Contents

RENXT Integration Overview

Fields being retrieved through Raiser's Edge's NXT SKY API and used in the Fundriver Impact software are outlined in the next few pages.

Fundriver Impact will be referencing the following RE NXT SKY API endpoints:

SettingsKey	SettingsValue
AuthBaseUri	https://oauth2.sky.blackbaud.com/
AuthClientId	0876e049-dc89-42c1-9ce0-d27d6d40f3a1
AuthorizationSubscriptionKey	c0446abbbab9445994d37f645c46e9c6
AuthRedirectUri	http://localhost:5001/SkyAPI/Callback
AuthRelativeUri	authorization
AuthTokenRelativeUri	token
ConstituentCodesAllRoute	constituent/v1/constituents/constituentcodes
ConstituentCodesByConstituentRoute	constituent/v1/constituents/{constituent_id}/constituentcodes
ConstituentCustomFieldsAllRoute	constituent/v1/constituents/customfields
ConstituentCustomFieldsByConstituentRoute	constituent/v1/constituents/{constituent_id}/customfields
ConstituentFundraiserAssignmentRoute	constituent/v1/constituents/{constituent_id}/fundraisers
ConstituentNameFormatsSummaryRoute	constituent/v1/constituents/{constituent_id}/nameformats/summary
ConstituentsListRoute	constituent/v1/constituents
SkyApiBaseUri	https://api.sky.blackbaud.com/

Fundriver Impact and Raiser's Edge NXT Integration

Fundriver Impact utilizes rules to filter out records that will not be useful to the stewardship report building process. For example, Impact rules filter out inactive and deceased records from the API constituent record call and do not bring these records into the Impact system (see 'Fundriver Rules' in Table 1). Additionally, certain table values chosen by the client (see 'Description' for each row in table 1) will be visible in the Impact system to be used for filtering lists and grouping records.

Table 1

Fundriver Rules	Field Name	Required	Type	Description
	constituent_code		array	Represents a list of constituent codes. Returns constituents if any of the specified constituent codes match any of their active constituent codes. For example, "constituent_code=Board Member&constituent_code=Volunteer" returns constituents with either "Board Member" or "Volunteer" constituent codes.
	constituent_id		array	Represents a list of constituent identifiers. Returns constituents if any of the specified constituent identifiers match any of their constituents. For example, "constituent_id=280&constituent_id=1232" returns constituents with either "280" or "1232" constituent identifiers.
	custom_field_category		array	Represents a list of custom field categories. Returns constituents if any of the specified custom field categories match any of their active custom fields. For example, "custom_field_category=Interests&custom_field_category=Anniversary" returns constituents with either "Interests" or "Anniversary" custom fields.
[=Active, None]	fundraiser_status		array	Represents a comma-separated list of fundraiser statuses. Returns constituents if any of the specified fundraiser statuses match the constituent's fundraiser status. For example, "fundraiser_status=Active,None" returns constituents whose fundraiser status that matches Active or None. Valid values for this filter are Active, Inactive, and None.
[=False]	include_deceased		boolean	Set this parameter to "true" to include deceased constituents in the response.
[=False]	include_inactive		boolean	Set this parameter to "true" to include inactive constituents in the response.

Constituent

Table 2 shows specific fields being retrieved by Fundriver Impact from the Constituent endpoint.

Not all fields outlined in Table 2 are currently being used in the Impact User Interface, but we are pulling over more fields than we need so that we can add functionality to the software in a later phase. The fields with an 'x' in the 'User Interface' column are the ones that will be actively used and/or visible in the initial phase of Fundriver Impact.
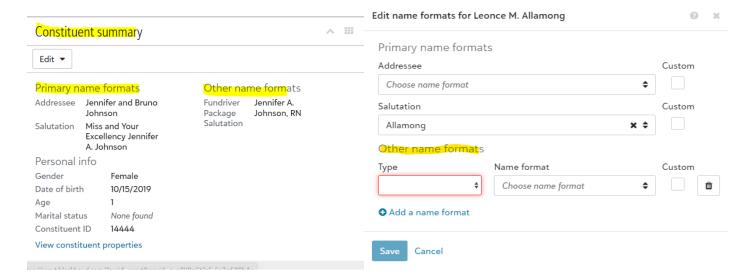
Table 2

User Interface	Property	Type	Description
x	id	string	The immutable system record ID for the constituent. This is not the same as the user-definable constituent identifier, which is stored in the lookup_id.
x	address	address	The constituent's preferred address.
	age	integer	This computed field calculates the constituent's age based on the birthdate property. For individuals only.
	birthdate	fuzzy date	The constituent's birthdate. For individuals only.
	date_added	datetime	The date when the constituent was created. Includes an offset from UTC in ISO-8601 format: 1969-11-21T10:29:43-04:00.
	date_modified	datetime	The date when the constituent was last modified. Includes an offset from UTC in ISO-8601 format: 1969-11-21T10:29:43-04:00.
	deceased	boolean	Indicates whether the constituent is deceased. For individuals only.
	deceased_date	fuzzy date	The date when the constituent died. For individuals only.
x	email	email address	The constituent's primary email address, or the constituent's first active email address if no active email address is marked as primary.
x	first	string	The constituent's first name. For individuals only.
	former_name	string	The constituent's former name. For individuals only.
x	fundraiser_status	string	Indicates whether the constituent is a fundraiser. For individuals only. Active Inactive None

x	gender	string	The constituent's gender. Available values are the entries in the Gender table. This property defaults to unknown if no value is provided. For individuals only.
x	gives_anonymously	boolean	Indicates whether the constituent gives anonymously.
	inactive	boolean	Indicates whether the constituent is inactive.
x	last	string	The constituent's last name. For individuals only.
	lookup_id	string	The user-defined identifier for the constituent.
	marital_status	string	The constituent's marital status. Available values are the entries in the Marital Status table. For individuals only.
x	middle	string	The constituent's middle name. For individuals only.
x	name	string	If the constituent's type is *Individual*, this computed field indicates the full name of the constituent based on the target organization's display name settings. If the type is *Organization*, this is the organization's name.
	online_presence	online presence	The constituent's primary online presence, or the constituent's first active online presence if no active online presence is marked as primary.
	phone	phone	The constituent's primary phone, or the constituent's first active phone if no active phone is marked as primary.
x	preferred_name	string	The constituent's preferred name. For individuals only.
x	spouse	spouse	This computed field retrieves information about the constituent's spouse using the constituent's relationships. For individuals only.
x	suffix	string	The constituent's primary suffix. Available values are the entries in the Suffixes table. For individuals only.
x	suffix_2	string	The constituent's secondary suffix. Available values are the entries in the Suffixes table. For individuals only.
	title	string	The constituent's primary title. Available values are the entries in the Titles table. For individuals only.
	title_2	string	The constituent's secondary title. Available values are the entries in the Titles table. For individuals only.
x	type	string	The type of constituent. Available values are *Individual* and *Organization*.

		Individual
		Organization

Primary and Other Name Formats (Individual Records)

Name formats (addressee and salutations) will appear in the Impact user interface for constituents with a RE NXT record type of 'Individual'. The API will pull over all available addressee and salutation formats, but the client can choose one format to appear in the Impact interface. If no format is chosen, the default will be the 'Primary' or 'Preferred' format. The mapping will be based on the Addressee/Salutation type.

RENXT API Endpoints Accessed for Fund and Donor Pages in Impact

Table 3

Label	Source	API	API Endpoint
Constituent ID	CRM	Blackbaud RE NXT	GetContituent
Donor Name	CRM	Blackbaud RE NXT	GetContituent
Addressee	CRM	Blackbaud RE NXT	GetConstituentNameFormatSummary
Primary Salutation	CRM	Blackbaud RE NXT	GetConstituentNameFormatSummary
Location	CRM	Blackbaud RE NXT	GetContituent
Address	CRM	Blackbaud RE NXT	GetContituent

Email	CRM	Blackbaud RE NXT	GetContituent

Custom Field Categories

The Fundriver Impact report template that is used for a specific report run is mapped to a custom field (attribute) that is set on the constituent record. If a custom field for tracking stewardship reports already exists on constituent records in RE NXT, Fundriver can map to that custom field. Otherwise, one can be created globally and added to records that will get a specific report format. The fields that Fundriver Impact is accessing to manage this process are shown below in Table 4.

Table 4

[ConstituentCustomFieldID] [varchar]
[ConstituentID] [varchar]
[Category] [varchar]
[Comment] [varchar]
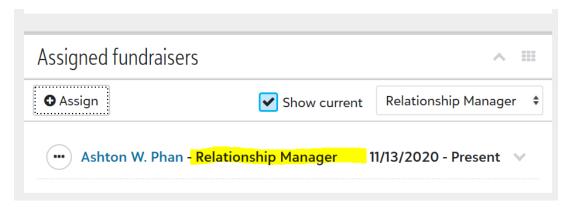[Type] [varchar]
[Value] [varchar]
[LastSyncDate] [datetime]
[DF_ConstituentCustomFields_LastSyncDate]
[CreateDate] [datetime]

Fundraisers/Assigned Solicitors

The API pulls all Assigned Solicitor types for active fundraisers (no end date), and one type of Assigned Solicitor may be mapped to appear in the Impact User Interface (i.e. 'Primary Solicitor'). If no solicitor is assigned to a constituent/donor, then none will appear in the Impact interface.

From the Fundraising API endpoint, the items marked with an 'x' in Table 5 will be utilized in the Impact User Interface. The fundraiser name will be pulled from the Constituent table.

Table 5

Table Data	Property	Type	Description
	id	string	The immutable system record ID of the given assignment.
	amount	currency	The goal amount for the fundraiser to solicit from the assigned constituent.
	appeal_id	string	The immutable system record ID of the appeal the fundraiser should use to request gifts.
	campaign_id	string	The immutable system record ID of the campaign to apply resulting gifts to.
x	constituent_id	string	The immutable system record ID of the target constituent.
	end	datetime	The fundraiser end date. Uses ISO-8601 format: 2017-05-17T00:00:00.
	fund_id	string	The immutable system record ID of the fund any resulting gifts should be applied to. If a restricted fund is selected, only campaigns and appeals associated with that fund may be selected.
x	fundraiser_id	string	The immutable system record ID of the fundraiser assigned to the constituent.
	start	datetime	The fundraiser start date. Uses ISO-8601 format: 2017-01-29T00:00:00.
x	type	string	The type of fundraiser. Available values are the entries in the Solicitor Type table.

Authorizing the Nightly Feed

In order to pull data from Raiser's Edge nightly, a RE NXT administrator will need to authorize access to the CRM data. The following table in Fundriver Impact shows the data collected in the authorization process.

AUTHORIZATION DETAILS:

- ⊟ 🔲 dbo.BlackbaudClientTokens
  - ⊟ 📁 Columns
    - 🔑 AuthTokenID (PK, int, not null)
    - 🔳 ClientID (int, not null)
    - 🔳 AccessToken (varchar(max), not null)
    - 🔳 AccessTokenExpiresIn (int, not null)
    - 🔳 TokenType (varchar(100), not null)
    - 🔳 RefreshToken (varchar(max), not null)
    - 🔳 RefreshTokenExpiresIn (int, not null)
    - 🔳 EnvironmentId (varchar(max), not null)
    - 🔳 EnvironmentName (varchar(max), not null)
    - 🔳 LegalEntityId (varchar(max), not null)
    - 🔳 LegalEntityName (varchar(max), not null)
    - 🔳 UserId (varchar(max), not null)
    - 🔳 Email (varchar(max), not null)
    - 🔳 FamilyName (varchar(max), not null)
    - 🔳 GivenName (varchar(max), not null)
    - 🔳 CreateDate (datetime, not null)
    - 🔳 LastRefreshDate (datetime, not null)