The Financial Edge™ Software Request Form

The Financial Edge offers powerful new features to help your organization manage accounting activities more efficiently. A smooth conversion to **The Financial Edge** requires careful planning. **The Four Keys to a Successful Conversion** are critical to your success. Please read them carefully, then use this form to guide your planning and assess your organization's readiness. Contact your Account Manager if you have any questions about the planning process or completing this form. Once this form is completed and signed, fax it to your Account Manager at 1.843.216.6111 to request **The Financial Edge**.

1. Have you allowed enough time for the conversion?

◉ YES!	◆	Plan your conversion when you and your staff can devote sufficient time to the process. **The Financial Edge** is an entirely new product with a new look and feel, significant changes to functionality, and hundreds of new features. You will need time for everyone to become acclimated to the new system. Additional time is needed to recreate your version 6 queries, exports and *Crystal* reports because these will not convert. Allow time to consider your Chart of Accounts structure and new functionality; any changes to your account setup should be made before converting.

2. Have you prepared a comprehensive conversion plan?

◉ YES!	◆	Study **The Financial Edge Facts**, which lists the major differences between Accounting for Nonprofits and **The Financial Edge** that may affect your daily operations. Please see your account manager for a complete list of changes between our version 6 and 7 financial products.
	◆	Study **The Financial Edge Conversion Planning Guide** (located on the Support section of our Web site under User Guides), which includes a sample conversion plan and explains the new features and differences between **Accounting for Nonprofits** and **The Financial Edge**.
	◆	**Click here** to view an online demonstration of **The Financial Edge**
	◆	Involve and get a commitment from all appropriate personnel in your plan; create a cross-functional conversion team (technical staff, end users, management, etc.) with a designated lead and an executive sponsor.
	◆	A test conversion is recommended to help you determine what changes you want to make to your version 6 data prior to the actual conversion to maximize the benefits of **The Financial Edge**. Allow time to run through your business processes in the test conversion before going live

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	so you can determine whether any changes to your business processes are needed. Allow additional time for making changes to your converted data. Refer to the Conversion Planning Guide for guidance on the estimated days of down time to allocate for the conversion itself.

3. Have you ensured your organization meets system recommendations?

O YES!	◆ Review the current **System Recommendations** for **The Financial Edge** with your technical staff. System recommendations are higher for **The Financial Edge** than for **Accounting for Nonprofits**. Hardware upgrades should be installed prior to the conversion.
	◆ Review the **SQL Server for Blackbaud Products** technical paper and determine which version of SQL Server 2000 is right for your organization.
	◆ Note: When converting **Payroll 6** or **Student Billing 6**, it is possible that the size of the database could increase such that it will exceed the size limits of *Microsoft SQL Server Express* or *Microsoft Desktop Engine (MSDE)*. You may be required to run your database on *SQL 2000* or *SQL 2005* after converting one or both of these modules.
	◆ Note: Once a database has been converted to *SQL 2005 or SQL Express* it cannot revert to *SQL 2000* without restoring to the last backup made while running the database on *SQL 2000* or *MSDE*.

4. Have you determined your training needs?

O YES!	◆ Training should be considered a requirement for your organization — regardless of your level of expertise with **Accounting for Nonprofits**. **The Financial Edge** is a new product that includes new functionality and different ways of performing tasks present in version 6. You risk an inefficient and difficult conversion and potential post-conversion issues if you elect to decline training. Several training options are available; to review and sign up for classes, visit the **Training section** of our Web site. The three-day *Transitioning to The Financial Edge* class helps you plan your conversion and start using the new or enhanced functionality in **The Financial Edge**. This class is strongly recommended if you convert. If you decide to start fresh in **The Financial Edge**, the two-day *Implementing The Financial Edge* class will help you get started. The three-day *General Ledger 7 Essentials* and two-day *Accounts Payable 7 Essentials* classes teach the basics of these products to staff not familiar with **Accounting for Nonprofits**.

5. Have you determined the number of user licenses you will need?

○ YES!	◆ User licenses in **The Financial Edge** are handled differently than in **Accounting for Nonprofits**. The number of user licenses you will need for **The Financial Edge** is determined by the maximum number of users who will need access to any of your accounting products at the same time. If you need more licenses for **The Financial Edge** than you currently have in your version 6 products, you will not be charged for these additional licenses at the time of conversion.

6. Have you determined your additional needs?

Note: An additional purchase and/or maintenance fee may apply to the following options.

After answering YES to the above questions, fill out the following form and fax it to 1.843.216.6111.

○ YES!	◆ **Consulting** — You should strongly consider engaging Consulting services to convert your data from **Accounting for Nonprofits** to **The Financial Edge**. Performing this conversion without assistance places your organization at risk for conversion and post-conversion issues. At the minimum, we recommend a pre-conversion analysis to determine if you have existing data integrity issues that may lead to problems during and after conversion. Consulting services can help you get the most out of **The Financial Edge** by aligning system functionality with your organization's processes and structures. To make the conversion process smoother, our **professional consultants** can analyze your Chart of Accounts and make recommendations based on new functionality.
	◆ **Crystal Reports** — The **Crystal Reports Standard** CD you receive with **The Financial Edge** includes one user license. If you have more than one person designing custom *Crystal* reports, you need to purchase additional user licenses. If you plan to report off the backend of your SQL Server database, you need **Crystal Reports Professional**.
	◆ **Customization** — Customization With **Visual Basic for Applications** and **Application Programming Interface**, customize **The Financial Edge** to meet your organization's specific needs. For details, refer to the **Advanced Technology in The Financial Edge** technical paper.
	◆ Optional modules such as **Projects and Grants**, **Budget Management**, **Cash Management**, **Allocation Management**, **Purchase Orders**, **eRequisitions**, and **Advanced Security** will help you get the most from your system.

Last updated: May 23, 2007   Page 3 of 5
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	◆ Available with **Advanced Security**, **view-only licenses** allow users to view key financial information without having the ability to change data in the system.

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Return via FAX to: 1.843.216.6111

Yes! We are ready for The Financial Edge.

I understand that by submitting this request form, I am stating that I have completed the questionnaire and my organization is prepared at this time to convert to The Financial Edge.

⦿ We will convert our Accounting for Nonprofits database to The Financial Edge. Please send a Conversion CD. **OR**

⦿ We will install a new database for The Financial Edge. Please send an Installation CD.

⦿ We have elected to convert our Accounting for NonProfits to The Financial Edge without assistance from Blackbaud. We accept responsibility for conversion and post-conversion issues.

We will need _____ user licenses in The Financial Edge.

⦿ We understand that Payroll 7 includes a third-party product for producing federal and state payroll tax forms, and maintenance costs for payroll will increase by $100 per year to cover the annual forms updates. We also understand that we will incur additional fees from Aatrix when using the electronic filing option.

Please check availability of training in the following month: _____ **OR**

⦿ We have read and understand the risks associated with converting to The Financial Edge without training and have elected to decline training. We accept responsibility for issues that may occur as a result of this decision.

Last updated: May 23, 2007   Page 4 of 5

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Our additional needs include (please check all that apply):	
O Consulting O Customization O Read Only Database Assistance O View-only licenses	O Remote conversion and installation O Training O Optional Modules O Other (please specify): _____
Authorized Signatures:	
Organization Name:	State/Province and Account Manager:
Executive Director or Authorizing Contact Name:	Phone:
*Executive Director or Authorizing Contact Signature:	Email:
Primary User Name:	Phone:
*Primary User Signature:	Email:
Technical Staff Person Name:	Phone:
*Technical Staff Person Signature:	Email:
Timeframe for Upgrading:	Requested Ship Date:
*This is not a contract; it confirms your review of this document and request for shipment of The Financial Edge.	

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