers: Portlet Types Table; Shortcuts Portlet

Identify tools for organizing daily activities, communicating, and sharing documents.

How to Study: Know these features: Events, Tasks, Email, File Cabinet. Review options under Home > Set Preferences > Activities. SuiteAnswers Topics: Sending Email from NetSuite (and linked topics); Sending Email from Records

Courses addressing this topic: ERP: Fundamentals, NetSuite: Administrator Fundamentals

Standard NS process flows (3)

Identify how to set up Sales Force Automation.

How to Study: Know how to set up these features: Lead routing through Sales Territories assigned to Sales Reps, online customer form, Customer type (Individual vs. Company), Contact Records. Know settings available under CRM Lists.

Courses addressing this topic: Sales Force Automation: Fundamentals

Identify elements in progressing through the sales cycle.

How to Study: Know how Lead Conversion works. Understand how Sales Preferences interact with Lead | Prospect | Customer records, and Sales Transactions.

Courses addressing this topic: Sales Force Automation: Fundamentals

Identify fields and settings which affect quota and forecast reporting.

How to Study: Recognize fields on the Quote/Estimate record. Know what settings under Sales Preferences affect Forecasts. Understand how Quotas are set and assigned, and how Forecasts can be edited or overwritten.

Courses addressing this topic: Sales Force Automation: Fundamentals

Identify how to set up and use Case Management.

How to Study: Understand how these Support features are set up and used: Case routing, case forms setup, online case form, customer center

LCS Pass Course addressing this topic: *Call to Resolution (Case Management)*

Identify how to set up and use marketing campaigns and SuitePromotions.

How to Study: Understand how Marketing Campaigns are set up and tracked in NetSuite, including these components: Groups | Promotions | Promo Codes | Email or Marketing Templates | Campaign Metrics | Lead Nurturing| SuitePromotions.

Courses addressing this topic: Marketing Automation Workshop, NetSuite Certification: SuiteFoundation Exam Preparation

Identify how Sales Order form impacts downstream transactions and future GL impact.

How to Study: SuiteAnswers Topics: Entering a Sales Order; Creating Invoices or Cash Sales from Sales Orders; The Standard Sales Order Form; Understanding Sales Transaction G/L Impact

Courses addressing this topic: ERP: Fundamentals, NetSuite Certification: SuiteFoundation Exam Preparation

Identify impact of controls on steps in order fulfillment.

How to Study: Understand how these features work: fulfill, pick/pack/ship, accounting preferences around fulfillment, advanced shipping, drop-ship, special order, invoice in advance of fulfillment

Courses addressing this topic: ERP: Fundamentals, NetSuite Certification: SuiteFoundation Exam Preparation

Identify supported payment methods.

How to Study: SuiteAnswers keywords: EFT, ACH, PayPal, Customer Payments, Credit Card Processing, Merchant Accounts, Electronic Payments

Courses addressing this topic: NetSuite Certification: SuiteFoundation Exam Preparation

Identify how Return Authorization form impacts downstream transactions and future GL impact.

How to study: Search SuiteAnswers keywords: Return Authorization (RMA) Forms

Courses addressing this topic: ERP Fundamentals, SuiteFoundation Exam Preparation

Identify impact of controls on steps in Return Management and issuing refunds.

How to Study: SuiteAnswers topics: Customer Returns Process (and related topics within); Customer Return Management Workflow; Preferences for Customer Returns; Refunding a Cash Sale; Apply Credit Memo to a Cash Sale; Receiving a Customer Return

Courses addressing this topic: NetSuite Certification: SuiteFoundation Exam Preparation

Identify Item Types and best uses.

How to Study: SuiteAnswers--know all the Item Types and the differences between them (how are they configured, how are they tracked for inventory, costing, G/L, Sales?) : Inventory, Non-Inventory, Service,

Group, Kit/Package, Assembly, Matrix Item, Serialized, Lot-Numbered NOT ON EXAM: Lot numbered; Units of Measure; Manufacturing

Courses addressing this topic: ERP: Fundamentals, NetSuite Certification: SuiteFoundation Exam Preparation

Identify the impact of inventory transactions on inventory levels.

How to Study: Know how all the transactions from Estimate to Invoice to Return can impact Inventory counts. NOT ON EXAM: Standard costing, Cost variance.

Courses addressing this topic: NetSuite Certification: SuiteFoundation Exam Preparation

Identify the functionality of advanced inventory features and potential impacts of enabling them.

How to Study: This only goes as far as Units of Measure, Multi-Location Inventory, Bins, Assemblies, Kits, Packages. NOT ON EXAM: Demand Planning or Manufacturing.

Courses addressing this topic: NetSuite Certification: SuiteFoundation Exam Preparation

Define sales pricing strategy options.

How to Study: Understand these features: Quantity Pricing, Price Levels, Pricing Groups, Pricing Schedules, Multi-currency pricing, Customer-specific Pricing.

Courses addressing this topic: NetSuite Certification: SuiteFoundation Exam Preparation

Identify how billable items, time, and expenses flow to Invoice.

How to Study: SuiteAnswers Topics: Billing Expenses to Customers, Understanding Time Tracking

Courses addressing this topic: N/A

Identify setup of approval and routing options for purchasing.

How to Study: Look at the standard out of the box approval process for Purchase Requests. What are the controls? How does NetSuite determine when approval is required, and who can approve a Purchase Request? NOT ON EXAM: Purchase Requisitions and Custom Approval Routing

Courses addressing this topic: ERP: Fundamentals, NetSuite Certification: SuiteFoundation Exam Preparation

Identify controls and steps in Accounts Payable transactions processes and their GL impacts.

How to Study: Understand how "Advanced Receiving" feature changes the Accounts Payable workflow. Understand which transactions impact accounting. Identify impact of changing price on Vendor Bill, after Items have been received. NOT ON EXAM: Blanket PO, 3-way match feature

Courses addressing this topic ERP: Fundamentals, NetSuite Certification: SuiteFoundation Exam Preparation

SuiteAnalytics (4)

Identify options for finding records.

How to Study: SuiteAnswers keywords: Global Search, Reports, Lists

Courses addressing this topic: ERP: Fundamentals, SuiteAnalytics: Financial Reports & Searches

Define elements of building a saved search.

How to Study: Understand these elements of a custom saved search: criteria, results, available filters, audience, highlighting, formula. Know how these Home > Set preferences settings change the way Saved Searches behave: Show Inactive, Show List when only 1 result, main line for transactions NOT ON EXAM: summary types, SQL, joins, html,

Courses addressing this topic: SuiteAnalytics: Reports & Searches, SuiteAnalytics: Financial Reports & Searches

Understand uses of different types of Portlets.

How to study: Search SuiteAnswers Keywords: Portlet Types Table (e.g. KPIs, KPI Meter, KPI Scorecard, My Login Audit portlet etc.)

Courses addressing this topic: ERP Fundamentals, SuiteAnalytics Series - Essential KPIs and Dashboard Metrics (All Releases)

Define the use of the following data management tools: Inline Editing, Mass Updates, csv imports, csv export, duplicate detection, Delete All Data.

How to Study: Research each of these keywords in SuiteAnswers

Courses addressing this topic: NetSuite: Administrator Fundamentals, NetSuite Certification: SuiteFoundation Exam Preparation

Maintenance, Resources, and Data Security (5)

Identify best practices in working with NetSuite Support.

How to Study: SuiteAnswers topic: Check the NetSuite Account number and environment that you're logged in.; Support Phone Menu Routing Options

Courses addressing this topic: NetSuite Certification: SuiteFoundation Exam Prep

Identify the resources to use to locate information on help, functionality, SuiteApp, enhancements, or "Best Practices", user discussion.

How to Study: Know these resources: SuiteAnswers, Learning Center, Help User Guides, User Group, status.netsuite.com, Suiteapp.com, SuiteIdeas (Enhancement Center). SuiteAnswers keywords: SuiteApps; SuiteIdeas, Best Practices, User Group. SuiteAnswers Topics: Tips for Effective Global Searches.

Courses addressing this topic: NetSuite Certification: SuiteFoundation Exam Prep

Identify resources to learn about NetSuite Release Cycles and New Features.

How to Study: SuiteAnswers Topics: Release Preview Notifications; More New Release Resources; Preparing for Testing

Courses addressing this topic: ERP: Fundamentals, NetSuite: Administrator Fundamentals, NetSuite Certification: SuiteFoundation Exam Preparation

Select options for controlling access to data when creating custom roles.

How to Study: SuiteAnswers keywords: data access by role, Restrict CSV import and export permissions, and Delete All Data. SuiteAnswers topic: Best Practices for NetSuite Administrators (Intermediate) - SuiteWorld 2012

Courses addressing this topic: NetSuite: Administrator Fundamentals, NetSuite Certification: SuiteFoundation Exam Preparation

Identify strategies in creating custom roles.

How to Study: How do you control access to sensitive data when constructing custom roles? Which permissions are especially sensitive? Is it better to create custom roles or use standard out-of-the-box roles? How do you test this control? SuiteAnswers topic: Best Practices for NetSuite Administrators (Intermediate) - SuiteWorld 2012

Courses addressing this topic: NetSuite: Administrator Fundamentals, NetSuite Certification: SuiteFoundation Exam Preparation

Define user authentication functionality.

How to Study: SuiteAnswers Topics: Updating Security Questions; Getting Access When You Forget Your Password; Two-Factor Authentication

Courses addressing this topic: NetSuite: Administrator Fundamentals, NetSuite Certification: SuiteFoundation Exam Preparation

Identify steps to set up security questions.

How to study: Search SuiteAnswers topics: Setting Up Security Questions; If You Forget the Answers to Your Security Questions.

Courses addressing this topic: ERP Fundamentals, Administrator Fundamentals

Identify features controlled from Settings Portlet.

How to study: Search SuiteAnswers topics: Settings Portlet

Courses addressing this topic: ERP Fundamentals, Administrator Fundamentals, SuiteFoundation Exam Preparation

Identify ways of tracking changes to records in NetSuite.

How to Study: There are several different ways to track changes besides System Notes. Think about the major record types in NetSuite, and how you would track any changes that might have been made in the system. What audit functions exist? What happens if the change made impacts the General Ledger? What happens to the history of a field if the field type is changed?

Courses addressing this topic: NetSuite Certification: SuiteFoundation Exam Preparation