

Get Started with Raiser's Edge NXT

An Overview of Relationship and Security Management on Your Desktop or Mobile Device

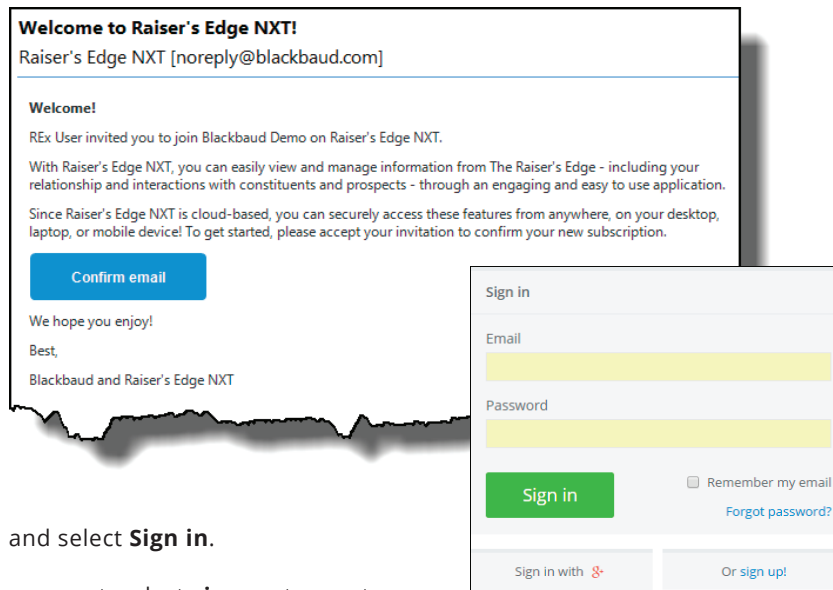
With **Raiser's Edge NXT**, you can view and manage your **Raiser's Edge** data through both a web-based interface via any browser or device and the database view accessed through *Citrix*. The web interface provides an elegant, friendly view of your data and enables people at your nonprofit — such as fundraisers — to easily manage constituent relationships like never before.

► We recommend you use the web interface via Apple *Safari*, Mozilla *Firefox*, Google *Chrome*, or Microsoft *Internet Explorer 10* or later.

Getting In

To first get into **Raiser's Edge NXT**, you'll receive a Welcome email invitation. After you select **Confirm email** in your invitation, simply sign into **Raiser's Edge NXT** with your Blackbaud account.

- If you already have a Blackbaud account, enter its email address and password and select **Sign in**.
- If you don't yet have an account, select **sign up** to create one and, when you receive another Welcome email message, confirm your email address again.



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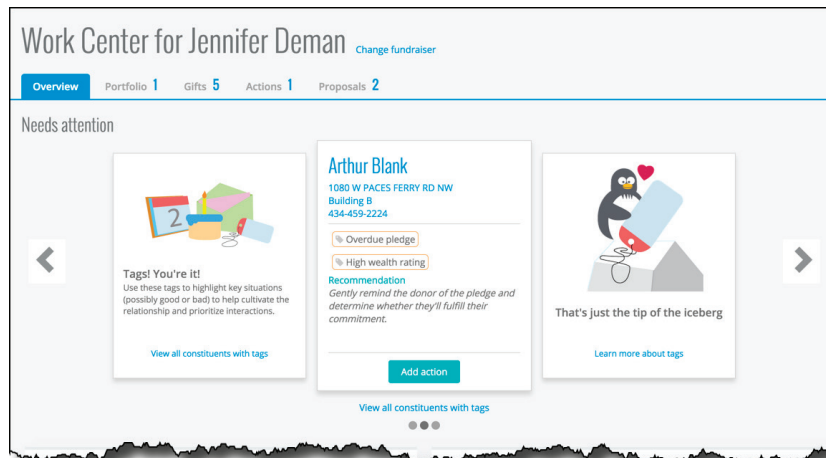
► **Admins!** You can send users invitations to join **Raiser's Edge NXT** from **Control Panel**. For information, see "Security Management" on page 6.

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Fundraising

From **Fundraising**, fundraisers have easy access to their assigned constituent relationships and related activity such as gifts and actions, and fundraising managers can view and strategize fundraiser assignments from a central location.

Work Center is the one-stop shop for everything a fundraiser needs to cultivate relationships and secure gift opportunities. From here, you can filter and analyze your portfolio of assigned constituents and manage the tasks, interactions, and proposals required to help cultivate those relationships.



You can customize the lists in **Work Center** to focus on only what you want. To view only specific records, click **Filters**. To select the information to view, click **Choose columns**.

Overview. Under **Overview**, you can quickly gauge your fundraising performance and identify where to focus your energies. From this dashboard, you can check, at-a-glance:

- Which of your assigned relationships need attention, based on special situations such as upcoming birthdays, lapsed giving, or a lack of communication.
- How many relationships you manage, and how many of them are new or lapsing.
- How many of your assigned actions are open, completed, or past due.
- Your progress toward goal amounts for campaigns, funds, and appeals.
- How many gifts you raised over the current fiscal year, and how many are new or past due.
- How much you ask for, expected, and funded through your proposal efforts.

Portfolio. On the **Portfolio** list, you can manage all your assigned constituent relationships.

From here, quickly add new actions and proposals, track activity, and compare wealth and giving information.

Gifts. On the **Gifts** list, you can view all giving you receive credit for and gifts received from your assigned constituents. From here, view detailed information, analyze giving by amount and time period, and track the effectiveness of your fundraising efforts.

For a list of items tied to a total under **Overview**, such as to manage your new relationships, past due actions, or overdue pledges, select the amount.

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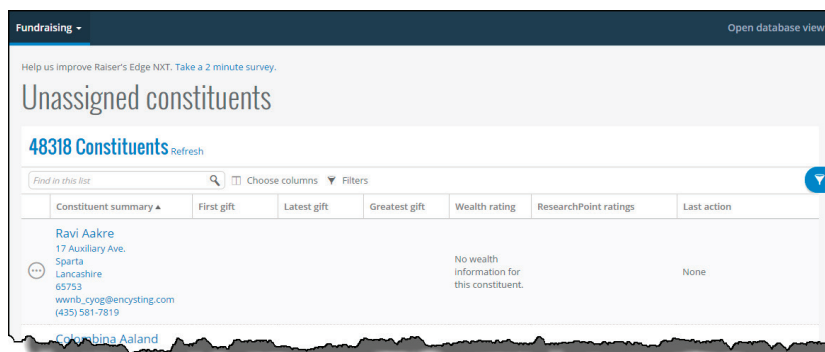
Actions. On the **Actions** list, you can manage all your assigned tasks and interactions, as well as actions added to your assigned constituents. From here, track and analyze your activity by date or status, mark tasks as complete, and add follow-up interactions.

Proposals. With *Prospect Research Management*, you can manage all your assigned proposal efforts — as well as proposals added to your assigned constituents — on the **Proposals** list. From here, track your efforts, stay on top of deadlines, and analyze proposals by status, dates, or how much was asked, expected, or received from the constituent.

► **Admins!** To set up **Work Center**, invite everyone who manages constituent relationships or related activities — including volunteers who contact donors — from **Control Panel**, assign them to security groups with access to **Work Center**, and select **Mark as fundraiser** on their constituent records.

By default, the **Actions** list includes only open and past due tasks and interactions, just like a To Do list.

From **Unassigned Constituents**, you can quickly view all active constituents not currently assigned to a fundraiser. To help cultivate these relationships and make sure no one gets left behind, you can easily



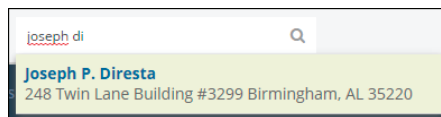
assign these constituents to a fundraiser — either one-off or in-bulk — from the list.

► **Admins!** To set up **Unassigned Constituents**, assign everyone who manages fundraisers and their assignments to security groups given access to **Unassigned Constituents** from **Control Panel**.

To help determine who should manage a relationship, consider criteria such as wealth rating, giving history, and location.

Constituent Relationships

To view and manage details about your relationship with a constituent, simply select their name in a list or search for them by name — like you would in *Google* — to open their record.

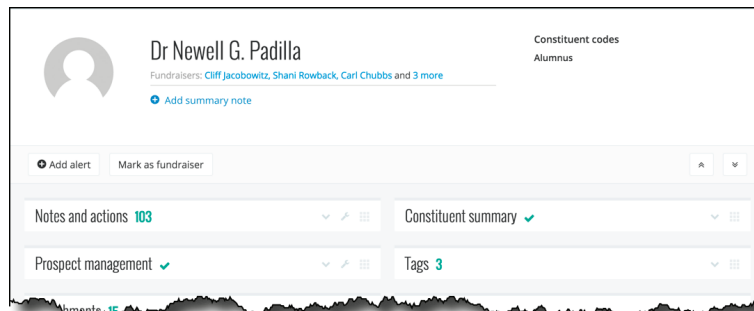


To help identify who you're looking for, search results include details such as contact information.

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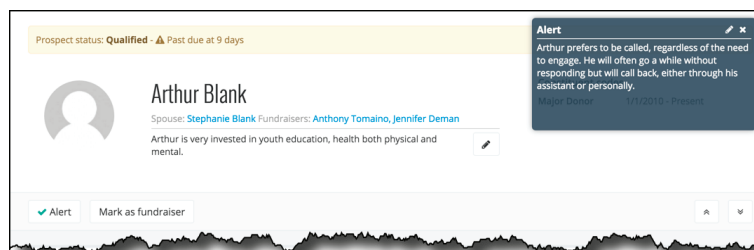
The constituent record provides a flat, single-page view of your relationship, similar to a profile page on a social networking site like *Facebook* or *LinkedIn*.

From the record, you can view and manage details about the individual or organization, including their constituent codes, spouse, assigned fundraisers, membership status, and more.



To help focus on what you find important or need most, you can expand or collapse sections of a record or move them however you like.

Summary note. To help cultivate your relationship with a constituent, pin a note to the top of their record to quickly summarize information you find valuable, such as their personal details and history with your organization.

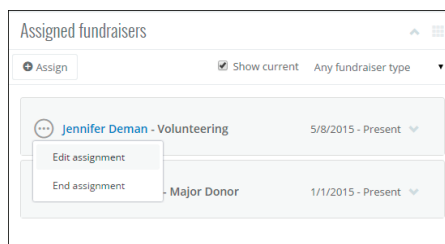


Alert. To give a reminder or special instruction to someone about a constituent's record, you can set an alert to appear in the profile information. For example, you can set an alert as a reminder to not update the record without first contacting its assigned fundraiser or with instructions to handle a high-priority donor with care.

In the database view, alerts appear as *annotations*.

Appeals. Under **Appeals**, you can view which solicitations the constituent received. For each appeal, you can view details such as its name, date, package, and how much the constituent gave in response. With this information, you can quickly gauge how often you ask the constituent for gifts and the effectiveness of each solicitation.

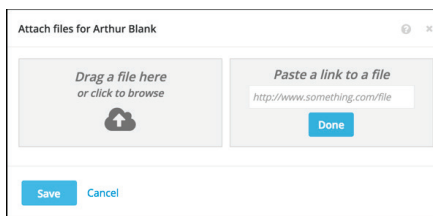
Assigned fundraisers. Under **Assigned fundraisers**, view and manage who's assigned to cultivate your organization's relationship with the constituent. For each fundraiser, you can quickly view their type and when the relationship began and ended. For additional details, such as any goal amounts and notes, simply expand the fundraiser's row.



In the database view, fundraisers appear as *solicitors*.

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Attachments. Under **Attachments**, view and manage files and collateral that help paint a full picture of the relationship. You can upload files directly from your device or network, or link to files found online or in a cloud storage account such as *Dropbox* or *Google Drive*.



Attachments live in the cloud, so you can manage them across devices and in their native applications.

Constituent summary. Under **Constituent summary**, view important details about the individual or organization, including:

- Where to contact them online — through websites, blogs, or social networking sites like *Facebook*, *Twitter*, and *LinkedIn* — or by mail, email, or phone.
- How to address them in mailings and communications.
- Important demographic and business information.
- A timeline synopsis of your interactions with them, including mailings and gifts.

To quickly email or phone a constituent, visit their website or social media profile, or map directions to their work or residence, simply select the contact information.

Custom fields. Under **Custom fields**, you can view specialized information your organization tracks about the constituent, such as hobbies, dietary preferences, or special requests.

► **Admins!** To set up the custom fields available to track specialized information, save them and their values as attributes from *Configuration* in the database view.

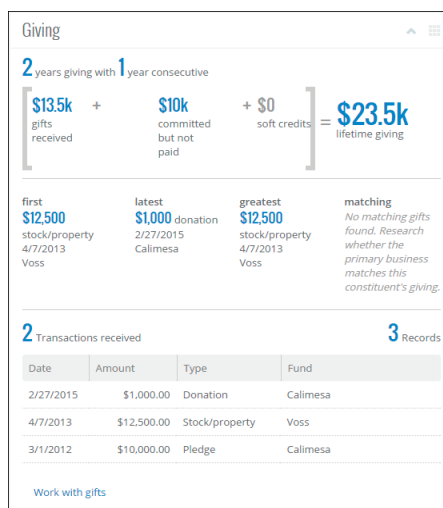
In the database view, custom fields appear as *attributes*.

Education. Under **Education**, view information about an individual's academic history, including where and when they attended school, whether they graduated, and with what degree.

Events. With *Events Management*, you can view which of your organization's events — such as fundraising galas, volunteer luncheons, or other activities — the constituent registered for. With this information, you can quickly gauge the constituent's involvement with your organization and plan for upcoming opportunities for interactions.

Giving. Under **Giving**, view a quick summary of the constituent's gifts to your organization, including their estimated lifetime giving, open commitments, and soft credits; the frequency of their giving; milestone gifts, such as first, latest and greatest; and a history of all their gifts.

For a more detailed view of their giving, select **Work with gifts** to open a list of their gifts. From the list, you can filter and analyze giving patterns — such as by campaign, amount, or time period — and select which columns to view to help focus on only what matters to you.

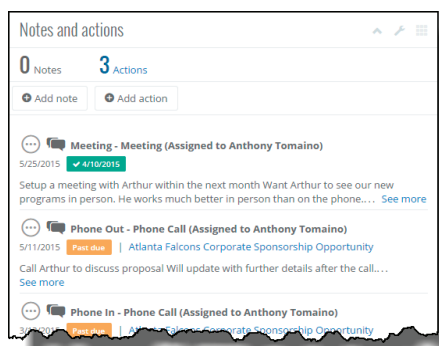


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To view detailed information about a gift, such as its credited fundraisers, soft credit recipients, acknowledgement and receipt status, general ledger post status, and intended campaign or fund, simply select its amount to open its record.

Membership. With *Membership Management*, you can set up membership programs to help engage constituents and encourage donor loyalty. Under **Membership**, view details about the constituent's memberships, such as the category, standing, program, expiration date, and dues of each. With this information, you can quickly view the constituent's activity as a member to see how engaged they are with your organization.

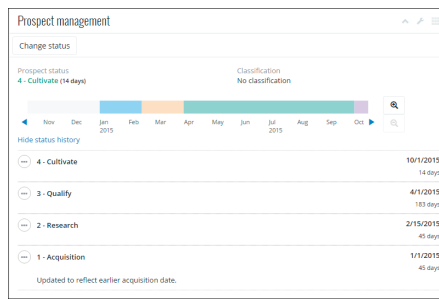
Notes and actions. Under **Notes and actions**, track information about your relationship and your tasks and interactions to cultivate the relationship, such as mailings and personal face-to-face meetings with the constituent. When you add an action, you can assign it to yourself or another fundraiser to make sure it happens. With the web interface, you can save details about actions and mark them as complete as they happen, through your smart phone, tablet, or other device. For a full list of a constituent's notes or actions, select their total under **Notes and actions**.



► **Admins!** To enable fundraisers to track the progress of their actions, you can set up *Raiser's Edge NXT* to use **either** its default completion statuses or custom status codes that better match your organization's business processes. To set up custom status codes, save them as a table from *Configuration* in the database view.

Proposals. With *Prospect Research Management*, track details about your plans and efforts to build a relationship with a donor and secure major gift opportunities. To view detailed information about a proposal effort, such as its assigned fundraisers, pertinent amounts, and the campaigns and funds its gifts apply to, simply select its name to open its record.

Prospect management. With *Prospect Research Management*, track the constituent's status in your moves management process, and view the constituent's giving preferences, financial information, contributions to other charitable organizations, and current prospect classification. To view a breakdown of contributions to other efforts, such as philanthropy, political campaigns, and other causes, simply select its total. With these details, you can better develop strategies to cultivate the relationship and determine their giving potential.



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► **Admins!** To track constituents through your moves management process and alert fundraisers when someone spends too long at a specific stage, you can set up the available prospect statuses and expected time frames for each.

Ratings. Under **Ratings**, analyze the constituent's estimated wealth and their capacity to give, based on information from your organization's prospect research or sources such as **Target Analytics**, a division of Blackbaud Inc. Use this information to help determine where to focus your efforts, whether to pursue a prospect or major gift, and how much to ask from a donor.

Relationships. Under **Relationships**, view the people and organizations that share an immediate relationship with the constituent, such as family, friends, or employers. To view any additional information about a related individual or organization, simply select their name to open their record (even if they're not also a constituent).

Tags. To help focus on relationships that need your attention, **Raiser's Edge NXT** automatically listens to your constituent records and tags them based on special situations such as upcoming birthdays or lapsed giving. Under **Tags**, you can view which situations apply to the constituent, such as to prioritize interactions and determine how to best cultivate the relationship.

Volunteer. With *Volunteer Management*, you can view a summary of the constituent's volunteer efforts with your organization — including their interests and first and latest assignments — under **Volunteer**. With these details, you can determine how active a constituent is with your organization and how best to keep them engaged with volunteer assignments related to your interests.

The screenshot shows a 'Volunteer' summary card with the following data:

- Summary:** 21 volunteer hours, \$1,335.00 value contributed, 2/3 years recurring volunteer.
- Interests:** Working with youth 8-15, One-one-one interactions with youth.
- First assignment:**

Job	Snug Hugs Metro
Date	12/1/2014
Department	Holiday Events
Location	Community Child Care Center - Palatine
- Latest assignment:**

Job	Holiday Gift Drive - Metro
Date	7/11/2015
Department	Holiday Events
Location	Corporate Home Office (Wacker)
- Availability:**

January 1 - June 30	Mondays	5:00 PM - 8:00 PM
January 1 - December 31	Saturdays	8:00 AM - 12:00 PM
July 1 - December 31	Tuesdays	5:00 PM - 8:00 PM

Lists

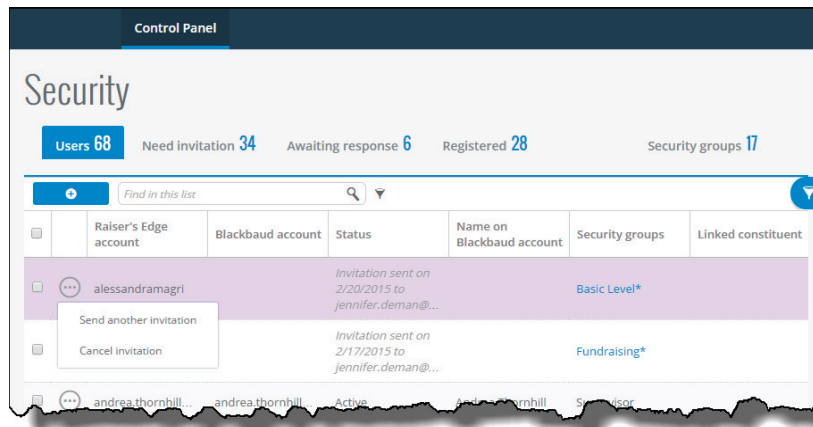
From **Lists**, you can create and manage custom lists of constituents, gifts, actions, and — with *Prospect Research Management* — proposals, such as to analyze fundraising effectiveness or refine recipients for a communication. You can work with multiple lists at once — such as different groups of records based on different filter choices — and save filter settings for the latest records based on the criteria.

► **Admins!** To set up **Lists**, assign everyone who should create custom lists of records to security groups given access to **Lists** — and which types of lists — from **Control Panel**.

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Security Management

Security settings and groups configured in the classic interface also apply to users of the web interface. From **Control Panel**, supervisor users such as system admins can manage users of **Raiser's Edge NXT**.



To help manage users, you can view lists based on invitation status, such as **Need invitation** or **Awaiting response**.

- Invite users of the database view to use the web interface.
- Add entirely new users to **Raiser's Edge NXT**.
- Cancel or re-send invitations, such as if email delivery fails.

You assign rights and permissions via security groups, so you can manage multiple users at once. To view details about a user's security group, such as their assigned rights and who else shares the group, select the group's name.

► When you add new users to **Raiser's Edge NXT**, you select which security group they belong to when you send their invitations.

Database View and Configuration

For detailed administration of your constituents, gifts, and organizational settings, you can select **Open database view** to manage your data through Citrix on your desktop. From the database view, you use a robust interface to view and manage all aspects of your fundraising efforts, including:

- Track detailed constituent and relationship information, including matching gift programs and memberships.
- Manage gifts and fundraising efforts such as campaigns, funds, appeals, events, and mailings.
- Create detailed queries to group, analyze, and export records.
- Enter or update multiple records in bulk through *Batch*; *Import*; and *Globally Add, Delete, and Change*.
- Set advanced security for users, records, and data.

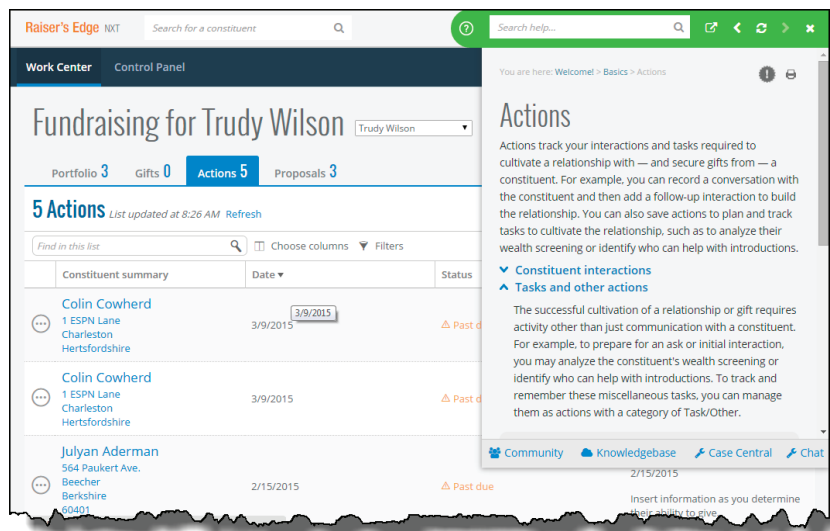
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In the database view, you can configure settings and features so your organization gets the most out of the web interface.

- To use custom status codes to track the progress of actions, set them up as action statuses in *Configuration*.
- To track your constituents' affiliations with your organization, set them up as constituent codes in *Configuration*.
- To track specialized information about constituents or proposals as custom fields, set up the available fields and values as attributes in *Configuration*.
- With *Prospect Research Management*, you can track where proposals are in your organization's solicitation process. In *Configuration*, set up the available proposal statuses as tables.

In-Product Assistance

Have a question about a concept or feature in **Raiser's Edge NXT**? Simply select the ? in the upper right corner for Help content, How-tos, and best practices based on what you're working with. If you still have questions, you can also quickly access additional resources like Knowledgebase and Chat Support.



When you first log in after a release, the Help automatically opens to a **What's New** topic so you know what's what. To quickly return to the topic and review content about a new feature, click  at the top of any Help topic.

► In addition to the in-product Help, you can find helpful blog posts and conversation in the **Raiser's Edge NXT Community** and training opportunities at **Blackbaud University**.