

Set Up Raiser's Edge Integration

Learn How to Configure the Raiser's Edge with ResearchPoint

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.

Overview

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.

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*. You cannot undo configuration in *ResearchPoint* without the assistance of *ResearchPoint* Customer Support.

Install and Update Web Services

If you are not a hosted *Raiser's Edge* customer, you may need to install or update *Web Services* before you configure integration. If your *Raiser's Edge* database is hosted with Blackbaud, we install and update *Web Services* for you.

1. Log in to the *Raiser's Edge*.
2. On the Raiser's Edge bar, click **Web Services**.
3. If you have not installed *Web Services* before, under **Available Services**, click **Blackbaud Web Services**. If you have installed but you have not updated the service, under **Installed Services**, find Blackbaud Web Services and in the Action column, click **Install Update**.

You are now ready to configure integration.

Configure the Raiser's Edge Database Key

We recommend an administrator with rights to both *ResearchPoint* and *Raiser's Edge* configure integration.

1. Log in to the *Raiser's Edge*.
2. On the Raiser's Edge bar, click **Web Services**.

System Requirements

- The Raiser's Edge on version 7.92 Patch 11 or higher, with The Raiser's Edge/Online Express HotFix Utility
- Hosted *ResearchPoint* database on version 3.17 or higher
- Access to your Raiser's Edge installation
- A non-"Supervisor" login name for your Raiser's Edge credentials
- The Raiser's Edge optional module RE: Search is strongly recommended.

Tip: Did you previously integrate The Raiser's Edge and *ResearchPoint*? With the new integration, you do need to configure your databases again. However, you do NOT have to re-link records you linked and synced with the old integration.

3. Under **Installed Services**, click **Blackbaud Web Services**. The Configuration Options screen appears.
4. Under **Service**, confirm that *Blackbaud Web Services* is running. If it is not running, start the service.
5. Under **Features**, click **ResearchPoint**. The Blackbaud Web Services for ResearchPoint settings screen appears.
On this page you can test your connection, deactivate the integration, and copy your database key.
6. 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.
7. Click **OK** twice to return to the Web Services page.
8. From the top menu bar, click **Help, About the Raiser's Edge**.
9. Write down the serial number. You use this number to confirm the database key is correct.
10. Log in to **ResearchPoint**.
11. On the Home page, from the Explorer bar under **Configuration**, click **The Raiser's Edge integration**.
12. On The Raiser's Edge Integration page, click **Configure integration**.
13. From the Configure integration screen, in the **RE database key** field, paste in the database key you copied from the **Raiser's Edge**.
14. Click **Test connection**. The serial key populates.
15. Match the serial key to the one you wrote down earlier. Do not click save until you are confident that the database key and serial key match the **Raiser's Edge** database you want to integrate with **ResearchPoint**. You cannot undo configuration in **ResearchPoint** without the assistance of **ResearchPoint** Customer Support.
16. Click **Save**. You return to The Raiser's Edge Integration page and you are now ready to configure the **Raiser's Edge** integration fields.

Tip: We recommend you run Raiser's Edge with Blackbaud Web Services installed on a secure server or machine that you can leave on all the time. When this server or machine is off, you cannot use integration tasks in ResearchPoint.

Configure Fields for Integration

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

1. From The Raiser's Edge Integration page in **ResearchPoint**, click **Configure fields**.
2. On the Sync to The Raiser's Edge tab, you select which data is important to add to the constituent record from **ResearchPoint** to the **Raiser's Edge**. Only confirmed wealth data is synced from **ResearchPoint**.
3. To learn more about each configuration option, select each option to see a description of the data that syncs.
4. Click the **Sync from the Raiser's Edge** tab. On this tab, you select which data is important to add to the prospect record in **ResearchPoint** from the **Raiser's Edge**. 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.
5. Click the **View Raiser's Edge data** tab. With *Blackbaud Web Services*, we now enable you to select which **Raiser's Edge** data to view in **ResearchPoint**. You can select

Maximum Record Sync

After you set up the configuration, we recommend you 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.

to view addresses and/or phones/emails/links on the prospect record's Biographical Information, Contact tab. 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.

6. After you configure your settings, click **Save**.

Tip: The contact information you view in ResearchPoint pulls the latest data from The Raiser's Edge, no sync required!

Configure 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.

For security purposes with *Blackbaud Web Services*, the only login credentials you cannot use is the user name "Supervisor."

1. From The Raiser's Edge Integration page in *ResearchPoint*, click **Edit credentials**.
2. Enter your *Raiser's Edge* login information.
3. To confirm the credentials are correct and can work for integration, click **Test credentials**.
4. Once the credentials confirm, click **Save**. You are ready to use integration tasks.

Add a Raiser's Edge 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* and is the *Raiser's Edge* credentials you set up in *ResearchPoint*.
5. Click **OK** to save the changes.

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