ORACLE NETSUITE SOCIAL IMPACT PRO BONO PROGRAM

Project Offerings Guide

The Suite Pro Bono quarterly projects match the professional skills of our passionate employees with the needs of Social Impact customers. Projects are categorized into four stages based on the depth of your NetSuite usage and needs.

There are three types of project options available:

- Discovery: Choose a specific element of NetSuite that you're interested in exploring, and consult with a team to understand how the functionality works. From there, work together to jointly determine if it's a good option for you.

- Consultation: Receive detailed recommendations about how to address a challenge you are facing utilizing the system.

- Configuration: Work collaboratively with individuals who will help you configure your system. You will be expected to be involved in the configuration process and ideally, you have considered the discovery and consulting component of a project before doing any configuration to your system.

BASIC FINANCIALS PROJECTS		
Project Name	**Expected Time on Project**	**Project Description**
Setting Up Your Chart of Accounts	**Discovery:** 3-5 hrs **Consultation:** 5-7 hrs **Configuration:** 10-15 hrs	The Suite Pro Bono team will review your existing chart of accounts and share NetSuite's nonprofit leading practices for segmentation and chart of accounts. If time allows, the team will also share how you can segment your financial reports to slice and dice your finances. Your organization will be responsible for planning how you implement the changes to your chart of accounts based on the input from the Pro Bono team.
Tracking Departments, Locations or Regions	**Discovery:** 3-5 hrs **Consultation:** 5-7 hrs **Configuration:** 10-15 hrs	Teams will be able to provide general guidance and direction around setting up Departments (ex: Finance, Development to represent your org chart), Locations (physical locations or tied to inventory) and Regions (where they deliver service).

BASIC FINANCIALS PROJECTS

Project Name	Expected Time on Project	Project Description
Using NetSuite To Track Donations (Accounts Receivable)	**Discovery:** 3-5 hrs **Consultation:** 5-7 hrs **Configuration:** 10-15 hrs	Want to use NetSuite to track your donations/pledges? The Suite Pro Bono team can help your organization set this up in NetSuite. *Your org will need to make sure you are using items in NetSuite and review your revenue streams. This project will not cover grants of any type.*
Using NetSuite To Track Vendor Bills/Expenses (Accounts Payable)	**Discovery:** 3-5 hrs **Consultation:** 5-7 hrs **Configuration:** 10-15 hrs	Want to use NetSuite to track your vendor bills/expenses? The Suite Pro Bono team can provide advice or help your organization set this up in NetSuite.
Creating and Editing Basic Financial Reports	**Discovery:** 2-5 hrs **Consultation:** 4-7 hrs **Configuration:** 10-15 hrs	Pro Bono team will show and guide your organization on how to create and edit basic financial reports. Ahead of the project, we ask that you identify and share with your Pro Bono team: • What kind of reports are needed? • Who is the audience for the report? • Do the reports need to live in the NetSuite system or do you need to share them externally? • How often are the reports needed? • An existing report/spreadsheet that the team can use. *This does not include other types of reports.*
Checking Your NetSuite Configuration and Setup (For organizations using NetSuite 2 years or less)	**Discovery:** 2-5 hrs **Consultation:** 5-7 hrs	The Pro Bono team will perform a basic review of how your financial system is set up in NetSuite and offer suggestions about how to improve it. Suggestions will be provided to organization via written report.
Setting Up Organizational Roles in NetSuite	**Configuration:** 2-5 hrs	Do multiple people need to access and use NetSuite? This project will help you set up and control what each person can and cannot do, and what they can and cannot see in your instance of NetSuite.

SYSTEM INTEGRATION PROJECTS

Project Name	Expected Time on Project	Project Description
Using NetSuite for Basic Productivity	**Consultation:** 2-5 hrs	Learn how to utilize NetSuite to capture your contacts, update your calendar/events, and utilize NetSuite as a digital file cabinet.
Using NetSuite to Track Basic Inventory	**Discovery:** 3-5 hrs **Consultation:** 5-7 hrs **Configuration:** 10-15 hrs	For organizations who need a simple way to track current inventory of items. The Suite Pro Bono team will share how to use NetSuite to create an item to track inventory, sell that item in transactions, and run simple reports on inventory sold, available and history. **Prework:** Ahead of the project, organizations must create a list of inventory items to be captured in NetSuite.

SYSTEM INTEGRATION PROJECTS

Project Name	Expected Time on Project	Project Description
Setting up Employees in NetSuite	**Configuration:** 3-5 hrs	Learn how to capture employee information in NetSuite. The Pro Bono team will show you how to create employee details in the system and support you as you do that. **Prework:** Create a list of information (fields) you want to capture in NetSuite system about your employees. **Note:** If you are looking to capture customer records, you should apply for the CRM project. If your needs are payroll related, this project is not intended to cover that topic.
Using NetSuite for Basic Constituent Management (CRM for Beginners)	**Discovery:** 3-5 hrs **Consultation:** 5-7 hrs **Configuration:** 10-15 hrs	Learn how NetSuite's CRM functionality works, review the nonprofit leading practices, and learn how to effectively track engagement or involvement with your donors/customers. Project activities can potentially include reviewing existing CRM functionality, learning how to adapt it to your needs and use the customer record for multiple types of people.
Expense Management and Allocation	**Discovery:** 3-5 hrs **Consultation:** 5-7 hrs **Configuration:** 10-15 hrs	This project will help you with allocating your expenses across multiple segments (programs, funds, departments, etc.) in NetSuite. This will help increase accountability with stakeholders. You may need to first set up your chart of account to use NetSuite segmentation to realize the full benefit from this project.
Creating Budgets in NetSuite	**Discovery:** 3-5 hrs **Consultation:** 5-7 hrs **Configuration:** 10-15 hrs	Learn how to use NetSuite to create organizational and departmental budgets and basic budgeting reporting. **Pre-Requisite:** If you have your budget in Excel, please provide your Pro Bono team a copy of it (sensitive information should be removed).
Creating Basic Reports	**Discovery:** 3-5 hrs **Consultation:** 5-7 hrs **Configuration:** 10-15 hrs	Learn how to use NetSuite to create basic reports on various elements of your organization. Please provide specifics in your application about the types of reporting that you need. Project activities could include: Generating a report for giving trends, donor reports, CRM activity. *Note: This is not a financials report project. See Stage 1 for Creating Basic Financials Reports project option.*
Establish Financial Controls/Audit	**Discovery:** 3-5 hrs **Consultation:** 5-7 hrs **Configuration:** 15-20 hrs	The Pro Bono team will review your current setup and then provide insight and assistance around setting up approval workflows, audit reports and separation of duties. This may require creating additional roles, changing permissions and ensuring other controls are followed.

OPTIMIZED OPERATIONS PROJECTS

Project Name	Expected Time on Project	Project Description
Automating Basic NetSuite Processes	**Discovery:** 3-5 hrs **Consultation:** 5-7 hrs **Configuration:** 15-20 hrs	This project involves automating specific manual tasks. Work with your Suite Pro Bono team to understand NetSuite automation, review current manual processes and help you automate some of those projects. Your Pro Bono team will determine project scope. **Project Note:** This would be an ideal project to learn what teams are doing and what items are being automated.
Using NetSuite for CRM-Advanced (customers, donors, constituents)	**Discovery:** 3-5 hrs **Consultation:** 5-7 hrs **Configuration:** 15-25 hrs	Learn how to customize NetSuite's CRM to meet your specific needs. Project activities include understanding nonprofit leading practices, editing forms, creating custom fields and other ways to configure/customize NetSuite to meet your needs.
Unified View of Organizational Revenue	**Discovery:** 3-5 hrs **Consultation:** 5-7 hrs **Configuration:** 15-20 hrs	Does your organization have revenue data living in different sources? Learn how to consolidate your data streams into NetSuite. This project will be at the discretion of the volunteer team on what can and cannot be done based on number of systems, data, etc. **Project Examples:** • Evaluate your organization's third-party system(s) and recommendations on what can be integrated and/or what to change. • Move other systems into NetSuite.

MISSION EXCELLENCE PROJECTS

Project Name	Expected Time on Project	Project Description
Using NetSuite to Manage Inventory	**Discovery:** 3-5 hrs **Consultation:** 3-5 hrs **Configuration:** 15-20 hrs	Utilize NetSuite not only to track and report on inventory, but also to manage ordering, receiving and verifying inventory. **Project Examples:** Discovery: Learn about the options available within NetSuite's inventory system. Consultation: Recommendation of configuring or reconfiguring inventory in NetSuite. Configuration: Assist and instruct in setting up the different processes involved.
Using NetSuite for Email Marketing	**Discovery:** 3-5 hrs **Consultation:** 3-5 hrs **Configuration:** 15-20 hrs	Learn how NetSuite can help you send mass emails to selected audiences such as your constituents, customers, donors, etc. The Suite Pro Bono team will explain nonprofit best practices and develop project scope. **Project Examples:** Discovery: Understanding the needs of the organization, types of emails they want to send out, targeted recipients and how NetSuite could assist. Consultation: Creating project recommendations of how to use NetSuite to address your mass marketing needs. Configuration: • Create an email template • Save search creation that would need to be edited later by the organization.