



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



HOW TO

How To: Using the Blackbaud Raiser's Edge NXT interface

Version: 1.0



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How To: Using the Blackbaud Raiser's Edge NXT interface

This How To will assist you to send Funder / Grant information from your **GEM Portal** grants calendar into your **Blackbaud Raiser's Edge NXT** to create Opportunities.

You have 2 options when sending grants data to Raiser's Edge NXT:

1. **Push an identified Grant record from GEM Portal View Calendar screen to Raiser's Edge NXT, creating a new Constituent (Funder record data) and Opportunities (Grant record data) record pair within Raiser's Edge NXT.**
2. **Look up an existing Raiser's Edge NXT Constituent from within GEM Portal View Calendar. Create a new Opportunity record (containing GEM Portal grants information) attached to the existing Constituent.**

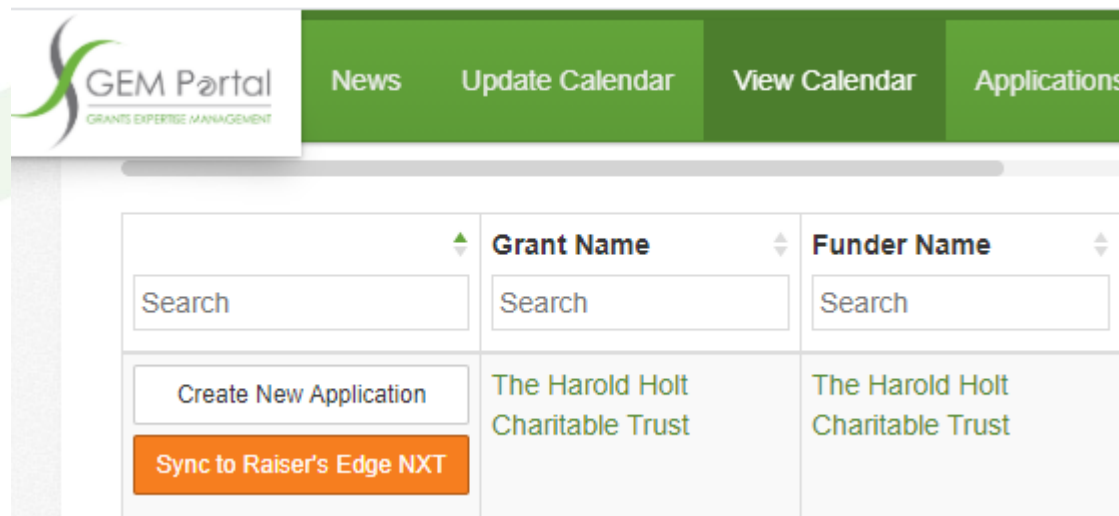
1. Push an identified Grant record from GEM Portal View Calendar screen to Raiser's Edge NXT, creating a new Constituent (Funder record data) and Opportunity (Grant record data) record pair within Raiser's Edge NXT.

Open the **View Calendar** screen.

Identify the grant that you would like to push across to Raiser's Edge NXT.

This grant and associated funder information is currently not in Raiser's Edge NXT as a Constituent / Opportunity

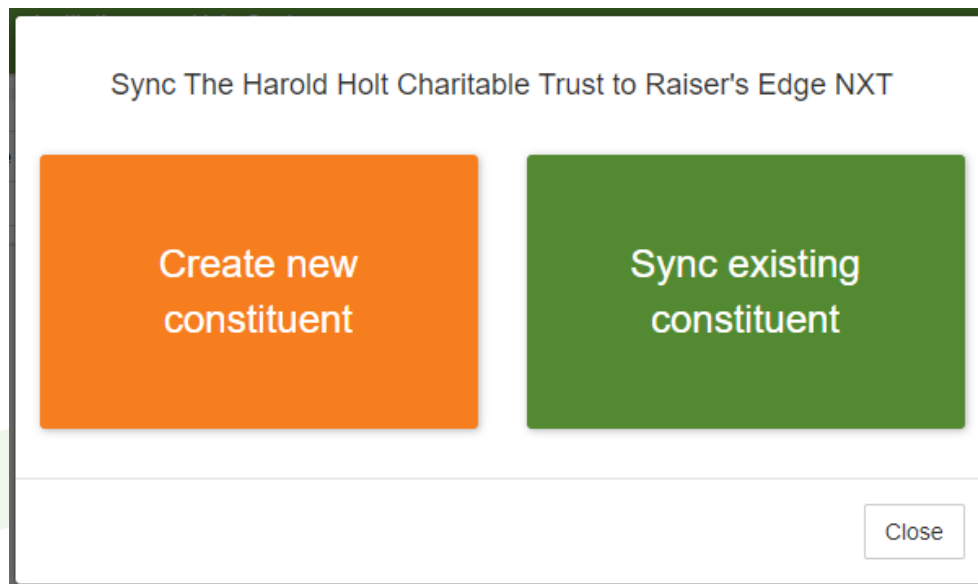
In the first column of View Calendar is the orange "**Sync to Raiser's Edge NXT**" button



| | 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 Harold Holt Charitable Trust | The Harold Holt Charitable Trust |
| <input type="button" value="Sync to Raiser's Edge NXT"/> | | |

Click the “**Sync to Raiser’s Edge NXT**” button

You are prompted with 2 options:



Click **Create new constituent**.

You will be prompted to select a **Raiser’s Edge Constituent Code**

If your organisation uses the **Constituent Code**, select the most appropriate option from the list

Sync The Harold Holt Charitable Trust to Raiser's Edge NXT

Create new constituent

Sync existing constituent

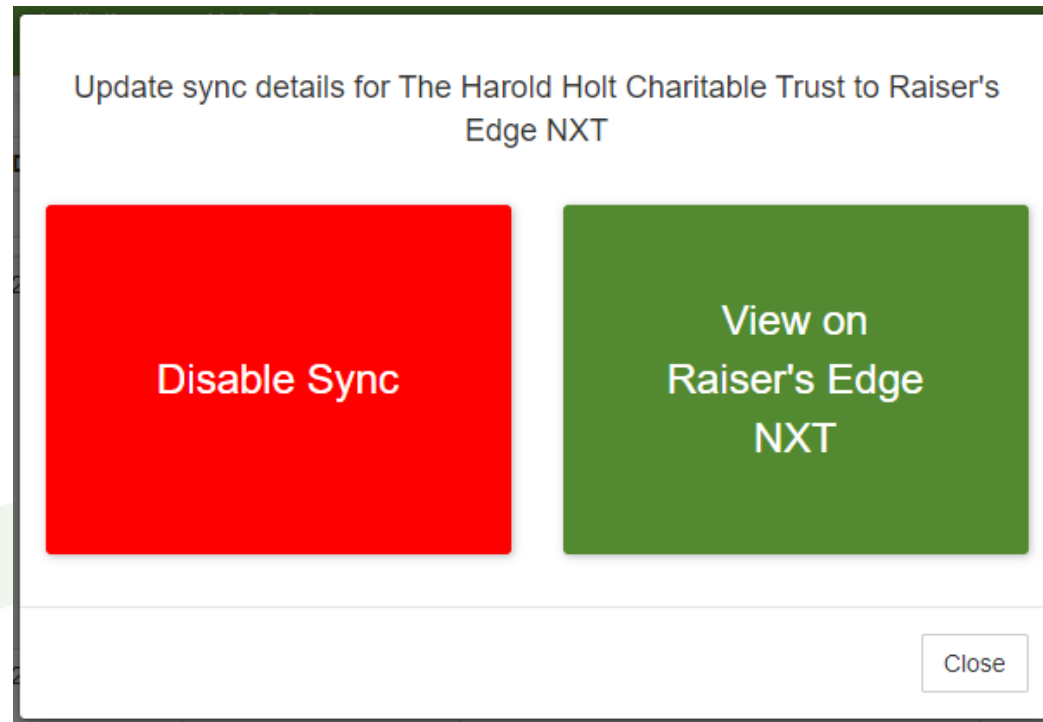
Select a Constituent Code to assign to the newly created constituent

Foundation

Close Sync Now

Now click the **Sync Now** button

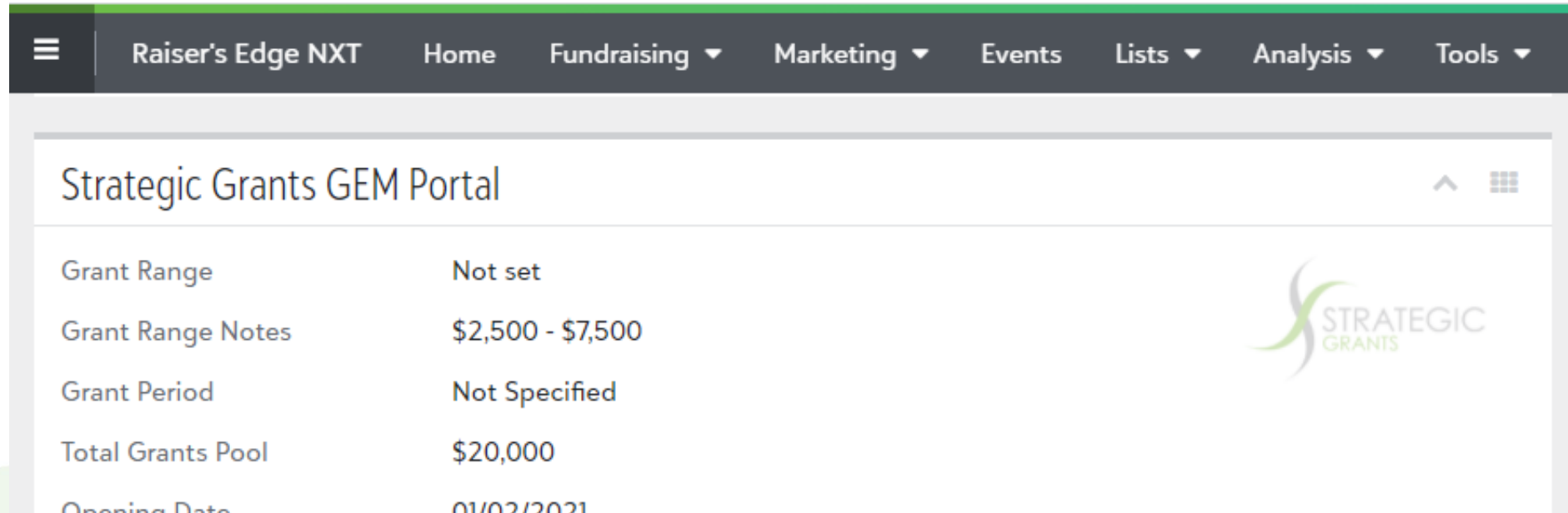
If Sync Now was successful you will be presented with this screen:



To view the new Constituent / Opportunity you have created in Raiser's Edge NXT, click the **“View on Raiser's Edge NXT”**. This will open Raiser's Edge NXT onto the new Opportunity.

Strategic Grants GEM Portal Tile

Within the Opportunity record is the Strategic Grants GEM Portal Tile



The screenshot shows a web interface for Raiser's Edge NXT. The top navigation bar includes a menu icon, 'Raiser's Edge NXT', and several menu items: 'Home', 'Fundraising', 'Marketing', 'Events', 'Lists', 'Analysis', and 'Tools'. Below the navigation bar is a section titled 'Strategic Grants GEM Portal'. This section contains a table with the following data:

| | |
|-------------------|-------------------|
| Grant Range | Not set |
| Grant Range Notes | \$2,500 - \$7,500 |
| Grant Period | Not Specified |
| Total Grants Pool | \$20,000 |
| Opening Date | 01/02/2021 |

The Strategic Grants logo is also visible in the bottom right corner of the tile.

While ever you have an active connection between GEM Portal and Raiser's Edge NXT, the information in the Tile for this Grant will present the latest available information out of GEM Portal.

Even if your GEM Portal is not open, the Tile will continue to present the latest available data.

Now that a link has been established for this grant, even if your GEM Portal is not open, any updates made by Strategic Grants in our grants database will be reflected in this Raiser's Edge NXT Constituent / Opportunity record.

Keeping your calendar updated.

You still need to regularly run the Update Calendar in GEM Portal, to keep your full calendar updated with the latest opportunities for your prospect research.

As we mentioned on the previous page,

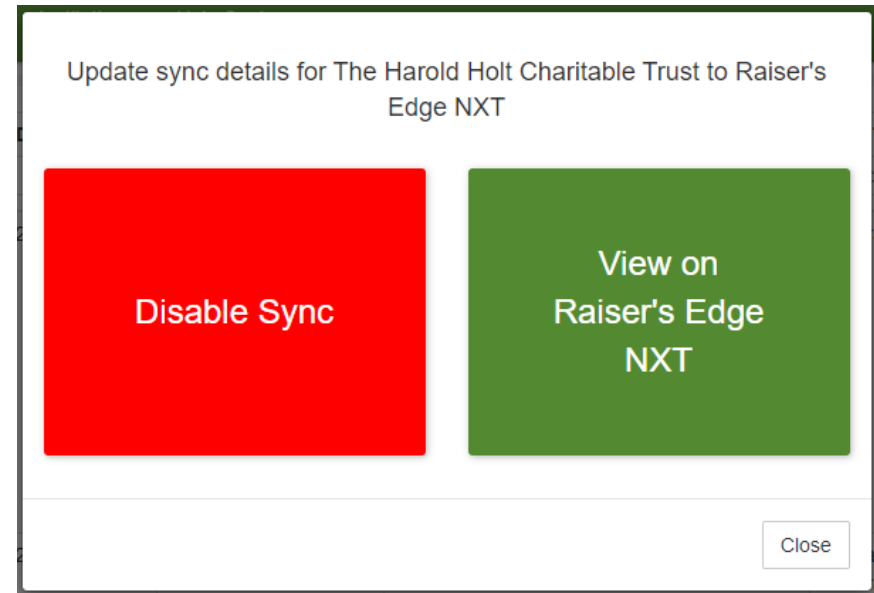
Even if your GEM Portal is not open, the Tile will continue to present the latest available data.

The specific grants you have linked to Raiser's Edge NXT will now always be kept up to date.

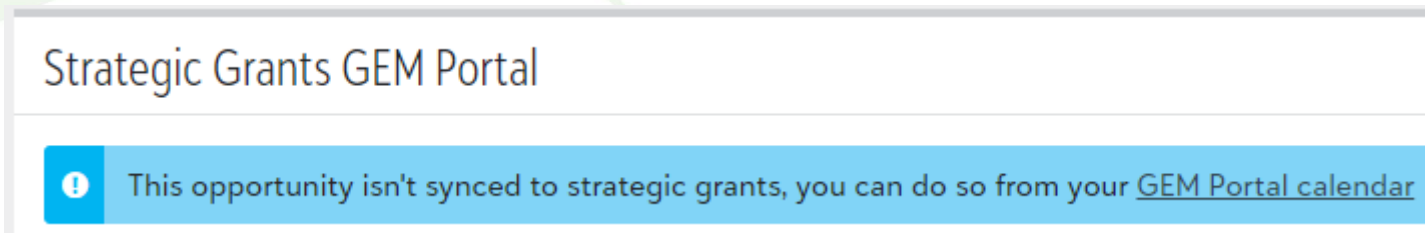
It is important that you still regularly run the **Update Calendar** process so that you are bringing in any new opportunities to your calendar.

Disable the Sync

Click the **Disable Sync** button if you want to remove the connection between GEM Portal and Raiser's Edge NXT for this particular Funder/Grant record.



After you disable the sync, when you return to the Opportunity in Raiser's Edge NXT, the Strategic Grants Tile will present like this:



The GEM Portal grant/funder data is no longer available.

Click **Close** to return to your GEM Portal

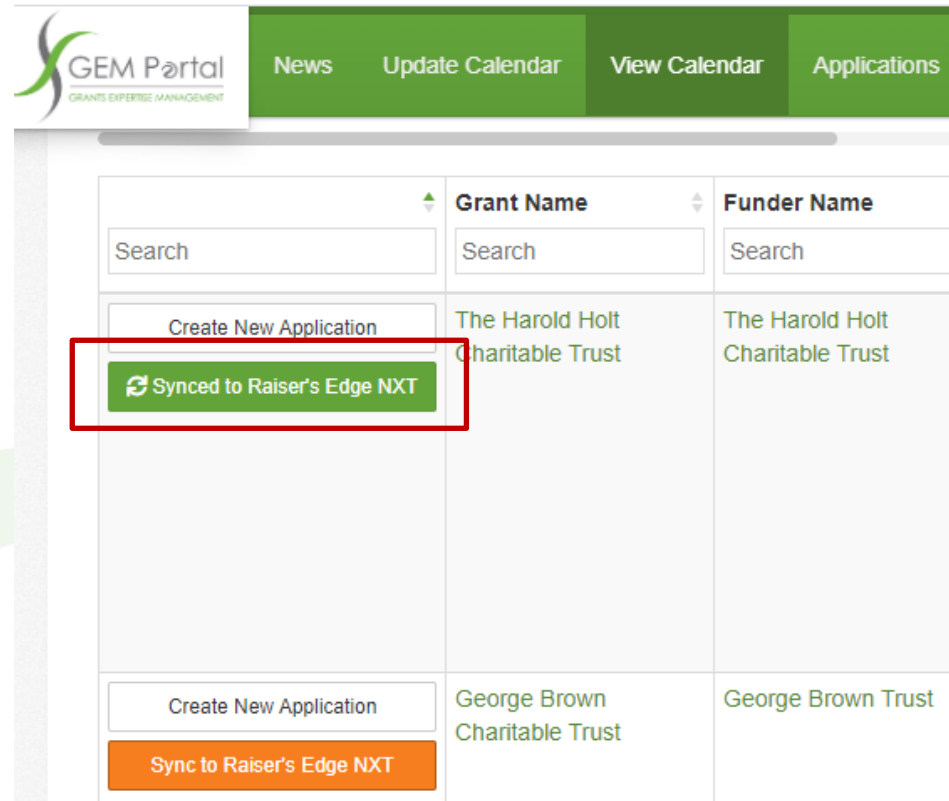
Update sync details for The Harold Holt Charitable Trust to Raiser's Edge NXT

Disable Sync

View on Raiser's Edge NXT

Close

Returning to GEM Portal **View Calendar** you will see that the button has changed from an orange “**Sync to Raiser’s Edge NXT**” to a green button that says “**Synced to Raiser’s Edge NXT**”:



| | Grant Name | Funder Name |
|---|-------------------------------------|-------------------------------------|
| <input type="text" value="Search"/> | <input type="text" value="Search"/> | <input type="text" value="Search"/> |
| Create New Application | The Harold Holt Charitable Trust | The Harold Holt Charitable Trust |
| Synced to Raiser's Edge NXT | | |
| Create New Application | George Brown Charitable Trust | George Brown Trust |
| Sync to Raiser's Edge NXT | | |

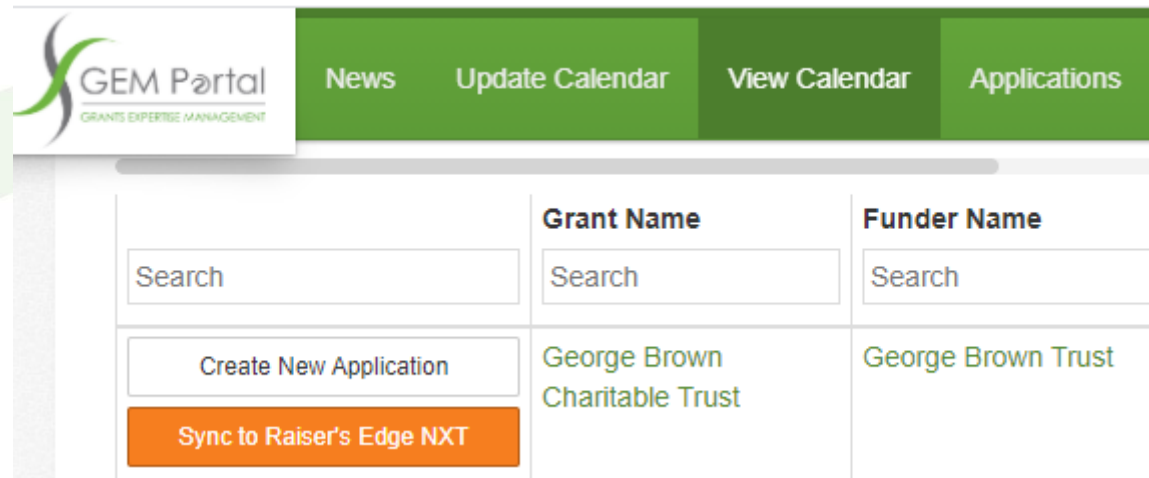
2. Look up an existing Raiser's Edge NXT Constituent from within GEM Portal View Calendar. Create a new Opportunity record (containing GEM Portal grants information) attached to the existing Constituent.

Open the **View Calendar** screen.

Identify the grant that you would like to push across to Raiser's Edge NXT.

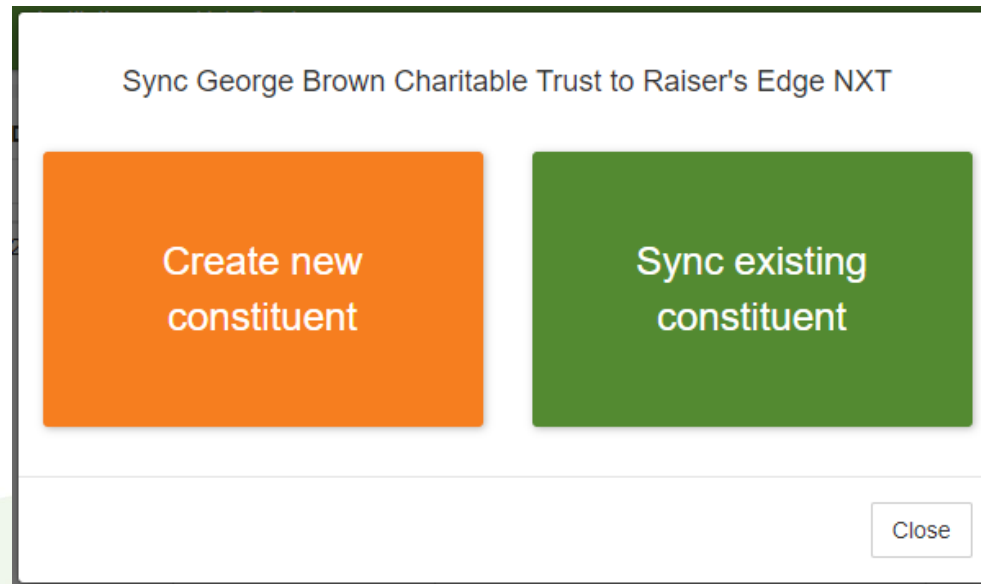
This grant and associated funder information will be linked to an already existing Raiser's Edge NXT Constituent record

In the first column of View Calendar click the orange **"Sync to Raiser's Edge NXT"** button



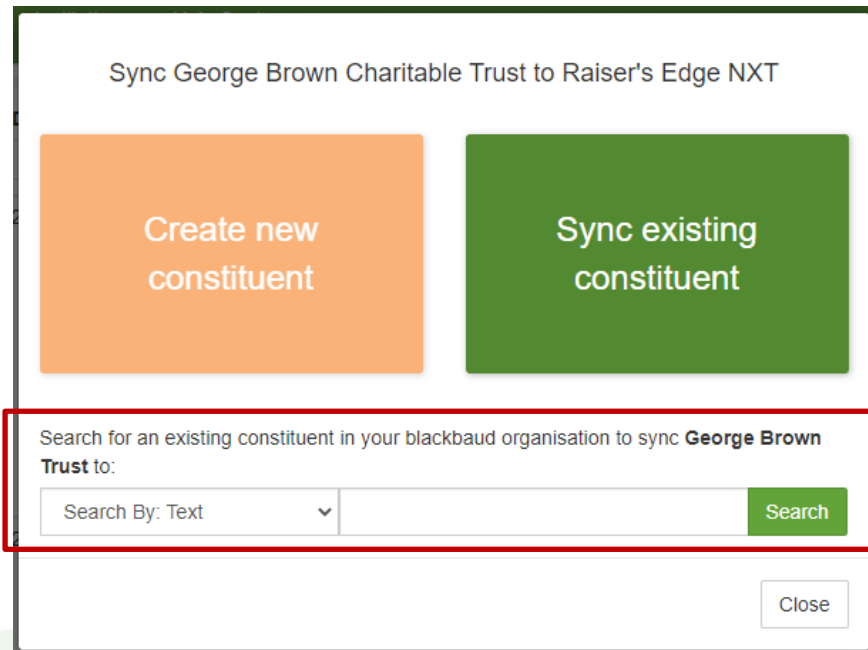
| | Grant Name | Funder Name |
|--|-------------------------------------|-------------------------------------|
| <input type="text" value="Search"/> | <input type="text" value="Search"/> | <input type="text" value="Search"/> |
| <input type="button" value="Create New Application"/> | George Brown Charitable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

You are prompted with 2 options:



Click the **"Sync existing constituent"** button.

A **Search By:** box will appear where you can type in details that identify the existing Raiser's Edge Constituent:



Sync George Brown Charitable Trust to Raiser's Edge NXT

Create new constituent

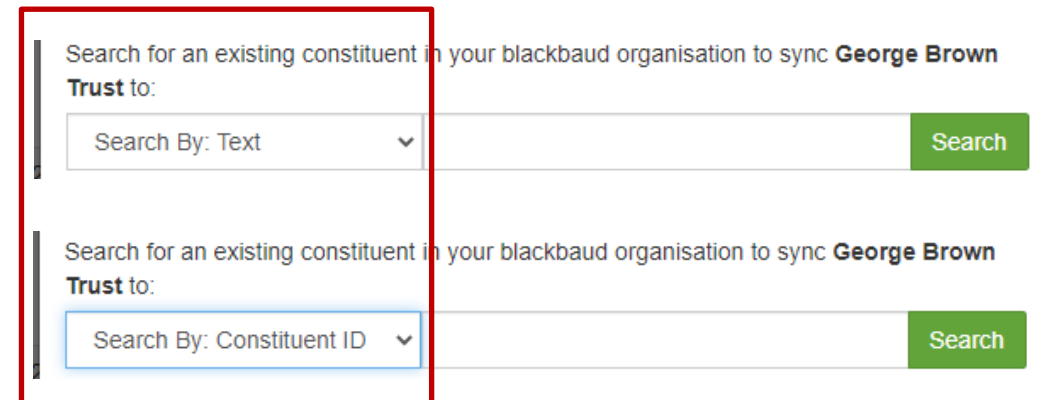
Sync existing constituent

Search for an existing constituent in your blackbaud organisation to sync **George Brown Trust** to:

Search By: Text

Search

Close



Search for an existing constituent in your blackbaud organisation to sync **George Brown Trust** to:

Search By: Text

Search

Search for an existing constituent in your blackbaud organisation to sync **George Brown Trust** to:

Search By: Constituent ID

Search

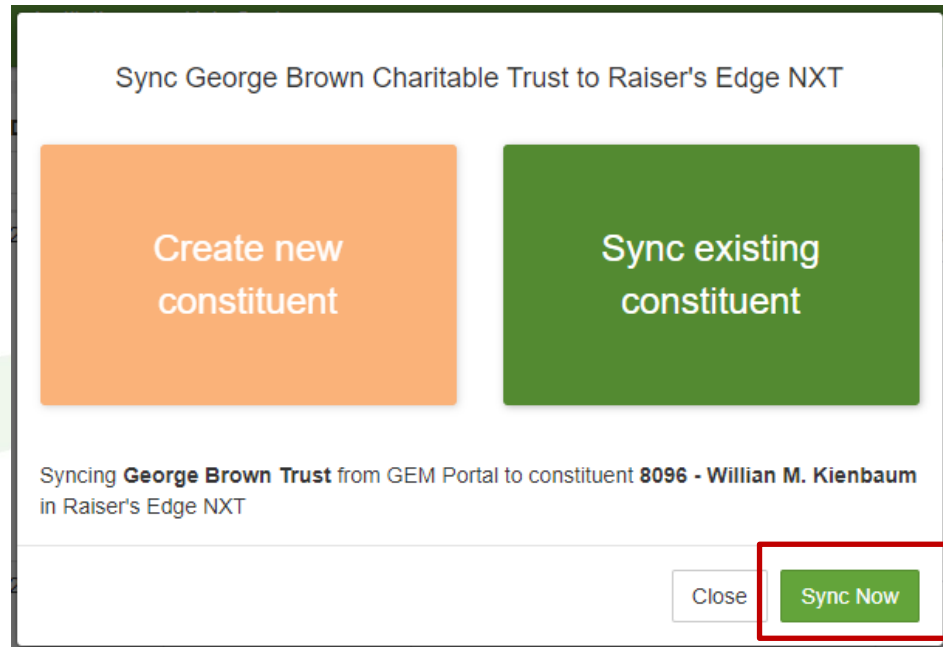
Type in the name or part of the name of your Constituent record that you already have established in Raiser's Edge NXT into the Search By: Text box.

If you know the Constituent ID of the Constituent record that you already have established in Raiser's Edge NXT, click the Search By: to Search By: Constituent ID and type in the ID number.

Click **Search**.

You will be presented with a list of zero or more potential Constituent records from your Raiser's Edge NXT.

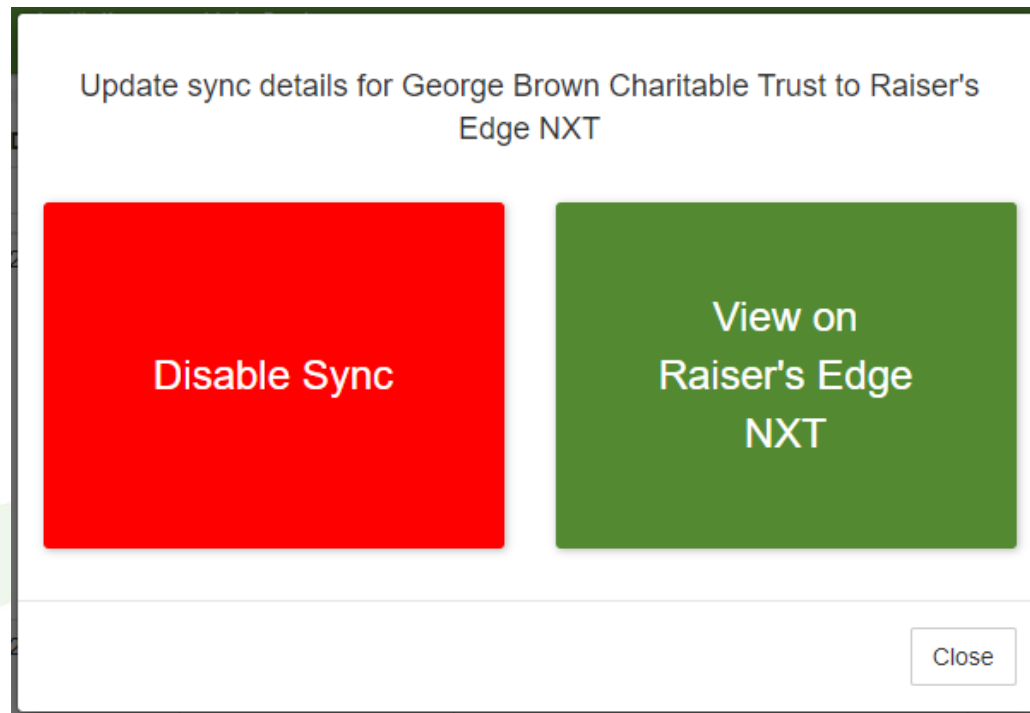
Select the relevant Constituent. Or search again if you did not find what you were looking for



The screenshot shows a dialog box titled "Sync George Brown Charitable Trust to Raiser's Edge NXT". It contains two main buttons: "Create new constituent" (orange) and "Sync existing constituent" (green). Below these buttons, it states: "Syncing **George Brown Trust** from GEM Portal to constituent **8096 - William M. Kienbaum** in Raiser's Edge NXT". At the bottom right, there are two buttons: "Close" and "Sync Now". The "Sync Now" button is highlighted with a red rectangular box.

When you have found the Constituent click **Sync Now**.

After the Sync Now has sent the grant information to Raiser's Edge NXT you will be presented with this screen:

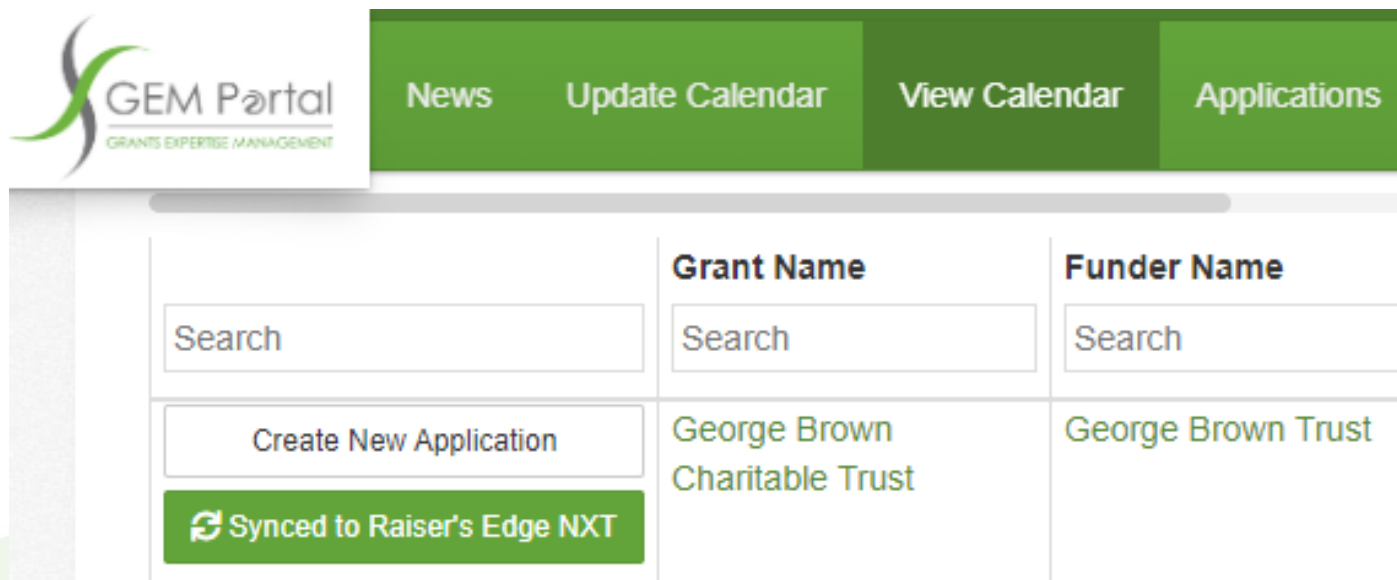


If you would like to view the Constituent with the new Opportunity (grants information) attached, click the “**View on Raiser's Edge NXT**” button, which will open the Opportunity in Raiser's Edge NXT.

If you want to remove the link and can cancel this newly established Constituent / Opportunity connection, click the “**Disable Sync**” button.

Click **Close** to return to GEM Portal.

Returning to GEM Portal **View Calendar** you will see that the button has changed from an orange “**Sync to Raiser’s Edge NXT**” to now be a green button “**Synced to Raiser’s Edge NXT**”.



The screenshot shows the GEM Portal interface. At the top, there is a navigation bar with buttons for 'News', 'Update Calendar', 'View Calendar', and 'Applications'. Below this is a table with columns for 'Grant Name' and 'Funder Name'. The table contains one entry: 'George Brown Charitable Trust' under 'Grant Name' and 'George Brown Trust' under 'Funder Name'. A green button with a refresh icon and the text 'Synced to Raiser's Edge NXT' is positioned below the table entry. A search bar is visible in the top left of the table area.

Now that a link is established, even if your GEM Portal is not open, any updates made by Strategic Grants in our grants database will be reflected in the Raiser’s Edge NXT Opportunity record.

Even if your GEM Portal is not open, the Tile will continue to present the latest available data.

Keeping your calendar updated.

You still need to regularly run the Update Calendar in GEM Portal, to keep your full calendar updated with the latest opportunities for your prospect research.

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Even if your GEM Portal is not open, the Tile will continue to present the latest available data.

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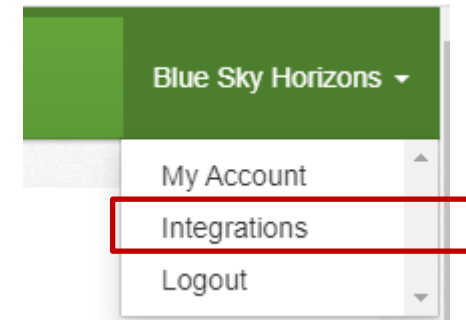
It is important that you still regularly run the **Update Calendar** process so that you are bringing in any new opportunities to your calendar.

Set Up: The Integrations tab

Within your GEM Portal, on the top right hand corner of the screen is the My Account section.

Click on your organisation's name to locate the **Integrations** option.

You don't need to change anything in the Integrations tab once the connection between GEM Portal and Raiser's Edge NXT has been established.



You will see there is a drop down selection "Default opportunity purpose type"

Integrations



Raiser's Edge NXT can:

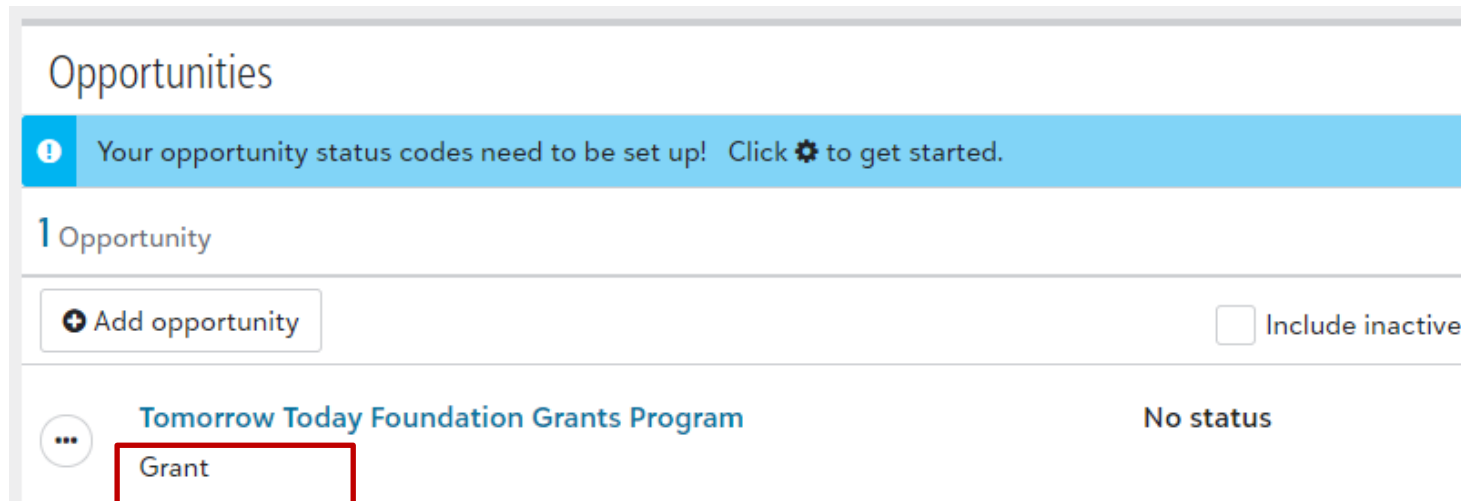
- Create and sync selected funder records to constituents
- Create and sync selected grant records to opportunities

Disconnect Raiser's Edge NXT

Default opportunity purpose type

Grant

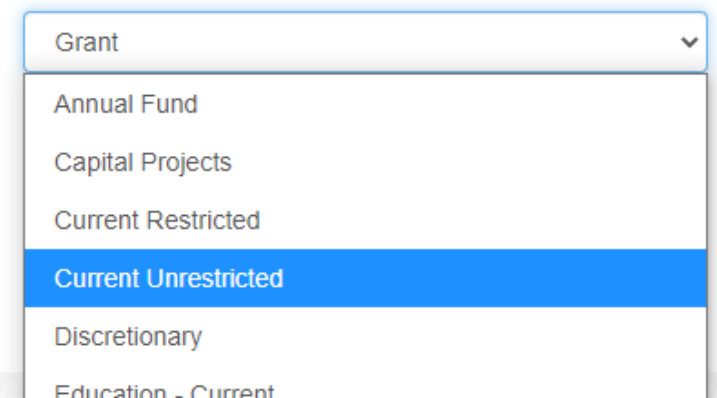
The Opportunity Purpose is used in Raiser's Edge NXT. In this example it is defaulted to Grant:



The screenshot shows the 'Opportunities' section of the Raiser's Edge NXT interface. At the top, there is a blue notification bar that reads: 'Your opportunity status codes need to be set up! Click [gear icon] to get started.' Below this, the page title is '1 Opportunity'. There is a button labeled 'Add opportunity' and a checkbox labeled 'Include inactive'. The main content area shows one opportunity: 'Tomorrow Today Foundation Grants Program' with a status of 'No status'. A dropdown menu is open for this opportunity, showing the selected option 'Grant' highlighted with a red box.

If you would like to associate the GEM Portal grant record with a different Purpose in the Raiser's Edge NXT Opportunity, you can switch the setting in GEM Portal to your organisations preferred Purpose type.

Default opportunity purpose type



A dropdown menu showing the 'Default opportunity purpose type'. The current selection is 'Grant'. Other options listed include: Annual Fund, Capital Projects, Current Restricted, Current Unrestricted (highlighted in blue), Discretionary, and Education - Current.



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If you need further support, contact the Strategic Grants team!

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