The Financial Edge NXT

Pre-Consultation Survey

& Responsibilities

<<Month, Day, Year>>

INTRODUCTION

This documentation is provided as a service to you. The Financial Edge NXT suite of products is a very sophisticated and flexible fund accounting system designed for nonprofit organizations of all sizes. As such, it is imperative that we understand your business before developing a database customized for your needs.

We respect the fact that your new financial system is a major capital investment and must serve you for many years. Because of this, we take care to thoroughly investigate all aspects of your financial processes. The better our understanding of your organization’s business needs as they relate to the software, the more focused and lasting the solution we can recommend. Your completion of the tasks below, while not replacing a full design session with your consultant, will give us vital information and a great starting place to ensure the effective configuration and implementation of The Financial Edge NXT.

Blackbaud is excited to be working with you on this project and we have outlined the critical path of tasks below. Failure to complete any of the tasks below before the Blackbaud consultant’s first session or to provide any requested information to Blackbaud personnel within the timeframes documented here or in previous or subsequent conversations, emails, or faxes could have a potential negative impact on the implementation.

Please email this completed document back to your project manager/project coordinator.

We look forward to working with you!

ACTION ITEM CHECKLIST

|  |  |
| --- | --- |
| **Action Item** | **Completed On** |
| 1. Establish members of your team with a [www.blackbaud.com](http://www.blackbaud.com) user account (Page 3)
 |  |
| Register for [Financial Edge Implementation Training – Pre-Design and Design Phase](https://blackbaud.docebosaas.com/lms/index.php?r=coursepath/deeplink&id_path=118&generated_by=13027&hash=0fe9db9125236234ea163904ef38d74590e17b05) (Page 3) |  |
| 1. Complete the business goals and survey questions (Page 4)
 |  |
| 1. Submit the requested reports (Page 5)
	* A copy of your current chart of accounts
	* Copies of financial reports you currently require (Income Statement and Balance Sheet)
	* A copy of your last completed external audit report (.pdf)
 |  |

CREATING YOUR BLACKBAUD.COM PROFILE AND BlackbaudU Campus

Registering on Blackbaud.com

Having a Blackbaud.com website login provides access to all of our online support resources including Knowledgebase, User Guides, BlackbaudU Campus, and Forums. If you haven’t established your login yet you can do so using the following link: [Reset Blackbaud.com Login](https://www.blackbaud.com/profile/loginreset.aspx).

Your primary Blackbaud contact, generally the person who signed your purchase agreement, is your organization's first Site Administrator and can add users to our records so they can access the Blackbaud website.

How to invite (add) a user to Blackbaud.com 🡪 <https://kb.blackbaud.com/articles/Article/46340>

Pre-Implementation Training & Beyond

There are a couple of BlackbaudU Campus offerings that are important during your implementation. You will find all Financial Edge NXT courses outlined here: [BlackbaudU Campus](https://learn.blackbaud.com/pages/43/blackbaud-financial-edge-nxt-course-catalog)

Once you’re logged into Blackbaud’s website with your Blackbaud ID, you can review BlackbaudU Campus options and begin registering for courses.

[Financial Edge Implementation Training – Pre-Design and Design Phase](https://blackbaud.docebosaas.com/lms/index.php?r=coursepath/deeplink&id_path=118&generated_by=13027&hash=0fe9db9125236234ea163904ef38d74590e17b05)

[Financial Edge Implementation Training – Testing Phase](https://blackbaud.docebosaas.com/lms/index.php?r=coursepath/deeplink&id_path=119&generated_by=13027&hash=28ef625f5ac931f788d3c77560e2e70a9b0a7337)

NOTE: Fundamentals are prerequisites to all other Financial Edge NXT BlackbaudU Campus classes.

* + How to Navigate BlackbaudU Campus: [BlackbaudU Campus Curriculum](https://www.blackbaud.com/training-support/training/blackbaud-university-curriculum)

If you have any questions with regards to BlackbaudU Campus please contact TrainingHelp@blackbaud.com

SURVEY: YOUR BUSINESS & GOALS

1. Please explain your goals for The Financial Edge NXT implementation

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| --- |
| **Response:** |

1. What challenges/opportunities need to be addressed during this implementation?

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| --- |
| **Response:** |

1. What is your desired Go-Live date for The Financial Edge NXT?

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| --- |
| **Response:** |

1. Provide names, titles, and contact information for the the team members involved with the implementation?

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| --- |
| **Response:** |

1. Are you planning to have the entire project delivered remotely? Or would you like to have the consultant onsite for any portion of the project?

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| --- |
| **Response:** |

1. What is your fiscal year end?

|  |
| --- |
| **Response:** |

1. What is your current account structure?

Example1: If account number is 01-4100, then 01 = fund; 4100 = account number.

Example 2: If account number is XX – XXXX – XX, then Fund – Account Code – Department

|  |
| --- |
| **Response:** |

1. Do you use pre-printed or blank check stocks?

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| --- |
| **Response:** |

1. Please describe your budgeting process.

|  |
| --- |
| **Response:** |

1. Do you currently use spreadsheets or other out-of-system tools to analyze your data or prepare reports? If so, please describe them.

|  |
| --- |
| **Response:** |

FINANCIAL DOCUMENTS & REPORTS

Please provide the following information in an electronic format (.xls or .txt) when you return the completed survey:

* A copy of your current chart of accounts
* Copies of financial reports you currently require (Income Statement and Balance Sheet)
* A copy of your last completed external audit report (.pdf)

For data security, you can submit the reports and completed templates using our secure FTP servers.

Here’s an excerpt of our [KB Article 46099](https://kb.blackbaud.com/articles/Article/46099) on How to Upload to FTP using web-based server:

[Web-based Secure FTP (SFTP)](https://www.blackbaud.com/support/casecentral/webftp.aspx) for files 1.18 GB (1,237,319 KB) or less.

* Select the link for Web-Based Secure FTP. A new tab/window will open.
* Enter your FTP username and password (found on the previous tab/window, which is still open).
* To retrieve a file, check the box next to the file and select the Download Files button.