

# Blackbaud Raiser's Edge NXT for Database Managers

IT ISN'T JUST FOR FRONT LINE FUNDRAISERS ANYMORE!

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LEADING EDGE SOFTWARE SOLUTIONS



Have you ever said,  
“I’m the database administrator!  
I do all my work in the classic view of  
Raiser’s Edge” ??

If this is you, you’re missing out on  
**SO MUCH AWESOMENESS!!!!**



# RE NXT



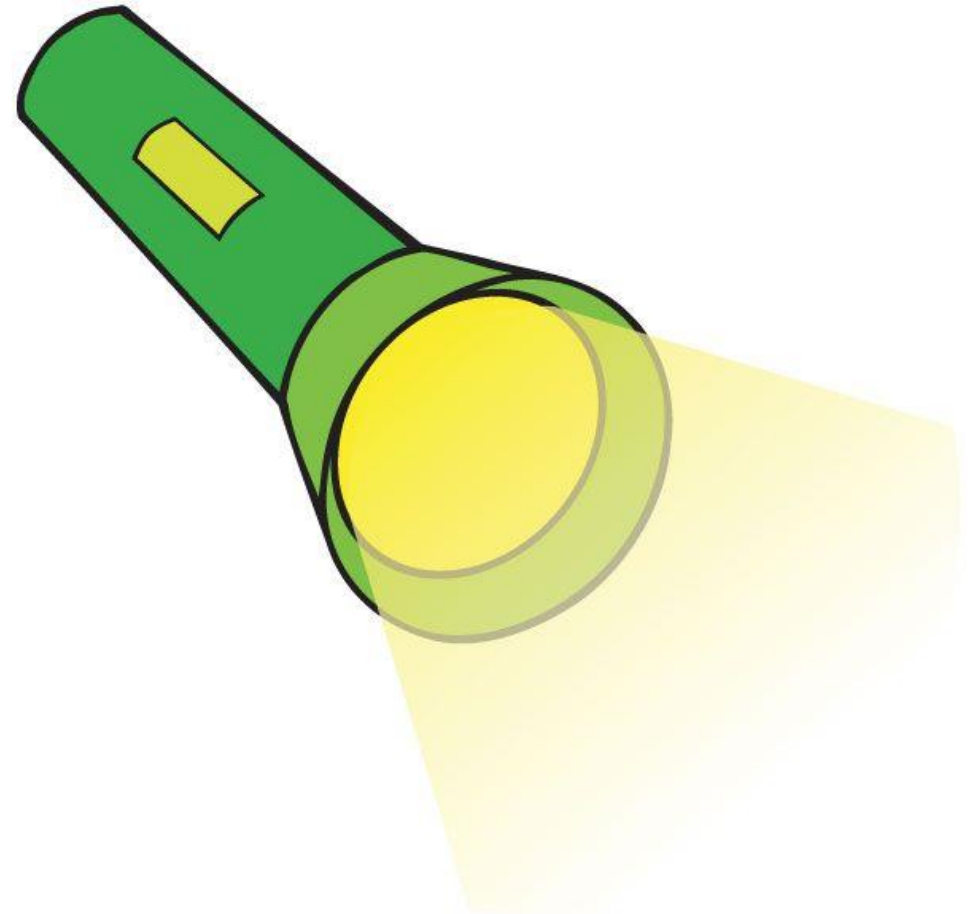
Experience the  
awesomeness!

Prepare for the  
awesomeness!



# PREPARING TO LIGHT UP RE NXT (WEB VIEW)

- Audit security carefully in both database view and web view. Who can/should have rights to:
  - Add/edit information (addresses, Constituent codes, etc.)
  - Add/Edit Gifts
- Double check phone types and formats
- Check on Completed status of past actions
- Active Solicitors/Fundraisers
- Fundraiser's portfolios, particularly relationships for former employees (end dates)



Announcing the end of playing  
**PASS THE SPREADSHEET!!!**

**NXT LISTS  
TO THE RESCUE!!!**

# Create your list then customize it with Add/Exclude

The screenshot displays the Raiser's Edge NXT interface. The top navigation bar includes 'Raiser's Edge NXT', 'Home', 'Fundraising', 'Marketing', 'Events', 'Lists', 'Analysis', and 'Tools'. The main section is titled 'Constituents' and shows a list of 5,394 constituents, updated 39 minutes ago. A 'New list' button is visible. Below the list, there are buttons for 'Save', 'Share', 'Export', and 'Add/Exclude'. The 'Add/Exclude' button is highlighted with a yellow box. A filter is applied: 'Gift date: Last fiscal year'. The table shows columns for 'Constituent summary', 'Assigned to', 'Constituent codes', and 'Lifetime'. One constituent is visible: '333 Belrose Bar & Grill' with a lifetime value of '\$50'. A dropdown menu is open for the 'Add/Exclude' button, showing options: 'Add to list' and 'Exclude from list'. A second screenshot shows the 'Add to this list' dialog box, which has a search bar and a button 'Add a list of records'. A button 'All current trustees' is also visible. At the bottom of the dialog are 'Add' and 'Cancel' buttons.

5,394 Constituents List updated 39 minutes ago

Save Share Export Add/Exclude Find in this list

Filter: Gift date: Last fiscal year

| Constituent summary  | Assigned to | Constituent codes | Lifetime |
|--|-------------|-------------------|----------|
| 333 Belrose Bar & Grill<br>333 Belrose Ln.<br>Padon, PA 19087-4416 |             | Business          | \$50     |

Filter: Custom fields: Athletics: 20 selected

Add to list  
Exclude from list

Add to this list

Search for a constituent

Add a list of records

All current trustees

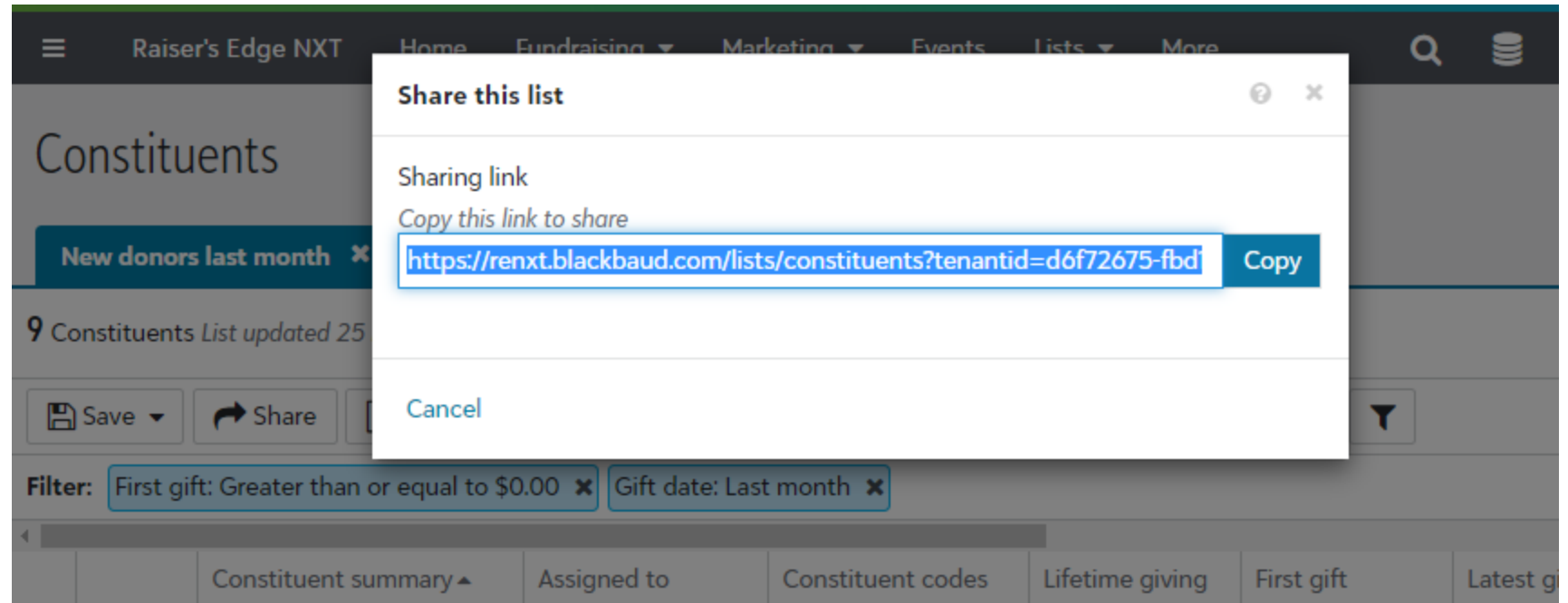
Add Cancel

Add or exclude individual constituents or entire lists of constituents. Donors last year plus all trustees? No problem!

# EXPERIENCE THE AWESOMENESS!

## Share and review mailing lists electronically

Instead of circulating an Excel spreadsheet, create (or bring) the list into Raiser's Edge NXT, and just e-mail the link to those who need to review it.





# THINGS TO KEEP IN MIND

## LISTS IN NXT....

- Static vs. dynamic
- Limited fields for filters and columns

## WHY THIS IS **STILL** AWESOME FOR YOU!

- Save time by not having to chase down the “list” – or the five different printed copies of it!
- No more “Has so and so reviewed the list?”
- Final product is usable list/group for global adds/import instead of some random Excel spreadsheet or sheets of paper



PREPARE FOR THE AWESOMENESS!!!



# PREPARE FOR THE AWESOMENESS

- Create (and maintain in DBV-remember, they're static!) lists of
  - Usually/always include
  - Usually/always exclude
- Examples:
  - Board
  - Alumni
  - Elected Officials/Community leaders
  - Staff
  - Solicit Codes
  - Society level donors

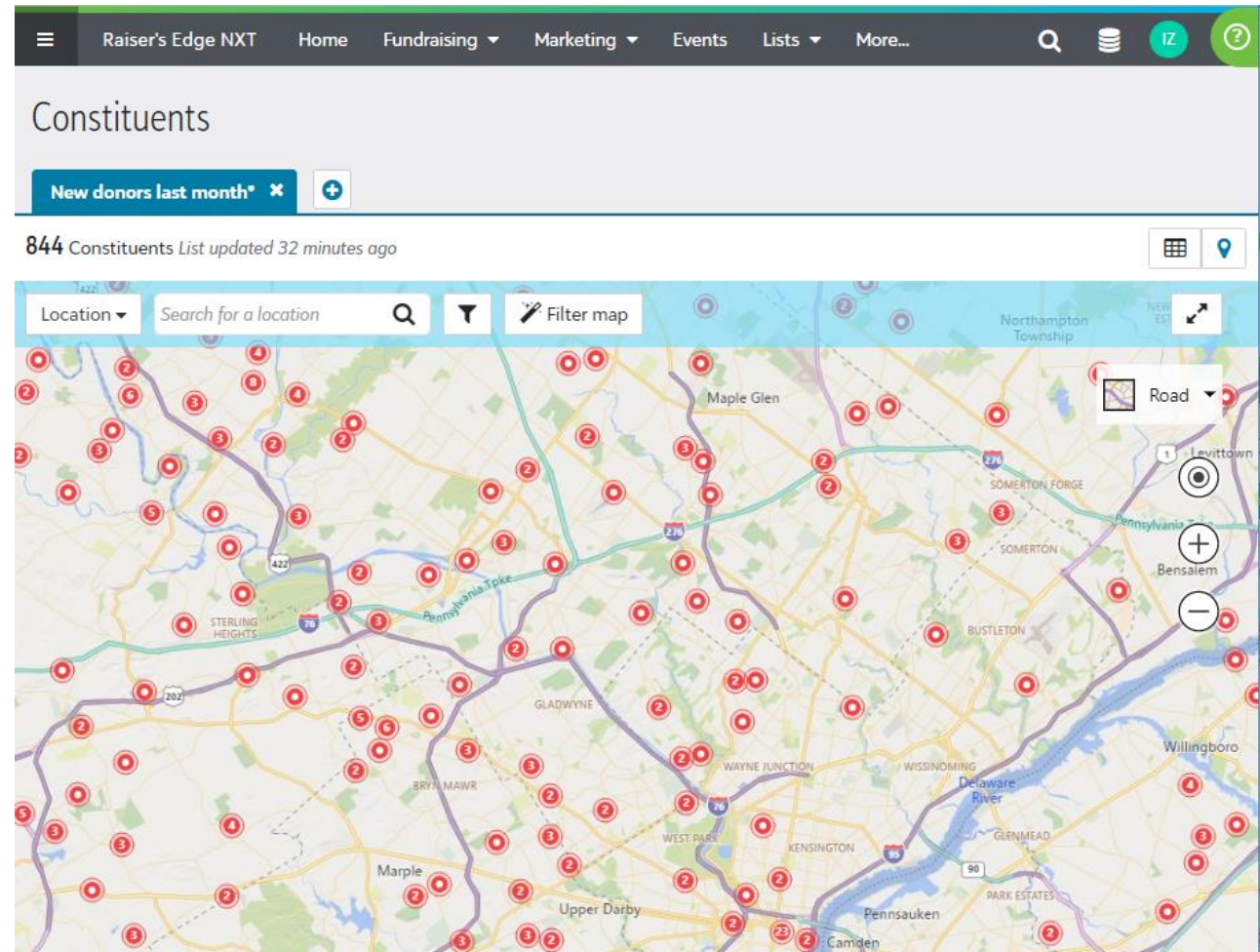
Experience the Awesomeness of Lists Part 2:

**EASILY CREATE LISTS  
BASED ON LOCATION!**

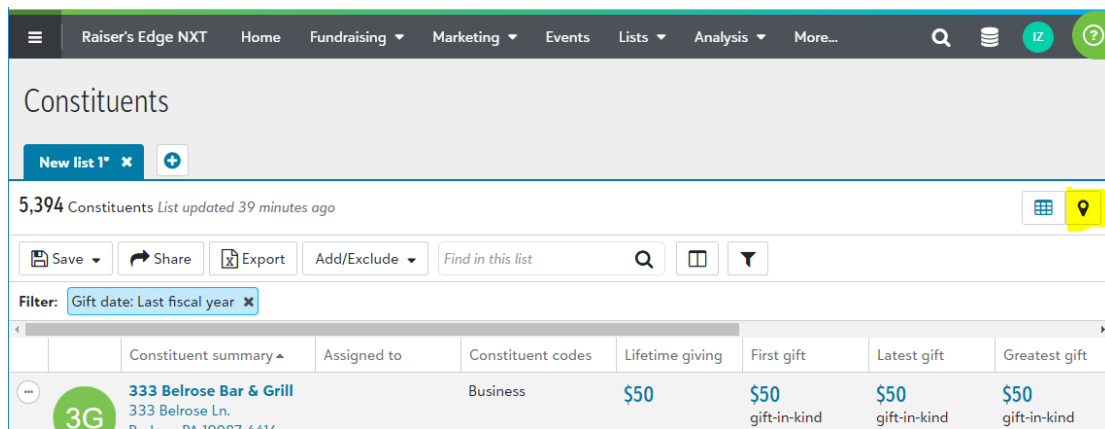
# Easily create lists based on geographic proximity

See where those in your list (or query) live, then select those in the area you need for an invitation or for planning a trip.

Draw a rectangle (or a custom shape!) to limit your list.

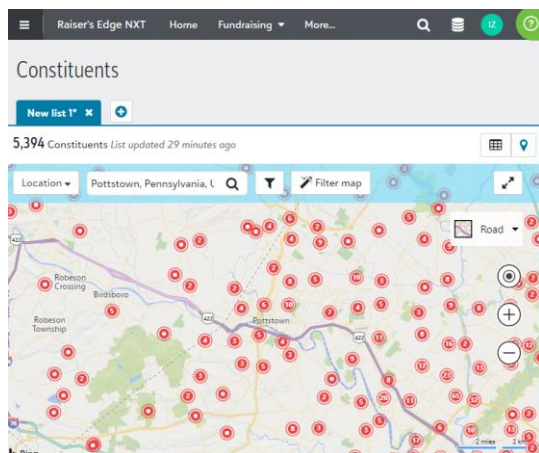


# Create your list, then click on the “map pin” icon

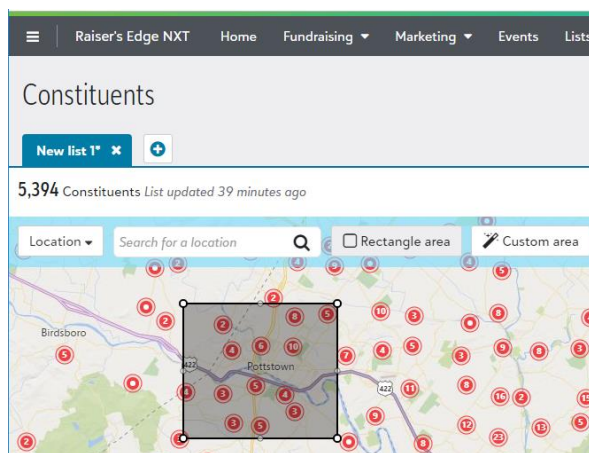


Select by location (town, address or even a constituent in the list); draw a rectangle or draw a custom shape. Then just apply the filter to only include those constituents in the list!

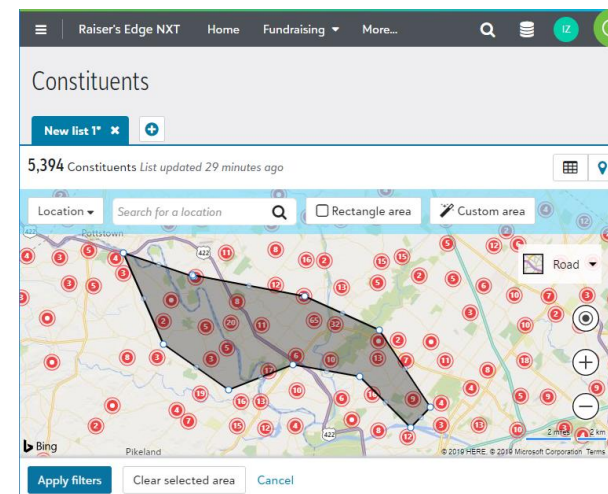
## Location



## Rectangle



## Any custom shape



# WHY IS THIS AWESOME FOR YOU?

- No more trying to query on ZIP codes
- Can customize, crossing by ZIP
- Helpful when deciding where in town to hold an event
- Helpful for traveling fundraisers to plan trips
- Eliminates wasting your time using trial and error queries trying to get to the constituents your fundraisers want

# PREPARING FOR AWESOMENESS

- Keeping mind this is a *starting* point for you as the DBM. You're not completely out of a job 😊
- The final data *probably* still comes from database view
- Things like:
  - Address processing
  - Head of household processing
  - Excluding Solicit codes (*potentially*)





EXPERIENCE THE AWESOMENESS!!!



Experience the Awesomeness of Automated Processes:

# **HANDS OFF NCOA ADDRESS UPDATES!**

# Automatic Address Finder Updates

## Set up Address Finder



### 2 - What to expect

When Address Finder finds a constituent who changed their address, it automatically:

#### Adds the new address

- Marked as **Primary**
- With a **Valid from date** of when the update ran
- With an **Info source** in the database view of AddressFinder
- With a single address line, USPS-standard abbreviations, and ZIP+4

New address format example:

**Robert Hernandez**  
**123 Main St Apt 123**  
**Anytown, CO 10101-1234**

#### Saves the former address

- Marked as **Do not mail**
- With a **Valid to date** of when the update ran

If that all looks okay, click 'Next' to configure your settings and then complete the acknowledgement. Once submitted, your Address Finder process will be scheduled to run overnight. Once it completes, you'll see your results on the Address Finder tile.

Previous

Next

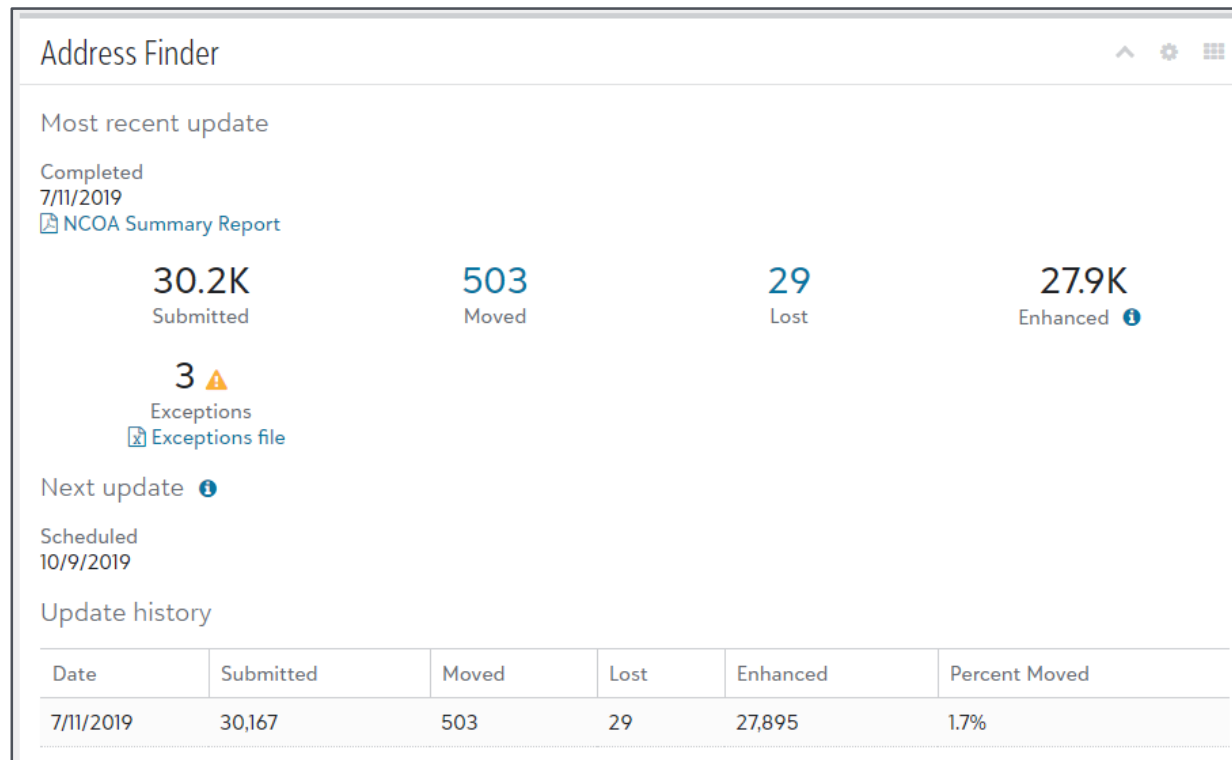
Cancel

# Things to know about Address Finder

- **You** control the settings
  - Record to include – all or specific constituent records
  - Choose whether to retain the address type for moves
  - Choose what address type to use for new addresses
- Information updates automatically
  - Moves – new address added, old one marked do not mail
  - Updates – zip+4, apartment number, etc.
  - Updated addresses maintain your formatting; new addresses use standard USPS formatting

# Address Finder – what it gives you

- Report in Raiser's Edge NXT with links to records changed
- Runs automatically every 90 days





PREPARE FOR THE AWESOMENESS!!!





Nothing to see here!  
Just set it up and GO! 😊





EXPERIENCE THE AWESOMENESS!!!

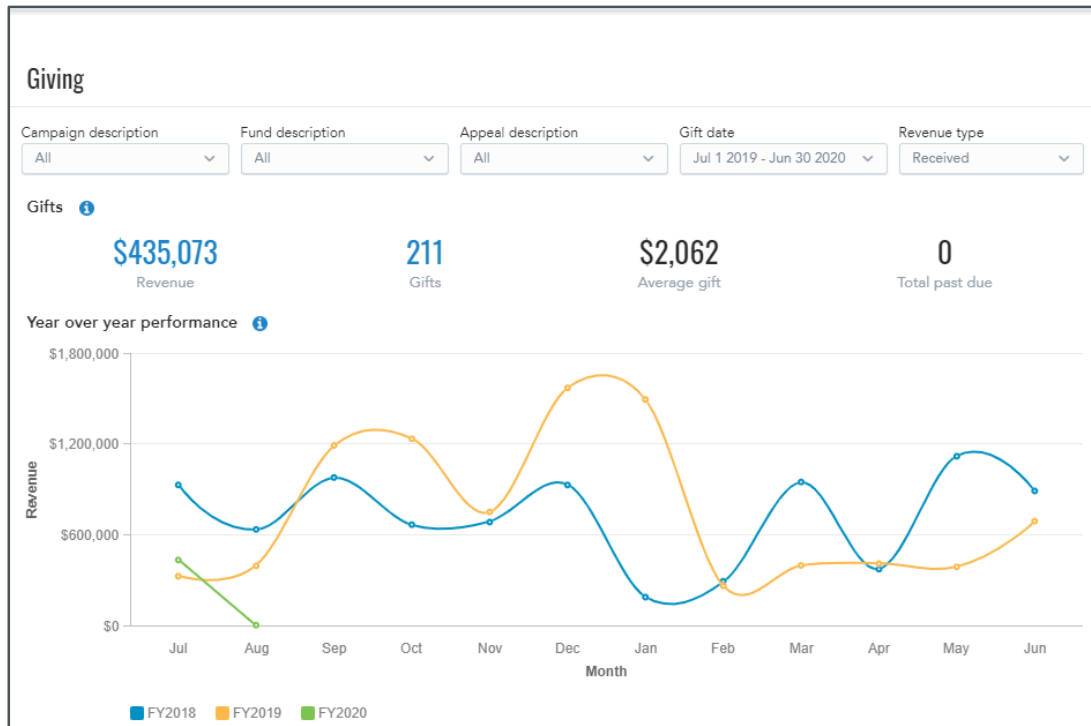




Experience the Awesomeness of Updated Reporting:

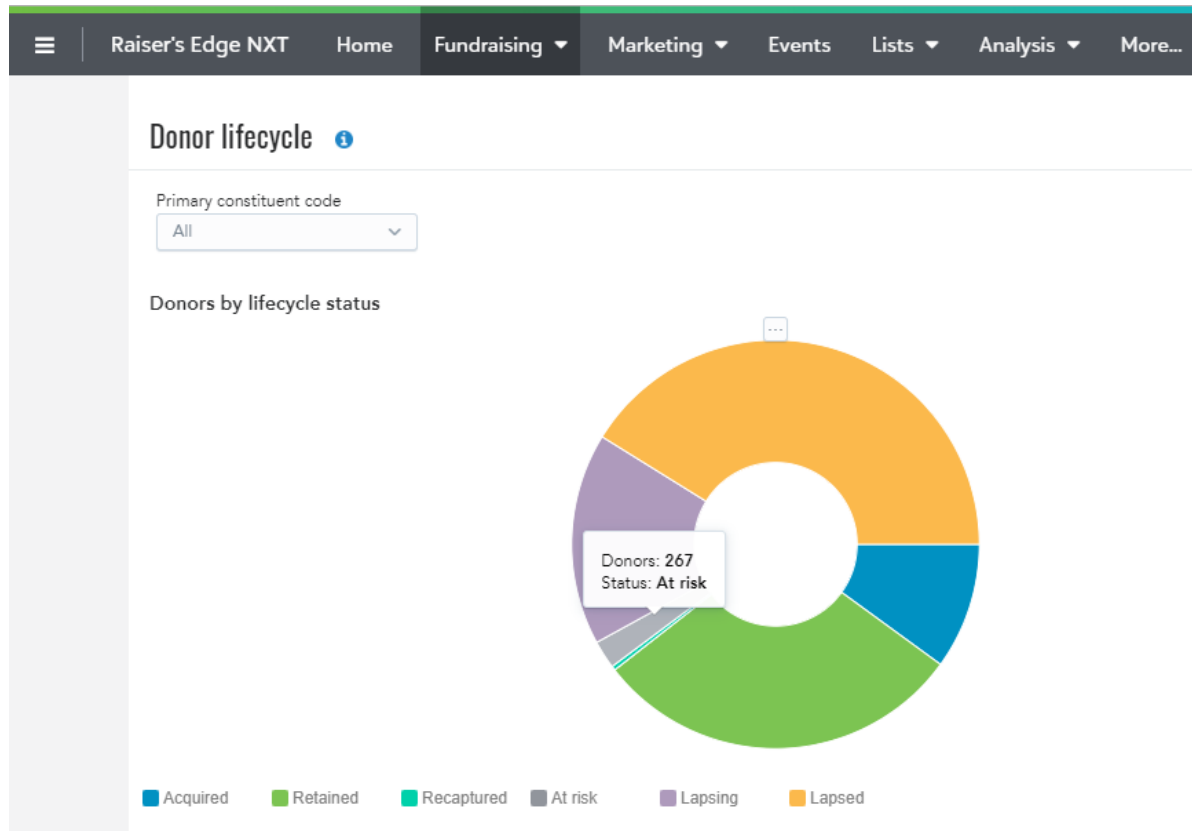
# **Prebuilt and Custom DASHBOARDS**

# Using prebuilt dashboards - giving overview



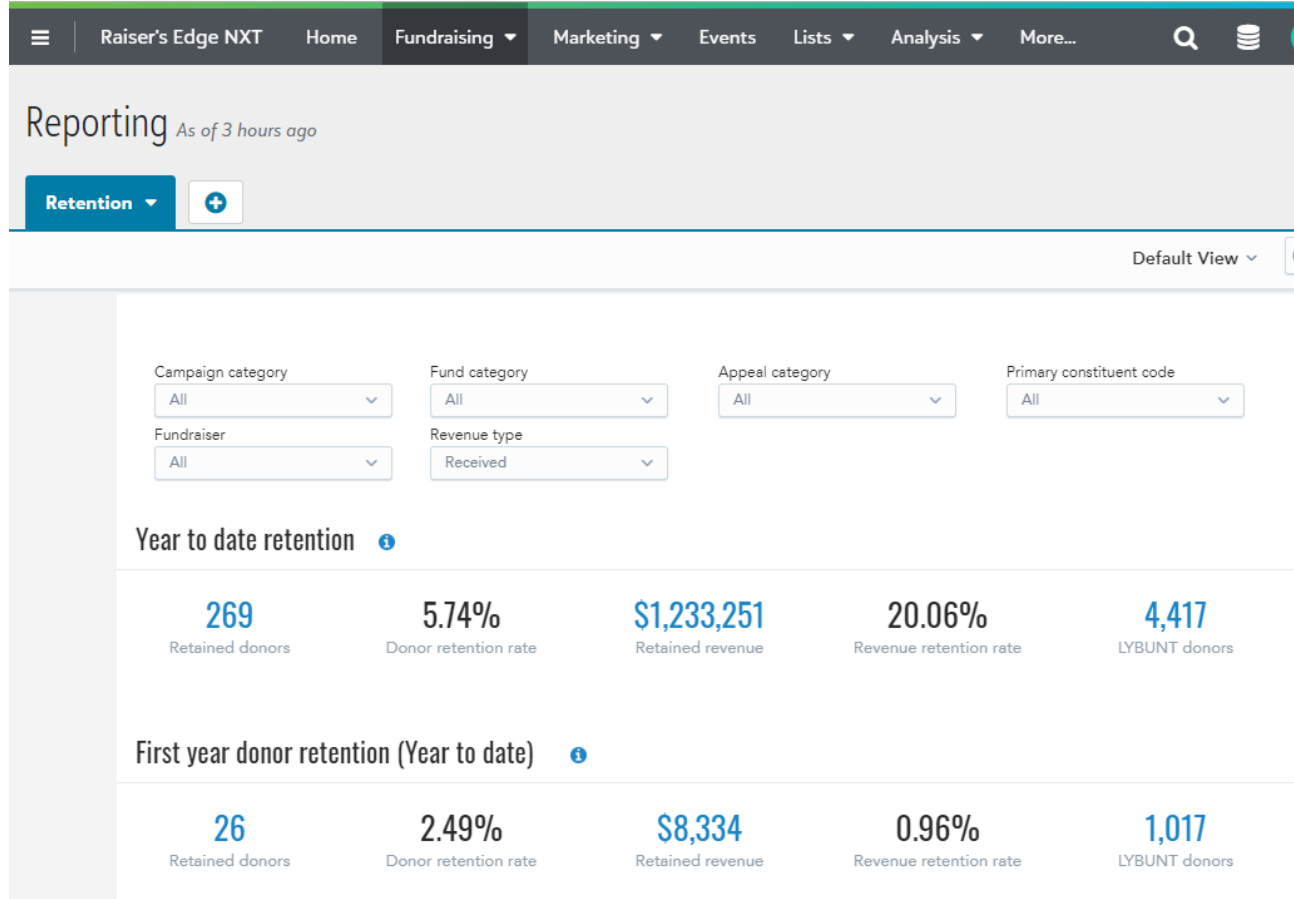
- Compare year-over-year
- You control whether you measure new gifts & commitments or gifts received
- Select only certain campaigns, funds or appeals
- ACTIONABLE information – click through for a list of gifts, or to see overdue pledges

# Using prebuilt dashboards - giving overview donor lifecycle



- Easily look at your donor pool as a whole
- Drill down for details
- Click a segment for a live list of constituents included in the category
- Uses Blackbaud's definitions for each grouping

# Using prebuilt dashboards – donor retention



- Very valuable insights, especially for Annual Fund directors
- Actionable click throughs to create/analyze lists

# WHY THIS IS AWESOME FOR THE DBM

- Donor Retention and Recaptured dashboards eliminate a series of complicated queries on your part!
- Empower your fundraiser's with data at the click of a mouse!
- Quickly identify new donors for additional attention and follow-up without any work on your part



PREPARE FOR THE AWESOMENESS!!!



# Things to think about with Dashboards and Analysis

- Define revenue types
  - Received
  - Committed
  - Recognition
- Caution around Gift attributes
  - Only available in Gift Lists
  - Only as an Include, not an Exclude
- Payments on multi-year pledges
  - No filtering on which pledge payments are included in revenue types

## In database view

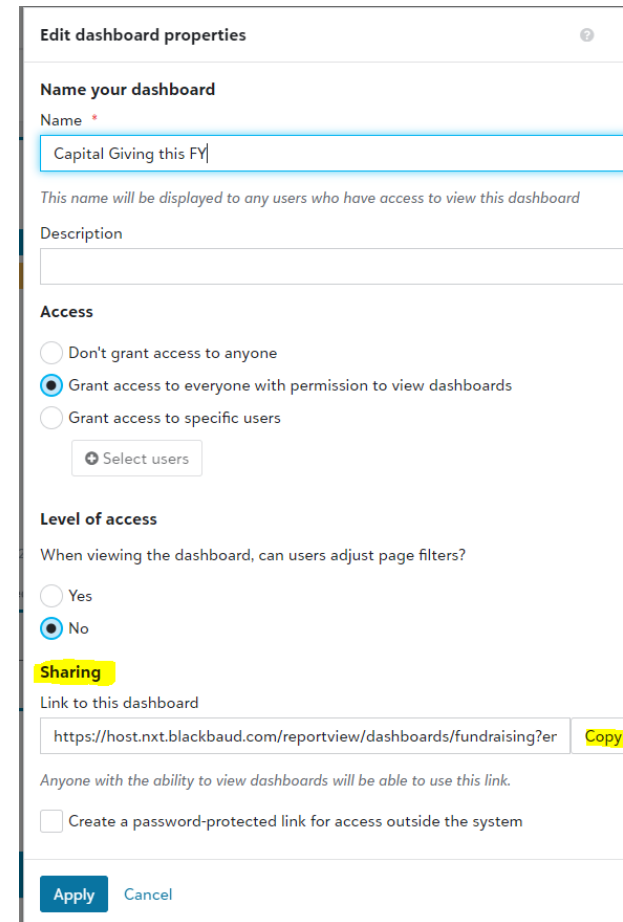
To encourage and empower your team to use NXT on their own (and save you TONS of time!), consider making meaningful use of Category field for:

- Campaigns
- Funds
- Appeals



# Share selected custom dashboards securely

You can choose to share a custom dashboard securely even with those who do not have access to your database!



The screenshot shows a web-based dialog titled "Edit dashboard properties". It contains several sections for configuring a dashboard:

- Name your dashboard:** Includes a "Name" field with the text "Capital Giving this FY" and a "Description" field.
- Access:** Features three radio button options: "Don't grant access to anyone", "Grant access to everyone with permission to view dashboards" (which is selected), and "Grant access to specific users". A "Select users" button is located below these options.
- Level of access:** Includes a question "When viewing the dashboard, can users adjust page filters?" with "Yes" and "No" radio button options. The "No" option is selected.
- Sharing:** This section is highlighted with a yellow background. It includes a "Link to this dashboard" field containing the URL "https://host.nxt.blackbaud.com/reportview/dashboards/fundraising?er", followed by a "Copy" button. Below this is a note: "Anyone with the ability to view dashboards will be able to use this link." and a checkbox for "Create a password-protected link for access outside the system", which is currently unchecked.

At the bottom of the dialog are "Apply" and "Cancel" buttons.

# Things to think about with secure dashboard sharing

Scheduling: Be aware that once you've added an email to receive a dashboard, the list is out of your control. A recipient has to unsubscribe to stop receiving the email

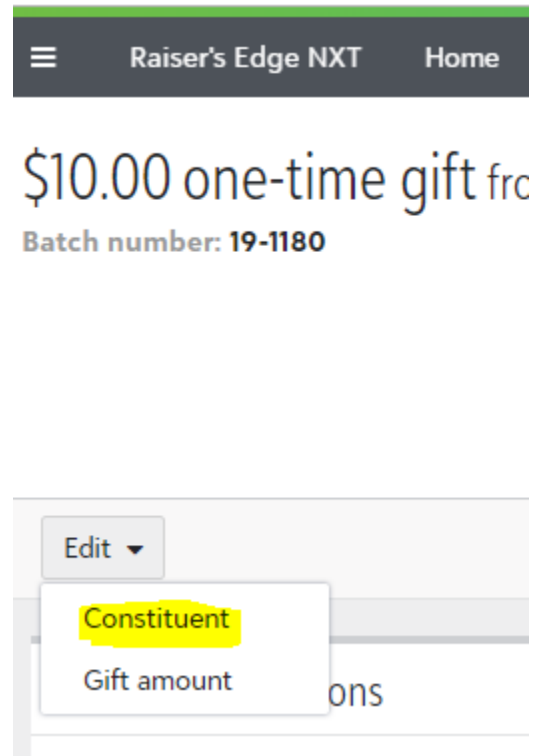


EXPERIENCE THE AWESOMENESS!!!

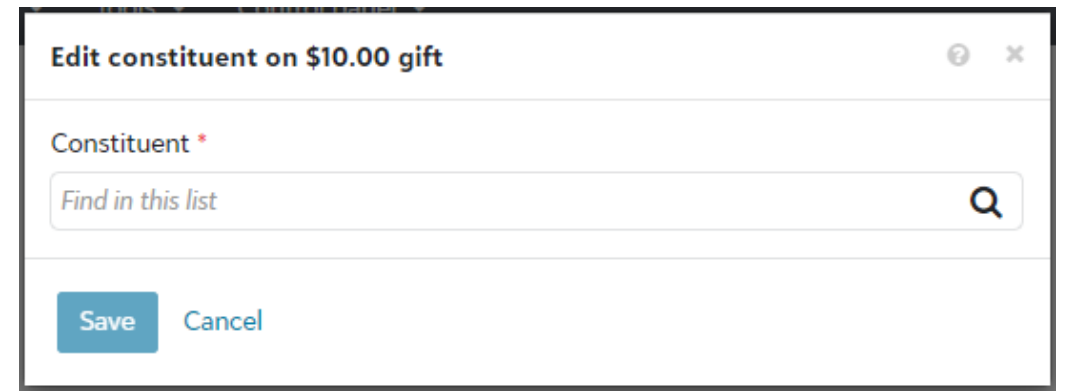


# Easily move a gift from one constituent record to another

Life happens, and gifts occasionally are entered on the wrong “John Smith” constituent record. Gifts can be moved to the correct constituent with no loss of gift history.



The screenshot shows the Raiser's Edge NXT interface. At the top, there is a dark navigation bar with a hamburger menu icon, the text "Raiser's Edge NXT", and a "Home" link. Below this, a gift record is displayed: "\$10.00 one-time gift from" followed by "Batch number: 19-1180". At the bottom of the screenshot, an "Edit" dropdown menu is open, showing two options: "Constituent" (highlighted in yellow) and "Gift amount".



The screenshot shows a modal window titled "Edit constituent on \$10.00 gift". It has a search bar labeled "Constituent \*" with the placeholder text "Find in this list" and a magnifying glass icon. At the bottom, there are two buttons: "Save" (in a blue box) and "Cancel".



PREPARE FOR THE AWESOMENESS!!!





Things to think about with moving a gift  
WORD:SECURTIY!

*\*oh, and GL Post status for those of you integrated with FE*





EXPERIENCE THE AWESOMENESS!!!

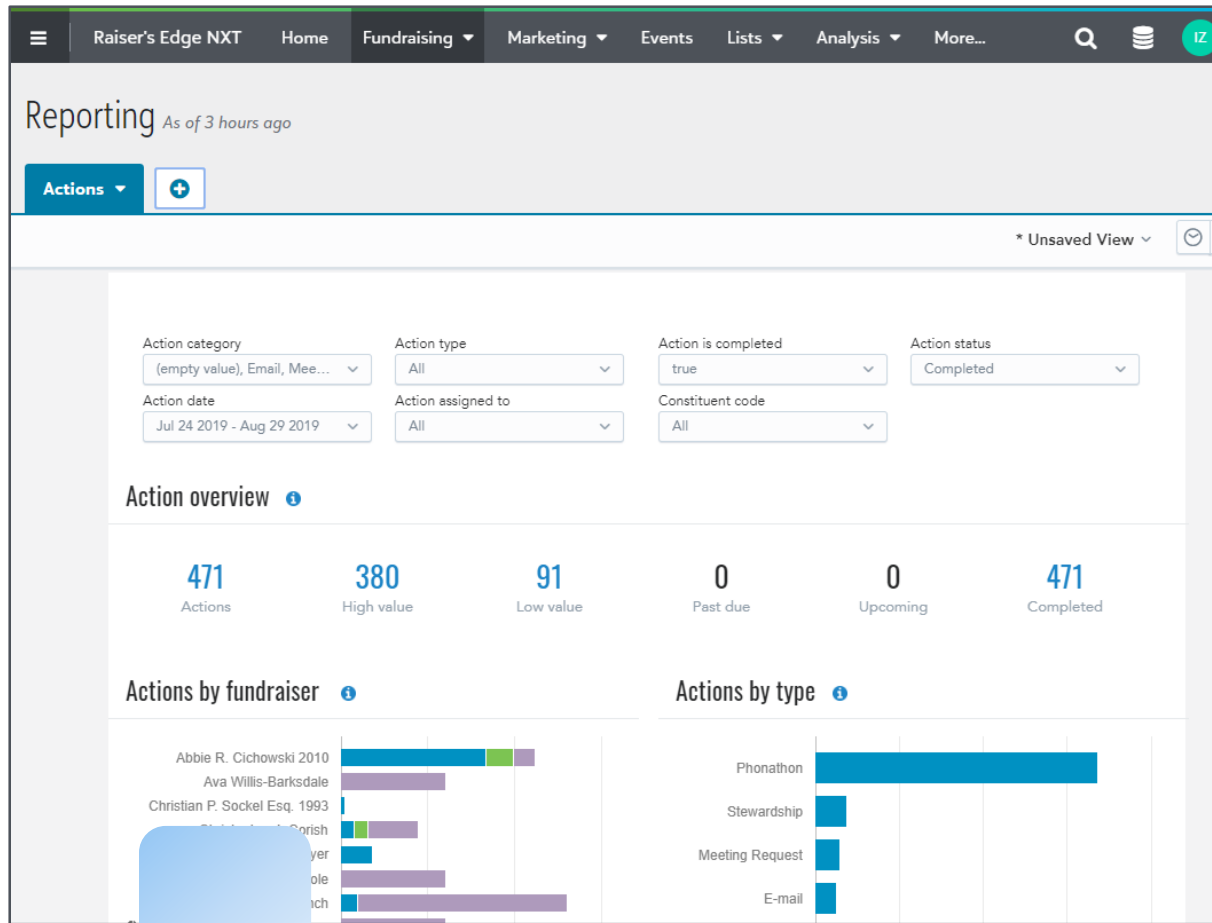


# EXECUTIVE MANAGEMENT DASHBOARDS

- Retention
- Acquisition
- Recapture
- Opportunity lists!!!!
  - With NEXT ACTION!!!
- Actions by Fundraiser
- High value actions only (Meetings, Phone calls)



# Using prebuilt dashboards - actions



- Instead of running several reports filtered by fundraiser in database view, put that information at everyone's fingertips



PREPARE FOR THE AWESOMENESS!!!



# Things to think about

- Overall health of existing Action records
  - Completed status
  - Fundraisers assigned appropriately
- Completeness of existing Opportunity (Proposal) records
  - Status
  - Fundraisers assigned appropriately
  - Dates
    - Asked
    - Expected
    - Funded

Questions?



Other great ideas of how Raiser's Edge  
NXT works for database administrators?



# LET'S CONNECT



<https://www.facebook.com/groups/REUserGroup/?fref=nf>

INSPIRED?  
WIRED?  
FIRED UP?

Tell us in a session survey  
on the mobile app, and  
you'll be entered to win a  
complimentary pass to  
bbcon 2020 in Seattle, WA!

THANK YOU!

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