ORACLE

Oracle NetSuite Suite Pro Bono

Service Descriptions

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SERVICE DESCRIPTIONS

Financial Projects Services

A. Project Management: Conduct one (1) introductory telephone conference call (up to one and a half (1.5) hours in duration), to review:
   1. Project scope.
   2. Project timeline considerations.

B. Provide up to two (2) standard core process walkthrough sessions of no more than 1.5 hours each.

C. Review, configure and/or customize the NetSuite instance based on Oracle NetSuite standard practices in one (1) single language and related to basic financial project assistance. Customer and Oracle will mutually agree upon one of the following deliverables (inclusion of more than one deliverable is at Oracle's sole discretion and will be documented in the Statement of Work under the list of services to be provided):
   1. Review the NetSuite instance financial configuration and setup (chart of accounts, segments, etc.).
   2. Assist You with setting up Your chart of accounts, tracking departments, locations, class or custom segments.
   3. Assist You with establishing financial controls/audit reports.
   4. Assist You with creating reports, saved searches and/or workbooks.
   5. Assist You with dashboard customization (roles and management) and KPIs.
   6. Assist You with setting up functionality to track donations and/or grants (accounts receivables) within NetSuite.
   7. Assist You with setting up functionality to track vendor bills/payments (accounts payable) within NetSuite.
   8. Assist You with expense management and allocation across segments.
   9. Train You on how to create and manage budgets in NetSuite.
   10. Assist You with using NetSuite for basic productivity.

D. Oracle NetSuite employees may, but are not obligated to, provide standard quick-reference guides and other materials adhering to nonprofit best practices using NetSuite.

E. Oracle NetSuite employees may, but are not obligated to, provide guidance and training on the use of one or more specific NetSuite functionalities to the customer or a group of customers, via online delivery, in person, or group learning modules.

ERP and Operations Services

A. Project Management: Conduct one (1) introductory telephone conference call (up to one and a half (1.5) hours in duration) to review:
   1. Project scope.
   2. Project timeline considerations.

B. Provide up to two (2) standard core process walkthrough sessions of no more than 1.5 hours each.

C. Review, configure and/or customize the NetSuite instance based on Oracle NetSuite standard practices in one (1) single language and related to ERP and Operations Services assistance. Customer and Oracle will mutually agree upon one of the following deliverables (inclusion of more than one deliverable is at Oracle's sole discretion and will be documented in the Statement of Work under the list of services to be provided):

1. Assist You with setting up roles in NetSuite.
2. Assist You with creating reports, saved searches or workbooks.
3. Assist You with dashboard customization (roles and management) and KPIs.
4. Assist You with establishing financial controls/audit reports.
5. Assist You with setting up employees in NetSuite.
6. Assist You with data migration.
7. Review the use of NetSuite with You, and review how to use NetSuite for basic inventory or item tracking.
8. Assist You with managing and adjusting inventory beyond basic tracking.
9. Assist You with customizing NetSuite for ecommerce.
10. Assist You with creation of PDF templates to be used for creating transaction receipts for Your customers.

D. Oracle NetSuite employees may, but are not obligated to, provide standard quick reference guides and other materials adhering to nonprofit best practices using NetSuite.

E. Oracle NetSuite employees may, but are not obligated to, provide guidance and training on using one or more specific NetSuite functionalities to the customer or a group of customers via online delivery, in person, or group learning modules.

System Customization, Integration and Automation Services

A. Project Management: Conduct one (1) introductory telephone conference call (up to one and a half (1.5) hours in duration) to review:
   1. Project scope.
   2. Project timeline considerations.

B. Provide up to two (2) standard core process walkthrough sessions of no more than 1.5 hours each.

C. Review, configure and/or customize the NetSuite instance based on Oracle NetSuite standard practices in one (1) single language and related to system customization, integration and/or automation assistance. Customer and Oracle will mutually agree upon one of the following deliverables (inclusion of more than one deliverable is at Oracle's sole discretion and will be documented in the Statement of Work under the list of services to be provided):

   1. Review the NetSuite instance configuration and setup of integrations and workflow automations.

2. Assist You with creating reports, saved searches or workbooks.
3. Assist You with customizing Your dashboard (roles and management) and KPIs.
4. Assist You with establishing reports and controls for integrations and automations.
5. Assist You with automating NetSuite processes.
6. Assist You with setting up a basic integration, identifying suitable integrations, or verifying the technical requirements of a selected integration.
7. Assist You with creating customized script for system integration or automation.
8. Assist You with establishing or editing Workflows using NetSuite Workflow builder.
9. Assist You with specific system integrations as outlined in Your Statement of Work.

D. Oracle NetSuite employees may, but are not obligated to, provide standard quick reference guides and other materials adhering to nonprofit best practices using NetSuite.

E. Oracle NetSuite employees may, but are not obligated to, provide guidance and training on using one or more specific NetSuite functionalities to the customer or a group of customers via online delivery, in person, or group learning modules.

CRM, Managing People, and Marketing Services

A. Project Management: Conduct one (1) introductory telephone conference call (up to one and a half (1.5) hours in duration) to review:
   1. Project scope.
   2. Project timeline considerations.

B. Provide up to two (2) standard core process walkthrough sessions of no more than 1.5 hours each.

C. Review, configure and/or customize the NetSuite instance based on Oracle NetSuite standard practices in one (1) single language and related to CRM, managing people and/or marketing assistance. Customer and Oracle will mutually agree upon one of the following deliverables (inclusion of more than one deliverable is at Oracle's sole discretion and will be documented in the Statement of Work under the list of services to be provided):

   1. Review the NetSuite instance configuration and setup of NetSuite as a CRM.
   2. Assist You with creating reports, saved searches or workbooks on NetSuite entities (Customers, Vendors, etc.).
   3. Assist You with dashboard customization (roles and management) and KPIs.
   4. Review the use of NetSuite for basic productivity with contacts, calendar events, and the filing cabinet.
   5. Assist You with setting up functionality to track donations and/or grants (accounts receivables), at the transaction level, within NetSuite.
   6. Assist You with using NetSuite for Customer Relationship Management (CRM) functionality.
   7. Assist You with creating landing pages and templates for online forms.
   8. Assist You with using NetSuite for email marketing.
   9. Assist You with managing and tracking members for membership integration.

10. Assist You with tracking and reporting on volunteer activities.

D. Oracle NetSuite employees may, but are not obligated to, provide standard quick reference guides and other materials adhering to nonprofit best practices using NetSuite.

E. Oracle NetSuite employees may, but are not obligated to, provide guidance and training on using one or more specific NetSuite functionalities to the customer or a group of customers via online delivery, in person, or group learning modules.

Group Guided Activation

A. Conduct a group introductory web-telephone conference call for up to one and a half (1.5) hours with Your project team to review the Group Guided Activation process and set expectations.

B. Configure the instance as follows based on Oracle NetSuite leading practices:

   1. Configure one (1) single language and up to two (2) currencies to be deployed for all application users;
   2. Configure up to one (1) subsidiary account

C. Activate the following preconfigured bundles related to SuiteSuccess Financials First Standard, which typically includes the following:
   1. Application Performance Management.
   2. Dashboard Tiles.
   3. Navigation Portlets.

   In connection with the activation of the preconfigured bundles, You also must activate the NFP Financials and NFP Reports bundles, which include Restriction, Fund\Program, Revenue Type and Functional Expense as custom segments.

D. Review a series of online videos, workbooks and worksheets that explain NetSuite's leading practices, functionality and configurations for nonprofits, and answer Your questions, if any, arising from these including:
   1. Overview of CSV import tool;
   2. Overview of standard NetSuite data templates;
   3. Guidance on how to map Your existing data into Your NetSuite instance;

E. Perform the following tasks for You (via phone)
   1. Provide an overview of standard NetSuite data templates
   2. Share guidance on mapping Your existing data into Your NetSuite instance

F. Assist migrating the following data into Your NetSuite instance using the CSV import tools:
   1. Chart of Accounts – up to 200 Accounts
   2. Accounting Segmentation - up to 150 lines
   3. Customers – up to 200
   4. Vendors – up to 100

5. Non-Inventory Items - up to 50
6. Opening Account Balances – one (1) Consolidated opening balance
7. Historical Trial Balances - up to 12 consecutive period balances within current and/or last fiscal year.

G. Provide a one-on-one final knowledge validation session (1 hour), led by an Oracle NetSuite employee, where Your NetSuite administrator demonstrates their understanding of how to use the covered functionalities in NetSuite.

H. Provide up to ten (10) hours of support to You to address questions. This includes:
1. A maximum of 8 weekly meetings by phone;
2. One month of support by email or phone after You have gone live;
3. Availability to answer questions by email or phone as needed during the Group Guided Activation.

I. Provide post Go-Live support through email for 30 days after the established Go-Live date for the Group Guided Activation. Post Go-Live support may include the following if Pro Bono resources available, which is determined at Oracle's sole discretion (and which may be provided to You in addition to the following):
1. Weekly meetings to answer questions of up to, but not more than 30 minutes;
2. An additional one-hour call may be available, subject to Pro Bono resource availability.

J. Project Assumptions
1. Services will be provided remotely via conference calls and web conferences as determined by Oracle.
2. All project documentation, presentations and project communication will be provided in English.
3. You have access to the standard Help Documentation describing the NetSuite Cloud Service's features and functionality, found at www.oracle.com/contracts, https://help.bronto.com/bmp or www.netsuite.com (under user guides). No additional documentation of standard product functionality will be provided.
4. "Go-Live" occurs in the production environment after migration has been completed.
5. You are responsible for all testing and sign-off before Go-Live.
6. All timelines or completion dates discussed with You are targeted, estimated dates of completion, intended for planning purposes only.
7. Anything not expressly listed in this Group Guided Activation service description is not included in the scope.
8. Closed/Completed Historical Transactions such as closed Sales Orders or Purchase Orders, Paid Customer Invoices, Customer Payments, Paid Vendor Bills or Vendor Payments will not be imported by Oracle NetSuite.