NONPROFIT: FUNDAMENTALS

Course Description

Do you need to learn how to manage your organization's NetSuite Nonprofit account? If so, this course will provide you with the foundational knowledge needed to implement and optimally maintain your NetSuite solution.

Nonprofit: Fundamentals examines key implementation tasks to provide the foundational knowledge needed to optimize NetSuite for your users' business needs.

This three-day course begins with a high-level introduction of NetSuite capabilities before turning to the tasks performed, based on leading practices by business process owners and administrators. The course concludes by exploring best practices and techniques to ensure ongoing optimal use of your NetSuite system.

Demonstrations and hands-on exercises will be conducted in a NetSuite SuiteSuccess Nonprofit account.

Who Should Attend

- Project team members who need to understand the features and capabilities of the NetSuite Nonprofit solution prior to implementation.
- New and experienced administrators and business process owners who are responsible for the day-to-day operations, maintenance and optimization of their organization's NetSuite account.

Key Tasks

How do I:

- Establish baseline knowledge of NetSuite core functionality?
- Complete key initial implementation tasks?
- Add users and set access levels per role?
- Perform key end-user tasks critical to nonprofit financial and fundraising operations?
- Use analytics to obtain important metrics?

Prerequisites

- Course participants should be familiar with NetSuite navigation and features. To learn how to navigate NetSuite and perform common tasks, view the Getting Started tutorials on SuiteAnswers.

Course Objectives

Through real-life use cases, hands-on exercises and best practices discussions, you will learn how to:

- Confirm company-wide configuration settings and user-level preferences.
- Identify features and business processes built into the application.
- Identify specific business challenges and corresponding NetSuite solutions and processes.
- Perform key administrative and end-user tasks for specific workflows.
- Monitor and measure business performance with analytics.
- Leverage additional tools and resources to extend account functionality.

Day 1 Agenda: Getting Started

How NetSuite Fits Your Organization: Identify how NetSuite addresses your business needs; identify the benefits of the database structure; consider the use of business rules and business processes.

Basic Navigation: Recognize NetSuite web page elements; personalize your Home Dashboard; identify the purpose of forms; use basic search options; leverage multiple Help resources.

Overview of Account Configurations: Identify the high-level processes built into the application; identify the features already enabled in your account, explore additional account personalization to fine tune the account to your needs.

Related Courses

Take these courses for more training:

- NetSuite: Administrator Fundamentals
- NetSuite: Financial Management
- SuiteAnalytics: Reports and Searches

Review NetSuite's Data Model: Identify how data is classified, sorted and recorded; what determines who can access the data; practice entering records.

NetSuite Roles and Permissions: Explain how roles are the foundation for data security in your NetSuite account; define user permissions and restrictions; set up users in your account.

Financial Tools: Set up the General Ledger, Chart of Accounts and Accounting Periods; explore native and custom financial segmentation options; review standard and custom financial reports.

Day 2 Agenda: Business Processes

Other Financial Tools Overview: Investigate fundamental financial tools: journal entries, allocations, budgets, releasing revenue from restriction.

Items for Revenue and Expense Management: Examine item types; create non-inventory and service items to track donations and expenses; create billing schedules and amortization templates.

Constituent Management: Create individuals, households, organizations and contacts; establish relationships between constituents.

Cash Donations: Set up Campaigns and Appeals; examine how NetSuite records donations; add soft credit, tribute and matching gift information to a donation; explore fundraising reports.

Pledges and Payments: Enter a pledge and payment (invoice) schedule; accept payment on a pledge; perform a pledge writeoff; review pledge-related reports.

Day 3 Agenda: Business Processes and Go-Live

Opportunities and Grants: Track grant prospects with Opportunity records; once awarded, set up the Grant record to manage the execution of the grant agreement.

Projects, Time and Expenses: For complex grants, use Projects to assign resources and manage tasks/milestones; examine how timesheets and expense reports can be linked to a project and billed back to a funder.

Purchase and Expense Management: Examine the life cycle of a purchase order through approval, receipt, billing and payment; process bills and payments; discuss custom approval routing built into the Nonprofit account; review reports.

SuiteAnswers

Get answers to your support and training related questions:

- Go to Training Videos to find the Getting Started tutorials.
- Take New Feature Training to learn about the latest NetSuite release.

Live Training Webinars

Participate in free webinars to get practical tips and tricks for using NetSuite better:

- Go to suitetraining.com > Webinars and Events to view the schedule and register for an event.

Vendor Credits and Refunds: Manage vendor returns and item fulfillment; create vendor credits; issue refunds; apply credits.

User Adoption: Discuss the importance of enabling end users and the available tools to ensure user adoption; explore broad strategies to execute a plan for Change Management.

Additional Access and Functionality: Identify the SuiteApps and SuiteSolutions already installed in your account.

NetSuite reserves the right to adjust the stated course content to reflect changes to the NetSuite application and to meet the expressed needs of course attendees.

Features and functions covered in this course might not reflect those in your purchased NetSuite account.