

## SuiteSolutions - NFP Mid-Market Edition

### Description and Terms of Service

#### **Overview of Functionality**

The SuiteSolutions NFP Mid-Market Edition bundle provides business process solutions for nonprofit organizations, including financial reporting, revenue management, fundraising, and constituent relationship management (organizational and individual constituents, householding, and tracking relationships). The NFP Mid-Market Edition bundle provides the data structures not found in the native NetSuite Service for nonprofit accounting, fundraising, constituent management, and grants. It also helps automate Constituent Management -- the management of individuals, "Households" (a group of one or more family members), organizations and their relationships to one another -- and captures the transactions associated to each Constituent, allowing for a variety of finance and fundraising reports.

Key components of SuiteSolutions - NFP Mid-Market Edition:

- Households are automatically created; Households can be split (in the case of a divorce) and added to in case of an addition; relationships can be deactivated
- Suitelets such as the Fund Dashboard and Relationship Report allow for quick views of overall giving and relationships.
- Financial, Revenue, Expense, Fundraising, and Grant reports are pre-built (including FASB reports)
- KPIs and Dashboards for a variety of nonprofit roles (such as CEO, CFO, Controller) are pre-built
- A custom "NFP Solution Center Tab" aggregates NFP reports and functions for ease of use

#### **Limitations**

1. A maximum of 11,000 search results can be loaded on the Current Projects tab in the Fund Dashboard. If the results are greater than 11,000 additional criteria will have to be added in the searches used for Fund Dashboard.
2. A maximum of 15,000 relationships can be successfully exported in the Relationship Report.
3. A limit of 20,000 soft credit records can be carried over when billing Sales Orders.
4. Households can hold a maximum of 2,000 Family Members.
5. Defaulting the Restriction column will not trigger on imported transactions.
6. On Relationship Report subtabs, only the results on the current page and not on all pages will be sorted.
7. When importing CSV files, the "Run Server SuiteScript and trigger Workflows" should be enabled to trigger the automations.
8. Editing transactions approved by Advanced Approvals is not supported.
9. Results displayed in the Fund Dashboard will depend on the role of the user.
10. NPO Constituent Relationship Form should be used when creating relationships.
11. All standard NetSuite Service usage and governance limits apply.

## **Terms of Service**

SuiteSolutions are pre-built offerings used to accelerate the delivery of custom functionality into Customer's account. Any custom configurations or code deployed with SuiteSolutions is not locked and can be further customized in Customer's NetSuite Service account. It is Customer's sole responsibility to review the functionality and limitations enabled by this SuiteSolutions item before procuring. Unless specifically agreed in writing in a separate Statement of Work, SuiteSolutions are not supported, maintained or upgraded by Oracle. In addition, unless otherwise agreed upon in writing pursuant to a Statement of Work, Customer is responsible for all testing and configuration of all SuiteSolutions. SuiteSolutions can only be deployed to the account of the specific Customer that has procured SuiteSolutions. SuiteSolutions are for Customer's internal use only for use with Customer's NetSuite Service account and cannot be re-bundled and/or shared. Customer may continue to use this SuiteSolutions item during the term of its use of the NetSuite Service.

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## **Open Source Software**

The following notices may be updated from time to time as provided in the code.

### **JQuery 1.11.3**

JS Foundation

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As adopted by the Board of Directors on October, 17 2016