Blackbaud Online Express™

Installation Checklist

With Blackbaud Online Express, you can be up and running in 7 simple steps:

1. Install the Application

✓ 1. Must use Internet Explorer 9 or higher to run the installer

✓ 2. Must be on version 7.92 of The Raiser's Edge

… Not on version 7.92? Visit https://www.blackbaud.com/support/support.aspx or contact a Support Specialist at (800) 443.9441 to learn more.

✓ 3. Must have a local administrative Windows account on the computer that runs the installer.

Your IT staff can quickly and easily help you with this if you do not have these rights.

✓ 4. Must have Supervisor rights to install/provision the first time

2. Provision Your Account

To successfully provision Blackbaud Online Express, we recommend you have the following information available:

✓ 1. Organization Site ID Information

✓ 2. Blackbaud Merchant Services Account Information

✓ 3. Blackbaud Payment Service Account Information

Please note, if you aren't currently signed up for Blackbaud Merchant Services or Blackbaud Payment Service, you will be required to sign up during the Blackbaud Online Express setup process. The following information will be required for Blackbaud Merchant Services:

• Preferred Bank Account Number

• Preferred Bank Routing Number

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3. Choose Your Pricing Tier

Blackbaud Online Express is priced by usable email addresses. Upon installation, simply select the plan that corresponds with your organization's desired usable email record count. As you upload lists from The Raiser's Edge and send emails, Blackbaud Online Express will keep track of your email usage, allowing you to always know where you are in regards to your selected plan.

4. Create Your Billing Account

Create the account you would like to be associated with billing for Blackbaud Online Express. On the 5th day of every month, any fees due are debited from this account.

5. Agree to the Terms and Services

Blackbaud Online Express requires a 36-month commitment.

6. Begin Using Blackbaud Online Express!

Create online donation forms, send emails, and set up event registration forms on your website.

7. Manage Your Security Settings

To allow other users to access Online Express, manage your security settings. From the Online Express **Account** menu, select **Integration options** and go to the **Security** option. You can then select the security groups that can use Online Express. To access the feature, users must be in one of the selected groups or have Supervisor rights.

> ➤ For more information about Online Express please contact your local Blackbaud
> account representative.