Get Started with Raiser's Edge NXT

An Overview of Relationship and Security Management on Your Desktop or Mobile Device

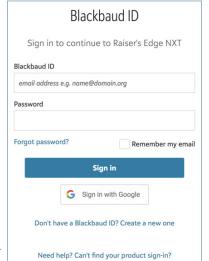
With *Raiser's Edge NXT*, you can view and manage your *Raiser's Edge* data through both a web view in any browser or device and the database view accessed through *Citrix*. The web view provides an elegant, friendly view of your data and enables people at your nonprofit — such as fundraisers — to easily manage constituent relationships like never before.

➤ We recommend you use the web view via Apple Safari, Mozilla Firefox, Google Chrome, Microsoft Edge, or Microsoft Internet Explorer 11 or later.

Get In

To first get into *Raiser's Edge NXT*, you'll receive a Welcome email invitation. After you select **Confirm email** in your invitation, simply sign into *Raiser's Edge NXT* with your Blackbaud ID.

- If you already have a Blackbaud ID, enter its email
 address and password and select Sign in. If you use a
 Google email address, you can also select Sign in with
 Google to sign in with your Google credentials.
- If you don't yet have a Blackbaud ID, select Create
 a new one to set up your credentials and, when you
 receive another Welcome email message, confirm your
 email address again.



Your organization may require multiple logins, such as to separate admin tasks from dayto-day data entry. If you receive multiple invitations based on your different security rights, confirm and sign into each with its own Blackbaud ID.

> Admins! You can send users invitations to join *Raiser's Edge NXT* from Control Panel. For information, see "Security Management" on page 17.

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Your organization may set up single sign-on (SSO) for Blackbaud ID. With SSO, you sign in to Blackbaud solutions through your organization's identity provider, with the same credentials you use with their network or other solutions.

Get Around

Along the top of the screen, you can navigate to features within *Raiser's Edge NXT* and other Blackbaud solutions and resources.



- From the **Solutions** menu in the upper left, you can navigate to other Blackbaud ID-supported solutions, such as **Financial Edge NXT**.
- To search for a constituent's record, select Search (the magnifying glass) and enter their name, constituent ID, or email address, similar to a search engine like Google. From the search results, you can also select Search relationship records to find other individuals and organizations, such as constituents' relationships.
- To open the database view or connect to a different *Raiser's Edge* database, select
- To open your Blackbaud ID profile or other resources, connect to a different organization's databases, or sign out of your Blackbaud ID, select your initials.
- Have a question about a concept or feature in Raiser's Edge NXT? Simply select the ?
 in the upper right corner for Help content, How-tos, and best practices based on what
 you're working with. If you still have questions, you can also quickly access additional
 resources like Knowledgebase and Chat Support.

➤ In addition to the in-product Help, you can find helpful blog posts and conversation in the *Raiser's Edge NXT* Community and training opportunities at Blackbaud University.

To help identify who you're looking for, search results include details such as contact information.

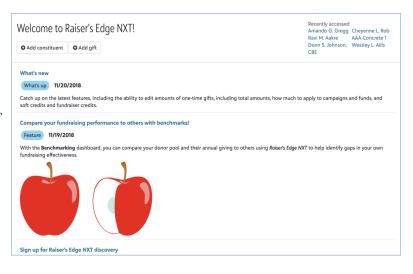
When you first log in after a release, the Help automatically opens to a **What's New** topic so you know what's what. To quickly return to the topic and review content about a new feature, click ① at the top of any Help topic.

Home

Raiser's Edge NXT

continually evolves and introduces new features and enhancements on a regular basis. From **Home**, you can keep current with the latest features, training opportunities, and best practices to get the most of *Raiser's Edge*NXT. You can also quickly revisit recently viewed

records and add new constituents and gifts.



If you don't have a fundraising work center, you start from **Home** when you sign in so you can catch up on the latest.

Constituents

At the heart of your fundraising efforts are the relationships with those who support your organization and its mission — from your donors and prospects to your staff, volunteers, and vendors. In *Raiser's Edge NXT*, you manage these relationships as *constituents*.

To add a new constituent to your database, select Add constituent from Home, choose whether add an individual or organization, and enter details such as their name, contact information, and affiliation.



To view and manage details about your relationship with a constituent, simply select their name in a list or search for them by name or email address — like you would in *Google* — to open their record. From the search results, you can also select **Search relationship** records to find other individuals and organizations, such as constituents' relationships. On a constituent's record, you can view and manage their details, such as their relationships, assigned fundraisers, giving, and membership status. The constituent record provides a flat, single-page view of your relationship, similar to a profile page on a social networking site like *Facebook* or *LinkedIn*.

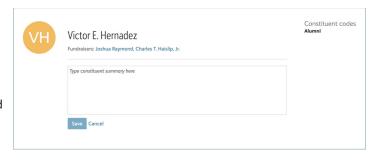
To help focus on what you find important or need the most, you can expand and collapse the sections of a record and arrange them however you like.

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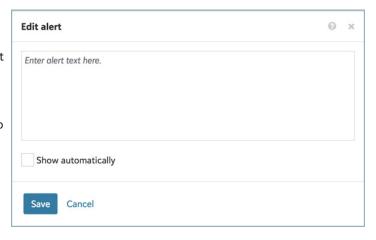
> Admins! In Control Panel, Settings, set up the display name to determine how your constituents' names appear throughout *Raiser's Edge NXT*.

For example, on a constituent's record, you can view:

Summary note. To help cultivate your relationship with a constituent, pin a note to the top of their record to quickly summarize information you find valuable, such as their personal details and history with your organization.



Alert. To give a reminder or special instruction to someone about a constituent's record, set an alert to appear in the profile information. For example, you can set an alert as a reminder to not update the record without first contacting its assigned fundraiser or with instructions to handle a high-priority donor with care.



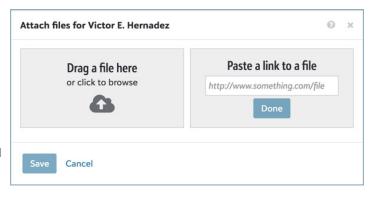
In the database view, alerts appear as annotations

Appeals. Under Appeals, view which solicitations the constituent received. For each appeal, you can view details such as its name, date, package, and how much the constituent gave in response. With this information, you can quickly gauge how often you ask the constituent for gifts and the effectiveness of each solicitation.

Assigned fundraisers. Under Assigned fundraisers, view and manage who's assigned to cultivate your organization's relationship with the constituent. For each fundraiser, you can quickly view their type and when the relationship began and ended. For additional details, such as any goal amounts and notes, simply expand the fundraiser's row.

In the database view, fundraisers appear as solicitors.

Attachments. Under
Attachments, view and manage
files and collateral that help
paint a full picture of the
relationship. You can upload
files directly from your device
or network, or link to files found
online or in a cloud storage
account such as *Dropbox* or
Google *Drive*.



Attachments live in the cloud, so you can manage them across devices and in their native applications.

Communication preferences. Under **Communication preferences**, view and manage specific rules of contact with the constituent, such as to not call after 8:00 p.m. or on weekends.

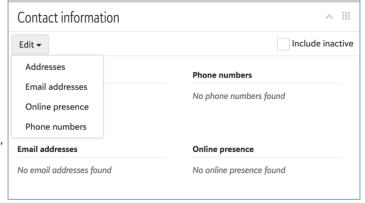
➤ Admins! To set up the communication preferences available to track rules of contact, save them as solicit codes from Configuration in the database view.

In the database view, communication preferences appear as solicit codes.

Consent. Whether it's to comply with regulatory guidelines such as the General Data Protection Regulation (GDPR) or to simply build positive relationships, it's important to ask constituents which types of communications they want to receive and how — and then honor those preferences. Under **Consent**, view and manage the constituent's consent history, including which communications and channels they opt in or out of.

Constituent summary. Under **Constituent summary**, view and manage pertinent details about the individual or organization, including how to address them in mailings and communications, and important demographic and business information.

Contact information. Under
Contact information, view and
manage where to contact the
constituent online — through
websites, blogs, or social
networking sites like Facebook,
Twitter, and LinkedIn — or by mail,
email, or phone.



To quickly email or phone a constituent, visit their website or social media profile, or map directions to their work or residence, simply select the contact information.

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Custom fields. Under **Custom fields**, view specialized information your organization tracks about the constituent, such as hobbies, dietary preferences, or special requests.

custom fields appear as attributes.

In the database view,

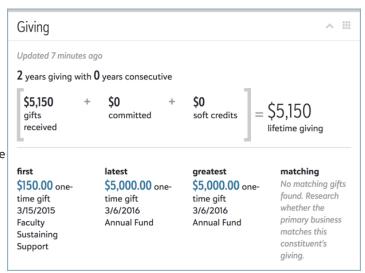
> Admins! To set up the custom fields available to track specialized information, save them and their values as attributes from *Configuration* in the database view.

Education. Under **Education**, view information about an individual's academic history, including where and when they attended school, whether they graduated, and with what degree.

Events. With *Events Management*, view which of your organization's events — such as fundraising galas, volunteer luncheons, or other activities — the constituent registered for. With this information, you can quickly gauge the constituent's involvement with your

organization and plan for upcoming opportunities for interactions.

Giving. Under Giving, view a summary of the constituent's gifts to your organization, including their estimated lifetime giving, open commitments, and soft credits; the frequency of their giving; and milestone giving, such as their first, latest and greatest gifts.



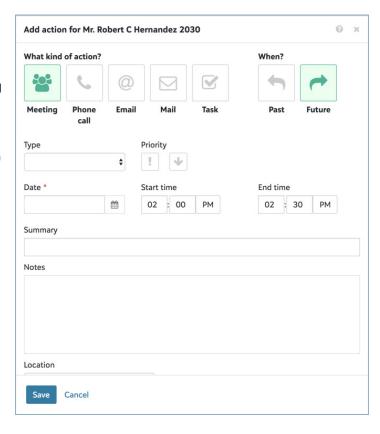
> Admins! In Control Panel, Settings, choose which gift types to consider as recognition for your constituents' lifetime giving and milestone gifts.

Giving history. Under **Giving history**, view a list of all the constituent's gifts. For a more detailed view of their giving, select **Work with gifts** to open a list of their gifts. From the list, you can filter and analyze giving patterns — such as by campaign, amount, or time period — and select which columns to view to help focus on only what matters to you.

To view detailed information about a gift, such as its credited fundraisers, soft credit recipients, acknowlegement and receipt status, general ledger post status, and intended campaign or fund, simply select its amount to open its record.

Membership. With *Membership Management*, you can set up membership programs to help engage constituents and encourage donor loyalty. Under **Membership**, view details about the constituent's memberships, such as the category, standing, program, expiration date, and dues of each. With this information, you can quickly view the constituent's activity as a member to see how engaged they are with your organization.

Notes and actions. Under Notes and actions, add and track information about your relationship and your tasks and interactions to cultivate the relationship, such as mailings and face-to-face meetings with the constituent. When you add an action, you can assign it to yourself or another fundraiser to make sure it happens. In the web view, you can save details about actions and mark them as complete as they happen, through your smart phone, tablet, or other device. For a full list of a constituent's notes or actions, select their total under Notes and actions.



With the Raiser's Edge NXT for Gmail add-on and Raiser's Edge NXT for Outlook add-in, you can create actions for constituents directly from your Google Gmail or Microsoft Outlook inbox to track your email interactions. (Admins! In Control Panel, Applications, you can enable these apps — and others from Blackbaud and partners for your organization.)

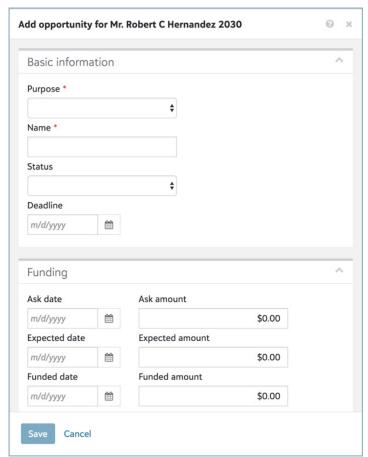
To track your actions, you can view their records from constituents' records or in lists. To open an action's record, select its name, such as in a list or on the constituent's record. Similar to constituent records, the action record provides a flat, single-page view where you can manage many details about the task or interaction, including its completion status and any notes, attachments, or custom fields.

> Admins! To enable fundraisers to track the progress of their actions, you can set up Raiser's Edge NXT to use either its default completion statuses or custom status codes that better match your organization's business processes. To set up custom status codes, save them as a table from Configuration in the database view.

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Opportunities. With Prospect Research Management, add and track your plans and efforts to build relationships with donor and secure major gifts. When you add an opportunity, you can assign it to yourself or another fundraiser to make sure it happens.

To track your opportunities, you can view their records from their constituents' records or in lists. To open an opportunity's record, select its name, such as in a list or on the constituent's record. Similar to constituent records, the opportunity record provides a flat, single-page view where you can manage many details about the effort,



including its status, funding amounts, assigned fundraisers, and supporting actions.

> Admins! To alert fundraisers when an opportunity has a status for too long, you can set durations for each status or whether to consider it closed.

Prospect management. With *Prospect Research Management*, track the constituent's status in your moves management process, and view the constituent's giving preferences, financial information, contributions to other charitable organizations, and current prospect classification.

To view a breakdown of contributions to other efforts, such as philanthropy, political campaigns, and other causes, simply select its total. With these details, you can better develop strategies to cultivate the relationship and determine their giving potential.

> Admins! To track constituents through your moves management process and alert fundraisers when someone spends too long at a specific stage, you can set up the available prospect statuses and expected time frames for each.

Ratings. For constituents located in the United States, you can analyze their estimated wealth and their capacity to give — based on information from your organization's prospect research, or sources such as *Target Analytics*, a division of Blackbaud Inc. — under Ratings. Under Custom ratings, you can also view details your organization tracks about a constituent's wealth gathered from your own research or other sources like *ResearchPoint*, Marts & Lundy, and econometrics. Use this information to help determine where to focus your efforts, whether to pursue a prospect or major gift, and how much to ask from a donor.

> Admins! To help prioritize ratings, you can choose whether your organization uses the Blackbaud NXT ratings from *Target Analytics* and which custom ratings should appear in the web view.

Relationships. Under **Relationships**, view the people and organizations that share an immediate relationship with the constituent, such as family, friends, or employers. To view any additional information about a related individual or organization, simply select their name to open their record (even if they're not also a constituent).

Tags. To help focus on relationships that need your attention, *Raiser's Edge NXT* automatically listens to your constituent records and tags them based on special situations such as upcoming birthdays or lapsed giving. Under **Tags**, you can view which situations apply to the constituent, such as to prioritize interactions and determine how to best cultivate the relationship.

Timeline. Under **Timeline**, you can quickly scroll through a history of the constituent's activity with your organization.

- · Gifts they've given (not including soft credits)
- · Appeals they've received
- · Events they've attended or registered to attend
- Tasks and interactions used to cultivate their relationship.

Volunteer. With *Volunteer Management*, you can view a summary of the constituent's volunteer efforts with your organization — including their interests and first and latest assignments — under **Volunteer**. With these details, you can determine how active a constituent is with your organization and how to keep them engaged with volunteer assignments related to your interests.

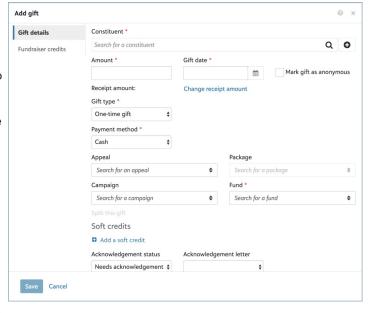
For details about a constituent's activity, select it on their timeline

Gifts

In *Raiser's Edge NXT*, you can track the many types of gifts you acquire from your constituents through your fundraising efforts.

One-time gifts. One-time gifts capture charitable giving paid outright as cash, check, payment card, or direct debit. To add a one-time gift in the web view, select Add gift from Home or under Giving history on the donor's constituent record.

Gifts-in-kind. Gifts-in-kind are contributions of goods or services that have an estimated monetary value, such as auction items, furniture, computer equipment, or pro bono work by a professional.



In the web view, you can add one-time gifts and view records of *all* types of gifts.

In the database view, one-time gifts appear as *Cash* gifts.

Stock/property. Stock/property gifts are contributions of stock certificates, land, or estates, which your organization may opt to keep or sell to benefit your fundraising efforts. If you sell the stock or property, you can track its value as a gift of Stock/property (sold).

Pledges and pledge payments. Pledges are commitments to donate in the future with a single gift or through multiple installments, such as a gift of \$1,200 as 12 monthly payments of \$100. When the donor pays toward an installment, you can track the gift as a pledge payment.

Recurring gifts and recurring gift payments. Recurring gifts are commitments to donate at regular intervals, such as an automatically monthly gift of \$50. When the donor fulfills their regular commitment, you can track the gift as a recurring gift payment.

Matching gift pledges and payments. Many companies donate matching gifts when an employee or corporate partner also donates a gift to a nonprofit. With matching gift pledges, you can track matching gifts you expect to receive from a company based on their relationships with other donors. When a matching gift company fulfills the commitment, you can track the gift as a matching gift payment.

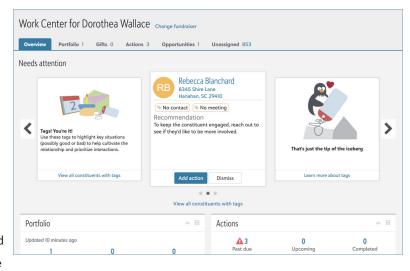
Planned gifts. With *PlannedGiftTracker*, you can track gifts your organization expects to receive from a donor through a bequest, annuity, trust, pooled income fund (PIF), estate, or life insurance policy.

Other. For other gifts that don't fall under another type, you can track them as gifts of Other.

To analyze your giving in the web view, you can view and manage gift from their records or in lists. To open the record of a gift, simply select its amount, such as in a list or on the donor's record. Like with constituents, the gift record provides a flat, single-page view of many details about the contribution.

Fundraising Work Center

From Fundraising, Work, fundraisers have easy access to their work center. The Work Center is the one-stop shop for everything a fundraiser needs to cultivate relationships and secure giving. From here, you can filter and analyze your portfolio of assigned constituents and manage



the tasks, interactions, and opportunities required to help cultivate those relationships. Fundraising managers can also view and strategize fundraiser assignments from a central location.

Overview. Under **Overview**, you can quickly gauge your fundraising performance and identify where to focus your energies. From this dashboard, you can check, at-a-glance:

- Which of your assigned relationships need attention, based on special situations such as upcoming birthdays, lapsed giving, or a lack of communication.
- · How many relationships you manage, and how many of them are new or lapsing.
- · How many of your assigned actions are open, completed, or past due.
- · Your progress toward goal amounts for campaigns, funds, and appeals.
- How many gifts you raised over the current fiscal year, and how many are new or past due.
- How much you ask for, expected, and funded through your opportunities.

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For a list of items tied to a total under **Overview**, such as to manage your new relationships, past due actions, or overdue pledges, select the amount.

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Portfolio. On the **Portfolio** list, you can manage all your assigned constituent relationships, such as with donors and prospects in addition to vendors, volunteers, and other individuals and organizations. From here, quickly add new actions and opportunities, track activity, and compare wealth and giving information.

Gifts. On the **Gifts** list, you can view all giving you receive credit for and gifts received from your assigned constituents. From here, view detailed information, analyze giving by amount and time period, and track the effectiveness of your fundraising efforts.

Actions. On the **Actions** list, you can manage all your assigned tasks and interactions, as well as actions added to your assigned constituents. From here, track and analyze your activity by date or status, mark tasks as complete, and add follow-up interactions.

Opportunities. With *Prospect Research Management*, you can manage all your assigned opportunities — as well as those added to your assigned constituents — on the **Opportunities** list. From here, track your efforts, stay on top of deadlines, and analyze efforts by status, dates, or how much was asked, expected, or received from the constituent.

Unassigned. On the **Unassigned** list, you can quickly view all active constituents not currently assigned to a fundraiser. To help cultivate these relationships and make sure no one gets left behind, you can easily assign these constituents to a fundraiser — either one-off or in-bulk — from the list.

> Admins! To set up Work Center, invite everyone who manages constituent relationships or related activities — including volunteers who contact donors — from Control Panel, assign them to roles with access to Work Center, and select Mark as fundraiser on their constituent records.

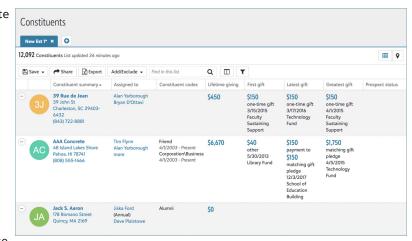
You can customize the lists in **Work Center** to focus on only what you want. To view only specific records, select **Filters**. To select the information to view, select **Choose columns**.

By default, the **Actions** list includes only open and past due actions, like a To Do list.

To help determine who should manage a relationship, consider criteria such as wealth rating, giving history, and location.

Lists

From **Lists**, you can create and manage custom lists of constituents, gifts, actions, and — with *Prospect Research Management* — opportunities, such as to analyze fundraising effectiveness or refine recipients for a communication. To create



a list, you can work from scratch or start with a saved list or static query from the database view. You can work with multiple lists at once, such as to slice-and-dice and compare different groups of records based on different filter choices. You can also save filter settings for the latest records based on the criteria and save the records as static queries or — with constituent lists — query lists in the database view.

➤ Admins! To set up Lists, from Control Panel, grant everyone who should create custom lists of records access to Lists, and choose which lists and whether they can export their data. To help protect and control your constituents' personal data, we recommend you enable only appropriate people to export from *Raiser's Edge NXT*.

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To locate constituents on a map, such as to identify nearby donors or meet with prospects, select Map from a constituent list. Powered by Microsoft Bing, the map pinpoints constituents based on their primary addresses.

To identify a constituent

Location - Search for a location Q T Filter map

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at a location, select their pin to view their name and address. You can also search the map for a specific constituent or a general location, such as to plan for an interaction. To view a list of records

– such as gifts, donors,
or actions – included in
the number-crunching,
select the total or
metric. For further
analysis, you can select
Create list to open the
list in Lists, where you
can apply additional
filters, choose columns,
and save for future
reuse.

To find constituents within a specific area, search for the location, select Filter map, Rectangle area or Custom area, and draw a shape around the area to include. To create a list of those constituents, select List to apply the map as a filter.

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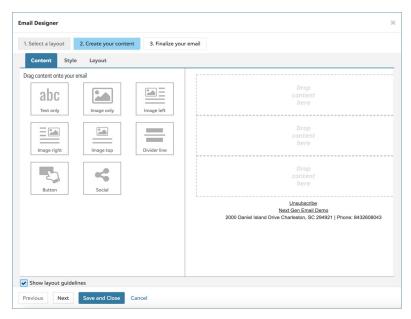
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Email

Email is one of the most important ways to stay in touch with your constituents and share information about your mission. For example, you can send monthly newsletters to highlight key events, or send email with calls to action, such as to donate or register for an event.

From Marketing, Email,

you can create email

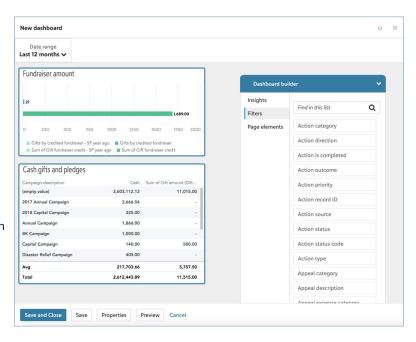


communications, manage your scheduled and draft email, and analyze the performance of your sent email. When you create an email communication, you can start from an out-of-the-box best practice template or — for more flexibility — build your own from a blank layout.

> Admins! To set up Email, from Control Panel, grant everyone who should create email access to Marketing, Email. To enable your organization to create email, select Email options in Marketing, Email and enter the information to appear in the footer of every email.

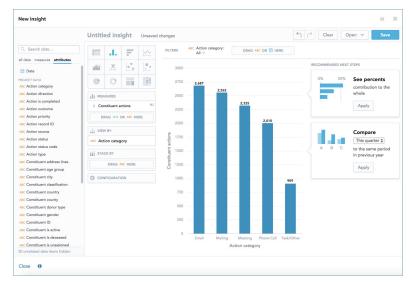
Analysis

From Analysis, Report builder, you can build dashboards from outof-the-box insights to analyze your fundraising performance, including your donor pool and lifecycle, moves management, completed actions, and giving. When you create a dashboard, you can choose who at your organization can view it and share with them a direct link to the analysis.



For additional flexibility, with *Insight Designer*, you can break down totals or counts — or measures — by shared characteristics — or attributes — to create custom insights to better meet the needs of your organziation.

You can design insights in various formats or visualizations, including tables, headlines,



charts, and heat maps. After you create a custom insight, in **Report builder**, you can add it to dashboards side-by-side with out-of-the-box insights.

From **Fundraising**, **Reporting**, you can

track and gauge your

organization's overall

fundraising performance.

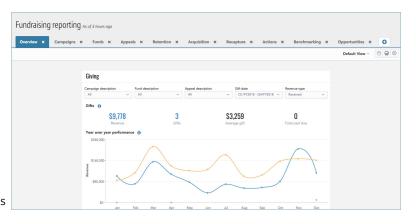
With the rich analysis

and visualizations of SKY

Reporting, you can easily

analyze your effectiveness

both at-a-glance and as



a deeper dive into the campaigns, funds, appeals, actions, and opportunities that drive your fundraising efforts.

To open a dashboard, select **Add** and choose which dashboards to view in **Fundraising reporting**. In addition to custom dashboards your organization creates in **Analysis**, **Report builder**, you can choose from several out-of-the-box dashboards.

Overview. Under **Overview**, you have — at a glance — a pulse-check of how well your organization acquires donors and gifts, completes actions and opportunities, raises money towards its fundraising efforts, and much more.

Campaigns, funds, and appeals. Under Campaigns, Funds, and Appeals, you can quickly assess your organization's effectiveness toward its overall fundraising initiatives or specific cause, or through its solicitations.

Retention and acquisition. Under **Retention** and **Acquisition**, you can analyze how many donors give year-over-year or for the first time — or again after more than five years since their previous gift — as well as their giving.

Opportunities. With *Prospect Research Management*, you can quickly assess the performance of your organization's opportunities to build relationships with prospects and secure major gifts under **Opportunities**.

Actions. Under **Actions**, you can assess the overall activity of your fundraisers' interactions and tasks to cultivate relationships with constituents.

Benchmarking. Under **Benchmarking**, you can compare your donor pool and its annual giving to that of other organizations using *Raiser's Edge NXT* in your country. For more apples-to-apples comparison, you can apply filters to include only organizations like yours, based on criteria such as mission or annual cash-in-hand revenue.

To take analysis offline or share it with someone outside of *Raiser's Edge NXT*, select **Download PDF** to save metrics in **Reporting** as a portable document file (PDF). You can also select **Schedule emailing of this dashboard** to automatically receive a PDF via email on a regular basis.

With the Revenue type filter, you can choose whether to analyze revenue received through cash-in-hand giving or committed through pledges and matching gifts. (Admins! In Control Panel, Settings, set up which gift types your organization considers for each revenue type.)

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> Admins! To set up **Reporting**, grant everyone who should track your overall fundraising performance access to **Reporting** — and choose which of its out-of-the-box dashboards they should access — from **Control Panel**.

Security Management

Security settings and groups configured in the database view also apply to users of the web view. From **Control Panel**, **Security**, supervisor users such as system admins can manage users of **Raiser's Edge NXT**.

- Invite users of the database view to use the web view.
- Add entirely new users to Raiser's Edge NXT.
- · Cancel or re-send invitations, such as if email delivery fails.
- > Admins! To help prevent data loss, we recommend users (like yourself) with access to system-level features such as those in *Config* or *Admin* of the database view or **Control**Panel of the web view have a unique login for their admin tasks, separate from their day-to-day tasks. For those people, set up multiple user accounts in the database view and invite each to *Raiser's Edge NXT* with the appropriate roles through the web view.

To manage your users' access to *Raiser's Edge NXT*, you assign them rights and permissions for feature areas via roles. Roles determine which features users can access and what tasks they can perform, such as to fully manage items or only view them. To ease management of multiple users with the same responsibilities, you can share roles across multiple users. To view details about a user's role, select their name under **Users**.

> Admins! When you add new users to **Raiser's Edge NXT**, you select which role they belong to when you send their invitations.

To help manage users, you can filter the **Users** list based on invitation status, such as Active and invitation sent or Invitation sent only.

Database View Configuration

For detailed administration of your constituents, gifts, and organizational settings, you can select **Database**, **Open database view** to manage your data through *Citrix* on your desktop. From the database view, you use a robust interface to view and manage all aspects of your fundraising efforts, including:

- Track detailed constituent and relationship information, including matching gift programs and memberships.
- Manage gifts and fundraising efforts such as campaigns, funds, appeals, events, and mailings.
- Create detailed queries to group, analyze, and export records.
- Enter or update multiple records in bulk through Batch; Import; and Globally Add, Delete, and Change.
- · Set advanced security for users, records, and data.

In the database view, you can configure settings and features so your organization gets the most out of the web view.

- To use custom status codes to track the progress of actions, set them up as action statuses in *Configuration*.
- To track your constituents' affiliations with your organization, set them up as constituent codes in *Configuration*.
- To track specialized information about constituents or opportunities as custom fields, set up the available fields and values as attributes in Configuration.
- With Prospect Research Management, you can track where opportunities are in your organization's solicitation process. In Configuration, set up the available opportunity statuses as tables.

Web-to-Database View Lexicon

As you work in the two views of *Raiser's Edge NXT*, some features in the web view are named differently in the database view.

| This web view feature | is this in the database view | and means this. | |
|--------------------------|------------------------------|--|--|
| Alert | Annotation | Reminder or special instructions to someone when they | |
| | | open a constituent's record. | |
| Attachment | Media | Files and collateral about a record, such as correspondence with a constituent or a plan for a major gift ask. Unlike media in the database view, attachments live in the cloud and can be opened directly in their native applications. | |
| Communication preference | Solicit code | Rule of contact for a constituent, such as to not call after 9:00 p.m. or on weekends. | |
| Custom field | Attribute | Specialized information about a record, such as a constituent's dietary preferences or interests. | |
| | | With Insight Designer, attributes are the criteria by which you break down a measure, such as gift types within a giving total. | |
| Former name | Maiden name | Name a constituent previously used, such as a before marriage. | |
| Fundraiser | Solicitor | Person who researches and interacts with constituents, manages actions and proposals, or asks for gifts — in short, works to successfully fund-raise — on behalf of your organization. | |
| One-time gift | 'Cash' gift | Charitable gifts of money, regardless of payment method. | |
| Opportunity | Proposal | With Prospect Research Management, plan or effort to cultivate donor relationships and secure major gifts. | |
| Pledge payment | 'Pay' gift | Payment toward a pledge installment. | |
| Preferred name | Nickname | Informal name a constituent likes to go by in familiar situations, such as "Bob" for Robert. | |