



# **Support Guide**

*Your handbook  
of Blackbaud Advantage™  
maintenance benefits  
and how to use them*

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## General Information

### Introduction

Welcome. As a Blackbaud client and participant in one of our Blackbaud Advantage™ Custom Maintenance plans, you have access to a wide range of resources designed to help you accomplish your mission. Maintenance plan participation ensures you get the most from your investment in Blackbaud software.

The Support Guide introduces you to the benefits of maintenance, which include self-help resources available 24 hours – 7 days a week, product upgrades, product support, , and more. We explain our customer support procedures, state our service level goals, and explain the scope of support. We strive to provide you with consistently excellent support, and we want you to know what to expect when you contact us.

### Mission Statement

Blackbaud's Support department endeavors to provide the industry's best customer service. Through education and support, we focus on empowering clients to use Blackbaud software in a manner that achieves the maximum benefit to their organisations, thereby advancing each client's individual mission. We continually strive to meet Blackbaud's commitment to "help you make the world a better place" through friendly, swift, and knowledgeable assistance.

## Self-Help Resources

A variety of self-help resources is available 24 hours – 7 days a week to help you quickly and easily resolve any issues you encounter when using Blackbaud software.

### Help File

The built-in help file contains detailed information about your software. When you have a question about a process or function in your program, press F1 on your keyboard and the help file will open directly to information about the screen you are viewing.

### User Guides

When you want a more in-depth explanation than the help file provides, check the user guides, which are installed on your workstation with the software. Select Help from the menu bar to access them. User guides open in Adobe Acrobat. To search for a word or phrase, click the binoculars or press CTRL+F; Acrobat searches the entire guide for you. The user guides are updated each time you update the software on your workstation. You can also download the most recent guides from [userguides.blackbaud.com](http://userguides.blackbaud.com).

### Support Web Site

Access to the Support Web site is a maintenance benefit and is password-protected. When you log in at your workstation, mark the Save my Password checkbox so you won't be prompted for a password again. If you forget your user name and password, click Forgot your login/Account locked? and enter the information requested to receive your login via email. We encourage you to visit [support.blackbaud.com](http://support.blackbaud.com) regularly. Updated daily, it contains many useful resources, including:

## Knowledgebase

Have a software question or issue? Find your answer in the Knowledgebase. We record every question software users ask us in the Knowledgebase, and it's one of the main tools our analysts use. To search the Knowledgebase, visit [kb.blackbaud.com](http://kb.blackbaud.com), enter your question, select your product, and click Search. The Knowledgebase uses a natural-language search engine, like Google, so begin your how-to questions with the words "How to" and enter the exact text of the error messages.

## Support Resources Pages

The product-specific Support Resources pages are the home pages for your Blackbaud software. They include links to the most important resources on the Support Web site and we update them regularly. Bookmark them in your browser!

- The Raiser's Edge: [resupport.blackbaud.com](http://resupport.blackbaud.com)
- The Information Edge: [tiesupport.blackbaud.com](http://tiesupport.blackbaud.com)

## Frequently Asked Questions (FAQs)

Use the FAQs pages to find answers to the most frequently asked questions about Blackbaud software. Access FAQs pages for each product at [faq.blackbaud.com](http://faq.blackbaud.com).

# Customer Support Procedures

## Case System

Our customer management database is Amdocs ClarifyCRM. We assign every organisation a unique site ID number and enter information about your organisation as well as your software users' names and contact information in Clarify. We automatically assign every software user in Clarify his own login to our Support Web site and subscribe him to the technical bulletin for the software he uses. When you contact Support for assistance, we document the issue in a Clarify case for your organisation. We track each unique issue in a separate case, which has its own case number and title. Each contact (phone calls, Case Central notes, emails, faxes) is logged into the case created.

## Case Central

Case Central is an online interface with Clarify. We recommend you use Case Central to manage your organisation's Support cases and to contact Support for issues that are not critical. On Case Central, you can also quickly and easily read the analyst's suggested resolution to an existing issue and log notes instructing an analyst to close a case once you have followed his instructions. Case Central maintains security by restricting access to other sites' cases. To access Case Central at [casecentral.blackbaud.com](http://casecentral.blackbaud.com), simply log into our Support Web site.

## Phone System

We use an Automatic Call Distribution (ACD) system that is designed for maximum efficiency in call routing and handling. Clients who call our local rate number are prompted with several options. Please listen to them carefully as we occasionally change them based on client needs.



## **New Issues**

Please direct any new issues to the general support team instead of contacting a particular analyst you have worked with on a previous case. If you contact a specific analyst about a new issue, the service levels in this document will not apply and you may experience significant delays in resolving your issue.

## **Open Cases**


When an analyst begins assisting you with a new issue, he will be responsible for that case until it is closed or escalated (see Troubleshooting/Escalation Procedures below). If a case remains open after our initial contact, an Action Plan will be outlined and followed until the case is closed. Action Plan components are:

1. What is the client to do before the next contact is made?
2. What is the analyst to do before the next contact is made?
3. When will the next contact be made (date and time) and by whom (the client or the analyst)?

Due to various responsibilities, an analyst may be unavailable to work your case through to a conclusion. If this happens, the analyst will transfer ownership of the case to another analyst. (see Troubleshooting/Escalation Procedures below).

## **Troubleshooting/Escalation Procedures**

Support consists of a team of analysts of varying experience levels. Analysts can escalate or transfer open cases within the team for a variety of reasons, including time, severity, and level of expertise required for solving the issue.



In addition to the analysts the support team has a senior staff consisting of Support Manager, Team Lead and a Product Lead. Should you need to contact this senior team direct to escalate an issue you can contact them on the client relations hotline. (see page 20 for details).

These are the escalation procedures our analysts use when troubleshooting issues you report:

- Check support resources, such as the Knowledgebase and the user guides
- Test the issue using sample data
- Consult the team lead
- Contact the product lead, who serves as an escalation point for software design questions and program-related issues

### **How to Check the Status of a Case**

1. Check the case status on Case Central at [casecentral.blackbaud.com](http://casecentral.blackbaud.com). (For more information, review Case Central on page 7.)
2. If you don't have Internet access, email Customer Support, including your Site ID and case number. (Email addresses are on page 20.)
3. Call Customer Support at 0845 658 8500 and be ready with your case number. (For more information, review Open Cases on page 8.)



## **Case Closure**

We will close your case when you confirm that your issue has been resolved. Case closure means the analyst will not take further action on that case. If an issue either was not completely resolved or reoccurs, we will reopen the case upon your request and continue assisting you with it.

## **Who to Contact First**

Software is complex, making it difficult to know where to seek technical assistance. Use the following lists if you need assistance with Blackbaud software-related issues. For issues under the heading “Your Organisation’s Support Team,” contact your organisation’s internal resources, such as a system administrator, IT/ISS department, or consultant.

## **Blackbaud’s Support Resources (Web Site, Support Team)**

- Installation of Blackbaud software
- Problems/questions about Blackbaud software
- Error when Blackbaud software is running
- Detailed system recommendations for Blackbaud software
- Problems interfacing with other Blackbaud software

## **Your Organisation’s Support Team**

- Backup/restore procedures or problems
- File Transfer Protocol (FTP) problems
- Pre- and post-conversion data cleanup
- Errors when Blackbaud software is not running
- Establishing/changing network settings
- Installation of protocols
- Establishing IP addresses
- Advice on equipment purchases
- Problems printing from Blackbaud software

## **Special Note About Backups**

Power outages, hardware and network failures, and other unexpected circumstances can lead to an unrecoverable data loss. Programs can be reinstalled but your data files are irreplaceable. We strongly recommend you ensure your data's safety by running database backups daily, testing the backups frequently, and storing the backups in off-site locations safe from fire, flood, and theft. For complete instructions, review your Database Administration Guide. This information is also in the Knowledgebase (solution number BB52243).


If data loss or corruption occurs and a valid backup is not available, we may be able to repair and/or recover data. However, this repair is not covered under your maintenance agreement and there will be an additional charge for this service. If we attempt to repair data, we can make no guarantees as to estimated time for repair or possible success in recovering data. Your best insurance against any form of data corruption or loss is regular validated backups.

## **How We Communicate With You**

We're committed to providing you with important information in a timely manner.

**News in our Technical Bulletins** – Our weekly technical bulletins are our primary means of communicating information about our software to you, such as new releases and patch files. (For more information, review Technical Bulletins on page 16.) Subscribe to the technical bulletins at [subscribe.blackbaud.com](http://subscribe.blackbaud.com).

**News on Our Support Web Site** – We post release announcements, updates on software issues, and notification about service interruptions on our Support Web site. (For more information, review Support Web Site on page 5.)



**News in Support Digest** – Twice a year, we mail the primary contacts at each organisation the latest issue of Support Digest, which provides news about recent and upcoming releases, tips for using your software efficiently, and information about available Support resources.


**To ensure your organisation receives this information,** notify us of staff changes by submitting the Information Update form on our Web site: [contactinfo.blackbaud.com](http://contactinfo.blackbaud.com).

### **How You Can Help Us**

When you contact Support, please have your site ID and/or existing case number available. We will ask a variety of questions to determine what your issue is and how best to solve it. When you contact Support, you should know the following information:

- Exact wording of error message received
- Exact steps leading to the problem
- Type and version of networking software (e.g., Windows 2000)
- Type and version of workstation operating system (e.g., Windows Server 2003)
- Version of Blackbaud software (Select Help, About from the menu bar to determine your version.)

You are our greatest asset when troubleshooting problems. Be as detailed as possible when describing your issue. When you contact us, please be at the workstation where the problem is occurring. While working to resolve your issue, the analyst may ask you for additional information and/or request that you perform certain operations. Correct information and accurate execution of these operations are important to identifying a



resolution. Incomplete information may result in delayed case resolution.

The following tools can be useful when we are working to resolve your issue. Although we do not require you to have these tools, your use of them can often expedite resolution to an issue.

- Internet Access
- Internet email capable of accepting and reading attachments
- WinZip file compression software


### **Severity Schemes**

When you contact Customer Support, we will work with you to identify the severity of your problem, question, or issue. Although we strive to assist you with all issues in a timely manner, we use these severity identifications to separate mission-critical issues from questions, allowing us to respond appropriately to each issue.

**Down:** (Client Emergency) Cannot access/use the software on any workstation; OR software's main functionality is not working, with no viable workaround. **Examples:** Errors preventing you from entering the software from any/all workstations; database corruption.

**Critical:** Software is operational, but a critical feature is failing, or this is urgent. **Examples:** Several (but not all) workstations are not functioning; can't run mailsort labels or generate a transmission file for Direct Debits.

**Problem:** Overall software function is normal, but you have questions or are receiving an error. **Examples:** Errors in a specific area (i.e., on one particular report or query); errors importing data.



**Inquiry/Question:** Problems with no significant time constraints; “how to” questions. **Examples:** Assistance with a particular function (e.g., complex queries, exports); any problem that can wait; intermittent problems that are inconvenient, but do not interfere with software function.

## **Service Level Goals**

We operate on a Real Time Support model, the goal of which is to have analysts available to answer live as many calls as possible. Live is defined as delivery of your call to an analyst either immediately or after a short waiting period. We have established goals and service levels within the Real Time Support model. Our goals indicate the maximum level of service for which we strive and represent average performance throughout a day, not a particular point during a day. Therefore, actual results achieved during peak time periods may be slightly below the set goals.

### **Case Resolution**

We attempt to resolve all cases efficiently. Our goal is to resolve and close 73% of cases within 24 hours of the time the issue is reported. The remaining 27% are resolved as quickly as possible but may take additional time due to environmental complexity or involvement of other Blackbaud resources. Timely resolution requires you to remain responsive and we ask for your help.

### **Case Central and Email Service Level**

Our goal is to respond to cases created on Case Central and emails received during normal business hours within one hour of receipt. During peak times, expect response within two hours. Cases created after 5:30 p.m. on weekdays and on weekends are answered the next business day.



## **Hotline Service Level**

Our goal is for calls to be answered by analysts within 1 minute.

## **More Blackbaud Advantage™ Maintenance Benefits**

In addition to the self-help resources, the following benefits are available to all Blackbaud Advantage™ maintenance clients. Individual plans may have additional benefits. Details about all Blackbaud Advantage™ maintenance plans are available on the Blackbaud website.

### **Free Software Updates**

We are committed to an ongoing program of product development, based primarily on input from you. New software versions, free to maintenance clients, are available for download 24 hours – 7 days a week from the Software Downloads section of our Web site.

### **Forum Participation**

Our forums connect you with fellow Blackbaud software users. You can share tips, best practices, and creative uses of Blackbaud software directly with your peers in the nonprofit community. For more information about this resource, refer to the Forum FAQs at [forums.blackbaud.com](http://forums.blackbaud.com).



## Attend User Group Meetings

User groups are gatherings of Blackbaud clients that facilitate networking among fellow users. To learn more about upcoming user group meetings in your area, visit [usergroups.blackbaud.co.uk](http://usergroups.blackbaud.co.uk). If you are interested in hosting a user group meeting, email [usergroups@blackbaud.co.uk](mailto:usergroups@blackbaud.co.uk).

## The User's Edge

We email The User's Edge to users each week. They contain important product information and tips based on Knowledgebase solutions, and are our **primary means of communicating information** about our software, such as new releases and patch files. **We encourage all software users to subscribe.**

You can print your email to read later and browse recent issues at [documentation.blackbaud.co.uk](http://documentation.blackbaud.co.uk). We add each week's tips to the Knowledgebase, so you can easily find the information whenever you need it. Manage your own technical bulletin subscriptions at [subscribe.blackbaud.com](http://subscribe.blackbaud.com).



## Maintenance Plan Options

The Support resources described in this guide are available to help you with any question you may have about your Blackbaud products, including all functions of the Blackbaud software itself as well as any points at which the **Blackbaud software interfaces directly with built-in third-party objects** (such as built-in *Crystal Reports* or Microsoft Word's mail merge). This is the Advantage plan.


Depending on your organisation's needs, the complexity of your processes, additional products you have purchased, and the experience level of your staff, you may find that you need help outside the scope of our Standard Product Support. To ensure appropriate levels of support for all customers, we offer an additional Blackbaud Advantage™ Custom Maintenance plan: Advantage Professional. For details, e-mail [support@blackbaud.co.uk](mailto:support@blackbaud.co.uk).

## Miscellaneous

### Satisfaction Survey

Throughout the year, we email online questionnaires to request feedback on the quality of support you receive from us. The surveys reference the case number, the case title, and the analyst who assisted you. You can expect to receive one survey a year. Additionally, we email the Client Satisfaction Survey to the primary contact at your organisation. This short survey enables you to rate how Blackbaud is doing overall. Please fill out the surveys we send and give us your candid feedback. We read every returned survey and follow up as needed.

### Support Education and Training Program



We recognise our responsibility to provide knowledgeable and helpful analysts to answer your questions and resolve your issues. Therefore, all new analysts participate in a seven-week training program that focuses on educating analysts about Blackbaud's products and clients, in-depth technical information, and effective troubleshooting techniques. We also require all analysts to attend at least 30 hours per year of continuing education classes on advanced technical topics, the latest product information, and the nonprofit community. Our Support Education team is dedicated to the development of each member of the Support team.

### **Quality Contact Program**

Our Quality Contact Program is another component of our continued commitment to improving customer service. We randomly record and evaluate cases and incoming calls for quality, and provide analysts with regular evaluations and individual coaching sessions. These evaluations are an important factor in each analyst's overall performance assessment.

## **Service Interruptions**

### **Departmental/Company Meetings**

Six to eight times per year, Support attends department-wide or company-wide meetings. These meetings occur at the beginning or the end of the business day (either ending by 9:30 a.m., or beginning after 3:45 p.m.) to minimise service interruptions. During these times, service is available to clients with emergencies by calling 0845 658 8585. The greeting on our phone system will indicate if these meetings affect service. They are also announced in our weekly technical bulletins. During the meetings, service levels outlined in this document do not apply.



## Holidays

Blackbaud Europe's. office, including Support, is closed on:

New Year's Day (January 1)\*

Good Friday

Easter Monday

May Day (May 1st)\*

Spring Bank Holiday (last Monday in May)

Summer Bank Holiday (last Monday in August)

Christmas Day (December 25)\*

Boxing Day (December 26)\*

\*If a holiday falls at the weekend then the observed days are taken as the next working day. In addition, Blackbaud closes at 3 p.m. on the last working day before Christmas Day, and New Year's Day.



## How to Contact Customer Support

### Contact Information

**World Wide Web:** [support.blackbaud.co.uk](http://support.blackbaud.co.uk)

**Case Central:** [casecentral.blackbaud.com](http://casecentral.blackbaud.com)

### Email (if you don't have access to a web browser and can't reach Case Central)

The Raiser's Edge: [support@blackbaud.co.uk](mailto:support@blackbaud.co.uk)

The Information Edge: : [tiesupport@blackbaud.co.uk](mailto:tiesupport@blackbaud.co.uk)

**Phone from within the United Kingdom:** 0845 658 8500

**Phone from outwith the United Kingdom:** +44 (0)141  
575 0801

**Fax:** 0141 575 0999

If you have questions about the Blackbaud Advantage™ maintenance program benefits or the various plan options, email [support@blackbaud.co.uk](mailto:support@blackbaud.co.uk). If you have questions about the standards and expectations in this publication or feel we are not meeting them, contact our client relations hotline or e-mail box:

[clientrelations@blackbaud.co.uk](mailto:clientrelations@blackbaud.co.uk), 0845 658 8585

### Support Hours

Support is available 9:00 a.m. to 5:30 p.m., Monday to Thursday and 9:30 a.m. to 5:30 p.m. on Fridays, excluding holidays. Peak time periods, when the volume of incoming requests is heaviest, vary seasonally and by day of the week. For support 24 hours – 7 days a week, visit [support.blackbaud.com](http://support.blackbaud.com).