Statement of Work

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# 1 Summary & overview

To formally define the scope, roles, responsibilities, and deliverables for the NetSuite implementation project.

CFO, IT Director, Operations Manager, and department heads across Finance, Inventory, and Sales departments.

Replace fragmented systems with a centralized NetSuite ERP platform to improve reporting, operational efficiency, and decision-making.

# 2 About Implementation Partner

An ERP implementation consulting firm specialized in NetSuite implementations for nonprofits and mid-sized enterprises, with over 10 years of experience as a NetSuite Alliance Partner.

Completed over 50 NetSuite projects for organizations transitioning from systems like Microsoft Dynamics, QuickBooks, and other legacy ERPs.

Recently implemented NetSuite for a large nonprofit operating in five regions with inventory and donor management requirements similar to the current project.

# 3 Project Scope - Our Understanding

Full NetSuite implementation covering Financials, Inventory Management, CRM, and e-commerce integrations, with deliverables including a configured live environment, user training, and documentation.

Financial management, donor management, inventory tracking, e-commerce operations, and CRM.

Financials First, Inventory Management, CRM, SuiteCommerce for e-commerce.

Covers Finance, Sales, Warehouse, and Operations departments across all five locations.

Successful data migration, real-time reporting, seamless donor and sales integration, and minimal downtime at go-live.

Configured NetSuite environments, tested integrations, trained users, and post-go-live support.

## 3.1 Configuration Scope

General Ledger, Accounts Payable, Inventory Management, CRM, and Order Management.

Custom approval workflows, role-based access control, and tailored forms for donor tracking.

Yes, especially for custom donor communication automation.

Considering Salesforce connector for CRM synchronization and Celigo integrator for e-commerce.

## 3.2 Environmental Planning

Production and Sandbox environments.

Yes, a staging environment is planned prior to go-live.

Using SuiteBundler and ensuring change tracking through a release management checklist.

A 2-week window before go-live for final sandbox refresh and User Acceptance Testing (UAT).

## 3.3 Data Migration Scope

Microsoft Dynamics GP, a custom CRM database, and Shopify for e-commerce.

Master data (customers, vendors, items), open AR/AP transactions, and limited historical sales orders.

At least the last 3 fiscal years.

Internal IT team will clean and map the data, with guidance from the implementation partner on templates and validations.

Inconsistent customer naming conventions and missing inventory SKUs are known issues.