

## Payroll 7 Software Request Form

Return via FAX to 1.843.216.6111

**Payroll 7** offers powerful new features to help your organization manage payroll activities more efficiently. A smooth conversion to **Payroll 7** 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 **Payroll™ 7**.

### 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. **Payroll 7** 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 overall payroll setup in version 7.

### 2. Have you prepared a comprehensive conversion plan?

YES!

- ◆ Study the [Payroll 7 FACTS](#), which lists the major differences between version 6 and version 7 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.
- ◆ 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 **Payroll 7**. Allow time to run through your business processes in the test conversion before going live 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?

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 from **Payroll 6** to **Payroll 7**, 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?

YES!

- ◆ Training should be considered a requirement for your organization — regardless of your level of expertise with **Payroll 6**. **Payroll 7** 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.

### 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** for your payroll operations than you currently have in your version 6 products, you will need to purchase 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 **Payroll 6** to **Payroll 7**. 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 **Payroll 7** 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.
- ◆ 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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**Yes! We are ready for Payroll 7.**

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 **Payroll 7**.

- We will convert Payroll 6 to Payroll 7. Please send a utility. **OR**
- We will unlock Payroll 7 in The Financial Edge and start with a blank payroll database. Please send an unlock code.
- We have elected to convert from Payroll 6 to Payroll 7 without assistance from Blackbaud. We accept responsibility for conversion and post-conversion issues.

We will need \_\_\_\_ user licenses in Payroll 7.

- 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.

**Our additional needs include (please check all that apply):**

<ul style="list-style-type: none"> <li><input type="radio"/> Consulting</li> <li><input type="radio"/> Customization</li> <li><input type="radio"/> Read Only Database Assistance</li> <li><input type="radio"/> View-only licenses</li> </ul>	<ul style="list-style-type: none"> <li><input type="radio"/> Remote conversion and installation</li> <li><input type="radio"/> Training</li> <li><input type="radio"/> Optional Modules</li> <li><input type="radio"/> Other (please specify): _____</li> </ul>
<p><b>Authorized Signatures:</b></p>	
<p>Organization Name:</p>	<p>State/Province and Account Manager:</p>
<p>Executive Director or Authorizing Contact Name:</p>	<p>Phone:</p>
<p>*Executive Director or Authorizing Contact Signature:</p>	<p>Email:</p>
<p>Primary User Name:</p>	<p>Phone:</p>
<p>*Primary User Signature:</p>	<p>Email:</p>
<p>Technical Staff Person Name:</p>	<p>Phone:</p>
<p>*Technical Staff Person Signature:</p>	<p>Email:</p>
<p>Timeframe for Upgrading:</p>	<p>Requested Ship Date:</p>
<p>*This is not a contract; it confirms your review of this document and request for shipment of The Financial Edge.</p>	

### Addendum

I understand that Payroll 7 includes a third-party product (Aatrix) for our federal and state payroll tax forms, our maintenance will increase by \$100 per year, upon our next maintenance renewal, to cover the Aatrix forms subscription. If my organization chooses to use the electronic filing option, I understand this is an additional, billable service offered by Aatrix.

#### Authorized Signature:

Organization Name and site ID:	State/Province or Account Manager:
Business Office Contact Name:	Phone:
Business Office Contact Signature:	Email: