

The Raiser's Edge® Software Request Form

The Raiser's Edge 7 offers powerful new features to help your organization manage fundraising activities more efficiently. A smooth conversion to **The Raiser's Edge 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 **The Raiser's Edge 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. **The Raiser's Edge 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, *Crystal* reports, and RE:Open customizations because these will not convert. Acknowledgement letters and other mail merge documents will need to be modified and you may want to make changes to your converted data to take advantage of new features.

2. Have you prepared a comprehensive conversion plan?

- YES!**
- ◆ Study **The Raiser's Edge 7 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 versions 6 and 7.
 - ◆ 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.
 - ◆ Allocate a minimum of three days of down time for the conversion itself, and additional time for making adjustments to your converted data. A test conversion can help you determine what changes you may wish to make to your version 6 data prior to the actual conversion to maximize the benefits of **The Raiser's Edge 7**.

3. Have you ensured your organization meets system recommendations?

- YES!**
- ◆ Review the current **System Recommendations** for **The Raiser's Edge 7** with your technical staff. System recommendations are higher for version 7 than for version 6. Hardware upgrades should be installed prior to your conversion.
 - ◆ Review the **SQL Server 2000 for Blackbaud Products** technical paper and determine which version of SQL Server 2000 is right for your organization.

4. Have you determined your training needs?

- YES!**
- ◆ All your staff must be trained on **The Raiser's Edge 7** prior to the conversion, regardless of their level of expertise with version 6. Several training options are available; to review and sign up for classes, visit the [Training section](#) of our Web site. The two-day *Converting to The Raiser's Edge 7 from Version 6* helps you plan and run the conversion to **The Raiser's Edge 7**. The three-day *The Raiser's Edge 7 Essentials for version 6 Users* class emphasizes the new features of version 7 and explains the differences between versions 6 and 7 so you can take full advantage of your new system.

5. Have you determined your additional needs?

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

- YES!**
- ◆ **Clean Data** — If your version 6 data is in disarray now, **The Raiser's Edge 7** will not fix it. We highly recommend cleaning up your database before the conversion. To ensure a smooth and quick transition process, our [Fundraising System Consultants](#) can take responsibility for individual aspects of the conversion or the entire process.
 - ◆ **Additional Users** — The conversion to **The Raiser's Edge 7** is an ideal time to evaluate the number of users who need access to your database. For example, your executive director may want to access reports from his/her desktop.
 - ◆ **Crystal Reports** — The **Crystal Reports Standard** CD you receive with **The Raiser's Edge 7** includes one user license. If you have more than one person designing custom *Crystal Reports*, you will need to purchase additional user licenses. If you plan to report off the backend of your SQL Server database, you will need to purchase **Crystal Reports Professional**.
 - ◆ **E-Philanthropy** — [RE:NetSolutions](#) is a suite of Web-based components that enable your organization to easily extend your fundraising activities to the Internet without manual data entry or Web programming.
 - ◆ **Mail Processing and Address Validation** — **PostalSaver**, **AddressAccelerator**, and **AddressFinder** can help you keep addresses up to date, allow you to easily process your mailings, and qualify for postal discounts. Note: The PostalSaver feature has been significantly improved and is now only available as an optional module, unless you are currently using **RE:MailCenter**.
 - ◆ **Read-Only Database Assistance** — This maintenance option provides resources and support for back-end access to databases.
 - ◆ **Internet/Intranet Access** — **RE: Anywhere** optional module allows your organization to access **The Raiser's Edge** over an intranet or the Internet. Note: A purchase of and/or additional maintenance fee for **RE: Anywhere** may apply.
 - ◆ **Point of Sale** — This optional module can be used to manage your in store products and inventory and integrates with **The Raiser's Edge 7**. Note: If you are currently using QuickSell 2000, an upgrade fee is associated with upgrading to Microsoft's Retail Management System for use with **The Raiser's Edge 7 Point of Sale**.
 - ◆ **Customization** — **RE:VBA & RE:API** allow you to customize **The Raiser's Edge 7** to meet your organization's specific needs, such as sharing Raiser's Edge data with other applications. For further details, refer to the [Advanced Technology in The Raiser's Edge](#) technical paper.

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

The Raiser's Edge® 7 Software Request Form

Return via FAX to: 1.843.216.6111

Yes! We are ready for The Raiser's Edge 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 The Raiser's Edge 7.

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

<input type="checkbox"/> Mail processing / address cleansing	<input type="checkbox"/> Additional users
<input type="checkbox"/> Customization	<input type="checkbox"/> eLearning Library
<input type="checkbox"/> Web access	<input type="checkbox"/> Remote Conversion and Installation
<input type="checkbox"/> E-philanthropy	<input type="checkbox"/> Read Only Database Assistance
<input type="checkbox"/> Point of Sale	<input type="checkbox"/> Other (please specify): _____

Please check availability of The Raiser's Edge 7 classroom training for my organization:

<input type="checkbox"/> Jan <input type="checkbox"/> Feb <input type="checkbox"/> Mar <input type="checkbox"/> Apr <input type="checkbox"/> May <input type="checkbox"/> Jun <input type="checkbox"/> Jul <input type="checkbox"/> Aug <input type="checkbox"/> Sep <input type="checkbox"/> Oct <input type="checkbox"/> Nov <input type="checkbox"/> Dec

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 Raiser's Edge 7.