

Raiser's Edge NXT Integration

Welcome to Qgiv's Raiser's Edge NXT integration! To get started exporting Qgiv data to Raiser's Edge NXT, there are a few settings you'll need to configure.

This document focuses on defining the settings that are specific to Raiser's Edge NXT. To read the full integration documentation—including getting started, choosing default values, and configuring optional mappings—[check out this article](#).

At the end of this document, you'll find a brief checklist you can use to make sure everything's ready to go!

Raiser's Edge Settings

Enable Fundraiser Assignments (soft credits) – Enable this feature if you'd like to create additional entries in Raiser's Edge for donations made to peer-to-peer participants.

Enable Tributes – This toggle enables mapping to tributes. Tributes are equivalent to dedications in the Qgiv system. To map Qgiv dedications tributes in Raiser's Edge NXT, you'll first need to set up some tributes in your instance of Raiser's Edge. Then, set up dedications in Qgiv with the same names as your tributes. When a Qgiv donation with a dedication exports to Raiser's Edge, the integration will look for a tribute with a matching name. If it finds one, the dedication will be mapped to that tribute.

Please note: Only Environment Admins can activate mapping to tributes in the integration.

Override Anonymous – This toggle overrides the anonymity settings on the Qgiv form and marks transactions as not anonymous / does not give anonymously. If the toggle is turned off, each transaction's anonymous field will be respected.

Override Opt-in? – This toggle tells the integration never to select “Do Not Mail/Email/Phone” or “Request no Email” on new constituent records. This setting ignores constituents' responses to opt-in prompts, so we advise it be used with caution.

Maximum Transactions – This field specifies the maximum number of transactions Qgiv will export to Raiser's Edge NXT at a single time. The default is 100 transactions.

Receipt Status – This drop-down determines how to classify new gifts with regard to receipts. Your options are **Needs receipt**, **Do not receipt**, and **Receipted**.

Post Status – This drop-down sets the posting status for new gifts. Your options are **Post to ledger (not posted)**, **Do not post**, and **Already posted**.

Constituent Code – Use this drop-down to apply a constituent code to transactions upon export. Constituent codes are for identifying constituents' connections with your organization.

Addressee Name Format and Salutation Name Format – These drop-downs determine how constituents' names appear in your communications with them. You can also opt to designate them as **Unmapped**.

Acknowledgement Letter Upload – This is where you can upload a CSV file of your Acknowledgement Letters, as they appear in Raiser's Edge NXT. Once you've uploaded the file, the **Acknowledgement Letter** drop-down in the Default Values area will populate with a list of Acknowledgement Letters for you to choose from with options to designate transactions as **Acknowledged** or **Needs Acknowledgement**.

Matching Logic – You can set up the integration's matching logic for both Individual and Company contributions. The options in the menus determine how the integration will identify existing constituent records in Raiser's Edge NXT to import Qgiv donor information to if they're already in the donor database.

Setup checklist

- Activate the integration in Qgiv using your Raiser's Edge NXT username and password.
- Determine start date for export and export frequency. You can export historical data!
- Decide whether to specify an end date for export and whether to include offline and matching donations.
- Set Raiser's Edge-specific settings (see above).
- Determine Default Values for export.
- Choose any additional information to add to the Gift Reference field upon export.
- Save your settings at the bottom of the screen.
- Configure Optional Mappings, if needed.
- If you choose the Manual export frequency, click Run Export to run an export. Otherwise, hourly exports will run once an hour, and daily exports will run at the time you choose.
- Log into Raiser's Edge NXT and approve the batch of exported data.