Raiser's Edge NXT Consultancy

Go-Live Assistance - Two-Day Agenda

Customer preparation

- ✓ Onsite sessions must have a suitable space for delivery, WIFI access and screen or projector for presenting
- ✓ Remote sessions are delivered either through Microsoft Teams or WebEx
- ✓ A member of the Project team should be prepared to take notes during the session
- ✓ Project team members are encouraged to have their own computers/laptops to use during the session if they "learn through doing". These computers will need to have Citrix Receiver installed. *Note - if prompted to enter an email address and create an account during the installation process, click Close, as this step is not required.*

Day One

Session	Description
Session 1	Introductions
Session 2	Data • Check data Administration and Configuration areas • Control Panel & Help - Inviting new users, accessing help and resources • Security - users and groups overview • General Settings • Introduction to Business Rules
Lunch	
Session 3	Go Live Task List • Go Live Tasks Identified throughout the project Examples – can include but not limited to: o Events Sample set up[1] o Create new Campaigns, Funds, Appeals and Packages o Create new Letter Templates o Create Batch Template o Set up Consent Configuration o Configure New Attributes/ Custom Codes o Set-up New User Records o Create Quality Control Queries

---

[1] These are specific Go Live tasks identified during design session.

Day Two

Session	Description
Session 4	Online Express [2] • Create a donation page • Test Transaction Log onto BBMS to see transaction
Session 5	Constituent Management Refresher • Adding and Editing Constituent information • Assigning Relationships • Adding Notes and Actions • Adding attachments and custom fields
Lunch	
Session 6	Personalised Settings • Work Centre - Managing your Work Centre • Saved Lists • Saved Reports 365 or Gmail Application[3] • Activate Application • Individual user set up *We recommend that members of the team attend this session*
Session 7	AOB/Questions Thanks and Close

Breaks will be taken throughout the day as suitable points are reached

---

[2] Online Express used BBMS to collect payments must be set up prior to session to complete this task
[3] Office 365 Integration may require assistance from your IT department