

# NetSuite Certified Administrator Exam

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*Study Guide: June 2023*

## Contents

|  |    |
|--|----|
| About the NetSuite Administrator Exam.....   | 4  |
| Exam Fee.....  | 4  |
| Taking the Exam .....  | 4  |
| Description of a Qualified Candidate .....   | 4  |
| Maintaining Your Certification .....   | 4  |
| Subject Areas and Objectives Covered by the Test.....  | 5  |
| Study Suggestions.....   | 8  |
| SuiteAnalytics .....   | 8  |
| Identify the options in defining advanced saved searches to obtain the described results.....                                | 8  |
| Recognize which record to use as the basis of a search to yield a desired result.....  | 8  |
| Compare the methods of sharing search results vs. reports for a given use case.....  | 8  |
| Determine the best method to monitor saved search usage and access. ....   | 8  |
| Identify the advantages of various methods of publishing or updating dashboards.....   | 8  |
| Compare dashboard elements to address user requirements. ....  | 9  |
| SuiteBuilder .....   | 9  |
| Recognize use-cases driving form selection.....  | 9  |
| Compare the considerations when setting field options at the field vs. at the form level.....                                | 9  |
| Identify implications of various methods of restricting users to a particular custom form. ....                              | 9  |
| Identify considerations and impact of creating online forms. ....  | 9  |
| Identify functionality of custom form layout and printing functionality. ....  | 9  |
| Compare differences between field display types and uses cases where appropriate. ....                                       | 10 |
| Match custom field settings for displaying, calculating, or manipulating data from other fields or records to use cases..... | 10 |
| Compare differences between setting "Record is Parent" vs. publishing a Sublists search. ....                                | 10 |
| Identify when to use a custom record over a custom list. ....  | 10 |
| Given a use case, select appropriate attributes when defining a custom record type.....                                      | 10 |
| SuiteCloud Platform .....  | 11 |
| Order the steps in creating a SuiteFlow from a given scenario. ....  | 11 |
| Identify a method for determining all the automations running for a given record. ....                                       | 11 |

Order the steps in creating or finding and installing or uninstalling a SuiteBundle..... 11

Compare differences between Managed vs. non-managed bundles and identify steps in updating already installed bundles..... 11

Compare uses of SuiteTalk SOAP Web Services, SuiteScript, ODBC/SuiteAnalytics Connect and CSV Import to manage data in NetSuite..... 11

Setup and Administration..... 12

    Recognize recommended NetSuite practices for creating and assigning custom roles and use of Global Permissions and Core Administrator Permission. .... 12

    Identify how subsidiary access is defined on custom roles and impact of subsidiary on entity records..... 12

    Recognize best practices around the use of the Administrator Role. .... 12

    Identify how role options affect the records, searches, and forms to which a user will have access. .... 12

    Identify considerations of assignment of limited access or custom role to Vendor, Partner, Customer, or Employee. .... 12

    Recognize the capabilities of the Multi-language feature. .... 12

    Recognize NetSuite recommended practices around managing NetSuite environments (Sandbox, Production, Release Preview). How to Study: SuiteAnswers keyword: Sandbox refresh, Release Preview. SuiteAnswers topics: Best Practices for NetSuite Administrators (Intermediate) - SuiteWorld 2012 ..... 13

    Determine the proper use of advanced options in CSV Import and SuiteCloud Plus. .... 13

    Analyze an error in the CSV Import process to determine the appropriate resolution..... 13

Data Security ..... 13

    Identify methods for controlling access to File Cabinet..... 13

    Recognize permissions with high levels of data access..... 14

    Identify the strategies to manage data security risks when an employee leaves..... 14

    Identify impact of changing field values on reporting..... 14

Working with NetSuite ..... 14

    Identify how to view or change system alert email notifications. .... 14

    Recognize recommended steps in the New Release Test Plan. .... 14

    Given a scenario, determine what information is needed to troubleshoot a problem. .... 14

    Identify how to determine how many licenses are provisioned and number of licenses being used. .... 14

    Identify steps and benefits of accessing the NetSuite Support Center Role..... 15

## About the NetSuite Administrator Exam

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

Passing this NetSuite Administrator Exam certifies that you have the knowledge and skills necessary to be a Certified NetSuite Administrator. See Description of a Qualified Candidate below.

### Exam Fee

- \$250
- \$150 (retake)

### Taking the Exam

- This will be a live proctored examination.
- No written or online reference materials may be used during the exam.
- Complete all questions in the allotted time

## Description of a Qualified Candidate

The candidate has ideally 1 year of experience configuring and managing a robust NetSuite implementation/account. The candidate can perform the day-to-day tasks of managing the application to meet the company's needs. Their role is to support users and they understand the standard business processes, standard accounting practices, advanced features, options, and capabilities of the product.

## Maintaining Your Certification

There will be 2 ongoing requirements for maintaining your NetSuite Administrator title:

### Annual Release Maintenance

Oracle NetSuite will publish a once per year "New Release Quiz" to validate awareness of new NetSuite features that have been released in the prior year. Information on availability of this Upgrade Test will be posted to the following:

- Emailed out to the email of record in the Webassessor testing system
- Included in the Announcements posted to the NetSuite Certification webpage ([www.netsuite.com/certification](http://www.netsuite.com/certification))
- Closed LinkedIn NetSuite Certified Group

**Refresh Administrator Exam**

NetSuite will rewrite the NetSuite Administrator exam as needed. Oracle NetSuite Certified NetSuite Administrator certificate holders may be required to retake and pass this exam to maintain their certification.

**Recommended Training and Background**

These courses and skills are recommended for candidates planning to take this exam. The courses are available via the Certification Preparation–NetSuite Administrator Exam learning path in [NetSuite MyLearn](#).

**Recommended Training Courses**

- ERP: Fundamentals
- NetSuite: Administrator Fundamentals
- NetSuite Certification: Administrator Exam Preparation
- SuiteAnalytics: Reports and Searches
- SuiteAnalytics: Advanced Searches
- SuiteCloud: Exploring the NetSuite Platform
- SuiteFlow: Workflow Fundamentals

**Recommended Skill Level**

Equivalent to at least 1 year administering a complex NetSuite instance with extensive customization and rigorous reporting requirements.

**Subject Areas and Objectives Covered by the Test**

These are the broad subject areas covered on the Exam:

- SuiteAnalytics
- SuiteBuilder
- SuiteCloud Platform
- Setup and Administration
- Data Security
- Working with NetSuite

Below is each subject area broken out into more detail:

|                       |                     |   |
|-----------------------|---------------------|---|
| <b>SuiteAnalytics</b> | <b>Saved Search</b> | Identify the options in defining advanced saved searches to obtain the described results. |
|                       |                     | Recognize which record to use as the basis of a search to yield a desired result.         |
|                       |                     | Compare the methods of sharing search results vs. reports for a given use case.           |

|                                 |                             |   |
|---------------------------------|-----------------------------|---|
|                                 |                             | Determine the best method to monitor saved search usage and access.   |
|                                 | <b>Dashboard</b>            | Identify the advantages of various methods of publishing or updating dashboards.  |
|                                 |                             | Compare dashboard elements to address user requirements.  |
| <b>SuiteBuilder</b>             | <b>Form Customization</b>   | Recognize use-cases driving form selection.   |
|                                 |                             | Compare the considerations when setting field options at the field vs. at the form level.   |
|                                 |                             | Identify implications of various methods of restricting users to a particular custom form.  |
|                                 | <b>Online Forms</b>         | Identify considerations and impact of creating online forms.  |
|                                 | <b>Layout customization</b> | Identify functionality of custom form layout and printing functionality.  |
|                                 |                             | Compare differences between field display types and uses cases where appropriate.   |
|                                 | <b>Custom Fields</b>        | Match custom field settings for displaying, calculating, or manipulating data from other fields or records to use cases.                          |
|                                 |                             | Compare differences between setting "Record is Parent" vs. publishing a sublist search.   |
|                                 | <b>Custom Records</b>       | Identify when to use a custom record over a custom list.  |
|                                 |                             | Given a use case, select appropriate attributes when defining a custom record type.   |
| <b>SuiteCloud Platform</b>      | <b>SuiteFlow</b>            | Order the steps in creating a SuiteFlow from a given scenario.  |
|                                 |                             | Identify scenarios where SuiteFlow can be used to solve a user requirement.   |
|                                 |                             | Identify a method for determining all the automations running for a given record.   |
|                                 | <b>SuiteBundler</b>         | Order the steps in creating or finding and installing or uninstalling a SuiteBundle.  |
|                                 |                             | Compare differences between Managed vs. non-managed bundles and identify steps in updating already installed bundles.                             |
|                                 | <b>Extending NetSuite</b>   | Compare uses of SuiteTalk/SOAP Web Services, SuiteScript, ODBC/SuiteAnalytics Connect and CSV Import to manage data in NetSuite.                  |
| <b>Setup and Administration</b> | <b>Manage Roles</b>         | Recognize recommended NetSuite practices for creating and assigning custom roles and use of Global Permissions and Core Administrator Permission. |
|                                 |                             | Identify how subsidiary access is defined on custom roles and impact of subsidiary on entity records.   |
|                                 |                             | Recognize best practices around the use of the Administrator Role.  |

|   |  |  |
|---|--|--|
|   |  | Identify how role options affect the records, searches, and forms to which a user will have access.                    |
|   |  | Identify considerations of assignment of limited access or custom role to Vendor, Partner, Customer, or Employee.      |
|   | <b>Supporting users worldwide</b>  | Recognize the capabilities of the Multi-language feature.  |
|   | <b>Sandbox Refresh</b>   | Recognize NetSuite recommended practices around managing NetSuite environments (Sandbox, Production, Release Preview). |
|   | <b>CSV Import</b>  | Determine the proper use of advanced options in CSV Import and SuiteCloud Plus.  |
| Analyze an error in the CSV Import process to determine the appropriate resolution. |  |  |
| <b>Data Security</b>  | <b>Data Access</b>   | Identify methods for controlling access to File Cabinet.   |
|   |  | Identify available security controls for user login, including Two-Factor Authentication and Single Sign-On.           |
|   |  | Identify setup for Two-Factor Authentication and Single Sign-On.   |
|   |  | Recognize permissions with high levels of data access.   |
|   | <b>Removing Users</b>  | Identify the strategies to manage data security risks when an employee leaves.   |
| <b>General</b>  | Identify impact of changing field values on reporting.                     |  |
| <b>Working with NetSuite</b>  | <b>Notifications</b>   | Identify how to view or change system alert email notifications.   |
|   | <b>Preparing for Releases</b>  | Recognize recommended steps in the New Release Test Plan.  |
|   | <b>Troubleshooting in NS</b>   | Given a scenario, determine what information is needed to troubleshoot a problem.                                      |
|   |  | Identify how to determine how many licenses are provisioned and number of licenses being used.                         |
|   | Identify steps and benefits of accessing the NetSuite Support Center Role. |  |

## Study Suggestions

### SuiteAnalytics

#### Identify the options in defining advanced saved searches to obtain the described results.

**How to Study:** Master these concepts - use these as SuiteAnswers Keywords: Summary types, formulas, functions, expression builder (), minimum, maximum, grouping, averages, apply to. SuiteAnswers Topic: Search Formula Examples and Tips

**Courses addressing this topic:** SuiteAnalytics: Reports and Searches; SuiteAnalytics: Financial Reports and Searches, SuiteAnalytics: Advanced Searches; NetSuite Certification: Administrator Exam Preparation

#### Recognize which record to use as the basis of a search to yield a desired result.

**How to Study:** Study how NetSuite standard record types are joined to each other. SuiteAnswers Topics: Search Formula Examples and Tips; Standard Search Filters

**Courses addressing this topic:** SuiteAnalytics: Reports and Searches; SuiteAnalytics: Financial Reports and Searches; NetSuite Certification: Administrator Exam Preparation

#### Compare the methods of sharing search results vs. reports for a given use case.

**How to Study:** Know how to compare these functions for sharing data, as related to Saved Searches vs. Custom Reports: Messaging, Alerts, Scheduling, Emails. Know the difference between sending out a single record, vs. summary of records. How is timing affected for these features? Is there a way to send them out to a pre-defined group of people? What if the recipient list varies depending on the results? SuiteAnswers Topic: Defining Recipients for Saved Search Email; Sending Summarized vs. Single-Record Results

**Courses addressing this topic:** SuiteAnalytics: Reports and Searches, SuiteAnalytics: Financial Reports and Searches; SuiteAnalytics: Advanced Searches

#### Determine the best method to monitor saved search usage and access.

**How to Study:** Become familiar with how to give access to users to Saved Searches and how to monitor who executes/edits/deletes Saved Searches; Search keywords on SuiteAnswers: Defining Audiences for Saved Searches, Audit Trail for Saved Searches, Reports and Schedules

**Courses addressing this topic:** SuiteAnalytics: Reports and Searches

#### Identify the advantages of various methods of publishing or updating dashboards.

**How to Study:** Compare advantages and disadvantages of using standard roles with Publish Dashboard permission, vs. creating custom roles only for publishing dashboards, vs. using the Global Permissions feature. Review these SuiteAnswers topics: Publishing a Dashboard; Applying Changes to Published Dashboards

**Courses addressing this topic:** NetSuite Certification: Administrator Exam Preparation



### Compare dashboard elements to address user requirements.

**How to Study:** Compare these dashboard elements to each other: Key Performance Indicator, Reminder, KPI Scorecard, Snapshot, KPI Meter. Know steps required to set up each of these, and the source data (does it require a saved search, or a custom report?).

**Courses addressing this topic:** SuiteAnalytics: Reports and Searches; SuiteAnalytics: Financial Reports and Searches, SuiteAnalytics: Advanced Searches

## SuiteBuilder

### Recognize use-cases driving form selection

**How to Study:** Know how these features work: Store Form with Record, Linked Transaction forms. Know which record types these options are available with. SuiteAnswers topics: Creating Custom Entry and Transaction Forms; Linking Transaction Forms

**Courses addressing this topic:** NetSuite Certification: Administrator Exam Preparation

### Compare the considerations when setting field options at the field vs. at the form level.

**How to Study:** Know custom field types. Know recommended practices for making fields mandatory, or setting default values, at the field level vs. at the form level. SuiteAnswers topic: Custom Check Box field default to be checked on Custom Form

**Courses addressing this topic:** NetSuite: Administrator Fundamentals; NetSuite Certification: Administrator Exam Preparation

### Identify implications of various methods of restricting users to a particular custom form.

**How to Study:** Know the difference between marking a Form "Preferred" vs. "Restricted" vs. clearing the "Enabled" column. Understand implication of hiding the custom form field. Recognize where a custom form can be marked Preferred. SuiteAnswers topic: Setting Default Forms for Roles; Defining Preferred Forms

**Courses addressing this topic:** NetSuite Certification: Administrator Exam Preparation

### Identify considerations and impact of creating online forms.

**How to Study:** Identify steps to create and publish online forms, identify use cases where an online form may be used. Know how data is submitted using these online forms, and the mandatory fields for creating each. Know the 3 record types that have online form capability. SuiteAnswers topics: Enable Online Forms; Creating Online Custom Record Forms

**Courses addressing this topic:** NetSuite: Administrator Fundamentals; NetSuite Certification: Administrator Exam Preparation

### Identify functionality of custom form layout and printing functionality.

**How to Study:** Know how to add a Custom Element to a custom form, and how it is used. Know how PDF vs. HTML layout versions of printed forms differ, and when they are used. Know where the default settings are for

the user. SuiteAnswers topics: Defining Custom Elements; Transaction Form HTML Layouts; Transaction Form PDF Layouts

**Courses addressing this topic:** NetSuite Certification: Administrator Exam Preparation

**Compare differences between field display types and uses cases where appropriate.**

**How to Study:** Know these custom field options and compare them to each other: Hidden, disabled, normal, inline text. Know the difference between 1) setting field width to 0 vs. 2) hide field label. SuiteAnswers topic: Setting Display Options for Custom Fields

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

**Match custom field settings for displaying, calculating, or manipulating data from other fields or records to use cases.**

**How to Study:** Know how to use these custom field features: Filtered lists based on criteria, Dependent Dropdowns; Source data from one record to another, Formula fields. SuiteAnswers topics: Create Controlling and Dependent Dropdown Fields or Nested List; Setting Filtering Criteria; Setting Sourcing Criteria; Creating Formula Fields

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

**Compare differences between setting "Record is Parent" vs. publishing a Sublists search.**

**How to Study:** Memorize the differences in functionality between these 2 methods of creating sublists: 1) Publish Search, or 2) Record is Parent. Which one allows creation of new records from the sublist view? Which allows Customize View option? SuiteAnswers topics: Custom Child Record Sublists; Creating Saved Searches for Custom Sublists

**Courses addressing this topic:** NetSuite Certification: Administrator Exam Preparation

**Identify when to use a custom record over a custom list.**

**How to Study:** Consider how these use cases may drive a Custom List vs. Custom Record design decision: dependent dropdowns, reporting requirements, need for an online form, one to many data relationships. SuiteAnswers keywords bolded above. SuiteAnswers topic: Creating Online Custom Record Forms

**Courses addressing this topic:** NetSuite Certification: Administrator Exam Preparation

**Given a use case, select appropriate attributes when defining a custom record type.**

**How to Study:** Identify the UI behavior and user access as defined by the settings in the header of the Custom Record. SuiteAnswers topic: Creating Custom Record Types

**Courses addressing this topic:** NetSuite: Administrator Fundamentals; NetSuite Certification: Administrator Exam Preparation

## SuiteCloud Platform

### Order the steps in creating a SuiteFlow from a given scenario.

**How to Study:** Study the various elements created as part of a workflow, and which order they are created in.  
SuiteAnswers topic: Creating Your First Workflow

**Courses addressing this topic:** SuiteCloud: Exploring the NetSuite Platform

### Identify scenarios where SuiteFlow can be used to solve a user requirement.

**How to Study:** Understand how SuiteFlow Actions and Conditions are defined, and how they work together.  
SuiteAnswers topics: Workflow Actions

**Courses addressing this topic:** SuiteCloud: Exploring the NetSuite Platform

### Identify a method for determining all the automations running for a given record.

**How to Study:** How would an administrator identify whether a SuiteFlow or a SuiteScript is running on a record type? Where can an Administrator check on which scripts have been installed and are running in an account, as opposed to test mode? SuiteAnswers topics: Using the Scripted Records Page; Script Deployment

**Courses addressing this topic:** SuiteCloud: Exploring the NetSuite Platform

### Order the steps in creating or finding and installing or uninstalling a SuiteBundle.

**How to Study:** How to install a SuiteApp/Bundle, searching for bundles in the repository, creating and installing a bundle, uninstalling a bundle. NOT ON TEST: configuration bundle. Keywords bolded above. SuiteAnswers topic: SuiteBundler Overview (and related topics)

**Courses addressing this topic:** SuiteCloud: Exploring the NetSuite Platform

### Compare differences between Managed vs. non-managed bundles and identify steps in updating already installed bundles.

**How to Study:** SuiteAnswers topic: SuiteBundler Overview (and related topics); Understanding Managed Bundles

**Courses addressing this topic:** SuiteCloud: Exploring the NetSuite Platform

### Compare uses of SuiteTalk SOAP Web Services, SuiteScript, ODBC/SuiteAnalytics Connect and CSV Import to manage data in NetSuite.

**How to Study:** Contrast these features in their uses, and limitations for managing data. You will be given business use cases and will select which feature can be used to meet the requirement. Focus on: data import, data update, single sign-on, data validation, business process automation, triggers.

**Courses addressing this topic:** SuiteCloud: Exploring the NetSuite Platform

## Setup and Administration

### Recognize recommended NetSuite practices for creating and assigning custom roles and use of Global Permissions and Core Administrator Permission.

**How to Study:** Know how custom roles are based upon Centers. Know why it is always recommended to create custom roles, rather than just assign the standard role. SuiteAnswers topics: Managing NetSuite Roles; Understanding NetSuite Permissions, Using the Global Permissions feature; Best Practices for NetSuite Administrators (Intermediate) - SuiteWorld 2012, Core Administration Permissions

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

### Identify how subsidiary access is defined on custom roles and impact of subsidiary on entity records.

**How to Study:** SuiteAnswers topics: Permissions and Restrictions; Associating Subsidiaries with Entities; Creating Intercompany Customers and Vendors; Controlling Employee Access to Subsidiaries

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

### Recognize best practices around the use of the Administrator Role.

**How to Study:** It is recommended that you have two Administrators, but they do not use the Administrator role for their everyday access. SuiteAnswers topic: Best Practices for NetSuite Administrators (Intermediate) - SuiteWorld 2012

**Courses addressing this topic:** NetSuite: Administrator Fundamentals; NetSuite Certification: Administrator Exam Preparation

### Identify how role options affect the records, searches, and forms to which a user will have access.

**How to Study:** Review Forms and Searches tabs in Custom role screen. SuiteAnswers topics: Permissions and Restrictions

**Courses addressing this topic:** NetSuite Certification: Administrator Exam Preparation

### Identify considerations of assignment of limited access or custom role to Vendor, Partner, Customer, or Employee.

**How to Study:** SuiteAnswers topics: Assigning the Advanced Partner Center Role; Assigning Roles to Vendors; Giving Customers Access; Employee Center Role, The Partner Center Role

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

### Recognize the capabilities of the Multi-language feature.

**How to Study:** SuiteAnswers topics: Multi-Language Names and Descriptions; Choosing a Language for Your NetSuite User Interface; Setting Up Multiple Languages

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

**Recognize NetSuite recommended practices around managing NetSuite environments (Sandbox, Production, Release Preview).**

**How to Study:** SuiteAnswers keyword: Sandbox refresh, Release Preview. SuiteAnswers topics: Best Practices for NetSuite Administrators (Intermediate) - SuiteWorld 2012

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

**Determine the proper use of advanced options in CSV Import and SuiteCloud Plus.**

**How to Study:** Topics include: Advanced Options in CSV tool: multi-threading, CSV mapping options: default values, internal|external|name ID options. Best practices around system notes in CSV import. Where else are there CSV import options, besides the main CSV import tool? Who has access to checkbox to run scripts against the import? SuiteAnswers keywords bolded above. SuiteAnswers topics: Webinar: Easy Data Migration with NetSuite CSV Imports; Guidelines for using CSV import tool for data imports

**Courses addressing this topic:** NetSuite Certification: Administrator Exam Preparation

**Analyze an error in the CSV Import process to determine the appropriate resolution.**

**How to Study:** Common errors: required field is null, read-only field, invalid reference (spelled item name wrong, e.g.)

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

## Data Security

**Identify methods for controlling access to File Cabinet.**

**How to Study:** Know these methods of working with the NetSuite File Cabinet: File Cabinet, Group access, available without login, publish the URL internal vs. external. SuiteAnswers topic: Working with the File Cabinet

**Courses addressing this topic:** NetSuite Certification: Administrator Exam Preparation

**Identify available security controls for user login, including Two-Factor Authentication and Single Sign-On.**

**How to Study:** User login security: password reset, User security question, weak/strong password, forced changes, authentication options, minimum password length, etc. Search SuiteAnswers keywords: Password security, Best Practices for NetSuite Administrators (Intermediate) - SuiteWorld 2012

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

**Identify setup for Two-Factor Authentication and Single Sign-On.**

**How to Study: Search keywords on SuiteAnswers:** Two-Factor Authentication (2FA), Managing Two-Factor Authentication, Authentication Overview

**Courses addressing this topic:** NetSuite Administrator Fundamentals (Security Considerations module)

**Recognize permissions with high levels of data access.**

**How to Study:** SuiteAnswers topic: Best Practices for NetSuite Administrators (Intermediate) - SuiteWorld 2012

**Courses addressing this topic:** NetSuite Certification: Administrator Exam Preparation

**Identify the strategies to manage data security risks when an employee leaves.**

**How to Study:** Terminating an Employee; Using the Login Audit Trail

**Courses addressing this topic:** NetSuite Certification: Administrator Exam Preparation

**Identify impact of changing field values on reporting.**

**How to Study:** Impact of changing fields such as, Accounts on the Item record after the Items have been sold; changing the manager on employee record does not change historic manager on time entries; managers for sales reps--how does this impact on sales reports?

**Courses addressing this topic:** NetSuite Certification: Administrator Exam Preparation

## Working with NetSuite

**Identify how to view or change system alert email notifications.**

**How to Study:** SuiteAnswers topic: Using System Alerts; Setting Email Preferences; Configuring Administrative Notifications

**Courses addressing this topic:** NetSuite Certification: Administrator Exam Preparation

**Recognize recommended steps in the New Release Test Plan.**

**How to Study:** SuiteAnswers topics: Overview of Release Preview; Accessing Your Release Preview Environment; Preparing for Testing; Recommended Test Plan; More New Release Resources; Functionality Available for Testing; How to Report Release Preview Issue; Understanding NetSuite Environments

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

**Given a scenario, determine what information is needed to troubleshoot a problem.**

**How to Study:** SuiteAnswers topics: Troubleshooting Performance Issues; Admin Notifications and status. NetSuite.com; Create a portlet that will show status. NetSuite.com; Increasing Speed and Performance in NetSuite; Improving Client Performance; Optimizing Custom Form Performance

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

**Identify how to determine how many licenses are provisioned and number of licenses being used.**

**How to Study:** SuiteAnswers topics: Checking the User License Count; Full Access User and Employee Center Licenses Usage Count; Roles That Do Not Use Up Full User License

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

**Identify steps and benefits of accessing the NetSuite Support Center Role.**

**How to Study:** SuiteAnswers topics: The NetSuite Account Center; Accessing the NetSuite Account Center

**Courses addressing this topic:** NetSuite: Administrator Fundamentals; NetSuite Certification: Administrator Exam Preparation