

Customer Guide

Your passion is our purpose.
We are privileged to partner with you, and we take
pride in giving you the industry's best support.

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Dear Blackbaud customer,

This guide provides an in-depth look at the benefits of your support plan. If you have any questions or comments, please email feedback@blackbaud.com or contact us directly. Your feedback is an essential part of everything we do and we look forward to hearing from you.

Whether you've been with us for years or have just recently come on board, we want to thank you for the opportunity to support you. Your work is changing the world, and we are honored to play a role in helping you accomplish your mission.



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Our Commitment to You

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 are committed to:

1. Providing exceptional customer service

When you have questions about our products, we want to answer them right away. As a participant in one of our Blackbaud Advantage™ support plans, you have access to comprehensive online resources that are available 24/7 so you can resolve issues and answer questions as they arise. You can also contact our support team to work with our top-quality analysts who take pride in giving you the industry's best customer support. 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.

2. Hiring and developing great people to support you

By establishing a team of satisfied, knowledgeable, and experienced employees, we are able to provide you with an unmatched customer support experience. To maximize 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 seven-week 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 and 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 solutions are continually evolving as we consider how we can further help your organization 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 Day of Caring programs, awarding quarterly grants to the nonprofits where employees serve, coordinating philanthropic campaigns and volunteer activities, and investing in local grants.

Your Blackbaud.com Account

As a Blackbaud customer, you have access to numerous resources on our award-winning support website, <http://support.blackbaud.com>, to help you make the most of your software and resolve any issues you may encounter. Many of our resources are benefits of your **Blackbaud Advantage™** support plan, so you will need to log in to access them.

Your Blackbaud.com Login

We encourage every Blackbaud customer to have a [Blackbaud.com](http://blackbaud.com) login so you can access the secure support resources on our website. If you do not already have a login for our website, your site administrator can invite you to create one. For your security, Blackbaud.com user names must contain at least six characters and cannot include spaces, and 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 create a Blackbaud.com login, you must also have a unique email address that is not shared with other users because we use it to verify your identity and ensure your protection. If your organization doesn't have email or if employees have a shared account, you can easily create secure email accounts using a respected email provider such as MSN Hotmail, Google Gmail, or Yahoo! Mail.

After you've created your login, simply click Log In at the top of any Blackbaud.com web page, or you'll automatically be prompted to log in when you try to visit secure pages. If you have any trouble, click Login Help on the main login screen or contact us for assistance.

Your Profile

Once you've logged into our website, you can view and make changes to your information in our records by clicking your name at the top of any Blackbaud web page, which opens [your profile](#). To modify your contact information (e.g., phone number or email address), click Update Personal Profile in the left navigation menu. You can also change your login settings, including your user name, password, and security question.

Please ensure we always have your correct email address in our records. If you forget your Blackbaud.com login, we'll ask you to enter your email address to reset it.

Your Site Administrator

Every Blackbaud client organization has at least one site administrator who manages your organization's information in our records. To find out which individuals at your organization have site administrator rights, log into our website and click your name at the top of any Blackbaud web page to access your profile. Then, click View My Profile in the left navigation menu and scroll down to the Default Organization Information section, which includes the names of your site administrators.

Your organization can have as many site administrators as you'd like. We automatically assign the role of site administrator to your primary Blackbaud contact who signed your purchase agreement, and your first site administrator can give other users site administrator rights as needed. If you have site administrator rights, you can follow the steps below to add new software users to our records and invite them to create Blackbaud.com logins:

1. Log into our website and click your name at the top of any Blackbaud web page to go to your profile.
2. In the left navigation bar, click Invite New User.
3. Enter the user's first name, last name, and email address and click Submit.
4. Select the user's main role and click Submit.



The new users automatically receive an email with a secure link, which allows them to create their own unique web profile and be added to our records. As a site administrator, you can also manage users' current roles and approve or deny users' new role requests that we use to track their relationships with Blackbaud. Please designate at least one primary contact for each of your products. Periodically, we'll notify your primary contact(s) of important software issues; primary contacts can also download the Supervisor Password Reset utility for your software. When users leave your organization, your rights enable you to remove their association with your organization in our records. Lastly, you and your primary contacts can update your organization's primary, shipping, and billing addresses, and request changes to your organization's name.

Note: It is your organization's responsibility to verify its user records are up-to-date. For your security, please ensure the site administrator, training administrator and primary contact roles are given only to users who are currently at your organization. Users with those roles can download the supervisor password reset utility for your organization's software, if applicable, and can reset passwords for **Blackbaud Merchant Services**, **Blackbaud Payment Service** and **Blackbaud Application Hosting**. Your organization is also responsible for adhering to best practices regarding password security, such as restricting users from sharing logins. For more information, visit [Site Administrators](#).

Your Site ID

Your organization has a unique site ID that helps us identify your record. Your site ID is listed on your invoices, statements, and in your profile on our website. Click your name at the top of any Blackbaud web page; then, click View My Profile in the left navigation menu and scroll to the Default Organization Information section. Your site ID displays under your organization's name. If you contact us by phone, please enter your site ID when prompted so we can route your call accordingly.

Our support resources are tailored to your organization's products and support plan. If you are associated with multiple organizations that use our solutions, you may change which organization 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 Organization and select the appropriate organization.

Your Account Manager

Your account manager is available to assist you with questions unrelated to software functionality; for example, to purchase additional user licenses, 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 800.443.9441 or email solutions@blackbaud.com.

Your Invoices

Invoices for new software, services, training, maintenance, and subscriptions purchases will be sent to your organization's invoice contact according to your contract terms. Payment terms will be stated on the invoice. If applicable, two weeks after the invoice date, we'll follow up by email and phone to answer any questions and facilitate payment.

If you need to change your invoice contact, please call Customer Service at 800.468.8996 (option 4, sub-option 2) or email accounts.receivable@blackbaud.com. Please allow two weeks for processing; during that time, previously scheduled invoices may be sent to the original invoice contact. For more information about invoices and Blackbaud billing, we encourage you to review our [Blackbaud Finance FAQs](#), or contact Customer Service and we'll be glad to assist.

Your Maintenance Program

Your Blackbaud Advantage maintenance program gives you unlimited, around-the-clock access to our extensive Knowledgebase, downloads, and a network of peers through user groups, forums, and blogs. Our Advantage Professional and Advantage Priority maintenance programs also entitle you to training discounts and free WealthPoint® searches, which you can use to determine the wealth potential of prospects and your entire database. With Advantage Priority, you'll also receive a discount to Blackbaud conferences.

Your maintenance and subscriptions renew annually on the anniversary of your first purchase per software family (such as fundraising or accounting). Ten weeks before your renewal date, we'll mail a renewal reminder. One month later, we'll mail the invoice, which will be due in 30 days. If you have questions about a maintenance or subscriptions invoice, please email customercare@blackbaud.com or call 800.468.8996 and select option 4, then option 2.

When We'll Contact You

We'll contact you to confirm changes that are made to your personal account, such as your email address, subscriptions, and Blackbaud.com login. If you're a primary contact for your organization, we'll notify you about important software issues. If you're an invoice contact, we'll send you annual renewal reminders and invoices. If you're a site administrator, we'll email you to confirm changes you make to users' Blackbaud.com access or to let you know when users request new roles (e.g., primary contact). If we host your Blackbaud applications, we'll inform you of upcoming maintenance at our data centers. Don't worry; we respect a clean inbox and will keep our correspondence to a minimum.

Online Support Resources

We offer comprehensive, online resources that are available 24/7 on our award-winning support website, <http://support.blackbaud.com>, to get you the help you need when you need it.

Knowledgebase

[Knowledgebase](#) 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 on our website. You can also view frequently asked questions for your product by selecting [FAQs](#) from the right Welcome box in Knowledgebase.

We also encourage you to subscribe to alerts to receive important information about your software. To subscribe, click Alerts in the Knowledgebase banner, select a product, and click Subscribe at the top of the page. For an informative overview, select [Knowledgebase Help](#) from the Welcome box.

How-to Documentation

[How-to Documentation](#) includes user guides, help resources and more so you can find step-by-step instructions and in-depth explanations for your software. To access the user guides, which open in Adobe Reader, select Help from the software's menu bar or select How-to Documentation from our website's Support menu. To search for a word or phrase, click the binoculars or press CTRL+F.

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 nonprofit community. You can also share documents (e.g., procedures, reports, and letters) by attaching them to your postings. To have forum posts and replies come directly to you, use RSS or modify your email preferences. All posts, including shared documents, are publicly available. For more information, select [Forums Help](#) from the Shortcuts menu on the main Forums page.

Blogs

Select [Blogs](#) from the Support or Resources menus on our website to follow our employees as they share insights into Blackbaud products, nonprofit 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.

Twitter

If you're on Twitter, we encourage you to follow us at [@blackbaud](#) and [@bbsupport](#). Most questions about our products can't be answered in 140 characters or less, but if you ask us a question on Twitter, we'll direct you to helpful resources or let you know if it's better to create a case online. We use Twitter as a way to promote blog posts, share news, and inform users about support resources. Review our [Twitter Guide](#) for more information, including a full list of the hashtags we use to indicate which product or service each tweet refers to.

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.

Contacting Customer Support

When you have questions about our products, we want to answer them right away. Review our Service Level Agreement (Appendix A) to learn about our response and resolution times, as well as our scope of support. Our online resources are always available, and you can also contact Support using one of the following methods:

Case Central:

- Have Support contact you by selecting Case Central from our website's Support menu; then select Create a Case in the left navigation menu. (If you don't have a Blackbaud.com login, contact your organization's site administrator.) We'll ask you to enter a brief question or issue and select your product.
- When you click Continue, Knowledgebase will automatically search for any related solutions and return the top search results. If the solutions do not address your question or issue, you can complete the case form and click Submit. We automatically prioritize 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, you can attach them when creating or viewing your case on Case Central. If your files contain sensitive information, we recommend compressing them into one password-protected ZIP file. To stay within the 30-minute case creation time limit, consider attaching larger files after your case has been created.

Chat Support:

- Connect with an analyst online using chat support, which is available for selected products from 9 a.m. to 5 p.m. ET Monday – Friday.
- Click "chat with support" at the bottom of any Blackbaud.com web page or use the "Chat Live" option in our Support menu.

Phone: USA: 800.468.8996 **International:** 001.843.216.3372 **Local:** 843.216.6200 **Team Approach:** 617.583.8565

- 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 organization's site ID, specify if your question is critical, and select your product. Please listen carefully to the phone menu options to ensure you are directed to the appropriate team. For more information, refer to the phone menu.

Fax: 843.216.6100

- 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.

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 8:30 a.m. and 8:00 p.m. ET, Monday through Thursday and between 9:00 a.m. and 8:00 p.m. ET on Fridays, excluding holidays. Extended support hours are available for Advantage Priority customers.

Please note our U.S. office, including Customer Support, is closed on the following holidays. In addition, we close at 3:00 p.m. ET on the day before Thanksgiving, Christmas Eve, and New Year's Eve.

- New Year's Day (January 1)*
- Martin Luther King, Jr. Day (third Monday in January)
- Presidents' Day (third Monday in February)
- Memorial Day (last Monday in May)
- Independence Day (July 4)*
- Labor Day (first Monday in September)
- Thanksgiving Day (fourth Thursday in November)
- Day after Thanksgiving (fourth Friday in November)
- Christmas Day (December 25)*

*If a holiday falls on a Saturday, the holiday is observed the preceding Friday; if a holiday falls on a Sunday, the holiday is observed the following Monday.

Our headquarters are located in beautiful Charleston, South Carolina. Though it's nice to be close to the beach, we also face the reality of hurricane season, which is June 1 – November 30. If a natural disaster affects operations at our headquarters, we will provide support from an off-site location for down and critical issues. We'll continue to ensure your critical needs are met through every means possible and will notify you via Knowledgebase alerts when our headquarters have reopened.

How We Help You

Customer Support is divided into teams of 7 to 12 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, 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. You are our greatest asset when troubleshooting problems. 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?

Your Cases

We create a case to document your question or issue, the resolution, and any related contacts (e.g., emails or phone calls) that take place during the life of your case. Every case has a title and a unique case number so you can easily locate it in Case Central. When calling about an existing case, please enter the case number so our phone system can connect you with the analyst who owns your case. If he or she is not available, you'll be connected to the next analyst who will have access to your case notes and can quickly get up to speed.

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 former case owner may be assisting other customers or be out of the office.

Your Case's Severity

To distinguish 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 can't run payroll or report cards.
- **Problem:** The software is operational, but you have time-sensitive questions or are receiving an error.

Please select the appropriate severity level when creating a case so we can respond accordingly and assist every customer in a timely manner. Refer to the Response and Resolution Times section of our Service Level Agreement (Appendix A) for more information.

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.
 1. What you will do before the next contact is made
 2. What the analyst will do before the next contact is made
 3. When the next contact will be made and by whom. See the Response and Resolution Times section of our Service Level Agreement (Appendix A) for further details.
- **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. 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 whom to contact if you need additional assistance. For more information, refer to our Service Level Agreement (Appendix A).

- **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.
- **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 and enter your case number.
- **When are cases closed?** We close your case when you confirm your issue is resolved or tell us you can't address the issue. If you later need help with the same issue, 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 800.468.8996 and enter the case number when prompted. Closing cases when no further action is required from the analyst enables us to focus on resolving active cases.
- **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.

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 email the annual satisfaction survey to primary contacts and software users. If you contact Support for assistance, you may 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 about Support at any time, email feedback@blackbaud.com.

Analysts' Performance and Recognition

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

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

Every quarter we present our MVP and Circle of Excellence Award to staff who display strong customer focus and consistently perform above expectation. 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 through release announcements. 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. If we host your software, you do not need to install patches or updates. We will notify you prior to installing them on our server.

- 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 organization, 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 organization.

System Requirements

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

Release Announcements

We encourage your database administrator to subscribe to the release announcements for each Blackbaud product your organization 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 Update Subscriptions within your Blackbaud.com profile, mark the checkbox beside the announcements you want to receive, and click Submit. If we host your software, you may prefer not to receive these standard notifications; we will notify you separately prior to installing updates on our server.

Your Feedback and the Software Design Process

We value your feedback and want to ensure you are delighted with our products. 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.

Our products team regularly reviews your suggestions to identify trends and develop product improvement strategies through a formal [Discovery Process](#). Although we can't notify you if we're able to incorporate your ideas, we appreciate your feedback and encourage you to get involved.

Training Options

A well-trained staff is your organization's greatest asset. 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. Our curriculum and instructors are second-to-none when it comes to Blackbaud product knowledge and nonprofit expertise, and we make both very accessible to you through the Blackbaud Learn training subscription.

Blackbaud Learn is an annual subscription that provides the ongoing skill development and job knowledge training your staff wants and needs, including instructor-led and self-paced, strategy and best practices, exclusive "Q&A", and new classes every month.

We also offer tailored curriculum if one-to-one or onsite training will better meet your organization's needs. To learn more about your available training options, including Blackbaud Learn, click Training in the top menu of our website. If you have any questions or need help deciding which option is best for your organization, email traininghelp@blackbaud.com or call 800.468.8996 and select option 3 to speak with a training coordinator.

Start Learning™

As a Blackbaud maintenance customer, your entire organization 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**, **The Raiser's Edge(i)™**, **The Financial Edge™**, and **Blackbaud NetCommunity Spark™***. 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 organization
- 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 customizations. Our consultants pull from expertise as fundraisers, Big Four consultants, CPAs, and technology experts to help you realize your goals. Many of them come directly from the nonprofit community. They understand that every organization is different and are dedicated to making sure you get the most from your solution. For more information, select Professional Services from our website's Nonprofit Solutions menu.

Blackbaud Forms

We offer a variety of printed products including custom printed and customizable checks, forms, envelopes, membership cards, admission tickets, and tax forms for your Blackbaud accounting, fundraising, education administration, and ticketing software. Using your organization's logo and color specifications, we can create easy-to-use, high-quality forms you can incorporate into your day-to-day operations. We can also provide checks for other accounting packages at significant discounts.

For more information or to order, visit forms.blackbaud.com, email forms@blackbaud.com, or call 866.422.3676. Please note, we support only Blackbaud pre-printed forms. Blackbaud programmers work directly with our manufacturers to ensure there are no alignment or design issues. Third-party vendor forms may not align properly when printing from our software; if you experience alignment issues, please contact your vendor for assistance.

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 organization'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.

Appendix A: Service Level Agreement

Online Resources

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 nonprofit 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 email 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

We proactively adjust our staffing levels based on projected volume. Our busiest time of day is typically between 11:30 a.m. and 2:30 p.m. ET.

We may experience longer response and/or resolution times during the following seasonal peaks:

- Blackbaud NetCommunity: October – January
- Blackbaud Student Information System: February, June – October
- Data Enrichment Services: July – October
- Student Billing: February, June – July
- Target Analytics: July – October
- The Education Edge: February, June – October
- The Financial Edge: January, June – July
- The Patron Edge: March, September
- The Raiser's Edge: October – February

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 Nonprofit Solutions menu on our website. To ensure your organization realizes the full value of its Blackbaud software investment, we strongly encourage you to invest in training. Click Training in the top menu of our website to view our variety of training options.

We also recommend you document your organization'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.

Data Access and Disaster Recovery

We are committed to maintaining the privacy and confidentiality of your data. For details, refer to our Client Data Policy, 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.

Appendix B: Support Phone Menu

When you call 800.468.8996, you'll hear the following prompts. Press the appropriate number based on your needs:

- | | |
|-----------------------|---|
| 1. Customer Support | 4. Invoice or Maintenance |
| 2. Sales and Services | 5. Target Analytics, P!N, Data Enrichment Services, or NOZA |
| 3. Training | 6. Forms |

Note: For Team Approach Support, call 617.583.8565.

When you press 1 to select Customer Support

1. Enter your site ID.
2. Identify your issue's severity. If your issue is critical or down, press 8; otherwise press #.
3. Select your product as listed below.
4. Select a topic.

Note: To repeat the current menu's options, press *.

Press 1 from the Customer Support menu to select **The Raiser's Edge and fundraising products (including GiftMakerPro)** and then select one of the following options:

1. The Raiser's Edge support questions
2. Installing or updating The Raiser's Edge
3. Crystal Reports for The Raiser's Edge, including installing Crystal Reports
4. Target Analytics, P!N, Data Enrichment Services (such as ResearchPoint, The Researcher's Edge, WealthPoint, AddressFinder, and AddressAccelerator), or NOZA
5. GiftMakerPro
6. Integration with third-party software:
 - (1) CounterPoint
 - (2) Auction Tracker
 - (3) RMS, School Store Manager, or Point of Sale
 - (4) Sphere Connector
7. NetSolutions
8. Blackbaud Payment Services or Credit Card Processing

Press 2 from the Customer Support menu to select **The Financial Edge and accounting products** and then select one of the following options:

- | | |
|---|--|
| 1. The Financial Edge support questions | 2. Student Billing support questions |
| 3. Installing or updating accounting products | 4. Crystal Reports for accounting products, including installing Crystal Reports |
| 5. Advanced Budgeting | 6. RMS or School Store Manager |
| 7. CounterPoint | 8. FundWare (1 - FundWare and Modules; 2 - Installing or Updating FundWare) |

Press 3 from the Customer Support menu to select **Education software or integration with our education products (integration with Student Billing and The Raiser's Edge 7)**, and then select one of the following options:

1. The Education Edge or Education Administration version 6
2. Blackbaud Student Information Systems
3. Student Billing support questions
4. Installing or updating The Education Edge and Education Administration
5. Integration with Student Billing and The Raiser's Edge 7
6. Crystal Reports for The Education Edge and Education Administration, including installing Crystal Reports

Press 4 from the Customer Support menu to select The Patron Edge, and then select one of the following options:

1. The Patron Edge, The Patron Edge Online, or installing The Patron Edge Online
2. Installing The Patron Edge

Press 5 from the Customer Support menu to select Blackbaud CRM or Blackbaud Direct Marketing, and then select one of the following options:

1. Blackbaud CRM
2. Blackbaud Direct Marketing
3. Blackbaud NetCommunity
4. Custom Report Writing
5. Software Developer Kit
6. Blackbaud Payment Services or Credit Card Processing

Press 6 from the Customer Support menu to select Internet Solutions, and then select one of the following options:

1. Blackbaud Sphere (formerly known as Kintera):
(1) Events (2) eMarketing (3) Connector
2. Blackbaud NetCommunity
3. Online Campus Community or Online Admissions
4. Blackbaud Internet Solutions:
(1) CRM management (2) Internet components, including web page and email management, and Friends Asking Friends
5. Campus Foundations or NonProfit Central
6. NetSolutions
7. Blackbaud Payment Services or Credit Card Processing
8. Blackbaud Social

Press 7 from the Customer Support menu to select Developer Solution Support, and then select one of the following options:

1. VBA, API, or Read-only Database Access
2. Blackbaud's Developer Network or Software Developer Kit
3. Business Intelligence or The Information Edge

Press 8 from the Customer Support menu to select Altru, and then select one of the following options:

1. Altru
2. Blackbaud Payment Services or Credit Card Processing

Note: Options may differ for Advantage Support.