Customer Support Guide

blackbaud™

> power your passion

About Blackbaud

Serving the not-for-profit, charitable giving and education communities for more than 30 years, Blackbaud (NASDAQ:BLKB) combines technology solutions and expertise to help organisations achieve their missions. Blackbaud works in over 60 countries to support more than 30,000 customers, including non-profits, K12 private and higher education institutions, healthcare organisations, foundations and other charitable giving entities, and corporations. The company offers a full spectrum of cloud and on-premise solutions, and related services for organisations of all sizes, including non-profit fundraising and relationship management, eMarketing, advocacy, accounting, payment and analytics, as well as grant management, corporate social responsibility, education and other solutions. Using Blackbaud technology, these organisations raise, invest, manage and award more than $100 billion each year. Recognised as a top company, Blackbaud is headquartered in Charleston, South Carolina and has operations in the United States, Australia, Canada, the Netherlands, Ireland and the United Kingdom. For more information, visit www.blackbaud.co.uk.

You are at the heart of everything we do.
We are privileged to partner with you, and we take pride
in giving you the industry's best support.

Blackbaud's Mission

Make the world a better place by working with the nonprofit community to improve lives.

Blackbaud's Values

- Our people make us great.

- Customers are at the heart of everything we do.

- We must be good stewards of our resources.

- Innovation drives success.

- Our actions are guided by honesty and integrity.

- Service to others makes the world a better place.

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Our Commitment to You

Working with you to make the world a better place is our mission, and we are dedicated to providing you with prompt, accurate and courteous service every time

Welcome to the Blackbaud family! We are privileged to partner with you, and we take pride in giving you the industry's best customer support. We understand the important role our solutions play in helping you fulfil your mission, and we are committed to:

1. Providing exceptional customer service

When you have questions about our products, we want to get them answered right away. We offer comprehensive, online resources that are available 24/7 so you can resolve issues and answer questions as they arise. As a participant in one of our Blackbaud Advantage™ Support plans, you have access to our secure resources including Knowledgebase the first place to go when you have questions or need to troubleshoot software issues. All software users can connect with the nonprofits community and Blackbaud employees on our forums and blogs, and your Support plan additionally entitles you to Case Central, user guides, software and industry newsletters and FAQs.

2. Hiring and developing great people to support you

By establishing a team of satisfied, knowledgeable and experienced employees, we are able to give you an unmatched customer support experience. To maximise the effectiveness of our support team, we equip our analysts with the tools and information they need to better serve you. All new support analysts attend an intensive training program, and all employees have the opportunity to receive up to 40 hours of training each year.

3. Listening to your feedback to improve our solutions

Our customers are at the heart of everything we do, and your feedback is invaluable to us. Throughout the year, we invite you to participate in our annual case surveys to let us know what we are doing well and how we can improve. We also welcome your software suggestions, which we incorporate into our design process. Our products and services are continually evolving as we consider how we can further help your organisation accomplish its goals and make your job easier.

4. Living our values: "Service to others makes the world a better place"

We believe in living our mission by directly giving back to the community. We achieve that by encouraging our employees to volunteer through Volunteer for Vacation and awarding quarterly grants to the non-profits where employees serve, coordinating philanthropic campaigns and volunteer activities, and investing in local grants.

Contacting Support

We are privileged to partner with you, and we take pride in giving you the industry's best customer support. When you have questions about our products, we want to answer them right away. Our online resources are always available, and you can also contact Support using one of the following methods:

- **Case Central**: For non-critical questions or issues, create a case online by selecting Case Central from the Support menu on our website. (If you don't have a web login, contact your organisation's site administrator.). We'll ask you to provide a summary of your question or issue and select your product. When you click Continue, Knowledgebase will automatically search for any related solutions and return a split screen that displays so you can continue creating your case if the search results do not address your question or issue. We automatically prioritise each case by creation time and severity so you will receive assistance in a timely manner from the next available analyst.

   If you have related files (e.g. reports) that would be beneficial for us to review, upload them to your FTP folder and indicate in your case notes that they're available. Within Case Central, select FTP from the left navigation bar.

- **Phone**: 0845 658 8500

- **Email**: support@blackbaud.co.uk

If you have a critical or time-sensitive issue, call Support to speak with the next available analyst. We'll ask you to provide your organisation's site ID (see below).

If you need to fax information for an existing case, please provide a cover sheet that includes your case number and the name of the analyst who is assisting you.

- **Fax**: 0141 575 0999

- **Chat Support**: Connect with an analyst online using chat support, which is available for selected products Monday to Friday from 9:15 am to 5:15 pm.
   Click "chat with support" at the bottom of any Blackbaud.co.uk web page or use the "Chat Live" option in our Support menu.

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Your Site ID

Your organisation has a unique site ID that helps us indentify your record. Your site ID is listed on your invoices, statements and in your profile on our website. Click your name at the top right of any Blackbaud web page and scroll to the Default Organisation Information section; your site ID displays under your organisation's name.

Support Hours

We want you to get the help you need when you need it. Our online resources are available 24/7, and you can contact Support between 9 am and 5:30 pm Monday through Thursday and between 9:30 am and 5:30 pm on Fridays, excluding holidays.

Please note Blackbaud Europe, including Customer Support, is closed on the following holidays. In addition, we close at 3 pm on Christmas Eve and New Year's Eve.

- New Year's Day (1 January)
- Good Friday
- Easter Monday
- May Day (1 May)
- Spring Bank Holiday (last Monday in May)

- Summer Bank Holiday (last Monday in August)
- Christmas Day (25 December)
- Boxing Day (26 December)

When to Contact Your Account Manager

Contact your Account Manager when you have questions unrelated to software functionality; for example, to purchase additional user licenses, to receive a price quote, and learn more about optional modules, Blackbaud products you do not own, and additional services such as consulting or training. To contact your account manager call 020 7921 9600 or e-mail: solutions@blackbaud.co.uk.

When we'll Contact You

Periodically, we'll notify your primary contact or site administrator of important software issues that may affect your organisation. We'll also contact your to confirm changes that are made to your information in our records, such as website rights, contact roles, subscriptions, your e-mail address.

Customers whose applications are hosted by Blackbaud OnDemand will receive notice of upcoming maintenance and of service interruptions at our data centre. Don't worry; we respect a clean inbox and will keep our correspondences to a minimum.

How We Help You

Customer Support is divided into teams of 5 to 8 analysts who are led by a team manager. The analyst who begins assisting you when you contact Support will typically work with you until your case is resolved. Analysts may escalate or transfer cases to other analysts depending on the severity or technical nature of your issue.

Analysts use the following procedures to troubleshoot issues you report:

- Check resources, such as Knowledgebase, the help file (press F1), and the user guides

- Test the issue using sample data

- Consult the team manager

- Consult the product support leads, who serve as escalation points for software design questions and program-related issues.

How You Can Help Us

When you contact Support, we'll ask a variety of questions to determine what your issue is and how best to solve it. If you are reporting an error, we'll be able to resolve it quicker if you can provide the following information:

- What was the exact error message?

- What steps were you taking when this happened?

- Can you reproduce the error on other machines/ with other user names/ with other network logins?

- What has changed since the last time you tried this?

- What version of our software do you have? (Select Help, About from the menu bar.)

- What operating system do you have?

- Do you have access to the server/ administrative rights in the software?

You are our greatest asset when troubleshooting problems. Please be at the computer where the problem is occurring when you contact us and describe your issue in as much detail as possible.

Your Cases

When you contact Support for assistance, we create a case to document your question or issue, the resolution, and any related contacts (e.g. e-mails or phone calls) that take place during the life or your case. Every case has a title and a unique case number so you can easily locate it in Case Central.

For new questions or issues, please contact the general Support team instead of an analyst with whom you've previously worked. This will ensure the fastest response because your previous case owner may be speaking to another customer or out of the office.

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Your Case's Severity

To distinguish mission-critical issues from questions, we use the following severity levels:

- **Down**: You cannot use the software on any computer
- **Critical**: The software is operational, but a critical feature is failing. For example, several computers aren't functioning, or you cannot run report cards.

Please select the appropriate severity level when creating a case so we can respond accordingly and assist every customer in a timely manner.

Frequently Asked Questions about Cases

How quickly are cases resolved?

We answer most questions during the first contact. If a case remains open after the initial contact, your analyst will outline an action plan:

- What you will do before the next contact is made
- What the analyst will do before the next contact is made
- When the next contact will be made and by whom

How are critical or down issues handled?

When you contact Support, please indicate if your issue is critical or down so we can give your case the highest priority. To ensure you receive a resolution as quickly as possible, we have a Critical Situation (Crit-Sit) procedure through which our managers are automatically notified when their analysts are working on down or critical cases. They'll work with analysts to promptly and efficiently resolve your issue, and they'll proactively follow up with you so you'll know who to contact if you need additional assistance.

How are software bugs handled?

We give top attention to critical software issues that affect core functionality, and we regularly release patches to resolve outstanding issues. If you report a software bug, your analyst will notify you of the resolution timeline after our Programming Department reviews it. At any time, you can also contact a support manager to discuss the status of your issue.

How can I check the status of my case?

The quickest way to check your case's status is in Case Central. Select Case Central from our website's Support menu, select Case Search from the left navigation bar, and enter your case number.

When are cases closed?

We close your case when you confirm your issue is resolved or if you cannot address the issue further. If we have asked you for information to help us troubleshoot an issue and have not heard from you, we attempt to contact you three times before we close your case.

Why do you close cases?

We close cases when no further action is required from the analyst so we can focus on resolving active cases. We can easily reopen closed cases at any time.

What if I can't work on the case after I've reported an issue?

If you inform us that you can't work on an issue you've reported to us, we will keep your case open and wait for you to contact us. After two weeks, we will contact you to ask if you need further assistance. If we do not hear from you for another week, we will close your case.

How many cases can I have?

Your maintenance plan entitles you to an unlimited number of cases. If you have a question or are experiencing an issue, don't hesitate to contact us.

What should I do if I need more help with my case after it is closed?

We'll be glad to continue assisting you. To reopen a case, select the case in Case Central and enter Reopen Case Comments or call support and specify the case number when prompted.

Our Website

Our website http://support.blackbaud.co.uk has numerous resources to help you make the most of your software and resolve any issues you may encounter. Many of our resources are benefits of your maintenance plan, so you will need to log in to access them.

Your Website Login

If you do not already have a login for our website, your site administrator can invite you to create one. For your security, web user names must contain at least six characters and cannot include spaces. Web passwords must contain at least six characters and a combination of letters and numbers or special characters. They cannot include spaces or contain all numbers, all letters or all special characters.

To log in to our website, you must have a unique e-mail address because we use it to verify your identity and ensure your protection.

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Site Administrators can add software users at your Organisation to our records and let them create web logins.

If your organisation doesn't have an email or if employees have a shared account, you can easily create secure e-mail accounts using a respected e-mail provider such as the ones below:

- MSN Hotmail: www.hotmail.com

- Google Gmail: http://mail.google.com

- Yahoo! Mail: http://mail.yahoo.com

- Mail.com Messenger: http://www.mail.com

- Lycos Mail: http://mail.lycos.com

Once you have a user name and password, click Please Log In at the top of any Blackbaud web page. If you have any trouble, click Login Help on the main login screen or contact Support for assistance.

Your Site Administrator

The person who signed your purchase agreement is your organisation's first site administrator. Site administrators can add software users at your organisation to our records and let them create web logins. From their profile, site administrators click Invite User on the left and follow these steps:

1. Enter the user's first name, last name and e-mail address and click Submit.

2. Select the user's main role and click Submit.

The new users automatically receive an e-mail with a secure link, which allows them to create their own unique web profile and be added to our records.

Your Contact Information

You can make changes to your contact information in our records (such as your phone number or e-mail address) by clicking your name at the top right of any Blackbaud web page and then clicking Personal Profile in the left navigation bar.

Please ensure we always have your correct e-mail address in our records. If you forget your user name, we'll ask you to enter your e-mail address to retrieve it. If you forget your password, we'll send a reset form to your e-mail address.

Your Default Organisation

Our support resources are tailored to your organisation's products and support plan. If you are associated with multiple organisations that use our solutions, you may change which organisation is set as your default so you can access support resources (e.g. Knowledgebase, Case Central and Downloads) on its behalf. After logging in, click your name at the top of any Blackbaud page to access your profile. Then, click Change Default Organisation and select the appropriate organisation.

Online Resources

We offer comprehensive, online resources that are available 24/7 to get you the help you need when you need it. To learn about the resources we've created for you, visit our website's Support home page: http://support.blackbaud.co.uk. You can also easily access our Support resources by clicking the Customer Support button at the top right of any Blackbaud web page.

Knowledgebase

Support analysts document every question they're asked in Knowledgebase, which is the first place to go when you have questions or need to troubleshoot software issues. To start searching, select Knowledgebase from the Support menu. For an informative overview, including short video demonstrations, select Knowledgebase Help from the right Welcome box in Knowledgebase.

As part of our knowledge-centred support approach, we wait to publish solutions until we're contacted about the same question or issue a second time. Software issues are the exception; we publish those solutions immediately. By reviewing and publishing only solutions that we know have affected more than one customer, we can focus on ensuring their quality and accuracy. This also makes Knowledgebase more effective by not clogging your search results.

Searching Knowledgebase:

- On Knowledgebase Home, type your question (or enter the solution ID) in the Ask a Question field, and click Ask. For subsequent searches, you can enter your question in the New Question field in the upper right window.

- Search using either keywords or complete questions. If you receive an error message while working in our software, enter the exact error message.

- Your search results are automatically filtered according to your organisation's products. You can also select additional filters (e.g. Document Type) on the left side of the screen once your search results are returned.

Alerts:

- Alerts automatically display on Knowledgebase Home above the Ask a Question box in the right sidebar of support pages when you're logged in. They appear based on the Blackbaud products your organisation owns and may include software release announcements, notifications about critical issues, and information about special support hours.

- Recent alerts will display on Knowledgebase Home until you click their titles to read them. You can also click Alerts in the Knowledgebase banner to see all current alerts for your products.

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Subscriptions:

- Your Knowledgebase subscriptions keep you informed as changes are made to Knowledgebase solutions and alerts.

- We encourage you to subscribe to all alerts for your products so you will automatically be notified about important software and Support news that may affect your organisation. To subscribe to all alerts for a particular product, click Alerts in the Knowledgebase banner, select a product, and click Subscribe at the top of the page.

- We recommend subscribing only to solutions that affect your organisation, such as issues we are currently evaluating or suggestions we are considering for implementation. To subscribe, open a solution and click Subscribe beneath its title.

- Click My Knowledgebase Subscriptions in the Welcome box to view and manage your subscriptions.

User Guides

Review the user guides for step-by-step instructions and in-depth explanations. To access the guides, which open in Adobe Reader, select Help from the software's menu bar or select User Guides from the Support menu. To search for a word or phrase, click the binoculars or press CTRL+F; Adobe Reader searches the entire guide for you.

Help Topics

Answers to numerous software questions are right at your fingertips. While working in the software, select the help topics from the Help menu to find the information you need. In many of our software programs, you can also access the help topics by pressing F1 on your keyboard. Type keywords in the help file's search field to find specific information about a process or function.

Frequently Asked Questions (FAQS)

Find answers to the questions we're asked most frequently by selecting FAQs from the Support menu. We update the FAQs each month based on the solutions you view in Knowledgebase and the questions you ask Support. Each question is a link to a Knowledgebase solution, and there are separate FAQs for every product as well as database administration, Crystal Reports and PCI Compliance.

Forums

Whether you're new to the software or a "power user", select Forums from the Support menu to post questions and share ideas with your peers in the nonprofits community. If you have a question about best practices or have discovered a creative use for our software, the forums are a great place to contribute your knowledge and brainstorm with other software users.

To have forum posts and replies come directly to you, use RSS or modify your email preferences.

- **RSS:**

    1. Subscribe to an RSS Reader, such as Google Reader.

    2. After you subscribe, look for the RSS icon at the bottom right of forum pages. Click the icon and copy the web address (URL) of the page.

    3. Log into your RSS reader and add the address to your list of RSS feed subscriptions.

- **E-mail:**

    1. Once logged into the forums, click Edit Profile on the top right of the Forums page and select the Email tab.

    2. To receive emails from other forum participants, mark Receive Emails.

    3. To be notified by email of new posts to forums/threads you have subscribed to as well as any replies to one of your posts, mark Enable Email Notifications of forum/thread subscriptions and replies to my posts.

You can also share documents (e.g. procedures, reports, and letters) by attaching them to your postings. All posts, including shared documents, are publicly available. For more information, select Forums Help from the Shortcuts menu on the main Forums page.

Support Newsletters

Our support newsletters include the latest software information, tips for using your software effectively, and announcements about upcoming events. We encourage you to subscribe to the newsletters that pertain to the software you use.

Blogs

Select Blogs from the Support or Resources menus on our website to follow our employees as they share insights into Blackbaud products, non-profit technology, and web culture. We encourage all software users to subscribe by email or RSS to BlackbaudKnowHow.com to receive important news and best practices about our software and online resources. Each of our products have their own software blogs within BlackbaudKnowHow so you can easily subscribe to the ones that apply to you.

System Requirements

Before purchasing new hardware and installing or upgrading third-party software, take time to review the system requirements for your product. If you use multiple Blackbaud products, review the system requirements for each product. Select System Requirements from the Products menu.

Customer Satisfaction

Simply put, you are at the heart of everything we do. Our success is measured by your satisfaction, so we seek your feedback throughout the year to determine how we're doing and how we can continue improving our products and services.

Satisfaction Surveys

Each month we e-mail the annual satisfaction survey to primary contacts and software users who have created at least two cases within the last 12 months. If you contact Support for assistance, you may also receive a survey about the quality of support you received for a particular case. The survey references the case number, the case title and the analyst who assisted you. We read every returned survey and follow up as needed. To share feedback at anytime, email a member of our management team. See Appendix B for our management team's email address.

Analysts' Performance and Recognition

When you contact our support team, our top-quality analysts are committed to providing:

- Courteous service and accurate solutions
- Efficient and timely resolutions
- Proactive communication
- Outstanding customer satisfaction

We love to hear how analysts went above and beyond to assist you. To express your appreciation, nominate analysts for our MVP contest by emailing mvp@blackbaud.com.

Product Development

Software Versions and Patches

Throughout the year, we release new software versions to improve functionality and incorporate your feedback. We also provide patches in between major releases to correct issues reported in the current version.

When a new product version or patch is available for download, we will notify you in our support newsletters, on our website and through software update notifications. To learn about new product features, review the product release notes, which install during the product update and are also available in the Downloads section of our website.

If you experience a software issue, check Knowledgebase to determine if the issue has been resolved in the most recent version or patch. To download the latest release, select Downloads from the Support menu and select your product. Let us know if you prefer to receive a CD.

- Review the release readme for information about issues resolved in the current and previous versions. Each issue is identified by a unique Knowledgebase solution number.

- Review the release notes for information about new features and enhancements.

- Review the patch readme for the list of issues resolved in the patch. Before downloading a patch, consider whether it addresses issues that impact your organisation, and verify you have the time and resources needed to test and install it. We recommend installing a patch only when it resolves an issue that affects your organisation.

Software Update Notifications

We encourage your database administrator to subscribe to the software update notification for each Blackbaud product your organisation uses. Subscribers receive an email one business day after we release product updates or patches. This benefit of your support plan is the primary way to learn about new releases. To subscribe, click your name at the top right of any Blackbaud web page and then click Subscriptions.

Your Feedback and the Software Design Process

We incorporate many factors in the software design and development process, including industry trends, usability testing and your feedback. Understanding your experience and capturing the questions that arise as you use our software are of primary value to the design process.

We carefully document and review the feedback we receive from the questions you ask us and suggestions you submit, as well as your survey comments, forum discussions, user group comments and beta testing.

Training Options

When everyone in your office knows how to use your software to its fullest potential, you can rest assured that you are getting the most out of your investment. For your convenience, we offer a wide range of training options to give everyone in your office the tools they need to succeed.

- **Classroom Training**: Whether you're a new customer or just in need of a refresher course, Blackbaud classroom training is a great way to master our products. Learn with and from your peers either in Glasgow or London.

- **On-site Training**: Benefit from on-site training using your own data and covering topics that are important to you. We'll work with you to devise the perfect curriculum and hands-on exercises so when we leave, your employees are confident in both the system and their ability to use it.

For more information about your training options or if you have any questions or need help deciding which option is best for your organisation please contact your Account Manager.

We encourage your database administrator to subscribe to the software notifications for each Blackbaud product your organisation uses.

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Start Learning

As a Blackbaud maintenance customer, your entire organisation has access to Start Learning — a collection of over 50 free online training videos. These videos are only minutes in length and cover the fundamental skills you need in your daily use of The Raiser's Edge™ and Blackbaud NetCommunity™*. They are perfect to help get new users up and running quickly or to help experienced users brush up on their skills.

With Start Learning, you'll be able to:

• Easily access over 50 quick online product tutorials

• Watch lessons at any time and at your own pace

• Select lessons by your role(s) in the organisation

• Track your progress and training history

• Receive lesson recommendations

*Lessons for other Blackbaud products may be added over time.

Miscellaneous

Consulting

To ensure you reap results from your software investment, we offer a broad range of implementation and consulting services for business improvement, project management, change management and training, conversions and customisations. Our consultants pull from expertise as fundraisers, Big Four consultants, CPAs and technology experts to help you realise your goals. Many of them come directly from the non-profits community. They understand that every organisation is different and are dedicated to making sure you get the most from your solution. For more information, please contact your Account Manager.

Your Maintenance Plan

To help you maximise your productivity and the efficiency of your software, we offer three Blackbaud Advantage Maintenance plans: Advantage Priority, Advantage Professional and Advantage. For details, select Maintenance from the Services menu on our website.

Billing Procedures

You'll receive an invoice for each purchase agreement your organisation signs. Invoices, which we send via e-mail, are due upon receipt. We also mail a copy of each invoice for your records. If applicable, two weeks after the invoice date, we will follow up via e-mail and phone to determine if we can answer any questions or note when we can expect payment.

Maintenance is billed annually on the anniversary of your first purchase per software family (such as fundraising or accounting). Upon request, we can align the renewal dates for all software families. Ten weeks before your maintenance renewal date, we mail a renewal reminder. One month later, we mail the maintenance invoice, which is due in 30 days.

Special Note about Backups

Power outages, hardware and network failures, and other unexpected circumstances can lead to unrecoverable data loss. Programs can be reinstalled, but your data files are irreplaceable. To ensure your data's safety, we strongly recommend making 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 Knowledgebase solution BB52243: How to make a backup and restore from or test the backup. Consider adding your organisation's backup plans to your policies and procedures manual.

If data loss or corruption occurs and a valid backup is not available, we may be able to repair and/or recover data. However, because this repair is not covered under your maintenance agreement, there is an additional charge for this service. If we attempt to repair data, we cannot guarantee estimated repair time or possible success in recovering data. Regular, validated backups are your best insurance against any form of data corruption.

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eSupport

We are committed to providing every software user with the fastest answers possible 24/7. Visit the Support section of our website to learn about our products, resolve software issues that may arise, access the collective knowledge of all our product experts, and connect with your peers in the non-profits community.

Response and Resolution Times

When you contact Support, we'll ask you to specify the severity level of your case as Down, Critical or Problem so we can respond accordingly:

Down: You cannot use the software on any computer. Critical: The software is operational, but a critical feature is failing. Problem: The software is operational, but you have time-sensitive questions or are receiving an error.

Our goal is to begin assisting you within five minutes of your request, with higher priority given to down and critical cases. We aim to resolve at least 75 percent of all cases during the first contact and at least 85 percent of all cases within two business days. Please note our response and resolution times may vary depending on seasonal peaks and product complexity.

If your question or issue requires further research after the initial contact, the analyst assisting you will let you know when you can expect his follow-up call or e-mail to progress the case. For non-critical questions or issues that are not resolved in one contact, we will provide a resolution to or update on the case within two business days. For critical issues, we may follow up with you daily or even hourly depending on the severity of your issue and the troubleshooting steps involved. For down issues, we will typically provide an update on our progress multiple times a day until the resolution is determined. For software-related defects, our goal is to determine the cause, communicate an estimated timeframe for the resolution, and notify you when it's available.

Daily and Seasonal Peaks

Our busiest time of day is typically between 11:30 am and 2:30 pm. We may experience longer response and/or resolution times during the following seasonal peaks:

- **Blackbaud NetCommunity**: October – January

- **The Education Edge**: February, June – October

- **The Raiser's Edge**: October – January

Scope of Support

We support all Blackbaud products and assist customers within the guidelines defined in our scopes of support, which are available from the Maintenance section of the Services menu on our website. To ensure your organisation realises the full value of its Blackbaud software investment, we strongly encourage you to invest in training. Select Training from the Services menu on our website to view our variety of training options.

We also recommend you document your organisation's unique policies and procedures to ensure all of your users have adequate knowledge of your database setup and practices, as we cannot answer some inquiries without this information. Our consulting and other billable services are available if you have questions or issues that fall outside our scopes of support.

Escalation Process

Managers are automatically notified when their analysts are working on critical or down cases to ensure you receive a resolution as quickly as possible. They assist their team in obtaining a prompt resolution by guiding them to additional resources that can help progress the case. They'll also proactively follow up with you, when appropriate, so you'll know who to contact if you need further assistance. You can contact a support manager to discuss the status of your issue at any time. Refer to Appendix B for our managers' contact information.

Data Access and Disaster Recovery

We are committed to maintaining the privacy and confidentiality of your data. For details, refer to our Data Confidentiality agreement, which you can access from Knowledgebase solution BB70262. Please note, we do not store customer data for disaster recovery, and we strongly encourage you to have a complete backup process in place.

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Appendix B
Definitions

Alerts

Alerts automatically display on Knowledgebase Home above the Ask a Question box to keep you informed of software release announcements, notifications about critical issues, and information about special support hours.

Beta Program

Selected customers use a new version of the software for a designated period of time before its official release. To test the version's new functionality, they perform specific tasks within the software and provide feedback by completing surveys and using online forums on the beta website. They also have a designated "Beta Buddy" who initiates weekly calls to make sure everything is running smoothly and obtain additional feedback about various areas of the software.

Case

For every request we receive for support assistance, we create a case to document the question or issue and its resolution. Cases have their own ID numbers and titles, and you can access them online by selecting Case Central from the Support menu on our website.

MVP

Twice a year, our MVP award is presented to the analysts who receive the highest number of customer votes for the excellent service they provide. To nominate an analyst, email mvp@blackbaud.com.

Patch

In between major software releases, we correct issues reported in the current version by providing a patch, which is a small executable file. Before downloading a patch, review the patch readme for the list of issues resolved and verify you have the time and resources needed to test and install it. We recommend installing a patch only when it resolves an issue that affects your organisation.

Plug-in

A plug-in is a small program that can be used to add custom functionality or repair issues within the software.

Primary Contact

Primary contacts are the primary product-related contacts at your organisation. They often manage or coordinate the efforts of other software users. Periodically, we may notify your primary contact of important software issues that may affect your organisation. Your organisation should have a primary contact for each Blackbaud product your organisation owns.

Read Me

When we release a product version or patch, we publish a readme so you can identify the "fixes" included in the file. Each issue is listed with the corresponding Knowledgebase solution number. The release readme documents each issue patched in the previous version as well as issues corrected in the new version. The patch readme documents each issue corrected in the patch. Access the readmes for your product by selecting Downloads from our website's Support menu.

Release Notes

When we release a product version, we provide release notes that highlight its new features. Review the release notes for your product by selecting Downloads from the Support menu on our website.

Sample Database

We recommend you use a sample database to experiment with the capabilities of your product, view all of the optional modules, and test significant changes to the data before working with your organisation's records. The sample database is for testing and training purposes only, so do not use it to store actual data. Select Downloads from the Support menu on our website to download and attach the sample database for your product.

Site Administrator

Your organisation's site administrators have special rights to invite new users, approve users' role requests and remove users' associations with your organisation from our records. Your site administrators are listed in the Default Organisation Information section of your profile. There is no limit to the number of site administrators your organisation can have. Your organisation should have at least one site administrator.

Site ID

Your organisation has a unique ID number. Please enter it if you call Support for assistance so we can route your call appropriately.

System Recommendations

Carefully review the system requirements for your product before purchasing new hardware and installing or upgrading third-party software. If you use multiple Blackbaud products, review the system requirements for each one. Select System Requirements from our website's Products menu.