SuiteFoundation Exam Study Guide

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What is turned on under Enabled Features?	Enabling General Company Features Enabling Accounting Features Enabling Tax Features Enabling Transaction-Related Features Enabling Items and Inventory Features Enabling Employee and Payroll Features Enabling CRM and SFA Features Enabling Analytics Features Enabling Ecommerce Features Enabling SuiteCloud Features
What is Enabled Features?	The Enable Features page is where you turn on or off features in NetSuite.
What is General Preferences?	The General Preferences screen provides important choices related to date formats, default settings for Customer and Vendors records and more. The General Preferences screen manages: - Global Date and Time Formats - Phone Formats - First/Last Name preferences - Password Policies - Login Welcome - Screen Font - Default Customers as Individuals or Companies - Shows list with only one result - Others
What is Home>Set Preferences?	Gives user the ability to personalize certain elements of their NetSuite dashboard including: - Nickname field - Signature - Show Internal IDs On the Appearance tab, the Landing Page dropdown provides the ability to change the default Dashboard to a menu Dashboard if preferred On the Transactions tab, under the Printing section, choose the PDF radio button if you prefer to send attachments as PDF instead of HTML. On the Analytics tab in the Search section, the option Show List When Only One Result ensures that the search results screen is displayed rather than an individual record when only one result matches the search. This is a common option to select.
What is Accounting Preferences?	Determines the flow of the accounting management user interface in your account. The accounting preferences that can be set depend upon the NetSuite product purchased and the features enabled for your account. - General Accounting Preferences - Items/Transactions Accounting Preferences - Order Management Accounting Preferences - Projects Accounting Preferences - Time & Expenses Accounting Preferences - Approval Routing Accounting Preferences
Home>Set Preferences>Nickname Field?	The Nickname field is typically the user's name and is the "from" name when the user sends emails from the system. If the user sends emails frequently, they may want to make their Nickname the organization's name rather than their own.
Home>Set Preferences>Signature?	Signature refers to the email signature included on correspondence sent from NetSuite. If it includes more than one line of text, such as an address and phone number, you will need to use HTML formatting to show the data on separate lines or to style the font with bold or italics.
Home>Set Preferences>General tab>Show Internal IDs?	This helps users identify and find recently created records.

Home>Set Preferences>Appearance tab>Landing Page?	The Landing Page dropdown provides the ability to change the default Dashboard to a menu Dashboard if preferred
Home>Set Preferences>Transaction tab> Printing?	Under the Printing section, choose the PDF radio button if you prefer to send attachments as PDF instead of HTML.
Home>Set Preferences>Analytic tab> Show List When Only One Result?	Ensures that the search results screen is displayed rather than an individual record when only one result matches the search. This is a common option to select.
General Accounting Preferences?	The following types of preferences are available on the General subtab of the Accounting Preferences page: - General Ledger - Accounts Receivable - Accounts Payable - Classifications - Revenue Recognition - Amortization - OneWorld - Budget - Exchange Rate Integration
What is Netsuite OneWorld?	Supports global, multi-subsidiary organizations. With OneWorld, an organization can use a single NetSuite account to manage records and transactions for multiple legal entities or conducting business across multiple tax jurisdictions or involving multiple currencies. A OneWorld account organizes both domestic and international subsidiaries into a single hierarchical structure. Each subsidiary is treated as a distinct legal entity for taxation and regulation purposes, and is associated with a specific nexus and a specific base currency. This base currency is the currency in which the subsidiary manages its financials. Subsidiary-specific data is available for reporting, and data for multiple subsidiaries can be rolled up into consolidated reports in the currency of a parent subsidiary. OneWorld supports local and foreign currencies for transactions with foreign companies and between subsidiaries. Consolidated reports including aggregated financial statements provide foreign currency translation and consolidation for all child subsidiaries of a selected parent subsidiary.
Items/Transactions Accounting Preferences?	The following types of preferences are available on the Items/Transactions subtab of the Accounting Preferences page: - Accounts - Sales and Pricing - Inventory - Payment Processing - Other Transaction Preferences - Other Item Preferences
Order Management Accounting Preferences?	The following types of preferences are available on the Order Management subtab of the Accounting Preferences page: - Sales Orders - Picking/Packing - Fulfillment - Invoicing - Drop Shipment - Purchasing - Receiving - Returns - Transfer Orders - Work Orders

Projects Accounting Preferences?	The following preferences are available on the Projects subtab of the Accounting Preferences page: - Budget Categories - Post Time
Time & Expenses Accounting Preferences?	The following types of preferences are available on the Time & Expenses subtab of the Accounting Preferences page: - General - Time Tracking - Expenses
Approval Routing Accounting Preferences?	The following preferences are available on the Approval Routing subtab of the Accounting Preferences page: - Expense Reports - Purchase Orders - Vendor Bills - Resource Allocations - Journal Entries
Enabling General Company Features?	- Departments- Record income and expense transactions to the Department dimension. - Locations- Ability to record income and expense transactions to the Locations dimension. - Classes- Ability to record income and expense transactions to the Class dimension. - Projects- Ability to record income and expense transactions to Projects. - Inline Editing- Provides the ability to change data in lists. Much faster updating/editing capabilities compared to opening each record individually. - File Cabinet- Stores documents and files. - Duplicate Detection and Merge- Determine whether or not records have duplicates.
Enabling Accounting Features?	- Accounting- Enables the Accounting features. - A/R- Accounts Receivable includes issuing invoices, accepting payments and running reports. - A/P- Accounts Payables includes entering bills, making payments and running reports. - Accounting Periods- Creates distinct accounting periods; can be calendar or other fiscal year. - Expense Allocation- Account for fixed expenses without splitting them among individual departments, classes or locations before incurring the expenses. - Dynamic Allocation- Dynamically calculate the weight of any statistical allocation, based on the balance of the statistical account through statistical journals, at the time the allocation journal is generated. Also enables you to run multiple dynamic allocation schedules in a specific sequence, or batch. - Consolidated Payments- Allows all payments, credits, and deposits to be accepted either through the highest-level customer in a customer-subcustomer hierarchy or through the individual subcustomer for whom the invoice is entered. - Statistical Accounts- Used in conjunction with Expense Allocations and Allocation Schedules, track non-monetary data and then use this information on reports and income statements to view its relationship with the financial activity of your organization.
Enabling Tax Features?	- Advanced Taxes- Track taxes for multiple Nexuses - EU Mini One Stop Shop- Track taxes for EU Digital Services
	- Estimates- Prepare estimates or quotes to send to customers. Can be used as part of the fund raising and income projection process. - Sales Orders- Create and track Sales Orders. Also useful as part of the fund raising and income projection process.

Enabling Transaction-Related Features?	- Purchase Orders- Create and track vendor purchase orders. This feature is required for the Approval Routing feature - Advanced Billing- Provides the ability to manage recurring billing on Sales Orders - Billing Operations- Create and manage billing operations, schedules, groups and invoice approvals.
Enabling Items and Inventory Features?	- Drop Shipments & Special Orders - Matrix Items - Multiple Vendors - Gift Certificates - Sell Downloadable Files - Bar Coding and Item Labels - Inventory - Track inventory for multiple locations. - Shipping and Advanced Receiving. - Assembly Items - Work Orders - Serialized Inventory - Lot Tracking - Bin Management - Advanced Bin / Numbered Inventory Management - Advanced Inventory Management - Landed Cost - Demand Planning - Distribution Resource Planning - Available to Promise - Standard Costing - Group Average Costing - Manufacturing Work In Process - Inventory Count - Manufacturing Routing and Work Center - Supply Chain Management - Grid Order Management
Enabling Employee and Payroll Features?	- Payroll - Enhanced Premier Payroll - Service Printed Check and Stubs - Service Printed W-2S and 1099S - Time & Expenses - Expense Reports - Approval Routing - Per-Employee Billing Rates - Billing Rate Cards - Purchase Requests - Time Tracking - Weekly Timesheets - Time Tracking for CRM - Commissions - Employee Commissions - Commissions Payable account. - Commission on Custom Fields - Global Permissions

Enabling CRM and SFA Features?	- Basic Features - Customer Relationship Management - Sales Force Automation - Customer Support and Service - Marketing Automation - Related SuiteApp - Campaign Assistant - Sales - Opportunities - Lead Conversion - Advanced Forecasting - Team Selling - Historical Metrics - Support - Email Case Capture - Automated Case Escalation - Issue Management - Knowledge Base - Help Desk - Marketing - Online Forms - Mail Merge - CRM Template Categories - Capture Email Replies - Upsell Manager - Sales Campaigns - Partner Relationship Management - Partner Commissions/Royalties - Multi-Partner Management
Enabling Analytics Features?	- Dashboards - KPI Scorecards - Connectivity - SuiteAnalytics Connect - Third-Party Analytics Integration - Export to Tableau Workbooks
Enabling Ecommerce Features?	- Web Site - Web Store - Multiple Web Sites - Advanced Web Reports - Advanced Web Search - Descriptive URLs - URL Component Aliases - Site Management Tools - Customizable Checkout Subdomains - Commerce Categories - Publishing - Host HTML Files - External Catalog Site (WSDK) - Document Publishing - Access - Customer Access - Online Ordering - Vendor Access - Partner Access - Advanced Partner Access
	- SuiteBuilder- Item Options, Custom Records, Advanced PDF/HTML Templates - SuiteScript- Client SuiteScript, Server SuiteScript, SuiteScript Server Pages, SuiteFlow - SuiteGL- Custom GL Lines, Custom Transactions, Custom Segments - SuiteBundler- Create Bundles with SuiteBundler

Enabling SuiteCloud Features?	- SuiteTalk- Web Services - Manage Authentication- SuiteSignOn, OpenID Single Sign-on, SAML Single Sign-on, Token-based Authentication - Integration Add-ons- Telephony Integration, Related SuiteApp Outlook Integration - Real User Monitoring- SuiteCommerce Real User Monitoring - SuiteCloud Development Framework
What are Departments?	Categories that you can create to separate and track records such as financials, transactions, and employees. For example, you can create a department for each team of employees dedicated to a certain area of business, and then track income and expenses by each department over any time period.
What are Classes?	Categories that you can create to track records such as financials, transactions, and employees. For example, you own a janitorial service and you want to track income and expenses separately for household and commercial accounts. You set up a class for each account type and track the financial performance of each class over any time period.
What are Locations?	A record of the physical offices or buildings in your organization, such as corporate offices, warehouses, or retail premises.
What are Subsidiaries?	Represents a separate company within your global organization.
How Many Subsidiary Records Can You Create?	You can create up to 124 subsidiary records, in addition to the root subsidiary, for a total of 125. License fees for subsidiaries do not include charges for elimination subsidiaries, and elimination subsidiaries do not count toward the maximum of 125 subsidiaries. Inactive subsidiaries also do not count toward the maximum.
How to Create a Subsidiary?	Create a subsidiary record for each legal entity in your organization, and a separate elimination subsidiary record as a child of each parent subsidiary. It is recommended that you create subsidiary records in a top-down fashion, beginning with the root subsidiary, then all of its child subsidiaries, then the next level of subsidiaries, and so on. This order is recommended because you must define the parent for each child subsidiary in the Subsidiary of field on the subsidiary record.
Which values cannot be changed after you have saved a subsidiary record?	- Subsubsidiary of (the parent subsidiary) - Elimination - Currency - Edition - Country
Can you delete all Subsidiaries after they are created?	No. You cannot delete the subsidiary where the ID is equal to 1.
What is Elimination Subsidiaries?	When related companies within a consolidated company transact, keeping correct books may require eliminating the revenue or expenses for subsidiaries at the consolidated level to remove the effect of investment in subsidiaries. For example, inter-company transaction balances may require elimination for the following reasons: - Sales between subsidiaries - Inventory transfers between subsidiaries - Loans between subsidiaries You use elimination subsidiaries to post journal entries that balance consolidated books. These journal entries, called elimination journal entries, reverse the impact of the intercompany transactions. Each elimination journal entry is posted to an elimination subsidiary.
Is an Elimination Subsidiary required for all Subsidiaries?	Create an elimination subsidiary for any subsidiary that has child subsidiaries and create it as a child of the parent subsidiary. Set the currency to the same currency as the base currency of the parent subsidiary. An elimination subsidiary cannot be a parent.

How do you Create an Elimination Subsidiary?	You create elimination subsidiaries in the same manner that you create other subsidiaries except that you check the Elimination box on the subsidiary record.
Do Elimination Subsidiaries count toward the maximum 125 Subsidiaries?	License fees for subsidiaries do not include charges for elimination subsidiaries, and elimination subsidiaries do not count toward the maximum of 125 subsidiaries.
Can the Elimination Subsidiary be a different currency than the direct parent subsidiary?	No. An elimination subsidiary must use the same base currency as their direct parent subsidiary.
What consolidated exchange rate must be used for a elimination subsidiary?	When using consolidated exchange rates, an elimination subsidiary must use a consolidated exchange rate of 1 to its direct parent subsidiary.
Can Elimination Subsidiaries be selected for all Transactions?	No. An elimination subsidiary can be selected only for journal entries, not for other transactions.
Journal Entries that are Associated with an Elimination Subsidiary- are they an inter-company journal entry or a normal journal entry?	A journal entry that is associated with an elimination subsidiary is a normal journal entry, not an intercompany journal entry. It posts to a single subsidiary, which is an elimination subsidiary.
Do Elimination transactions affect the general ledger of non-elimination subsidiaries?	No. Elimination transactions post only to the elimination subsidiary and do not affect the general ledger of non-elimination subsidiaries.
Can elimination journals be generated automatically?	Yes. Elimination journal entries can be generated automatically if you enable the Automated Intercompany Management feature
Can an elimination subsidiary be selected on bank account record or a credit card account record?	No. An elimination subsidiary cannot be selected on a bank account record or a credit card account record.
Can an elimination subsidiary be selected on item records?	No. An elimination subsidiary cannot be selected on item records.
What are interCompany Journal Entries?	Specialized type of journal available specifically for OneWorld. The journal entry records debits and credits to be posted to ledger accounts for transactions between two subsidiaries. The journal entries adjust the value of any set of accounts without entering transactions such as invoices or bills.
What are General Journal Entries?	Records debits and credits to be posted to ledger accounts. Adjust the value of any set of accounts without entering transactions such as invoices or bills.
What are Elimination Journal Entries?	Regular journal entries, except that they are associated with elimination subsidiaries.
What are OneWorld Capabilities?	With OneWorld, you can manage inter-related business processes across multiple subsidiaries. Some of the capabilities that OneWorld provides include: - Accounting and Financial Consolidation - Tax and Regulatory Compliance - Customer Relationship Management - Shared or Unique Web Stores - SuiteCloud - Reporting and Search
What are OneWorld's Accounting and Financial Consolidation Abilities?	Each subsidiary completes transactions in its own base currency. Subsidiaries share inventory items and have unique items. Using a single chart of accounts as well as subsidiary-specific accounts you prepare consolidated and subsidiary financial statements in the appropriate currencies. You can also enter intercompany journal entries and eliminate profits for transactions among subsidiaries.
What are OneWorld's Tax and Regulatory Compliance Abilities?	Each subsidiary has one or more locations unique to that subsidiary, enabling you to administer location-based tax and regulatory requirements.
	With OneWorld you can manage your sales organization and customer relationships. Sales quotas and forecasts span sub-

What are OneWorld's Customer Relationship Management Abilities?	sidiaries and sales organizations. Sales people can sell and be commissioned across subsidiaries. Marketing campaigns and the leads obtained could be shared by one or more subsidiaries.
What are OneWorld's Shared or Unique Web Stores Abilities?	Subsidiaries can have dedicated or shared Web stores with unique items.
What are OneWorld's SuiteCloud Abilities?	SuiteCloud supports OneWorld with SuiteTalk (Web Services), SuiteScript, SuiteBuilder (customization), and SuiteAnalytics Connect.
What are OneWorld's Reporting and Search Abilities?	OneWorld supports reporting in the base currency of each subsidiary, its parent subsidiary, and the top-level, root-parent subsidiary. Financial statements, dashboards, and Key Performance Indicators Overview can display consolidated roll-ups and side-by-side comparisons of subsidiaries.
Who should use OneWorld?	OneWorld provides the most value to organizations with the following characteristics: - Subsidiaries exist as separate legal entities, particularly foreign subsidiaries. - The top-level, or root-parent subsidiary, owns 100% of all subsidiaries. Affiliates, franchisees, joint ventures, and similar shared-ownership entities require more specialized accounting treatment. - All subsidiaries have similar business processes. For example, a wholesale distribution company with similar operations in multiple countries can take advantage of company-level preferences. - All subsidiaries generally use the same chart of accounts and fiscal periods. However, a company could set up country-specific accounts to meet statutory or internal reporting requirements.
What are Accounts?	A category of transactions related to a specific type of asset, liability, equity, income, or expense. They are listed in your chart of accounts. You can customize your chart of accounts to make it more useful.
Can you delete Accounts?	Yes and No. Many accounts cannot be deleted. You can delete an account if there is no activity in the account and if the account is not required by NetSuite. For example, the non-posting Sales Order account cannot be deleted because NetSuite uses this account for sales orders. Also, certain accounts cannot be deleted because they are required for reporting purposes. Reports are hard-coded with these accounts, therefore, NetSuite does not permit you to delete them. You can, however, make them inactive. You can delete or make accounts inactive from individual account records, or directly on the chart of accounts list.
Can you Restrict Access to Records by Department?	Yes. If your account has the Departments feature enabled, you can restrict access to transaction, employee, partner, and optionally item records based on their assigned department values. You can also limit the departments that users can assign to these records. Department restrictions can be defined per user role and then applied to all users logged in with that role.
What are the settings for the Department Restrictions field, on the Role page, that define department-related restrictions for transaction and customer records?	- None - no default - There is no restriction on what can be selected. Record access is not determined by this field. A default selection does not appear. - None - default to own - There is no restriction on what can be selected. Record access is not determined by this field. Fields of this type will select the user by default. - Own, subordinate, and unassigned - Users are restricted when selecting any of the employee, sales rep, or supervisor fields. Users are granted access to records belonging to their supervisor hierarchy. Users may only select themselves or their subordinates. If the select field is optional, then the user may leave the value

	unassigned. Note that unassigned is technically a null value when used for filtering. - Own and subordinates only - Users are restricted when selecting any of the employee, sales rep, or supervisor fields. Users are granted access to records belonging to their supervisor hierarchy with the exception of unassigned records. Consequently, unassigned records are filtered and denied access. Users may only select themselves or their subordinates.
What are Classifications?	Departments, Classes, and Locations that you can use to identify and categorize records in your NetSuite account.
What feature requires a user to agree to the mass Messaging Application Terms of Service?	Mail Merge
Where does an Admin turn in Custom Records?	Enable Features
What Structure will allow the tracking of consolidation financial reports by a legal entity?	Subsidiaries
How can the impact of intercompany purchases and sales be offset?	Post Journals to elimination subsidiaries
In a OneWorld account which 2 steps are required to make items taxable?	-Assign a tax schedule to the item record - Create tax schedules for groups of items
What is a Custom Field Type - Multiple Select?	Ability to possibly record several related preferences
What is a Custom Field Type - Check Box?	Describe something as On or Off
What is a Custom Field Type - List/Record?	- Connect Customers to a custom record - Record only one of several related preferences
What is a Custom Field Type - Rich Text?	Record formatted text
What is the sequence that should be followed to create a custom record?	Step 1 - Define record attributes and behavior first Step 2- Create necessary subtabs Step 3- Create custom fields
Define the Customized Action - Field Group?	Field groups organize related data into logical groups on forms.
Define the Customized Action - Use for Pop-ups?	Enter information on-the-fly instead of a regular screen
Define the Customized Action - Manditory?	Force a user to fill in a field
Define the Customized Action - Store Form with Record?	Fields are presented in the same order each time a record is accessed
Define the Customized Action - Enable Field Editing on Lists?	Enable inline editing
A user just closed the record for a customer name Company A by mistake. What is the recommended method to go directly back to the Customer record for Company A?	Use Recent Records
Which action can be taken to optimize NetSuite's performance in a browser?	Use the smallest portlet level refresh
What information is displayed in a pop-up window after double clicking the NetSuite logo?	The PET (Page, Email, Time) page
What two options can be set by the User under Home > Set Preferences?	- The tab navigation - The default subsidiary
What configuration would allow a user to see only child items?	Set the user preferences to only show last sub item
What methods can be used to restrict access to a file from the file cabinet?	- Mark Folder as Private - Restrict Folder to Group - Restrict at Folder Level
Why might user A not see user B's Calendar?	User B's calendar is not shared as Public
What are CRM List types?	- Sales Role - Contact Role - Contact Category - Win-Loss Reason - Partner Category/Role

	- Note Type - Campaign Channel and Campaign Offer - Sales Readiness - Buying Time Frame .- Buying Reason
What are Sales teams in Netsuite?	Groups of employees
Each employee in a sales team has a designated contribution percentage. A member's contribution percentage determines how much of a transaction's total is used to calculate?	- Commission earned for that transaction - How much of the transaction counts towards a quota - How the transaction affects the sales forecast
What is the purpose of CRM list - Contact Role?	Create roles to identify your contacts, for example Decision Maker or Influencer. These are assigned to the contact on the Relationships > Contacts subtab on the Prospect and Customer record.
What is the purpose of CRM list - Contact Category?	Assigning categories to contacts helps you manage your contacts list.
What is the purpose of CRM list - Win-Loss Reason?	Indicates why an opportunity is won or lost. Note: This list is only available if you use the Opportunities feature.
What is the purpose of CRM list -Campaign Channel and Campaign Offer?	Both offer ways to track the effectiveness of your marketing campaigns. Note: These lists are only available if you have enabled the Marketing Automation feature.
What is the purpose of CRM list - Sales Readiness?	Describes how close a lead, prospect, or customer is to making a purchase. This list shows in the Sales Readiness field. On the Sales subtab, click Qualification. The field is viewable from opportunities, leads, prospects, and customer records.
What is the purpose of CRM list - Buying Time Frame?	Indicates when a customer intends to purchase. This list shows in the Buying Time Frame field. On the Sales subtab, click Qualification. The field is viewable from opportunities, leads, prospects, and customer records.
What is the purpose of CRM list - Buying Reason?	This list tracks why a lead, prospect, or customer wants to purchase. This list shows in the Buying Reason field. On the Sales sub-tab, click Qualification. The field is viewable from opportunities, leads, prospects, and customer records.
Where can statuses be mapped to actions for the progress of Lead to Prospect to Customer?	Sales Preferences
What is the default Customer Stage for the following Sales Transaction- First Invoice?	Customer Stage- Customer
What is the default Customer Stage for the following Sales Transaction- First Opportunity?	Customer Stage- Prospect
What is the default Customer Stage for the following Sales Transaction- First Sales Order?	Customer Stage- Customer
What is the default Customer Stage for the following Sales Transaction- First Quote/Estimate?	Customer Stage- Prospect
What is the default Customer Stage for the following Sales Transaction- Additional Sales Order?	Customer Stage- Customer
What are the Customer Stages?	There are three possible stages that can be defined for a customer — lead, prospect or customer
How does a Lead become a Prospect?	If an estimate or opportunity is created for a lead, the lead becomes a prospect.
How does a Lead become a Customer?	If you create a sales transaction for a lead, the lead becomes a customer.
How does a Prospect become a Customer?	If a sales transaction is created for a prospect, or an opportunity is closed for a prospect, the prospect becomes a customer.
What must be selected to allow sales reps and managers to adjust the statuses of opportunities when saving forecasts?	Allow Setting Status in Forecast Editor

What is the purpose of checking the Internal Only check box on a Case Form?	To prevent comments in the Reply window from being emailed
What allows more than 10,000 messages to be sent in a single email campaign?	- DomainKeys Identified Mail (DKIM) - Campaign Domain
What Sales Order transaction form can generate a Cash Sale upon billing?	Standard Sales Order
What is an Invoice?	An invoice is a record of a sale to a customer. Invoicing is the process of creating bills for goods and services that customers receive. Record an invoice when payment is not received at the time of delivery. The invoice amount is the total due to be paid to you by the customer. The invoice indicates terms of payment that specify when you expect to receive the money owed to you. Invoice aging tracks how long the amount has been due as payable. NetSuite keeps track of your outstanding invoices in an account called Accounts Receivable. All sales in NetSuite involve items from your Items list. Each invoice consists of multiple line items whose sales amounts add up to the total of the invoice. In companies with the most basic billing procedures, items are chosen at the time of sale by clicking Items in the middle of the Invoice page.
What is Progress Invoicing?	Many service businesses use progress billing to bill for portions of projects as they are completed. When using progress billing, a progress sales order is created and approved. When a portion of the project has been completed, the progress sales order is fulfilled. Then, a progress invoice is created for a percentage of the total cost.
What is the impact of enabling the Advanced Shipping feature?	. Fulfillment is separated from invoicing.
Which Customer Payment Methods are supported in NetSuite?	-Credit card payment (mastercard and visa by default) -Cash -Check -Paypal & Electronic Funds Transfer can be enabled -Electronic payments
Which setting allows returned items to be counted as part of inventory?	Receive Return > Check "Restock" checkbox
Which three Item Types can be defined for Purchase, Resale, or Sale?	Services, other Charges and Non-inventory Item
What is a Saved Search?	A reusable search definition, that can have many advanced search filters and results display options. If you have the Publish Search permission, you can share search results with other users. Saved search results provide reporting and tracking and can serve as the basis for business analysis and strategic decision-making.
How many KPI meter portlets can be added to a Dashboard?	You can add up to three KPI Meter portlets to a dashboard
What are Key Performance Indicators (KPI's)?	Synthesize your raw data into critical business metrics that you can see right on your dashboard in the formats you choose.
What is a Key Performance Indicators portlet?	Portlet displays a summary line for each selected KPI, with click-able links that drill down into each KPI's underlying data source.
What is a KPI Meter portlet?	Portlet displays a visual representation of KPI data, a semi-circular meter providing comparison, date range, and threshold values at a glance.
What is a Trend Graph portlet?	Portlet displays a chart of KPI data values over selected time intervals. This chart type can be Area, Line, Bar, or Column. Comparisons can be shown in continuous or side-by-side manner.

	Popup trend graphs also are available from clickable icons in the Key Performance Indicators portlet and the KPI Scorecard portlet.
What is a KPI Scorecard portlet?	Portlet displays a performance scorecard that can include complex comparisons among multiple KPIs over multiple date ranges or accounting periods. Scorecards also can include Excel-like formulas with KPIs and functions in their expressions.
What is a Nexus?	A tax jurisdiction
How does Multi-Location Inventory affect costing?	Cost are calculated at the location level
How can a customer's custom negotiated sales price for items be set up to default on sales transactions?	Assign the item pricing on a customer record.
Where is the purchase approval limit (amount) defined for supervisors?	On the Employee Record
How does enabling the Advanced Receiving feature change the Item Receipt function in NetSuite?	It separates the Item Receipt from the Vendor Bill
Does the shopping cart automatically save sale orders in the system?	Yes
What is a Quick Search?	Search for General or Transaction type only
What is a Global Search?	Search that can be used to search Help Topics
What is a Saved Search?	Search that custom filters can be used
In a Saved Search, what are two ways to get the transaction date to display as month and year?	-. Use the month function on the Result field - Create a Formula Field using a SQL date formatting function
What are three attributes of a custom report?	- Are available for Web Query - Provide point-in-time analysis -. Are the basis for custom report snapshots
What are three attributes of saved searches?	- Are the basis for custom metrics -. Can have critical data highlighted - Provides a dynamic list of results
When would you require the use of a report rather than a search?	Web Query enabled spreadsheet
What are three unique features to Financial Report Builder?	- Sections may have specific sorting - Sections may have highlighted results - Sections may be shared between financial reports
What is the Report Builder Interface elements Functionality- Filters?	Report Builder Interface element Functionality to select fields to limit results
What is the Report Builder Interface elements Functionality- Sorting?	Report Builder Interface element Functionality to have additional ranking options to display parent/child relationship
What is the Report Builder Interface elements Functionality- More Options?	Report Builder Interface element Functionality to select report access by roles, departments, groups and employees
What is the Report Builder Interface elements Functionality- Edit Column?	Report Builder Interface element Functionality to delete or move data, add formulas and define formatting
Report Builder- Can users export reports as an Excel Web Query?	Yes. User can export reports as an Excel Web Query.
Report Builder- Can Users add formula fields to columns in reports?	Yes. Users can add formula fields to columns.
Report Builder- Can users can add custom HTML into column headers?	No. Users can not add custom HTML into column headers
Report Builder- Can users customize data through Edit Layout Page?	No. Users can not customize data through Edit Layout Page.
What 3 actions can be accomplished with a CSV import?	- Add and Update Items - Update existing entity records - Add Transaction Records
Where can the Netsuite Account Number be found?	SuiteAnswers > Contact Support by Phone

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What are three methods to access Help in NetSuite?	- Click the Help link at the top right of any screen - Click the field label next to a field - Type Help: <and a keyword> in the Global Search field
What are three pieces of information are contained in the New Release Portlet?	- Release Notes - New Feature Overview - Release Preview Test Plan
What are two options for defining custom roles that will restrict the pool of records that a role can access?	- Location Restrictions - Employee Restrictions
What is a simple way to compare roles?	Show Role Differences
True/False: Creating a New Custom Role can be started from scratch?	True- They can be started from scratch.
True/False: Creating a New Custom Role can be edited after they are created?	True- They can be edited after they are created.
True/False: Creating a New Custom Role can started from Standard Roles?	True- They can be started from Standard Roles.
True/False: Creating a New Custom Role can be deleted while they are assigned?	False- They can not be deleted while they are assigned.
What is a recommended practice when adding a user?	Assign a Custom Role
What is the first step an Admin should take after being notified that an employee will be terminated?	Remove System Access for Employee
True/False: Password criteria is setup by the system administrator?	Yes- Password criteria is setup by the system administrator
True/False: Users can change their password via the Settings portlet?	Yes- Users can change their password via the Settings portlet
True/False: Passwords have strength ratings and cannot be changed until the criterion is met?	Yes- Passwords have strength ratings and cannot be changed until the criterion is met
True/False: The 'reset password' Security Questions are updated by the system administrator?	No- The 'reset password' Security Questions are NOT updated by the system administrator
Where is the logged information found- Transaction Numbering Audit Log?	Date Allocated
Where is the logged information found- System Notes?	Old and New GL Impact
Where is the logged information found- My Login Audit?	Login Failures Today
Where is the logged information found- Transaction Audit Trail?	Login Audit Trail
Where is the logged information found- Login Audit Trail?	Security Challenge
Password Policy- Built-in password policies support three levels of password validation for NetSuite users. What are they?	These policies enforce the following requirements for password length and content: - Strong: minimum length of 10 characters, at least 3 of these four character types —uppercase letters, lowercase letters, numbers, non-alphanumeric ASCII characters - Medium: minimum length of 8 characters, at least 2 of these four character types —uppercase letters, lowercase letters, numbers, non-alphanumeric ASCII characters - Weak (Not Recommended): minimum length of 6 characters
Password Policy- What is the maximum failed login attempts before the user is locked out?	NetSuite allows each user a maximum of six failed login attempts. When a user exceeds this maximum (usually because of an incorrect password), an email message is sent to notify the account administrator, and the user is locked out for 30 minutes. The administrator cannot unlock the user's access before 30 minutes; only NetSuite Support can do so.
Password Policy- When does the password expire?	Unless you are a Customer Center user, your NetSuite password will expire. The length of time a password remains valid depends on the password policy configured by the account administrator for your NetSuite account. You can view the date and time your

	NetSuite password will expire on your My Login Audit portlet on the Home page.
Which custom field types allow users to enter alphanumeric characters?	Text Area Long Text Rich Text Free-form
What is Suitecloud?	NetSuite's comprehensive offering of cloud development tools, applications and infrastructure that enables customers and software developers to maximize the benefits of the cloud.
What is Suitebuilder?	Makes customizing NetSuite application forms, fields and records a simple point-and-click experience.
What is SuiteScript?	NetSuite platform built on JavaScript that enables complete customization and automation of business processes. Using the SuiteScript APIs, core business records and user information can be accessed and manipulated via scripts that are executed at pre-defined events.
What is SuiteFlow?	Provides developers and customers with easy-to-use point-and-click tools to customize and automate business processes. Business processes such as lead nurturing, collections management, sales discounting approvals, purchase order approvals and more can be created easily with SuiteFlow.
What is SuiteAnalytics?	Provides embedded business intelligence to any customizations or applications built with SuiteCloud, eliminating the need for developers and IT to deal with the complexities of separate reporting tools, BI cubes or data warehousing.
What is SuiteTalk?	Web services integration that makes it easy for customers and developers to integrate NetSuite with a variety of applications including existing on-premise investments and third-party cloud applications, and to build website-to-NetSuite integrations or create lightweight custom mobile applications.
What is SuiteBundler?	Makes it easy for partners and customers to package and deploy customizations and applications built on the SuiteCloud platform. Whether a NetSuite customer moving customizations from a sandbox environment to production or an ISV or SI looking to package industry or domain expertise for distribution to end customers, SuiteBundler lets you easily bundle groups of customizations, manage versioning and deploy customizations nearly instantaneously.
Can you delete a Location?	You can delete a location only if there are no dependent transactions. If there are any historical transactions, you cannot delete the location.
What is the tax type for the US tax edition?	Sales Tax
What is the tax type for the UK tax edition?	VAT
What is the tax type for the Australia tax edition?	GST
What is the tax type for the Canada tax edition?	GST, PST
What is the tax type for the Japan tax edition?	Consumption Tax
What can you find on an Login Audit Trail?	Helps keep track of account users, when they have logged in, and from where. This search returns a list of login activity, that can include each session listed by date and time of initial login, the user's name, and the IP address from which the user logged in. When you drill down on individual login entries, you view a list of the transactions completed during the user's session. If no data appears, then the user did not complete any transactions during the period you are viewing. Search results also indicate whether each login attempt was

	successful, and include a Security Challenge column that tracks the status of users' answers to security questions when these questions are presented.
What can you find on an Transaction Audit Trail?	Enables you to produce a report that provides a detailed history of all transactions entered into NetSuite. The audit trail provides information about the transaction, who entered the transaction, and when the transaction was created or modified. To view the Transaction Audit Trail, go to Transactions > Management > View Audit Trail. - Date and time that the transaction change was executed - Name of the user who made the change - The action taken: create, change, or delete - Type of transaction - Internal ID - Transaction number - Posting date of transaction change - Account affected - Amount
What is a Standard Sales Order?	Lets you create an invoice or a cash sale, based on whether you enter billing terms or a payment method.
What is a Standard Sales Order - Cash Sale?	When you bill this type of sales order, a cash sale transaction is created in the system.
What is a Standard Sales Order - Invoice?	When you bill this type of sales order, an invoice is created.
What is a Standard Sales Order - Progress Billing?	Can be billed at intervals according to the fulfillment progress of the goods or services.
Why would you apply a Credit Memo?	To decrease the amount a customer owes you. When you applied against an open invoice or cash sale, the amount of the credit is deducted from the total amount due.
Where can you apply a Credit Memo?	- On Credit Transaction - On a Customer Payment - On a Open Invoice
When are you unable to issue a credit memo?	- When the customer is not defined on the transaction. - On Cash Sales Record
What is the general workflow for entering transactions in SCIS (SuiteCommerce InStore)?	First add a customer, then add items to the order, add the discount (if applicable), and finally accept payment.
What is the core function of SuiteCommerce InStore (SCIS)?	Sales transactions
How do you find your account #?	Login to the application, navigate to the Support tab, click Go to SuiteAnswers, and then click the Contact Support by Phone button.
What do reports assist you in summarizing data into?	Helps summarize data into Groups, Totals and Subtotals
True/False: You can update the underlying data from the report?	False- the underlying data on the report can not be updated from the report.
For Reports, what is the function of the following: Drill-down Balloon?	To hover over, click, go to detail
For Reports, what is the function of the following: Column Filter?	To slice and dice your report
For Reports, what is the function of the following: Schedule?	To provide report on a recurring basis
For Reports, what is the function of the following: Graph?	To display, copy and paste into another application
For Reports, what is the function of the following: Date Filter?	To select the point-in-time
For Reports, what is the function of the following: Export?	To send to Word, Excel, PDF or CSV
For Reports, what is the function of the following: Email?	To send to recipient
For Reports, what is the function of the following: Collapes?	To roll data up to highest level

What permissions do you need to access a Saved Search?	You can access a saved search created by another user if the search is public, or if you have been defined as an audience member, either by name or based on your assigned role, department, subsidiary, or group.
What is Global Search?	Enables you to find records anywhere in your account data. In the Search field near the center at the top of any page, enter keywords that map to all or part of a record name or ID.
What is Quick Find?	Provides find capabilities from many pages, so that you can quickly find another record of the same type. Quick Find is available when a magnifying glass icon is shown in a page header.
What is Transactions Quick find?	Click the Quick Find icon on a transaction page to find a specific transaction, or set of transactions of the same type, based on their dates, numbers, or associated entity name. When you click the icon, a Quick Find popup opens. In the popup, enter a name, date, transaction number, or a combination, and click Submit.
What is Records Quick Find?	Click the Quick Find icon on a record page to quickly search records of the same type. When you click the icon, a popup keywords box opens. Type in keywords, and press Enter or click the Go button.
What is a Quick Search Portlet?	Portlet which you can search for data that matches your entered keywords for the selected field.