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NetSuite

Prepare for the Oracle NetSuite SuiteFoundation Exam

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About the Oracle NetSuite SuiteFoundation Exam

The Oracle NetSuite SuiteFoundation certification is designed for individuals with 6 to 12 months of hands-on and NetSuite implementation experience and preparing to obtain NS Administrator, ERP Consultant or Developer Professional certifications. This certification validates knowledge of NetSuite core concepts and functionality:

- Setup and administration
- NetSuite UI and tools
- Standard NetSuite business process flows
- Reporting fundamentals
- Maintenance and data security

The credential awarded for passing this exam is **Oracle NetSuite Certified SuiteFoundation** .

Recommended Skill Level

6 to 12 months' hands-on experience with the NetSuite application or equivalent knowledge.

The candidate can work with the NetSuite product and has an intermediate understanding of the following concepts and features:

- 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

Recommended Training

NetSuite provides a variety of resources including eLearning courses, detailed articles and guides, and community knowledge bases that are designed to enhance your NetSuite skills and knowledge.

MyLearn

Use MyLearn as your primary resource to prepare for the exam. Search for the **Certification Preparation – SuiteFoundation** learning path to find a complete list of required courses.

MyLearn courses include video demonstrations that show you how to perform tasks in NetSuite. Some courses also provide downloadable Quick Reference Guides. In some courses, you can request a Lab to apply your knowledge in a NetSuite test environment.

NetSuite Help Center

The NetSuite Help Center contains detailed articles, guides, and how-to's that cover NetSuite functionality.

Consult the Help Center for more information on the exam topics.

SuiteAnswers

SuiteAnswers is a community-driven knowledge base with official NetSuite responses and FAQs on a variety of related topics.

Go to SuiteAnswers to explore the exam topics.

To access SuiteAnswers, log in to your NetSuite account, click **Help**, and select **SuiteAnswers** from the center or Additional Resources menu.

Topics Covered by the Exam

Exam topics indicate the key areas covered in the exam, helping you study specific NetSuite skills and knowledge you need to pass the exam:

Topic	Objective
Setup and Administration	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	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	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 forms impact 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	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	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

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. Contrast Enable Features | General Preferences| Home > Set Preferences | Accounting Preferences.

Identify the constraints and benefits with renaming records/transactions.

How to Study: Review Topic in ERP Fundamentals Course: Best practices: Renaming Records and Transactions, Naming conventions.

Identification of features requiring NetSuite Support intervention.

How to Study: Review topics related to Enabled Features

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

How to Study: Review topics, such as Departments, Classes, Locations, Subsidiaries, Accounts, 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?

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 Subtabs.

Probe high level knowledge of tools and enable features.

How to Study: Review: Installed Bundles, SuiteApps, SuiteFlow.

NetSuite User Interface

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.

Identify options for optimizing browser experience and NetSuite system performance.

How to Study: Review topics such as Identifying Performance Issues; Improving Server Performance; Improving Client Performance; Using a Trace Route to Troubleshoot Performance Issues; Adjusting Browser Settings.

Identify user-level preferences which modify the UI experience.

How to Study Review topics such as Enabling the Show Internal IDs Preference; Setting Preferences for Appearance; Improving Server Performance; Using Popup and Dropdown Lists.

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

How to Study: Review differences between Shortcuts menu icon and Shortcuts dashboard portlet. Review Shortcuts dashboard portlet. Review different types of portlets and their possibilities.

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. Sending Email from NetSuite (and linked topics); Sending Email from Records.

Standard NS Process Flows

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.

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.

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.

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

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

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

How to Study: Review topics, such as Entering a Sales Order; Creating Invoices or Cash Sales from Sales Orders; The Standard Sales Order Form; Understanding Sales Transaction G/L Impact

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

Identify supported payment methods.

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

Identify how Return Authorization forms impact downstream transactions and future GL impact.

How to Study: Review Return Authorization (RMA) Forms

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

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

Identify Item Types and best uses.

How to Study: 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

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.

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.

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.

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

How to Study: Review topics: Billing Expenses to Customers, Understanding Time Tracking

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?

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.

SuiteAnalytics

Identify options for finding records.

How to Study: Review Global Search, Reports, Lists

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,

Understand uses of different types of Portlets.

How to Study: Review Portlet Types Table (e.g. KPIs, KPI Meter, KPI Scorecard, My Login Audit portlet etc.)

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: Review the specified data management tools

Maintenance, Resources, and Data Security (5)

Identify best practices in working with NetSuite Support.

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

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).

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

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

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

How to Study: Review Data Access by Role, Restrict CSV import and export permissions.

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?

Define user authentication functionality.

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

Identify steps to set up security questions.

How to Study: Review topics, such as Setting Up Security Questions; If You Forget the Answers to Your Security Questions.

Identify features controlled from Settings Portlet.

How to study: Review Settings Portlet

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?