

Here is a sample offering of services available to Millennium customers worldwide:

Technical Consulting:

Technical consulting can be contracted to fulfill a specific technical need, such as:

- Upgrading Millennium to the latest version
- Diagnosing and correcting ongoing performance problems
- Moving Millennium database and IIS to a new server
- Separating reporting to a new server
- Upgrading the server OS
- Reviewing and reconfiguring our security settings
- Setting up and executing replicated reporting

These types of visits normally last two to three days

Custom Report Coaching

Whether you need a kick-start on your first or current report or a personalized tutorial on more advanced topics in Crystal Reports, our Custom Report Coaching service is designed to give you the help you need. With Custom Report Coaching, Sage offers you a personalized, one-on-one session with an experienced Crystal Reports developer using your report and your database. These sessions are conducted over the Internet from your own office.

Custom Report Programming

By utilizing Sage Software's custom report writing services, your nonprofit organization can arrange complex data in meaningful ways to increase fundraising results and enhance communications both within and outside the organization. We understand the reporting needs of nonprofit organizations - custom needs that may go beyond our Standard Report Libraries - and can provide efficient and accurate reports to meet these needs. Our specially trained Millennium experts understand advanced selection criteria and are experienced Crystal Reports developers. We produce custom, complex, reports that range from data extractions to mailing houses, directory services, and campus call centers, to constituent profile reports, to fundraising progress reports to 'Moves' management reports to advanced giving reports.

Custom Utility Programming

By utilizing Sage Software's Millennium custom utility programming services, your organization can improve productivity, automate almost any routine

database task, improve data integrity, enhance fundraising procedures, and increase fundraising results. We have a team of specially trained Millennium experts who understand the specific needs of nonprofit organizations and can enhance the use of Millennium within your organization in several key areas by providing general ledger interfaces, lockbox interfaces, new student imports, new graduate updates, third-party imports (Martz & Lundy, PIN, Ruffalo Cody and Smart Call to name a few), and data extractions to mailing houses, directory services, and campus call centers.

Millennium Data Entry Kits

This kit includes step-by-step detailed procedures for virtually all of the Development processes. Screen shots are incorporated for a comprehensive overview of how to manage your processes in Millennium.

Millennium Quick Referrals

These fast reference points are invaluable for the experienced data entry and reporting personnel that need to verify fine details or understand information that is infrequently managed. The documents include screen shots and can be incorporated into your Site Specific Help section in Millennium. These tools are also great snapshots for management and they are easily customized to your specific practices.

Post Implementation Services

1) Policies and Procedures Development/Training:

Working with your staff, consultants will develop detailed data entry, reporting and system procedures for every area requested. These procedures will conform to your site specific data and working needs, and will be uniformly documented in a user-friendly manner. All procedures will be tested and verified, and the documentation will be provided for your future reference and auditing needs. Appropriate staff will be extensively trained on all procedures, and exceptions reporting measures will be highlighted for future development.

2) Quick Referral Development:

Utilizing their extensive Millennium and Development experience, senior consultants develop key points for your customized data entry rules. These quick reference sheets are used by all data entry personnel, report writers and others that need to intimately understand the Millennium data and how the system works.

3) Exceptions Reporting

Inconsistent and inaccurate data can cause reporting errors and a great deal of user frustration. These errors can be virtually eliminated with detailed data business rules and regular data sweeps to identify violations of these

business rules. Consultants will work closely with your staff to develop detailed business rules, if they are not already available. After these rules are finalized, programs will be written to identify violations of these rules, and a detailed, systematic Exceptions Report will be developed and tested. Training and documentation will also be provided on the Exceptions Report.

4) **Standard Utility Implementation and Training**

Consultants are available to assist in the deployment, documentation and training for all of the standard Millennium utilities. This includes, where applicable, working with your staff and developing tools to massage the data set prior to importing it into Millennium. This will often provide better, more consistent imported data. The consultants will provide also valuable assistance on how to effectively utilize the Millennium tools with Internet Reporter, if applicable, and will provide insight on strategies for utilizing the Millennium utilities.

5) **Post Conversion Data Cleaning and Data Enhancing**

The key to developing good SQL scripts and effective data cleanup tools is to make sure that the problem is extensively written up for the programmers, and data examples are provided. Therefore, the first step of this project is a Data Integrity Specification and Review Site Visit. During this visit, consultants will work with your team to extract all of the information necessary to prepare detailed programming specifications for all of the data issues. Screen shots of data problems will be printed (if applicable), as well as screen shots of data that is functioning correctly. This will allow the programmers and consultants to fully understand what needs to be accomplished. After the Data Correction and Enhancement Specification sheet is finalized, programming work will begin based upon the work you approve. All programs will be run and tested on test data set to ensure that your data integrity stays in tact.

On-Site Consultation Services

In the event that a new staff member is hired, or existing staff members require special assistance in other areas, on-site training and consulting is available. Rates are on a per-day basis plus expenses and should be scheduled at least 30 days in advance.

Standard Onsite Online Constituent Directory Implementation Consulting Package

In order to best understand the needs of your institution, a pre-visit conference call will be conducted with key members of your staff and a Sage Software

Research & Development Manager, Implementation Manager and the Implementation Consultant assigned to work with your institution. This conference call will help identify site-specific topics that will need to be covered during the onsite visit, make recommendations for your website configuration, and allow you to gather any additional information with a team of Sage Software experts prior to the onsite visit.

Next, an Implementation Consultant will travel onsite for a two-day visit to work with the IT department to set up the Online Constituent Directory in Millennium and to train the staff on the use of the system. The majority of the visit will be open-ended based on your institution's needs.

Sage Software will work with your institution to set up the Online Constituent Directory functionality in Millennium. However, it will be your institution's responsibility for attaching the link to your website. The institution's representatives will need knowledge of how Millennium works with the IIS and the database and basic web design principles.