



Grant strategies to bridge the divide between
grant-seekers and **grant-makers**



HOW TO

How To: Connecting Strategic Grants GEM Portal to Blackbaud Raiser's Edge NXT

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This How To details the steps you need to follow to set up your connection between the

Strategic Grants GEM Portal

and

Blackbaud Raiser's Edge NXT.

The following is a once off process. Once the connection has been established between the two systems you will be able to push Funder / Grants data from GEM Portal into Raiser's Edge NXT.

Requirements

Strategic Grants must have enabled the interface connection in the backend database. Speak to your Strategic Grants Client Manager about organising for this to occur.

The person in your organisation who is establishing the initial connection must have **Administrator access (Environment Admin)** to Raiser's Edge NXT

** You must be running the Prospects module known as RE:Search in Raiser's Edge NXT to be able to use the connector

The Steps

1. Log in to your Blackbaud Raiser's Edge NXT

You must be an **Administrator** with "**environment admin**" privileges. This is different to "solution admin" privileges.

Refer to this Blackbaud Knowledgebase article to determine if you have environment admin access:

<https://kb.blackbaud.com/knowledgebase/Article/115405>

Manage roles for Andrew Thompson

It may take several minutes for changes to take effect.

Security

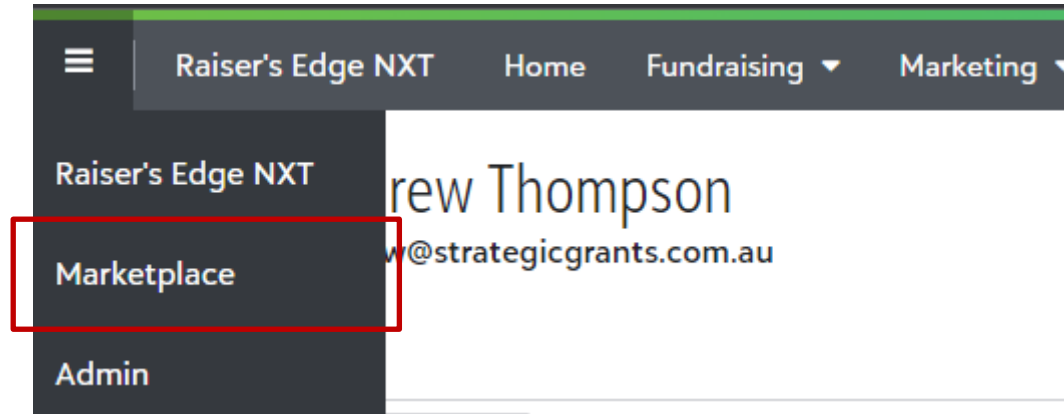
Make environment admin ⓘ

Raiser's Edge NXT Make solution admin ⓘ

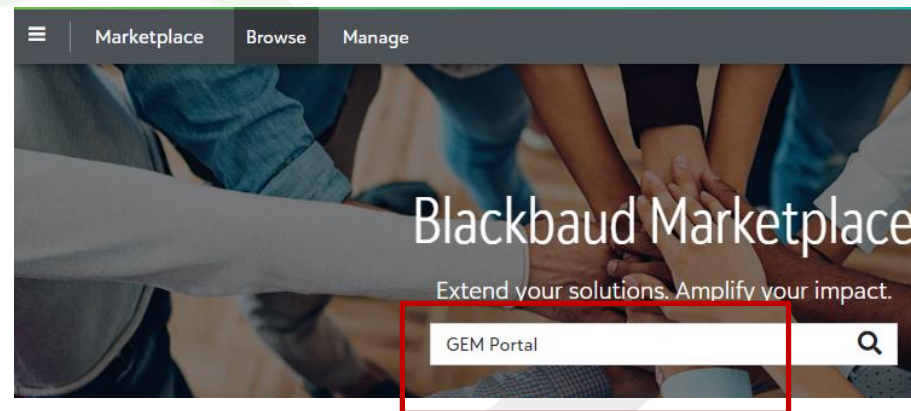
You need to have **Make environment admin** ticked.

It is possible that no one in your organisation has environment admin access. If this is the situation you will need to contact Blackbaud Support and request this access.

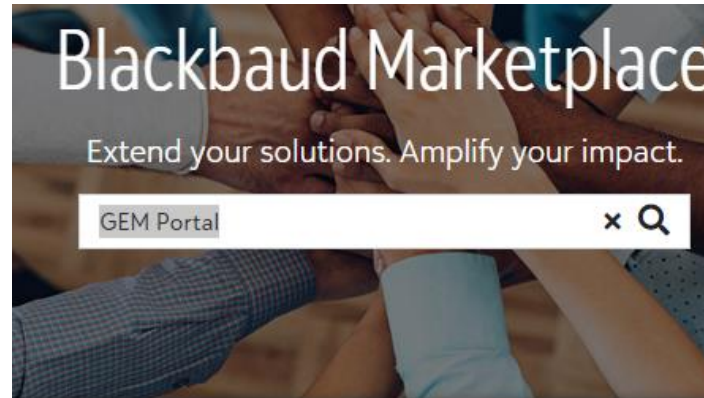
Open Blackbaud **Marketplace**




Search for GEM Portal



Click on the Strategic Grants GEM Portal app to go to the Connect screen




All apps



**Strategic Grants
GEM Portal**
Strategic Grants

GEM Portal contains a customised grants calendar and funder information of just the grants relevant to your organisation. Synchronise grants into RE NXT at the push of a button.

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Click on the Connect button and install the App into your Blackbaud environment

The screenshot shows a web interface for the Strategic Grants GEM Portal. At the top, there is a dark navigation bar with a menu icon, 'Marketplace', 'Browse', and 'Manage'. Below this, the left sidebar features the 'SG' logo, the text 'Strategic Grants GEM Portal', 'Publisher Strategic Grants', and two buttons: 'Connect' (highlighted with a red box) and 'Contact us'. The main content area on the right has a blue 'Overview' button, followed by the heading 'Overview' and the text 'Connect your GEM Portal'. Below this is another heading 'GEM Portal -' and the text 'GEM Portal is a custom for your organisation'. At the bottom of the main area, it says 'Strategic Grants work' and 'Now we can also deli'.

Strategic Grants Pty Ltd | ABN 58 140 784 943

PO Box 589
Annerley Qld 4103

Australia P: 07 3892 1150
New Zealand P: 09 801 0433

E: info@strategicgrants.com.au www.strategicgrants.com.au
E: info@strategicgrants.co.nz www.strategicgrants.co.nz


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Click Connect

Connect application? ? x

 **Strategic Grants GEM Portal**
Strategic Grants

For more information about Strategic Grants GEM Portal, see the [provider's website](#).

By connecting this application, you agree to let Blackbaud share user details with the provider for onboarding, support, billing, and other transactional activities.

You also agree to the provider's [license terms and conditions](#) and [privacy policy](#). The rights to use this application do not come from Blackbaud, unless Blackbaud is the provider.

Connect Cancel

Click Close

Strategic Grants GEM Portal is now connected

Ready to get started with the application?

Get started with Strategic Grants GEM Portal Close

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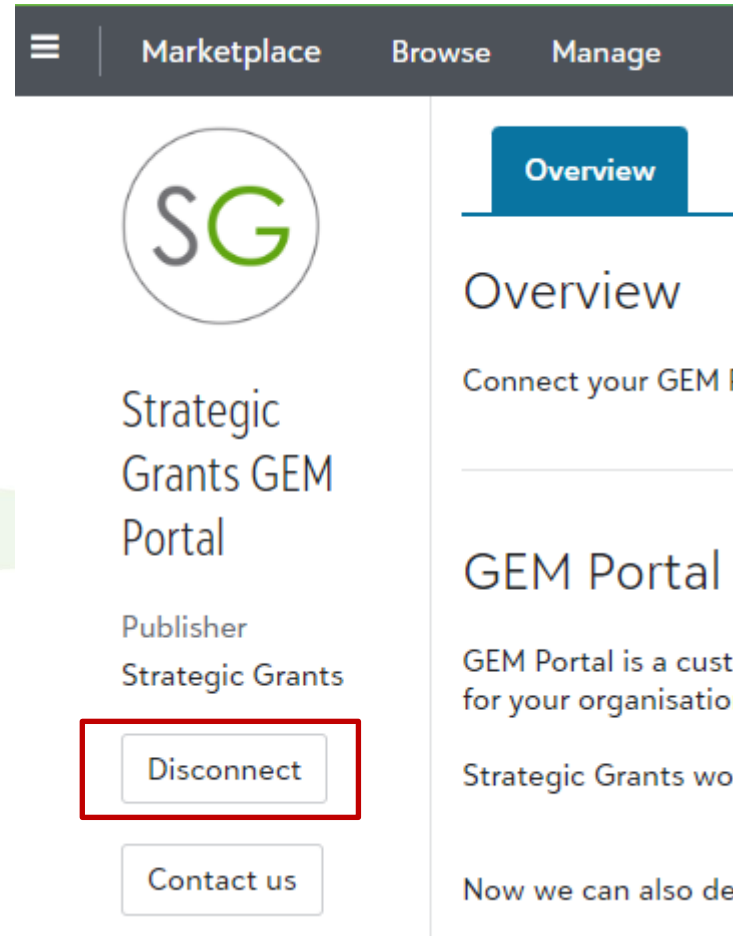
PO Box 589
Annerley Qld 4103

Australia P: 07 3892 1150
New Zealand P: 09 801 0433

E: info@strategicgrants.com.au www.strategicgrants.com.au
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When successfully installed the Marketplace App Connect button will have changed to say Disconnect

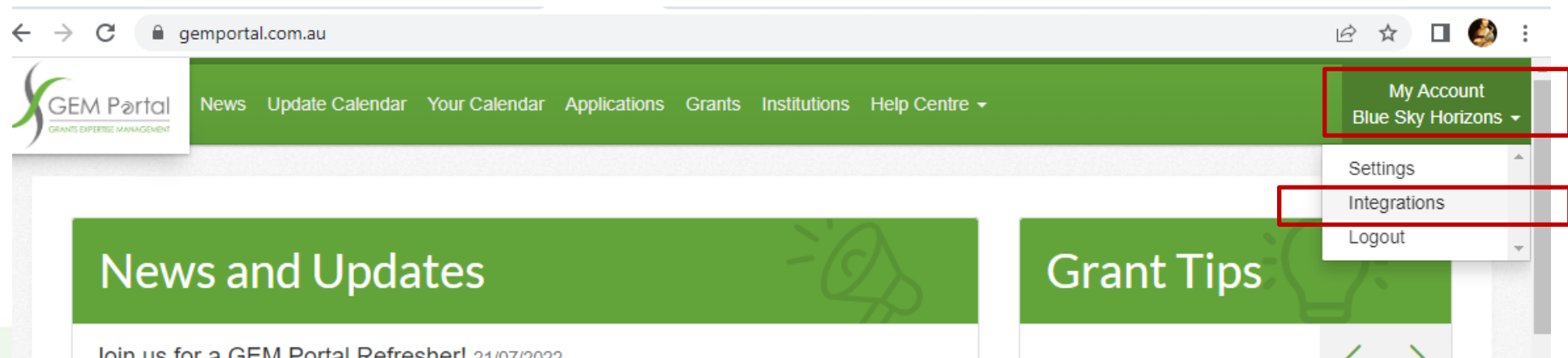


That's the Blackbaud side finished.

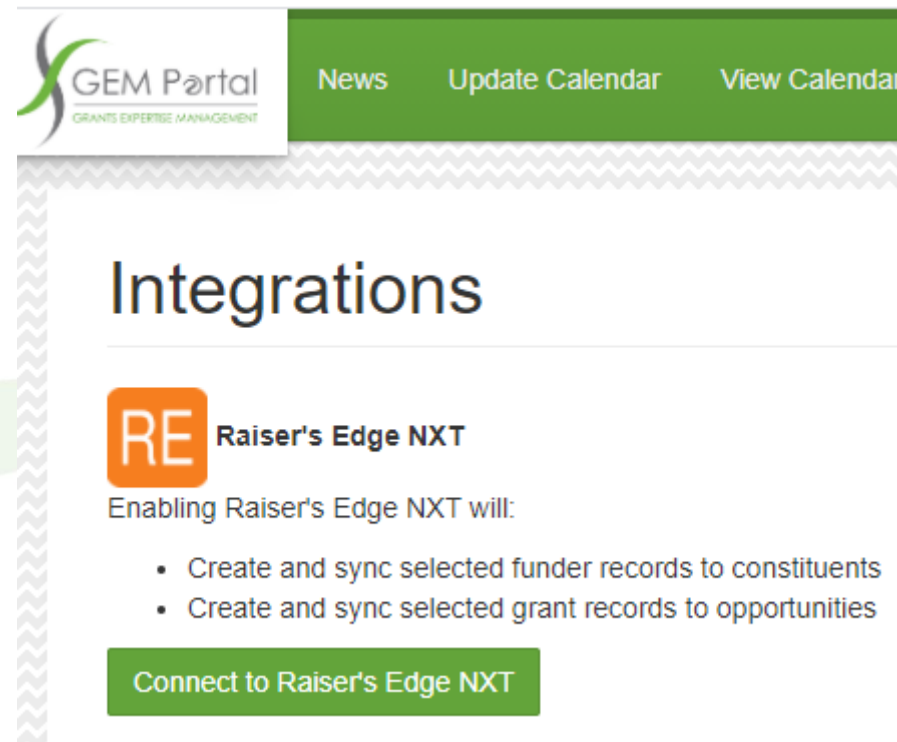
2. Log in to your Strategic Grants GEM Portal

3. Within GEM Portal, click on your Organisation Name, top right hand corner of screen

You will see an option call **Integrations**. Select this option:

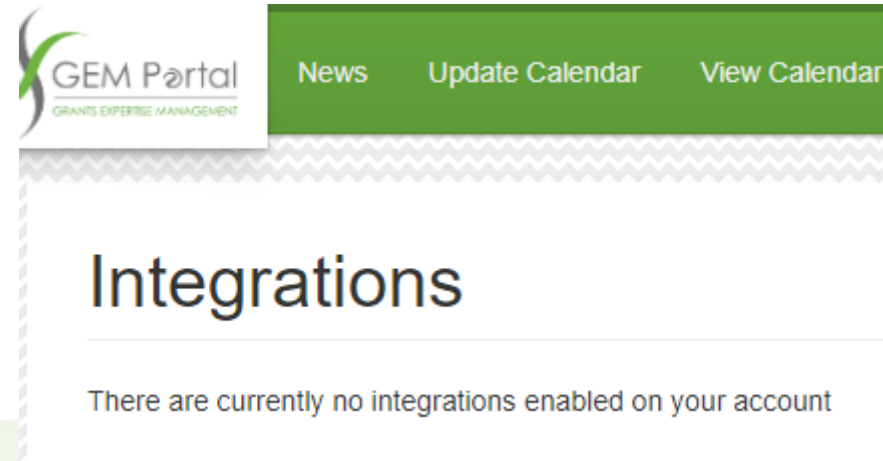


If your Strategic Grants Client Manager contact has enabled the integration in our database, you will be presented with this screen, with the green **Connect to Raiser's Edge NXT** button:



The screenshot shows the GEM Portal interface. At the top left is the logo for GEM Portal (GRANTS EXPERTISE MANAGEMENT). To the right of the logo is a green navigation bar with the text "News", "Update Calendar", and "View Calendar". Below the navigation bar is a section titled "Integrations". Under "Integrations", there is a section for "Raiser's Edge NXT" with an orange "RE" icon. Below the icon, it says "Enabling Raiser's Edge NXT will:" followed by a bulleted list: "• Create and sync selected funder records to constituents" and "• Create and sync selected grant records to opportunities". At the bottom of this section is a green button that says "Connect to Raiser's Edge NXT".

If it has not been enabled, you will see a screen like this advising “*There are currently no integrations enabled on your account*”



If your screen looks like this, contact Strategic Grants for assistance.

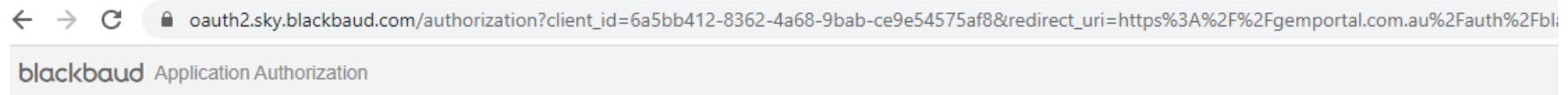


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4 Click the Connect to Raiser's Edge NXT button

Connect to Raiser's Edge NXT

You will be directed to a **Blackbaud** Application Authorization screen:



would like to access your Blackbaud data

By authorizing Strategic Grants, you provide access to the data and functionality that your user account can access with your email address. In addition, Strategic Grants operates under Blackbaud's Terms of Service and Privacy Policy.

From: STRATEGIC GRANTS PTY. LTD. - STRATEGIC GRANTS PTY. LTD. Environment 1

Authorize Cancel

Strategic Grants Pty Ltd | ABN 58 140 784 943

PO Box 589
Annerley Qld 4103

Australia P: 07 3892 1150
New Zealand P: 09 801 0433

E: info@strategicgrants.com.au
E: info@strategicgrants.co.nz

www.strategicgrants.com.au
www.strategicgrants.co.nz

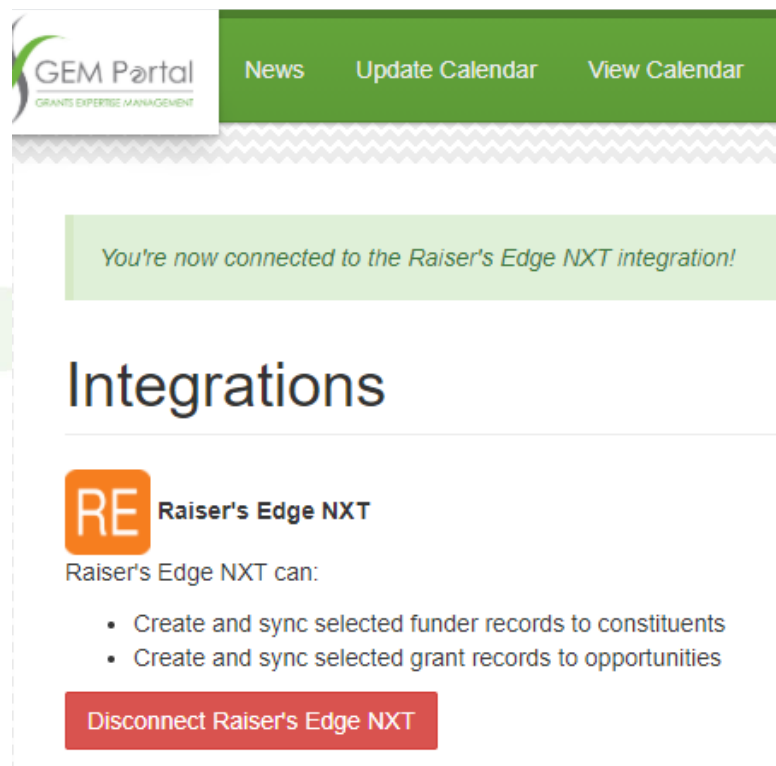
f /strategicgrants
t /strategicgrants

5 Click the Authorize button

After the authorisation process is complete, you will return to the **GEM Portal: Integrations** screen.

If the connection process has been successful, you will see a red button that is titled **Disconnect Raiser's Edge NXT**.

(Don't click the big red button !)

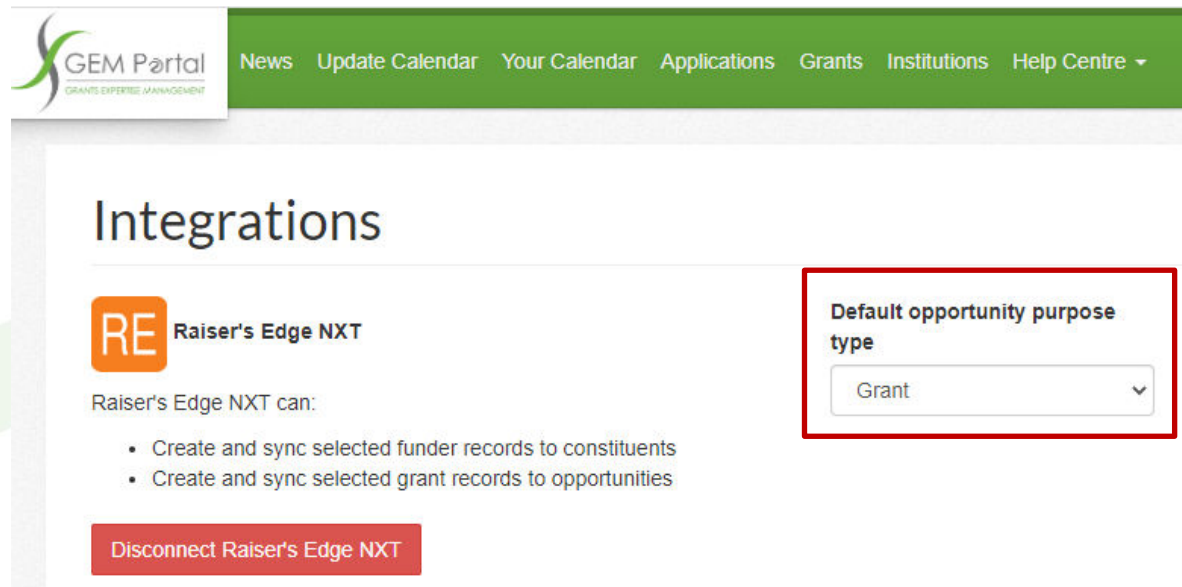


The screenshot shows the GEM Portal interface. At the top left is the GEM Portal logo with the tagline 'GRANTS EXPERTISE MANAGEMENT'. To the right are navigation links: 'News', 'Update Calendar', and 'View Calendar'. Below the navigation is a green banner with the text 'You're now connected to the Raiser's Edge NXT integration!'. The main heading is 'Integrations'. Underneath, there is an orange square icon with 'RE' and the text 'Raiser's Edge NXT'. Below this, it says 'Raiser's Edge NXT can:' followed by a bulleted list: 'Create and sync selected funder records to constituents' and 'Create and sync selected grant records to opportunities'. At the bottom of this section is a red button labeled 'Disconnect Raiser's Edge NXT'.

6 Set the Default opportunity purpose type

The connection between GEM Portal and Raiser's Edge NXT has been successfully established.

You will see a drop down selector titled **Default opportunity purpose type**



GEM Portal News Update Calendar Your Calendar Applications Grants Institutions Help Centre ▾

Integrations

RE Raiser's Edge NXT

Raiser's Edge NXT can:

- Create and sync selected funder records to constituents
- Create and sync selected grant records to opportunities

Disconnect Raiser's Edge NXT

Default opportunity purpose type

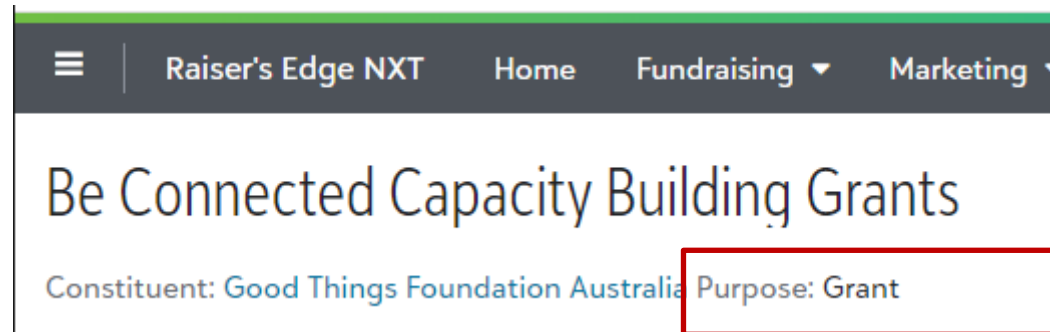
Grant ▾

Select from this list, the Opportunity Purpose that you want to set as your default. The list of available values is pulled out of your Raiser's Edge NXT. It is specific to your organisation.



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When you create new Opportunities in Raiser's Edge NXT, from within GEM Portal. The new Opportunity will be set with the Opportunity Type value that you set as your default:



It is the **Purpose** field on the Opportunity record.

You can return to the Integrations screen at any time to change this default value, if needed.

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PO Box 589
Annerley Qld 4103

Australia P: 07 3892 1150
New Zealand P: 09 801 0433

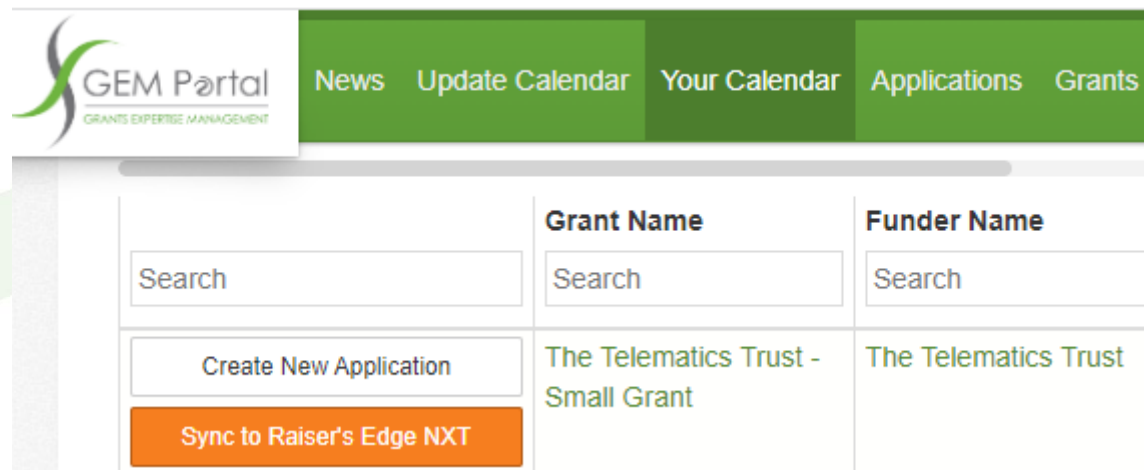
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Confirmation that the connection between systems has been established.

Now that everything is set up, you can confirm that the connection has been successfully established.

Open the GEM Portal **Your Calendar** screen. You will see that there are now orange buttons in the first column of **Your Calendar** with the label **“Sync to Raiser’s Edge NXT”**



| | Grant Name | Funder Name |
|--|-------------------------------------|-------------------------------------|
| <input type="text" value="Search"/> | <input type="text" value="Search"/> | <input type="text" value="Search"/> |
| <input type="button" value="Create New Application"/> | The Telematics Trust - Small Grant | The Telematics Trust |
| <input type="button" value="Sync to Raiser's Edge NXT"/> | | |

You have completed the process to establish a connection between GEM Portal and Raiser’s Edge NTX.



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For help on how to use the interface refer to our other **GEM Portal HowTo** documents and the **Help** within **GEM Portal**.

Contact the Strategic Grants Team if you would like additional support.

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PO Box 589
Annerley Qld 4103

Australia P: 07 3892 1150
New Zealand P: 09 801 0433

E: info@strategicgrants.com.au www.strategicgrants.com.au
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