



Nonprofit

Adopt transparent and accountable systems to drive mission success. Nonprofits increasingly rely on integrated platforms to optimize fund management, enhance donor relationships, and streamline operations, leveraging real-time data and reporting capabilities to maximize impact.

Roles: Executive Director, CFO, Development Manager, Program Manager, Grant Manager, Volunteer Coordinator, Board Members.

Key challenge

Shifting donor expectations and increasing operational demands are transforming how nonprofits deliver on their missions. As organizations focus on maximizing impact, the integration of advanced financial tools and donor management systems is fostering stronger collaboration among stakeholders to achieve sustainable growth and accountability.

Enhancing Mission Delivery and Operational Agility:

- Transitioning from manual processes to streamlined digital platforms.
- Prioritizing investments in technologies to optimize fund allocation and reporting.
- Strengthening relationships with donors, volunteers, and stakeholders through data-driven insights.

Product Features

Why NetSuite

Key Benefit

Key Solutions and Resources:

- Automate fund accounting and ensure compliance with nonprofit financial standards.
- Centralize grant management to track applications, reporting, and fund utilization.
- Optimize resource allocation for programs and initiatives based on real-time data.
- Improve donor engagement with integrated CRM tools and personalized communication.
- Standardize reporting processes with customizable dashboards for transparency.
- Monitor program performance to evaluate impact and ensure alignment with goals.
- Qualify vendors and partners for sustainability and ethical practices.
- Streamline volunteer management to maximize productivity and community engagement.



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Product Features

Why NetSuite

Key Benefit

Financial Management

Financial Management for Nonprofits:

Gain efficiencies with a powerful nonprofit fiscal management system built to meet the unique needs of your nonprofit.

Fund Accounting

Real-Time Financial Management for Nonprofits Core Accounting

- A specialized fiscal management system designed for nonprofits.
- Features include core accounting, real-time reporting, and process automation.
- Manage GL, AR, AP, cash, and statistical accounting in one system.
- Streamline approvals for Journal Entries, Purchase Orders, and Vendor Bills.
- Built-in checklist for period closing and supports multiple Net Asset accounts.
- Automation for expense amortizations and dynamic cost allocations.
- Ensures security, compliance, and audit visibility.
- Simplifies Accounts Receivable and financial reporting with over 250 FASB-compliant reports and dashboards tailored for nonprofit staff.

Grant Accounting

More Product Features

Business Impact

- **Streamline the Back Office**

Automate transactions and reduce manual data entry and errors.

- **Close with Confidence**

Accelerate the financial close and maintain compliance.

- **Faster Insight**

Gain real-time access to the financial and operational performance of your organization.



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Product Features

Why NetSuite

Key Benefit

Financial Management

NetSuite offers a GAAP-compliant fund accounting framework for nonprofits, enabling them to manage various revenue streams, link revenue sources to expenses, and effectively handle fund restrictions and grant requirements.

Fund Accounting

NetSuite provides a comprehensive fund accounting framework for nonprofits, enabling efficient management of diverse revenue streams and fund restrictions. Its solution automates FASB compliance with a streamlined Chart of Accounts, offering visibility into cash flow, fund balances, restricted revenue, functional expenses, and grant performance metrics.

Grant Accounting

- Track and manage diverse funds by relevant and associated segments.
- Manage resourcing by restriction, and report expenses against programs or grants to transparently show where funds are spent in real-time, at any time.
- Create FASB reports—Statement of Functional Expenses, Statement of Activity, Cash Flow, Statement of Functional Expenses—on the fly.
- Tag and report by Revenue Type, Subtype, Restriction, or any other segment with or without GL impact on the line level for data entry and FASB compliant reporting.
- Track a matrix of relationships between multiple revenue sources and multiple segment dimensions and geographic regions.
- Create unlimited GL segment code combinations for accurate and easy data entry.

More Product Features

Business Impact:

- **Innovate stewardship** by streamlining your Chart of Accounts with predefined GL custom segments for financial transparency.
- **Ensure FASB and GAAP** compliance by tagging revenue, time, and expenses, and automate reports like the Statement of Functional Expenses and Cash Flow.
- **Achieve transparent reporting** with visibility into fund balances and grant contributions, utilizing over 250 standard and customized reports and dashboards for real-time performance access via NetSuite's Reporting Engine.



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Product Features

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Financial Management

Fund Accounting

Grant Accounting

More Product Features

Grant Accounting

enhances efficiency and visibility throughout the grant lifecycle by tracking terms and conditions, automating time and expense tracking, managing multiple projects and grants, and overseeing expenses across several years.

NetSuite's grant accounting

streamlines the grant lifecycle by tracking terms and conditions, linking multiple projects to grants, automating time and expense management, and managing expenses over several years. It consolidates all relevant milestones, ensuring vital information is accessible in a unified system.

- Projects connect to grant records for automated time and expense tracking.
- Multiple projects and funds can correlate to various grants.
- Dashboards offer detailed reporting on all grant-related transactions.
- Track expenses, vendors, subcontractors, and employees for events.
- Manage internal projects with time, expenses, and scheduled tasks.
- A unified system simplifies management of donor and funding data.
- Simplified GL segment codes automate transaction data entry for grants.
- Full visibility of revenue and invoicing needs by funder or grant.
- Automated billing schedules in NetSuite with alerts for invoicing dates.

Reports can filter dates or periods for funder or grant invoicing requirements.

Business Impact

- **Grant Life Cycle Automation:** Automate tracking of billable/nonbillable transactions and manage expenses over multiple years.
- **Unified System:** NetSuite centralizes grant-related terms, conditions, and milestones, managing all donor and funding source data in one place.
- **Unparalleled Visibility:** Achieve full visibility into grant contributions, revenue, and invoicing requirements by funder and grant award.



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Product Features

Why NetSuite

Key Benefit

Automated FASB Reporting

Automated FASB Reporting allows for quick creation of configurable compliance reports for executive leadership, board members, external auditors, and accounting teams.

NetSuite simplifies FASB compliance by eliminating guesswork and manual data handling. It offers built-in FASB-defined reporting using custom GL Segments and an approved Chart of Accounts that aligns with Form 990 line items, allowing for customization.

Simplified, Flexible Financial Segmentation

Key Financial Statements Include:

- **Statement of Financial Position:** Modified balance sheet for FASB compliance.
- **Statement of Functional Expenses:** Breaks down expenses by "Program Services," "Management and General," and "Fundraising" as per FASB.
- **Statement of Cash Flow:** Details cash inflows and outflows from unrestricted and temporarily restricted funding.
- **Statement of Activities:** Revenue report for restricted funds supporting the Statement of Activity, listing transactions by account and fund.
- **Supporting FASB Activity Report by Program/Fund:** Similar to the Statement of Activities, detailing revenue by fund/program segment.
- **Grant Statement of Activity:** Combines revenues and expenditures, categorizing net assets, with options for single or comparative grant views.

KPIs, Roles and Dashboards

More Product Features

Business Impact

- **FASB Compliance with Confidence**

Built-in standard FASB reports make transparent reporting easy for board members, auditors and leadership.

- **Innovate Stewardship**

Gain complete visibility into restricted/unrestricted fund balances and grant contributions at transactional and summary levels.



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Key challenge

Product Features

Why NetSuite

Key Benefit

Automated FASB Reporting

Simplified, Flexible Financial Segmentation

Streamline your organization's Chart of Accounts using predefined GL custom segments to achieve complete visibility into the source and use of funds.

Simplified, Flexible Financial Segmentation

Simplify your Chart of Accounts with predefined GL custom segments to enhance fund usage visibility and reduce complexity. Financial segmentation minimizes chart bloat and improves reporting. NetSuite provides 12 built-in segments for transaction coding, with options for creating custom segments based on specific criteria, facilitating better fund stewardship and tailored reporting.

KPIs, Roles and Dashboards

Key features for managing revenue and expenses include:

- Tracking diverse revenue streams: grants, donations, pledges, etc.
 - Correlating revenue with expense transactions for real-time transparency.
 - Coding transactions for visibility and control over funds.
 - Monitoring project tasks, time, completion percentage, and expenses.
 - Analyzing relationships among various revenue sources and regions.
 - Creating unlimited GL segment code combinations for accurate data entry.
- Utilizing or customizing 12 predefined segments to fit business needs.

More Product Features

Business Impact Summary:

- **Innovate Stewardship:** Streamline Chart of Accounts with predefined GL custom segments. Enhance data entry using NetSuite's segmentation engine for unlimited combinations.
- **FASB Compliant:** Tag revenue, time, and expenses with GL custom segments. Automate FASB reports including Statement of Functional Expenses and Cash Flow.
- **Transparent Reporting:** Achieve visibility into fund balances and grant contributions. Access over 250 standard and customized reports and dashboards for real-time financial and operational insights.



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Key challenge

Product Features

Why NetSuite

Key Benefit

Automated FASB Reporting

KPIs, Roles and Dashboards

From FASB compliance reporting, to role-based metrics and analytics, to insight and decision-making, gain a more complete picture of your nonprofit's performance, on-demand and in real-time.

Reporting Metrics that Matter

Nonprofit Dashboards, Key Performance Indicators, Analytics and Reporting

- Facilitate timely identification of successes, issues and gaps with pre-built dashboards for CEO, Controller, CFO, Program, Development and Grants Managers.
- Align KPIs across the organization using Charity Navigator recommended scorecards for Fundraising Efficiency, Program Efficiency, Administrative Ratio, Fundraising Ratio, Cash Flow to Total Debt, Contributions Ratio and more.
- Confidently compliant – create FASB reports—Statement of Functional Expenses, Statement of Activity, Cash Flow, Statement of Functional Expenses—on the fly.
- Harmonize fundraising and finance reporting in one system with built-in fundraising reports such as Top Donor Reports, 'Last Year But Unfortunately Not This Year' and 'Some Year But Unfortunately Not This Year'.
- Ground decisions in concrete data with over 250 pre-built yet customizable nonprofit reports, searches, KPIs and dashboards.

Simplified, Flexible Financial Segmentation

KPIs, Roles and Dashboards

More Product Features

Business Impact

- **FASB Compliance with Confidence**

Built-in standard FASB reports make transparent reporting easy for board members, auditors and leadership.

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Product Features

Why NetSuite

Key Benefit

Program Efficiency Tracking

Program Efficiency Tracking

Create a culture of data driven decision-making using Charity Navigator™ recommended scorecards for program metrics that matter.
Excellence in Performance Measurement

KPI Scorecard

The watchdog agency Charity Navigator recommends to closely monitor functional expenses to demonstrate commitment to funding programs and services in an efficient way.
With NetSuite's built in scorecard, you can align definitions of success across the organization using Charity Navigator recommended governance metrics for Fundraising Efficiency, Program Efficiency, Administrative Ratio, Fundraising Ratio, Cash Flow to Total Debt, and Contributions Ratio.

Spend Management

Constituent Relationship Management

Global Cloud

Business Impact

- **Focus on Metrics that Matter**

Align definitions of success across the organization using Charity Navigator recommended scorecards.

- **Improve Decision-Making**

Drive better, faster decision-making with real-time data and reporting, and personalized dashboards.

- **Harmonize Fundraising and Finance**

Create detailed reports that encourage dialogue about progress toward goals using cross-departmental benchmarks.



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Product Features

Why NetSuite

Key Benefit

Program Efficiency Tracking

Spend Management

Constituent Relationship Management

Global Cloud

Spend Management

Ensure full accountability and stewardship of funds and gain complete control and visibility over total spend.

Gain Complete Visibility into Spend

Spend Management

- From acquisition through payment, automate the complete procurement process for goods and services.
- Establish budget and spend controls to ensure compliance with policies.
- Gain real-time visibility into the spending trends across your organization.
- Effectively track and manage detailed costs associated with grants and funds.
- Tie time and expenses back to one or more sources of funds; manage grants over multiple years.
- Multi-level approval processes to facilitate grant and fund/program management and ensure expenses stay within organizational policies.
- Procurement dashboard and email alerts to ensure purchases are completed and paid on time.
- Allocation schedules for spreading direct/indirect expenses across grant and fund/programs.
- Pre-defined expense or fixed asset accounts, as well as default billing schedule or amortization templates.
- Ability to track and monitor inventory.

Business Impact

- **Control Spend**

Automate the procure-to-pay process and drive greater visibility into spend.

- **Ensure Compliance**

Configure requirements, authorizations and approvals.



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Product Features

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Key Benefit

Program
Efficiency
Tracking

Spend Management

Constituent
Relationship
Management

Global
Cloud

Constituent Relationship Management Constituent & Financial Acuity CRM & Fundraising Operations

- Track individuals, organizations, households, relationships and multiple revenue streams.
- Manage all financial transactions in a single, unified set of tools.
- Build bridges between systems: NetSuite integrates constituent and transactional data with external systems.
- Manage and cultivate important relationships with a 360-degree view of all constituents.
- Establish customized workflows and processes to match the needs of your organization.
- Track actions, send emails, segment constituents.
- Build collaborative insight: generate fundraising and finance reports in one system.

Business Impact

- **Integrate Finance and Fundraising**

The whole is greater than the sum of its parts: data collaboration unites fundraising and finance.

- **Financial Acuity for Mission Impact**

See the big picture from fundraising, to finance, to program.

- **Constituent 360**

Make more educated decisions about programs, people, and other key business drivers.



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Product Features

Why NetSuite

Key Benefit

Program Efficiency Tracking

Global Cloud Expand Your Mission in the Cloud Globally

NetSuite Cloud: OneWorld

- You're in the hands of a leader: NetSuite was born and bred in the cloud.
- Run nonprofits IT operations with a browser and an internet connection.
- Confidence: Applications, operating systems, servers and network switches all managed by NetSuite.
- Security: Uptime, application maintenance, disaster recovery and system upgrades.
- Perfect for distributed workforce: Ease of access at any time, and from anywhere.
- Manage your affiliate or global nonprofit across multiple locations.
- Visibility into every aspect of your multinational or affiliate organization, even with multiple languages and currencies, including forecasts and campaigns.
- Adjust for currency, taxation and legal compliance differences at the local level, with regional and global consolidation and rollup.

Spend Management

Constituent Relationship Management

Global Cloud

Business Impact

- **Global Cloud Workforce**

Work anywhere at any time; manage your entire global and affiliate nonprofit on a single unified platform.

- **Focus on your Impact not on IT**

Expand your mission globally and focus your resources on achieving social impact, not managing Information Technology complexity.



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Key Benefit

Through the Social Impact program, NetSuite provides a suite of cloud software built for nonprofits of all sizes to improve operations and grow their mission. The three pillars of the program ensure that all nonprofits globally are able to successfully implement, utilize and accelerate their impact on NetSuite through the entire customer lifecycle.

- **Break Down Silos.**

Ease the burden of maintaining multiple systems and focus on your core mission.

- **Boost Your Resources.**

Strengthen connections with existing donors, find new supporters and deliver better programs and services.

- **Fuel Your Mission.**

Through innovative products and services, every nonprofit has the opportunity to leverage NetSuite to fuel its mission.



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Key Benefit

NetSuite ERP offers nonprofits a comprehensive, cloud-based solution to streamline operations, enhance financial transparency, and maximize mission impact. Key benefits include:

- **Unified Platform:** Integrates various functions such as accounting, fundraising, constituent relationship management (CRM), and inventory management into a single system, eliminating data silos and improving efficiency.
- **Real-Time Visibility:** Provides up-to-date insights into financials and operations through role-based dashboards and reports, enabling informed decision-making and proactive management.
- **Fund Accounting:** Supports management of multiple funds with different purposes and restrictions, ensuring accurate recordkeeping and compliance with donor intentions and regulatory requirements.
- **Donor and Volunteer Management:** Enhances engagement by providing a unified view of constituents, facilitating personalized communication strategies, and improving retention rates.
- **Operational Efficiency:** Automates routine tasks, reduces manual errors, and frees up resources to focus on strategic initiatives, thereby increasing productivity and reducing overhead costs.

By implementing NetSuite ERP, nonprofits can better manage resources, demonstrate transparency to stakeholders, and effectively pursue their missions.