

Raiser's Edge Integration

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Overview of Raiser's Edge Integration



To simplify constituent management and enhance prospect research, users of the standalone version of **ResearchPoint** can integrate with **The Raiser's Edge** [version 7.92 patch 5 or higher]. When you integrate, **Raiser's Edge** constituent records become the prioritized record of choice for biographical information and **ResearchPoint** prospect records become the prioritized record of choice for wealth information.

As of the August 2014 (3.17) release of **ResearchPoint**, the integration utilizes a new technology, *Blackbaud Web Services*, to enhance the way the databases work together. With these enhancements, the integration now provides more positive benefits than previously possible in the former integration. Because of the switch to *Blackbaud Web Services*, you need to re-configure your **ResearchPoint** and **Raiser's Edge** databases. However, the configuration enables the following positive benefits:

- You do not have to install and use **ResearchPoint** and **The Raiser's Edge** on the same workstation. When you configure, you only need access to your **Raiser's Edge** database to obtain the database key and confirm the serial key matches.
- You no longer have to use *Internet Explorer* only for **ResearchPoint**. You can use the latest version of your preferred Internet browser such as *Chrome*, *Firefox*, and *Safari*. If you are unsure if your browser is supported, we recommend you check the [system requirements](#).
- An improved user experience in how you update and keep the two databases synced. You have more choices in which information you want to sync between the two databases. We also provided new descriptions for each data option to sync.
- To return the best results, **ResearchPoint** uses information from **The Raiser's Edge** in individual and group wealth screens.
- When you create a research list from a **Raiser's Edge** query or when you add records from a prospect search, we now automatically sync the newly linked records at the time the constituent records are added to **ResearchPoint**.

Set Up Integration

If you are an organization who actively uses both ResearchPoint and The Raiser's Edge, we recommend you integrate them to enhance your major giving research and development capabilities. There are three parts to integration setup. You connect the two databases, determine the data to sync, and then enter your Raiser's Edge credentials.

To prepare for integration, we recommend you complete the following tasks.

- Upgrade your version of **The Raiser's Edge to 7.96** to patch 11 or higher using the The Raiser's Edge/Online Express HotFix Utility.
- We strongly recommend with the optional module *RE:Search*.
- Access the **Raiser's Edge** database you want to integrate with **ResearchPoint** and email or copy

your RE database key.

- Decide which prospect researchers should have access to **Raiser's Edge** to perform integration tasks. Then, add them to **The Raiser's Edge** within the appropriate security group.
- Decide which development officers in **The Raiser's Edge** should have the ability to open **ResearchPoint** and complete prospect research tasks. Add those **Raiser's Edge** users to **ResearchPoint**.
- Determine the workflow you want your prospect researchers and development officers to use, so they can take advantage of the integration.

If you have any issues with integration, we recommend you review [Raiser's Edge Integration Technical Tips on page 6](#).

Configure the Raiser's Edge Database

Warning: You can only integrate one **Raiser's Edge** database with your **ResearchPoint** database. Before you complete configuration, verify the RE database key and serial number match the **Raiser's Edge** database that you want to integrate with **ResearchPoint**. Once you integrate, you cannot undo the configuration.

To configure the Raiser's Edge database as part of the integration, you need access to the workstation or server where you host your Raiser's Edge database.

➤ How do I find my Raiser's Edge database key?

1. Log in to the **The Raiser's Edge**.
2. On the Raiser's Edge bar, click **Web Services**.
3. Under Installed Services, find **Blackbaud Web Services**. If an **Install Update** link appears, click the link to update Web Services. Once the install updates, click **Blackbaud Web Services**. The Blackbaud Web Services Configuration Options screen appears.

Tip: If you have not installed *Blackbaud Web Services* yet, under Available Services, follow the instructions to install.

4. Under Features, click **ResearchPoint**. The Blackbaud Web Services for ResearchPoint settings screen appears. On this page you can test your connection, deactivate an integration, and copy your database key.
5. To copy the database key that you need to enter in **ResearchPoint**, single-click **Copy to clipboard**. You can also write down the database key or email the key.

Warning: Single-click the **Copy to clipboard** link. In some cases, if you double-click the link, the text "Copy to clipboard" copies and not the database key.

Proceed to the next procedure on how to enter and verify your Raiser's Edge database key.

➤ Enter and verify the Raiser's Edge database key in ResearchPoint

1. From The Raiser's Edge Integration page, click **Configure integration**.
2. In the **RE database key** field, paste or type in your database key.
3. Click **Test connection**. The RE serial number auto-populates.

Warning: If you have more than one database for *The Raiser's Edge*, verify that the database key and serial number match the database that you want to integrate with **ResearchPoint**.

To verify the serial number matches, log on to the workstation or server where you host your *Raiser's Edge* database. Open the Blackbaud Management Console and select the name of the database you chose for the integration. Under properties, you can review and confirm that the serial key matches.

4. Click **Save**. You return to the The Raiser's Edge Integration page and you are now ready to [Configure The Raiser's Edge Integration Fields on page 4](#).

Configure The Raiser's Edge Integration Fields

When you configure the integration fields between **ResearchPoint** and the *Raiser's Edge*, you determine which specific data you want to synchronize between the two solutions. You can also determine which *Raiser's Edge* data you want to see in **ResearchPoint**.

We recommend after you set up the configuration to create research lists, with a maximum of 2,000 members, to sync between **ResearchPoint** and the *Raiser's Edge*. You can still sync prospects individually, however research lists are a more efficient way to keep your databases updated.

Tip: Want more detail about the configurable fields? When you select each data option, a description appears with additional information about which information syncs..

You can revisit these settings at any time to update the configuration.

➤ Sync to The Raiser's Edge

Do you want to add data from the prospect record in **ResearchPoint** to *The Raiser's Edge*? On the Sync to The Raiser's Edge tab, you select which data is important to add to the constituent record in *The Raiser's Edge*.

Tip: ResearchPoint does not send any wealth data to *The Raiser's Edge* that has not been confirmed.

Currently, you can sync the following information from **ResearchPoint** to *The Raiser's Edge*:

- Contributions (FEC and Philanthropic)
- Estimated Wealth (value and range)
- Major giving capacity (value and range)
- Model scores and ratings
- Overall rating
- Social media summary
- Summary business assets
- Summary income and compensation
- Summary other assets
- Summary real estate assets
- Summary securities holdings

> Sync from The Raiser's Edge

Do you want to add data from *The Raiser's Edge* constituent record to *ResearchPoint*? On the Sync from The Raiser's Edge tab, you select which data is important to add to the prospect record in *ResearchPoint*. If you select to add giving summary data, you can also select whether to include soft credits or not, and which gift types are important to you. Currently, you can sync the following information from *The Raiser's Edge* to *ResearchPoint*:

- Biographical information
- Giving summary
- Phone information
- Preferred address information
- Primary business information
- Primary solicitor information

> View Raiser's Edge data

With *Blackbaud Web Services*, we now enable you to select which *Raiser's Edge* data to view in *ResearchPoint*. You can select to view addresses, phones/emails/links, and solicitors on the prospect record's Biographical Information, Contact and Relationships tabs. This view-only information can help you determine if you are researching all the prospect's known addresses as well as if you have the most up-to-date contact information on the prospect record. This contact information pulls the latest from *Raiser's Edge*, no sync required!

After you configure fields and save, you return to the The Raiser's Edge Integration page. You are now ready to [Enter Raiser's Edge Credentials on page 5](#).

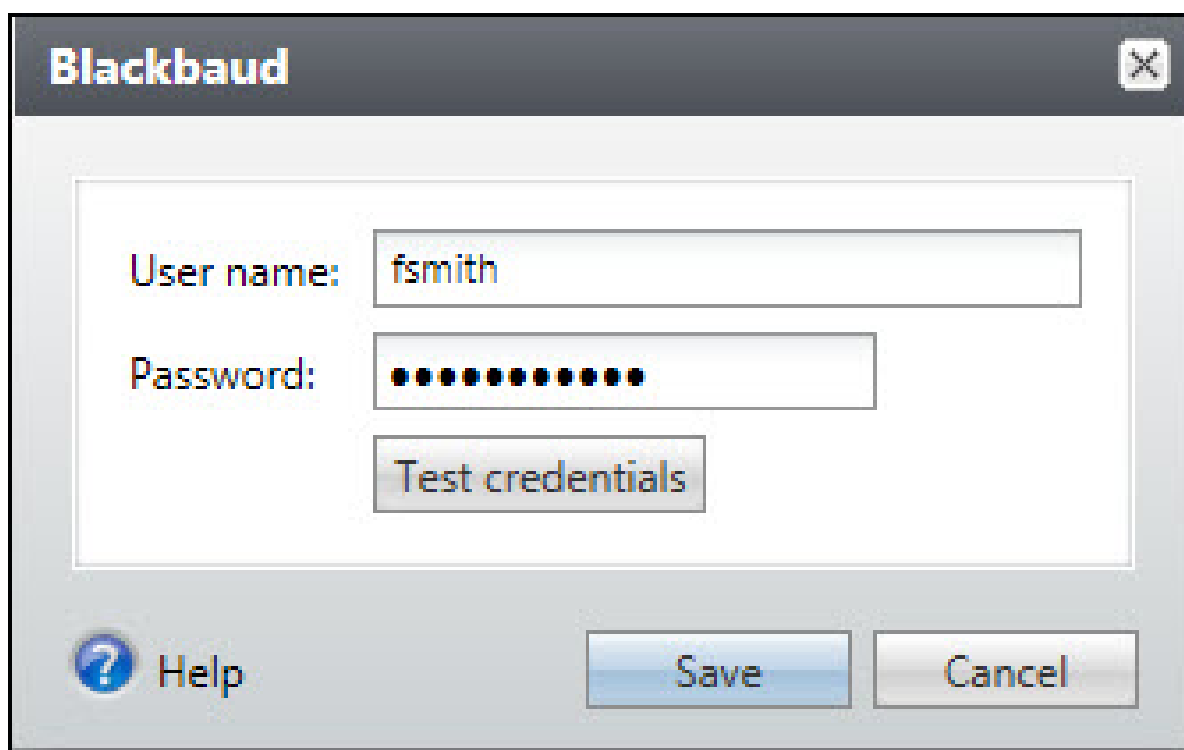
Enter Raiser's Edge Credentials

After configuration, for each user who needs to integrate *Raiser's Edge* with *ResearchPoint*, he or she needs to enter *Raiser's Edge* login credentials into *ResearchPoint*. Your organization can choose to use the same login credentials for integration or separate credentials.

Warning: The only login credentials you cannot use is the user name "Supervisor." For more information on why, see [Raiser's Edge Integration Technical Tips on page 6](#).

> Enter your Raiser's Edge credentials for integration with ResearchPoint

1. In *ResearchPoint*, you can access the integration configuration settings from two locations. From the Home page, on the task bar under Configuration, click **The Raiser's Edge integration**.
or
If you are on the Prospects page, under **Configuration**, click **The Raiser's Edge integration**. The Raiser's Edge Integration page appears.
2. Click **Edit credentials**.



The screenshot shows a dialog box titled "Blackbaud". It has a close button (X) in the top right corner. The main area contains two input fields: "User name:" with the text "fsmith" and "Password:" with masked characters. Below the password field is a button labeled "Test credentials". At the bottom left is a "Help" button with a question mark icon. At the bottom right are "Save" and "Cancel" buttons.

3. Enter your **Raiser's Edge** login information.
4. To confirm the credentials are correct and can work for the integration, click **Test credentials**.
5. Click **Save**. You return to the The Raiser's Edge Integration page.

Raiser's Edge Integration Technical Tips

If you have any issues with integration, use the following tips to help you troubleshoot.

➤ Supervisor No Longer Permitted

To protect you and your data during integration, we no longer permit the use of the user name "Supervisor" for **Raiser's Edge** credentials. Please set up a user with the appropriate security settings, including a unique user name and a strong password.

➤ Add a Raiser's Edge User to Blackbaud Web Services

If your **Raiser's Edge** database is hosted on a different machine than where you installed **The Raiser's Edge**, to enable *Blackbaud Web Services* to integrate **The Raiser's Edge** with **ResearchPoint**, we recommend you add the **Raiser's Edge** user credentials to *Blackbaud Web Services*.

1. From the workstation or server that hosts **The Raiser's Edge** database that you want to sync with **ResearchPoint**, open the Control Panel.
2. Under Administrative Tools, open **Services**.

3. Right-click **Blackbaud Web Services** and select **Properties**.
4. On the Log On tab, select **This account** and enter the login name and password for the user who you want to set up in *Blackbaud Web Services*. These user credentials are **The Raiser's Edge** credentials you set up in **ResearchPoint**. You may need to add multiple user credentials to *Blackbaud Web Services* for all users who want to use integration tasks in **ResearchPoint**.
5. Click **OK** to save the changes.

➤ Configure Integration with Raiser's Edge Database Online

Before you begin to set up integration, we recommend you verify that your Raiser's Edge database is online.

When you set up the configuration between **ResearchPoint** and **The Raiser's Edge** and paste in the RE database key, click **Test connection**. Before you **Save** and navigate away from the Configure integration screen, we recommend you make sure the RE serial number appears and matches the serial number for your **Raiser's Edge** database that you want to use for integration.


If your **Raiser's Edge** database is offline, when you click **Test connection**, the serial number will not auto-populate but you can save and leave the screen. However, your integration is not technically set up yet. You would then need to wait for **Raiser's Edge** database to go online, return to the Configure integration screen, and ensure the serial number populates.

ResearchPoint Search of Raiser's Edge Records

When you search **The Raiser's Edge** database for prospects to add to **ResearchPoint** and screen, the program attempts to match the name you enter against the name, nickname, and alias fields on the constituent records in **Raiser's Edge**.

Tip: If you enter a name and location in the basic search and then click **Show advanced search**, the program auto populates the information you already entered into the advanced search for you!

In an advanced search, the program can also search Raiser's Edge records for these fields: first name, last name, middle name, nickname, age range, spouse last name, spouse first name, business name, address, city, state, ZIP, constituent ID, and class of.

If you select to search all saved prospects (**Raiser's Edge** and **ResearchPoint**), in the results if you see the Raiser's Edge icon , that means the record that appears is a Raiser's Edge constituent record. To determine if the record has already been added to **ResearchPoint**, for each result, under the RE ID number, look to see if you have a **View RP** link or an **Add to RP** link.

Note: If the **Raiser's Edge** record is of a deceased person, we now show in the age field that the person is deceased and at what age they passed away.

If you have an **Add to RP** link, when you add the constituent record to ResearchPoint, you have the option to select the spouse and business. You can also select to screen the record on save. When you save, the **Raiser's Edge** constituent record and the **ResearchPoint** prospect record sync. The data that syncs depends on the options you chose when you configured integration. The options include:

- Biographical Information [first name, middle name, last name, nickname, date of birth, gender, title 1, title 2, suffix 1, suffix 2, and **Raiser's Edge** constituent ID]
- Giving Summary [Giving summary history: amount, date, type, and fund for the first, largest, and latest gifts, the total number of gifts, and the total amount given]
 - Soft credits
 - Gift types to include [cash, pledge, stock, gifts-in-kind, recurring gift, planned gift, other]
- Phone Information [all phone numbers]

If **The Raiser's Edge** constituent record has multiple phone numbers listed, **ResearchPoint** designates the "Home" phone number as "Primary." If no "Home" number exists, **ResearchPoint** will designate the first number on record as the "Primary."

Note: On the Bio 1 tab of a constituent record in **The Raiser's Edge**, if a constituent has the **Do Not Contact** checkbox selected for phone numbers, emails, or links, we do not show this data from **The Raiser's Edge** in **ResearchPoint**. If you need to see the do not contact information, we recommend you open up the constituent record in **The Raiser's Edge**. We do not show this data in **ResearchPoint** to make sure you don't accidentally contact the constituent when a preference has been made known previously.

- Preferred Address Information [address lines, city, state, state abbreviation, ZIP, country, country abbreviation, and address type for the preferred address]
- Primary business information [primary business name and address lines, city, state, state abbreviation, ZIP, country, country abbreviation, and address type for the primary business]

How to Add a Raiser's Edge Record as a Prospect in ResearchPoint

In the search results grid, click the **Add to RP** link. The Add new individual screen appears. After you select or enter the spouse and business, select whether to screen the record on save, and click **Save**. The prospect record creates and appears for you to begin your prospect research.

Raiser's Edge Data in ResearchPoint Wealth Screens

You have an ongoing relationship with your constituents in **The Raiser's Edge** from the first day they give you a gift or participate in one of your events. As you invest in getting to know them and developing that bond with your organization, you learn more about their addresses, phone numbers, name preferences, and more. Sometimes, you know about an address change before you even screen that information on a prospect search and pull in latest real estate data.

With the **ResearchPoint** and **Raiser's Edge** integration, we've provided ways for you to sync that information on the constituent and prospect record. However, we also know that it's important to use the updated information from Raiser's Edge in wealth screens.

After you link your **ResearchPoint** and **Raiser's Edge** records, when you perform a wealth screen, the program uses the latest biographical and address information from **The Raiser's Edge** in wealth screens. You do not even have to perform a sync first. Because **Raiser's Edge** is the biographical record

of choice, it takes priority in wealth screens. However, for wealth record information, **ResearchPoint** takes priority.

Note: If you have not added a prospect record to **Raiser's Edge** yet, the biographical information you have on record in **ResearchPoint** takes priority until a constituent record is created and linked.

Raiser's Edge Tasks on a Prospect Record

On the prospect record in **ResearchPoint**, you can link the record to a **Raiser's Edge** constituent record, sync, and view data from **Raiser's Edge**. What information appears from **Raiser's Edge** depends on the settings you configured during integration set up.

➤ Link or Unlink a ResearchPoint prospect with a Raiser's Edge constituent record

From the Tasks pane on the prospect record, click **Link with RE**. The Raiser's Edge constituent search screen appears. A number of the fields on this screen populate automatically, displaying information about the selected prospect.

If the program locates a potential match, the match appears in the grid. Select the record and click **Open**. The two records are linked, and you return to the Wealth and Ratings page.

Tip: If no potential match is located, modify the search criteria and try again. We recommend you cast a wider net with less strict criteria in case the information is slightly different in **The Raiser's Edge**.

If no match exists, click **Add New** from the Open screen. The record creates and links to the **ResearchPoint** prospect record.

To remove a link, from the Tasks pane, click **Unlink with RE**.

➤ View Raiser's Edge Contact Information

On the Biographical Information, Contact tab, you can view RE phones/emails/links and addresses below the prospect record's contact information. This information enables you to always see the latest contact information from **The Raiser's Edge**, no syncing required!

➤ Manually Sync the Prospect Record with The Raiser's Edge Constituent Record

Do you want to make sure your development officers have the latest wealth information from **ResearchPoint** and your researchers have the latest constituent information from **Raiser's Edge**? After wealth screens or when you complete research on a prospect, from the Tasks pane, click **Sync with RE** to send the latest data from **ResearchPoint** to **The Raiser's Edge** and vice versa. You may also want to generate a prospect research report and email the development officer assigned to the prospect, especially if they have the potential for a major gift.

Tip: The information that syncs depends on the selections you chose when you configured integration. For more information on configuration, see [Configure The Raiser's Edge Integration Fields on page 4](#).

Prospect Information on a Constituent Record in Raiser's Edge

If you do not have the *RE:Search* module in your **Raiser's Edge**, you cannot move data from **ResearchPoint** into **The Raiser's Edge**. If a constituent record in **The Raiser's Edge** displays a Prospects tab, you have **RE:Search**.

The data that syncs depends on the options you chose when you configured integration. The options include:

Tip: Only confirmed Wealth and Ratings records are synced with **The Raiser's Edge**. We recommend you research and confirm data before you sync.

- Contributions [all philanthropic and political gifts]
- Estimated wealth [prospect's estimated wealth value and range]
The prospect's wealth capacity formula determines the estimated value and range.
- Major giving capacity [prospect's major giving capacity value and range]
The prospect's wealth capacity formula determines the major giving capacity value and range.
- Model scores and ratings [annual giving likelihood, major giving likelihood, planned giving likelihood, target gift range]
To sync these values, you must purchase and import the Target Analytics scores and ratings into **ResearchPoint**.
- Overall rating
- Summary business assets [total confirmed business ownership value, organization name and confirmed ownership value for the top three businesses]
The top three businesses are determined by the ownership value and then the company value.
- Summary income and compensation [total confirmed income/compensation value, organization name and confirmed income/compensation value for the top three businesses]
The top three income/compensation records are determined by the income/compensation value.
- Summary other assets [total confirmed other assets' value, description and confirmed value for the top three other assets]
The top three other assets are determined by asset value.
- Summary real estate assets [total confirmed real estate value, address (address line 1, city, state) and confirmed property valuation for the top three properties]
The top three properties are determined by the property valuation.
- Summary securities holdings [total confirmed direct securities value, name and confirmed direct security value for the top three businesses]
The top three securities are determined by the direct security value.

Raiser's Edge Integration in Research Lists

From research lists, you can quickly import records into **ResearchPoint**, sync groups of records, and link/unlink list members with **The Raiser's Edge**.

We recommend after you set up the configuration to create research lists, with a maximum of 2,000 members, to sync between **ResearchPoint** and the **Raiser's Edge**. You can still sync prospects individually, however research lists are a more efficient way to keep your databases updated.

Tip: For any prospects included in the list that are linked to a constituent record in **The Raiser's Edge** the word "Yes" appears in the **RE7 linked?** column of the **Members** grid.

➤ Create a Research List from a Raiser's Edge Query

1. From the **Prospects** page or Research Lists, click **Add list from RE**. The Select The Raiser's Edge query to add screen appears.
2. To import records into ResearchPoint and create a new (or add to an existing) research list, enter the criteria and search for a group of records saved to a query in **The Raiser's Edge**.
3. In the **Results** grid, click the query name and click **Select**.

Note: In order for the **Raiser's Edge** query to import into **ResearchPoint**, the **Constituent information \ System Record ID** field must be included as an output value.

The query processes and the Research List Import screen appears.

4. Create a new research list or select an existing research list and click **OK**.
5. The Research List Add Constituents screen appears if records in the research list are not linked to records in **ResearchPoint**.
6. Select to add any unlinked records to **ResearchPoint** or select to ignore the remaining records and click **OK**.

If you select to add the records, when you click **OK**, the records sync and the constituents are added to **ResearchPoint** for you to research.

7. The research list appears for you to review the information and if ready, screen the list with **WealthPoint**.

Tip: After you complete work in the research list, such as when you screen for new WealthPoint information and edit research details, use the **Sync with RE** to sync a group of records all at once.

➤ Link a List Member to a Raiser's Edge Constituent Record

From an open research list, expand a prospect in the Members grid and click **Link with RE**. The Link to The Raiser's Edge Search screen appears for you to search for and select the constituent to link. When you link the records, the data synchronizes.

ResearchPoint 4.91 Raiser's Edge Integration US

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