Prepare for the Oracle NetSuite ERP Consultant Exam

Contents

About the Oracle NetSuite ERP Consultant Exam

The Oracle NetSuite ERP Consultant certification is designed for individuals with a solid understanding of NetSuite technology and 1-2 years' experience supporting NetSuite ERP implementations in a consultant role. This certification supports candidates who want to become proficient in matching NetSuite ERP solutions to customers' complex business requirements.

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

Passing both the Oracle NetSuite ERP Consultant exam and the Oracle NetSuite SuiteFoundation exam certifies that you have the knowledge and skills necessary to be an **Oracle NetSuite Certified ERP Consultant** .

This certification validates the knowledge and skill to:

- Apply extensive knowledge of NetSuite business process flows to solving customers' business problems
- Advise customers on how to effectively utilize the NetSuite platform and platform tools
- Devise a data strategy for migrating customer data into NetSuite
- Implement customer reporting requirements using NetSuite reporting and analytics tools.

Recommended Skill Level

Equivalent to at least 1-2 years' worth of NetSuite implementations in a consultant-related role.

The candidate has the equivalent experience of performing 5-10 medium scale, or 2-3 enterprise NetSuite ERP implementations. 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.

Recommended Training Courses

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 – ERP Consultant** 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 Test

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

Topict	***Objective***
ERP: Record to Report	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.
ERP: Order to Cash	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.
ERP: Design to Build	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	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.
Analytics and Dashboard	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.
Platform	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.
Data Strategy	Determine the proper use of advanced options in CSV Import.
	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.
Data Security	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

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.

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.

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

How to Study: 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, Custom Segments, Benefits of Custom Segments.

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

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

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

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

Identify how exchange rates are used throughout NetSuite.

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

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.

Courses Addressing This Topic: ERP Consultant Exam Preparation

ERP: Order to Cash

Identify considerations when setting up related Entity records.

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

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

How to Study: 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.

Identify the implications of shipping setup and use.

How to Study: reating 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 fulfilment, tracking numbers, label integration, Multi-location inventory.

Given a scenario, determine appropriate invoicing configuration and setup and when consolidated invoicing feature is appropriate.

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

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.

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.

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.

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.

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.

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?

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.

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.

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.

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

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.

Analytics and Dashboards

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.

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

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.

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

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

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.

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.

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

How to Study: Compare features of Reports vs. 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.

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.

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.

Recognize available SuiteFlow actions.

How to Study: Use SuiteFlow to Automate Business Workflows

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

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

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

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.

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. Working With Lists, Setting Sourcing Criteria, Setting Filtering Criteria, Create Controlling and Dependent Dropdown Fields or Nested List

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, Creating a Custom Field, Ways to Set Field Mandatory

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

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.

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

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.

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.

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), Export Lists, File Cabinet Access, Storage of Scripts, searches and Reports, Custom Records, Run Unrestricted, Limit Results.

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.