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**DEVELOPERS’  
CONFERENCE**  
June 15–17, 2021

# Expanding Raiser's Edge NXT® Adoption by Meeting Your Users Where They Are

BLACKBAUD SKY® TRACK

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**ELLEN SMITH, BEN REGIER**

*Session Host: Heather McLean*



# Safe Harbor Statement

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- Providing direct support to answer questions regarding Subscription functionality, internal business practices, and troubleshooting processes to Your Non-Authorized Users
- Providing direct support to answer questions regarding Customization specifications, features, intended usage, and Error correction and troubleshooting processes to Your Non-Authorized Users

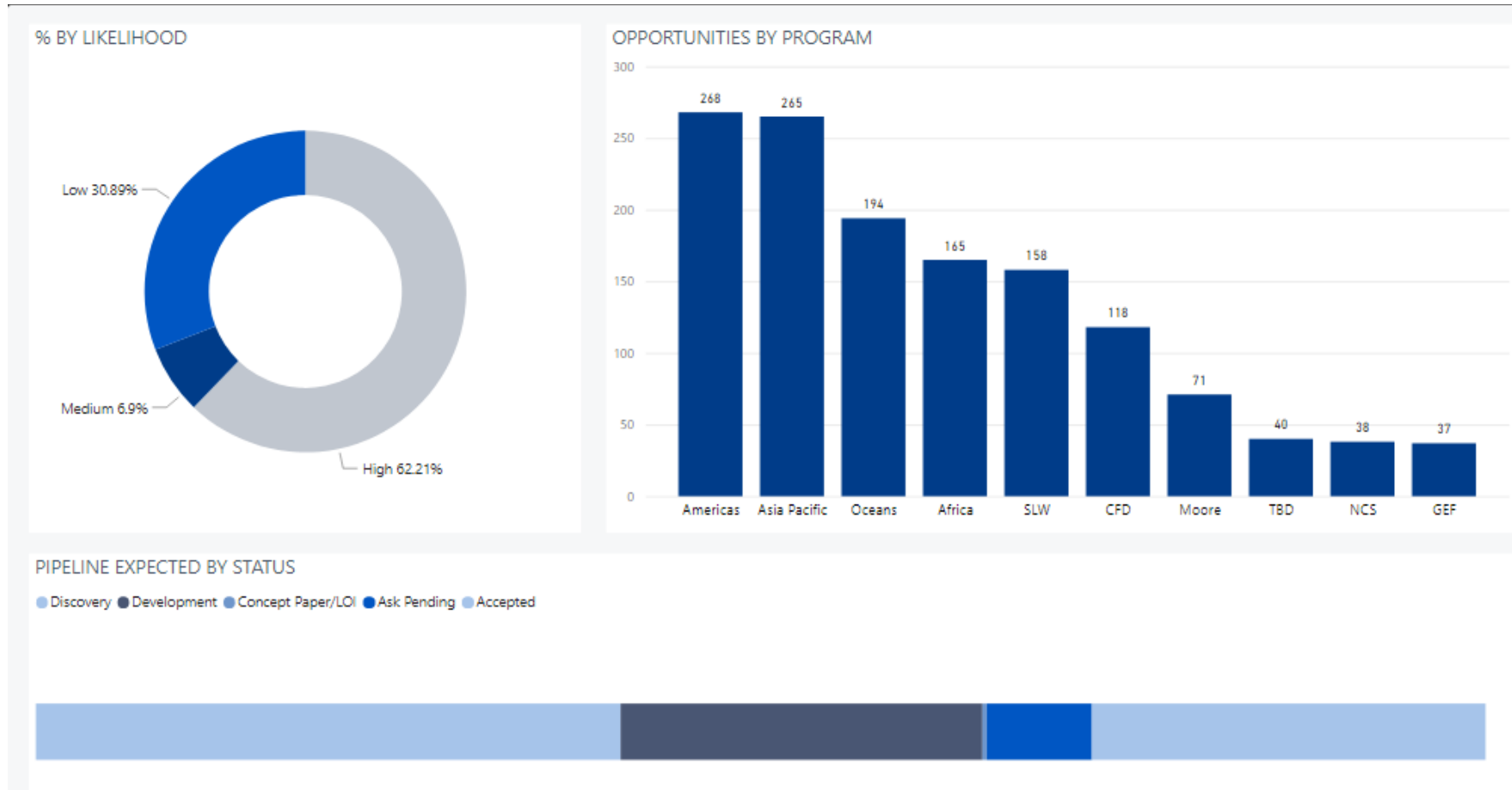


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# Managing Fiscal Year Updates

ELLEN SMITH, CONSERVATION INTERNATIONAL

# Pipeline Report

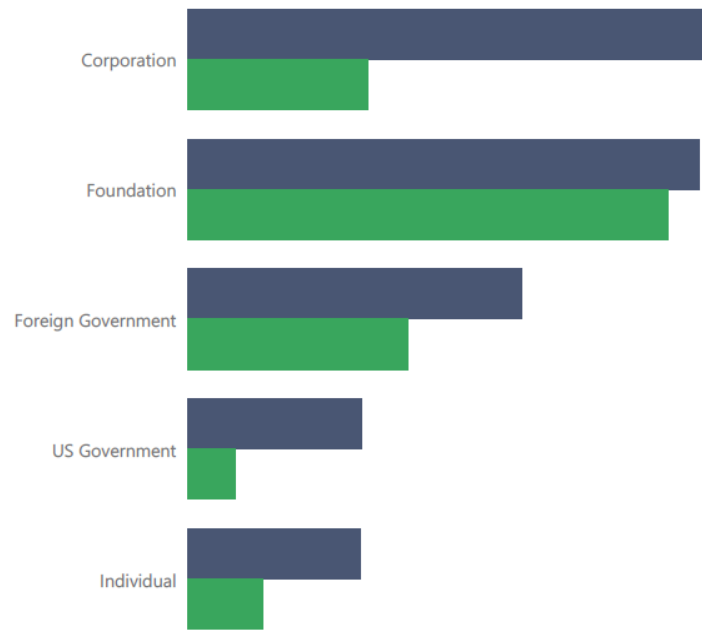


Link	FY	Project	Expected \$	Likelihood	Status	Fundraising Unit	Lead Div-Prog	Source
<a href="#">🔗</a>	FY22	Team Tracker	\$	Low	Discovery	Asia-Pacific	Asia Pacific - Japan	Corporation
<a href="#">🔗</a>	FY22		\$	Medium	Development	Major Giving	Asia Pacific - Indonesia	Individual
<a href="#">🔗</a>	FY22		\$	Low	Development	Asia-Pacific	Asia Pacific - Japan	Corporation
<a href="#">🔗</a>	FY22		\$	High	Development	Major Giving	Asia Pacific - APFD Executive	Individual
<a href="#">🔗</a>	FY22		\$	Low	Development	Asia-Pacific	Asia Pacific - Cambodia	Corporation
<a href="#">🔗</a>	FY21		\$	Low	Development	Major Giving	Asia Pacific - Indonesia	Individual
<a href="#">🔗</a>	FY21		\$	Low	Development	Major Giving	Asia Pacific - New Caledonia	Individual
<a href="#">🔗</a>	FY22		\$	Medium	Development	Major Giving	Asia Pacific - APFD Executive	Individual
<a href="#">🔗</a>	FY22		\$	Low	Development	Major Giving	Asia Pacific - Indonesia	Individual
<a href="#">🔗</a>	FY22		\$	Medium	Development	Major Giving	Asia Pacific - APFD Executive	Individual
<a href="#">🔗</a>	FY22		\$	Medium	Development	Major Giving	Asia Pacific - Indonesia	Individual
<a href="#">🔗</a>	FY21		\$	Medium	Development	Asia-Pacific	Asia Pacific - Indonesia	Foundation
<a href="#">🔗</a>	FY21		\$	High	Development	Asia-Pacific	Asia Pacific - Singapore	Corporation
<a href="#">🔗</a>	FY22		\$	Low	Development	Major Giving	Asia Pacific - Indonesia	Individual
<a href="#">🔗</a>	FY21		\$	Medium	Ask Pending	Asia-Pacific	Asia Pacific - New Caledonia	Foreign Government
<a href="#">🔗</a>	FY21		\$	High	Accepted	Asia-Pacific	Asia Pacific - Singapore	Individual
<a href="#">🔗</a>	FY21		\$	High	Accepted	GPP	Asia Pacific - Timor Leste	Foreign Government
<a href="#">🔗</a>	FY21		\$	High	Accepted	Asia-Pacific	Asia Pacific - Japan	Corporation
<a href="#">🔗</a>	FY21		\$	High	Accepted	Major Giving	Asia Pacific - New Zealand	Individual
<a href="#">🔗</a>	FY20		\$	High	Accepted	Asia-Pacific	Asia Pacific - Fiji	Individual
<a href="#">🔗</a>	FY21	\$	Medium	Accepted	Land & Waters	Asia Pacific - Indonesia	Corporation	

# Fiscal Year Projections

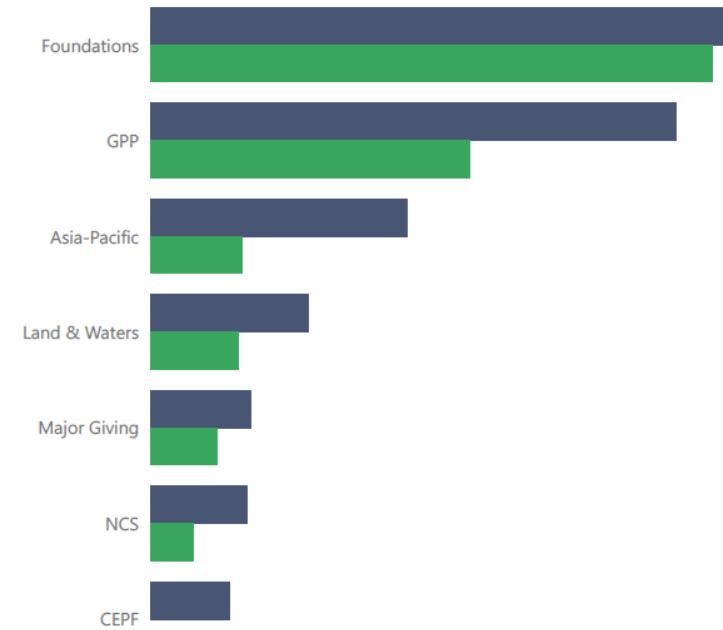
FY21 PROJECTED BY SOURCE

● Projected ● Secured



FY21 PROJECTED BY FR UNIT

● Projected ● Secured





# Annual Updates - Old System Options

## Option 1:

- Create Excel Sheets from Import File, vlookups required
- Split by Team
- Hide Import Columns (hope for the best!)
- Get lists back from all fundraisers
- Format Text
- Compile Sheets OR
- Streamline sheets and import each separately

## Option 2:

- Create NXT Lists for each fundraiser
- Send instructions for data entry steps for each update
- Reminders, reminders, reminders
- Data checks and follow ups



# Three Different Options for Updates at the End of the Year

**Close Opportunity**

- Status – Close
- Expected Amount - \$0
- Make Inactive

**Keep in FY21**

- Add Priority Designations

**Move to FY22**

- Update Campaign
- Update Purpose
- Update Expected Date
- Add Priority Designations

# New System

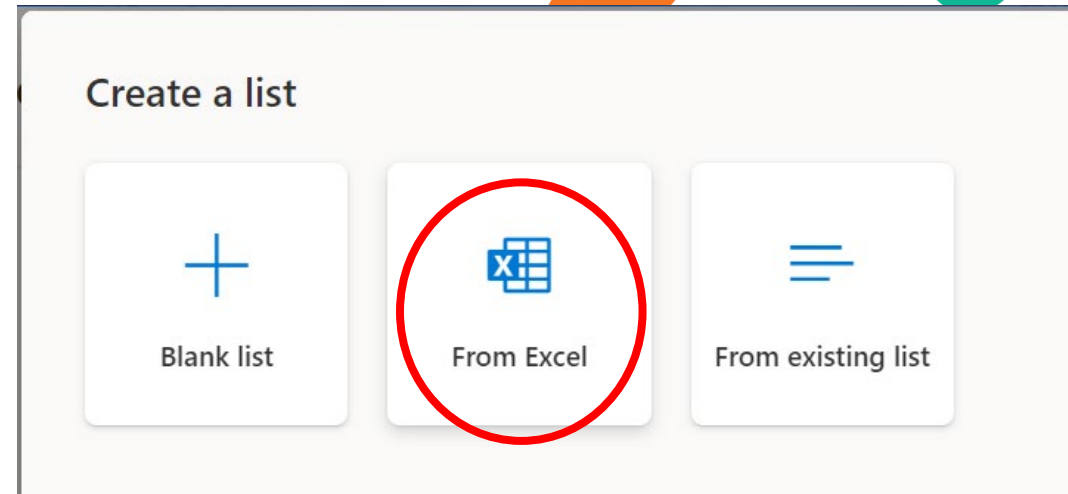
SharePoint List for users with simple  
choice columns

Choice columns feed into Power  
Automate

Power Automate updates RE  
Opportunities

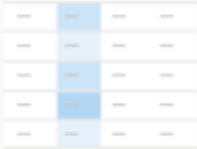
# Create a SharePoint List

- Based on NXT Opportunity List Export
- Under Version Settings, turn on creating version for each change
- Map List from Excel (has to be formatted as a table)
- Add choice columns for Action and Priority Designation

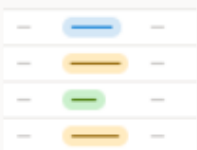


# Format Important Columns

## Format Action column

 **Background colors**  
Add a background color to each choice. Select 'Edit styles' to add borders, icons, and more.

[Edit styles](#)

 **Choice pills**  
Add color and rounded styling to each choice. Select 'Edit styles' to add borders, icons, and more.

[Edit styles](#)

... > Choice pills > Change style


← Change style


### Show list item as



 Fill color ▾

### Font

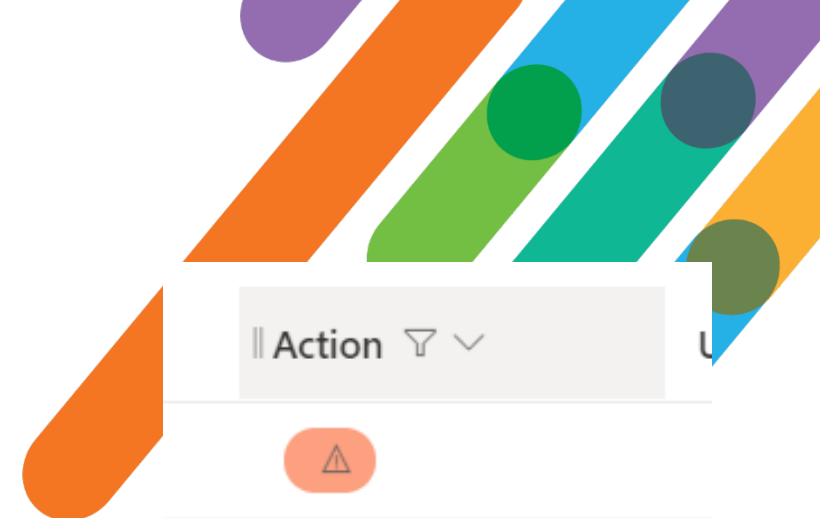
12 ▾ **B** *I* U 

 Font color ▾

### Icon



### Icon alignment



**Action** ▾ ▾

- 
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# User Experience

Project 	Action 	Updated Star Designation (Primary) 
Amazon Forever	<span>Move to FY22</span>	
Brazil Support	<span>⚠</span>	
Amazon Restoration	<span>⚠</span>	
Amazon Forever	<span>⚠</span>	
Additional Carbon Project Development	<span>Close Opportunity</span>	N/A
Americas Support	<span>Leave in FY21</span>	Other CI Priority

 Edit all  Copy link

## Brazil Support

 Action

Type to filter

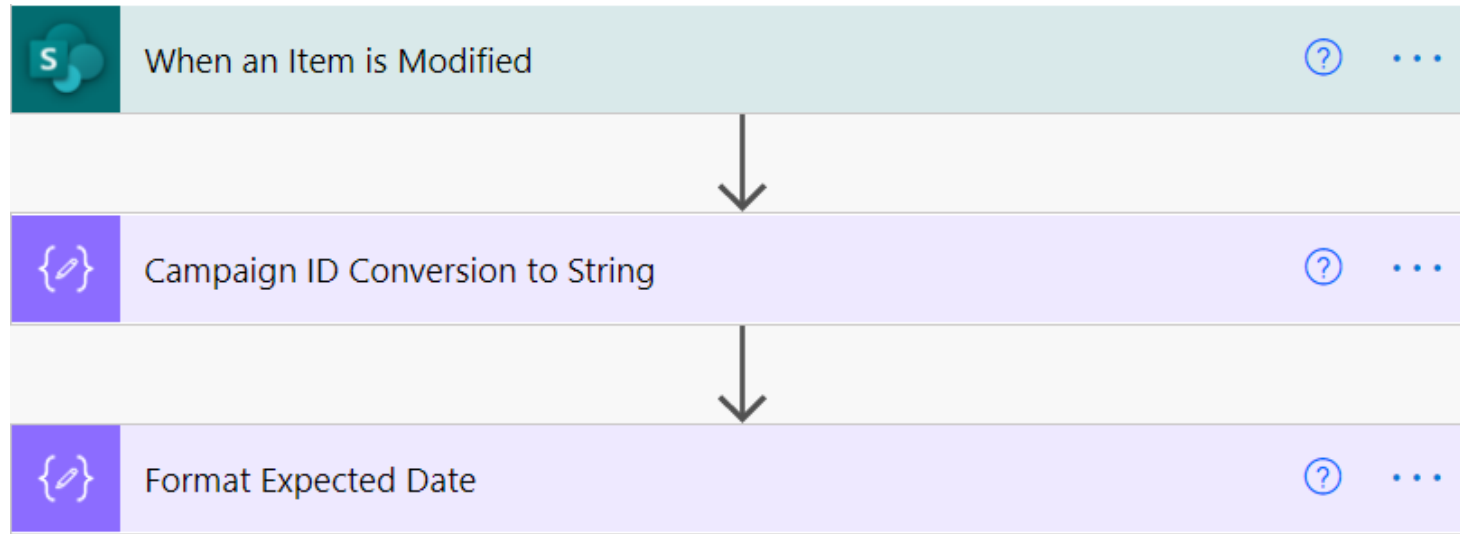
Move to FY22

Close Opportunity

Leave in FY21

User clicks on Project name and selects action from pop up form.

# Set Up Steps for Automate Flow



Campaign, Fund and Appeal IDs can be read as numbers and need to be string. Set up compose to convert.

Set up any formatting in the start of flow.

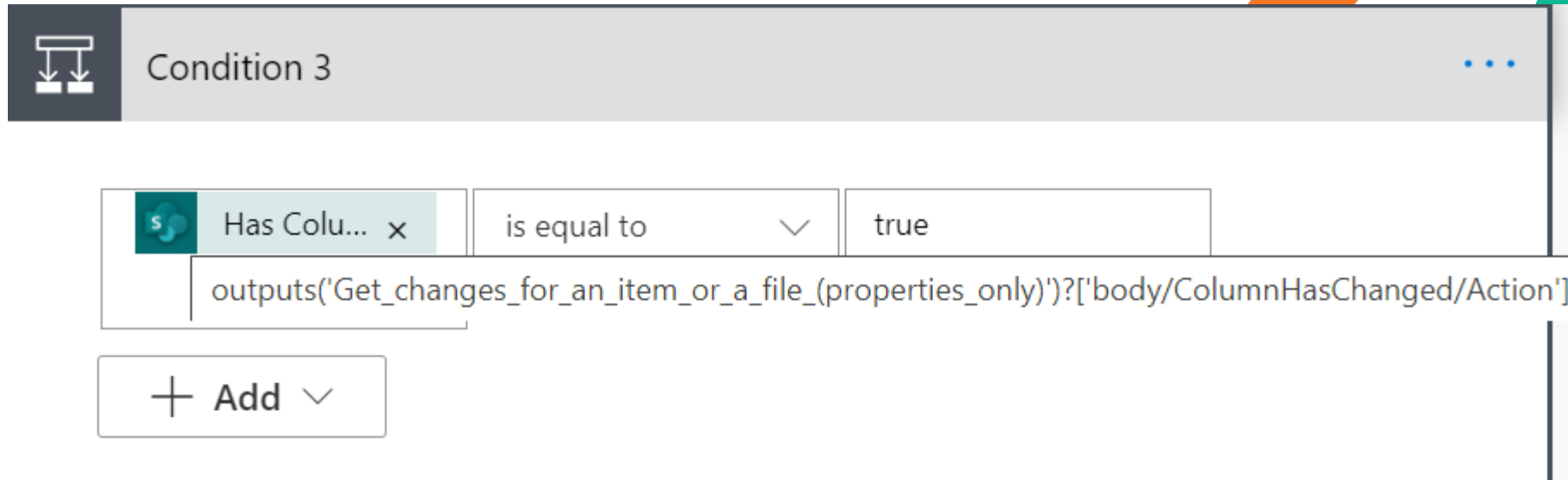
The screenshot shows the configuration for the 'Get changes for an item or a file (properties only)' step. The fields are as follows:

- \* Site Address: Fundraising Management Tools - <https://conservation.sharepoint.com/sites/FundraisingManagementTeam>
- \* List or Library Name: FY21 Opportunities for Review
- \* Id: ID
- \* Since: sub(...)
- Until: Trigg\_ sub(int(triggerOutputs()?['body/{VersionNumber}']),2) SO 8601 date


There is a 'Show advanced options' link at the bottom.

Note the formula for \*Since This is how many versions ago you will use in conditions to check for changes in relevant field

# Add Condition for Change Made to the Action Column



The screenshot shows a configuration window for 'Condition 3'. It features a tree icon on the left and a three-dot menu on the right. The main area contains a single condition row with the following components:

 Has Colu... x	is equal to	true
---	-------------	------

Below the condition row, a text input field contains the following JSON path:

```
outputs('Get_changes_for_an_item_or_a_file_(properties_only)')['body/ColumnHasChanged/Action']
```

At the bottom of the configuration area, there is a button labeled '+ Add' with a dropdown arrow.

Based on the formula set up in previous step, has column (in this case the action to be taken on the opportunity) changed since the version indicated in Since field

# Add Switch Condition Based on the Action Taken Choice Column

✓ If yes

Switch

\* On

Case

\* Equals

Update an opportunity (Preview)

Create an opportunity custom field (Preview)

Condition

Case 2

\* Equals

Update an opportunity 2 (Preview)

Add an action

Case 3

\* Equals

Create an opportunity custom field 3 (Preview)

Condition 2

Add an action



# Update Opportunity Records

**Move to FY22 (Preview)**

\* Opportunity ID: RE SYS ID x

Purpose: FY22 Gift Projection

Name: The name that identifies the opportunity throughout the program, such as in lis

Status: The status that indicates where the opportunity is in the solicitation proce

Deadline: The goal date for the opportunity to result in a gift (ex: '2020-09-18T04:13:56Z')

Ask date: The date when the solicitation was made (ex: '2020-09-18T04:13:56Z').

Ask amount value: The monetary value.

Expected date: fx formatDateTim... x

Expected amount value: The monetary value.

Funded date: The date when the prospect gave in response to the opportunity (ex: '2020-09-

Funded amount value: The monetary value.

Campaign ID: Outputs x

Fund ID: The system record ID of the fund associated with the opportunity. The fund des

Fundraiser(s) Constituent ID - 1: The system record ID of the constituent associated with the fundraiser.

Fundraiser(s) Credit amount value - 1: The monetary value.

+ Add new item

Inactive? No

**Close Opportunity (Preview)**

\* Opportunity ID: RE SYS ID x

Purpose: The intended use for any money raised as a result of the opportunity.

Name: The name that identifies the opportunity throughout the program, such as in lis

Status: Closed

Deadline: The goal date for the opportunity to result in a gift (ex: '2020-09-18T04:13:56Z')

Ask date: The date when the solicitation was made (ex: '2020-09-18T04:13:56Z').

Ask amount value: The monetary value.

Expected date: The date when the prospect is expected to give in response to the opportunity

Expected amount value: 0

Funded date: The date when the prospect gave in response to the opportunity (ex: '2020-09-

Funded amount value: The monetary value.

Campaign ID: The system record ID of the campaign associated with the opportunity. The can

Fund ID: The system record ID of the fund associated with the opportunity. The fund des

Fundraiser(s) Constituent ID - 1: The system record ID of the constituent associated with the fundraiser.

Fundraiser(s) Credit amount value - 1: The monetary value.

+ Add new item

Inactive? Yes

# Add Custom Fields for Primary and Secondary Priority Designations

**Add Primary Star Designation Custom Field (Preview)**

\* Opportunity ID: RE SYS ID x

\* Category: Primary Star Designation

Date: The date on the custom field (ex: '2005-09-18').

Comment: The comment on the custom field. Character limit: 50.

Value: Updated Star D... x



**If Secondary Star Value is Blank**

Updated... x is equal to null x

+ Add v

**If yes**

Add an action

**If no**

**Add Secondary Star Designation Custom Field (Preview)**


\* Opportunity ID: RE SYS ID x

\* Category: Secondary Star Designation

Date: The date on the custom field (ex: '2005-09-18').

Comment: The comment on the custom field. Character limit: 50.

# Data Check Temporary Custom Field

 Create Action Taken Custom Field (Preview) ? ...

* Opportunity ID	<input type="text" value="RE SYS ID x"/>
* Category	<input type="text" value="FY22 Updates"/>
Date	<input type="text" value="Modified x"/>
Comment	<input type="text" value="Update Status ... x"/>
Value	<input type="text" value="Action Value x"/>

I added a temporary custom field in opportunity records to keep track of what had been successfully updated in RE



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# MennoData

BEN REGIER, MENNONITE MISSION NETWORK

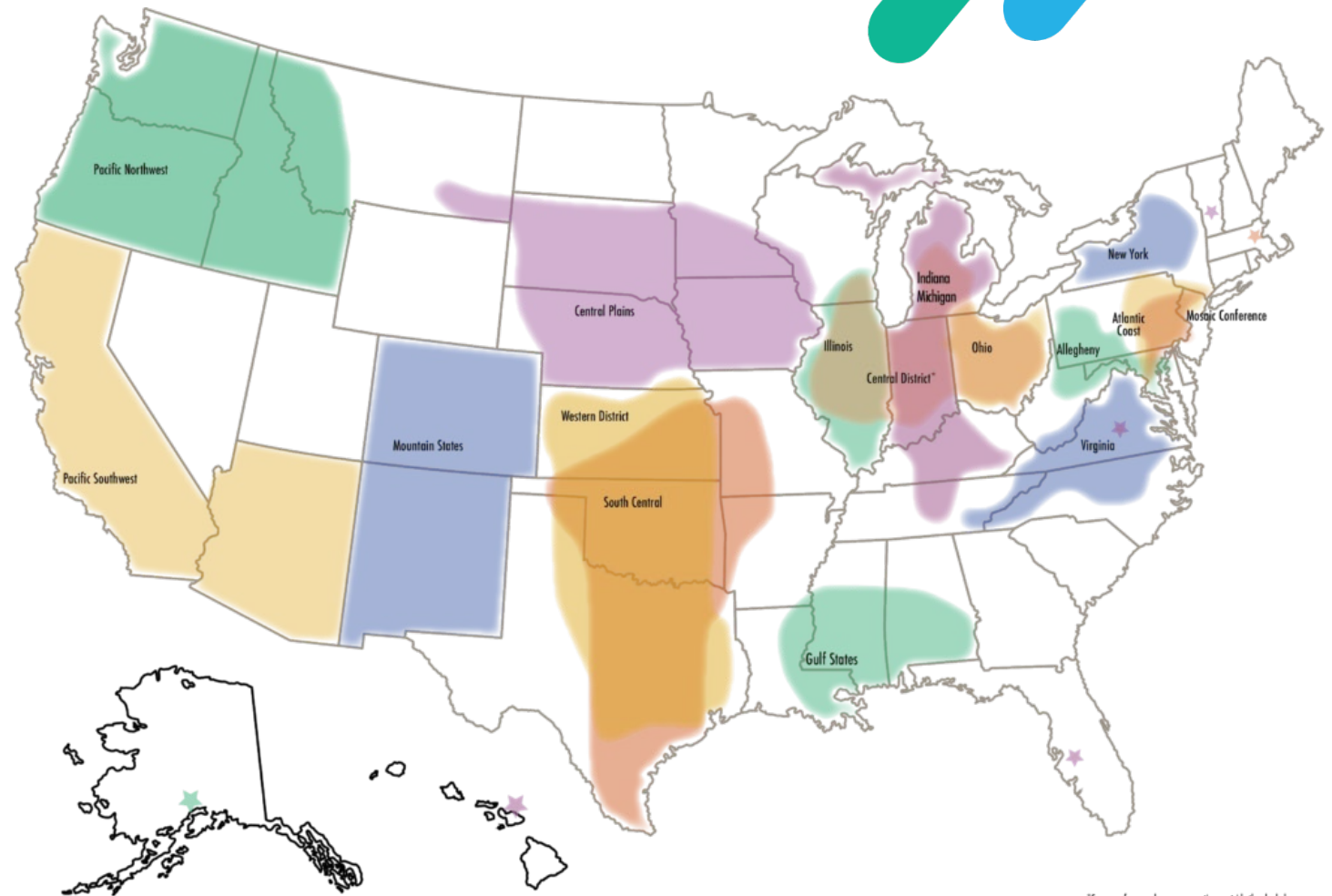


# What is MennoData?

- Information on Mennonite pastors in North America
- Information on Mennonite congregations in North America
- Data is owned by Mennonite Church USA and stored in Raiser's Edge
- Data is managed by Conference Ministers and MCUSA staff

# What is a Conference Minister, anyway?

- Needs to be able to view and edit pastor and congregation data for their conference
- They do not have Raiser's Edge accounts
- MennoData is the portal that allows them to view/edit their data in Raiser's Edge



\*Some conferences have congregations outside the shaded area



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# The Problem



# A cloud on the horizon

- Our current MennoData solution won't work once we move to NXT
  - SKY API is great, but it's also different from the API our current solution is built on
  - We won't have access to our on-prem SQL database once we're on the cloud
- We're moving to NXT in eight months

However

- I have some experience with software development (10 years ago...)

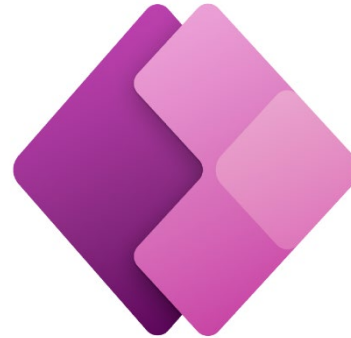


Maybe this could work?



SharePoint

- User interface
  - (Sites)
  - (Lists)
  - (Security)



PowerApps

- Additional SharePoint List functionality

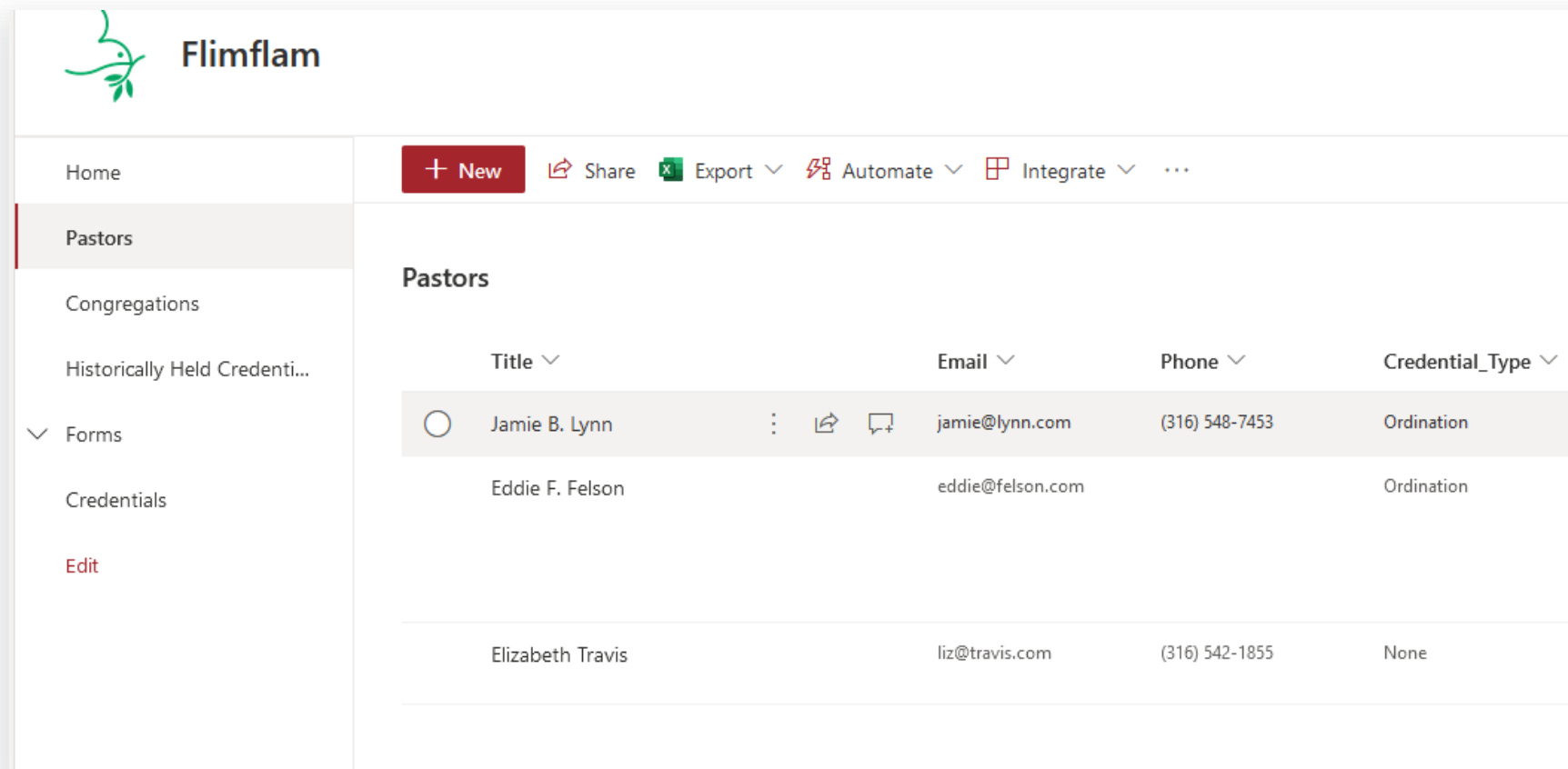


Power Automate

- Workflows
- Behind the scenes processes

# SharePoint

- Lists for pastors and congregations provide easy sort/filter/search functionality
- Security is built in
- Lists are updated every night, as well as on demand when certain things change



The screenshot shows the Flimflam SharePoint interface. The top navigation bar includes a logo and the name "Flimflam". Below the navigation bar, there are several action buttons: "+ New", "Share", "Export", "Automate", "Integrate", and a menu icon. The left sidebar contains a list of navigation options: "Home", "Pastors", "Congregations", "Historically Held Credenti...", "Forms", "Credentials", and "Edit". The main content area displays a list of pastors with the following columns: Title, Email, Phone, and Credential\_Type. The list contains three entries: Jamie B. Lynn, Eddie F. Felson, and Elizabeth Travis.

Title	Email	Phone	Credential_Type
Jamie B. Lynn	jamie@lynn.com	(316) 548-7453	Ordination
Eddie F. Felson	eddie@felson.com		Ordination
Elizabeth Travis	liz@travis.com	(316) 542-1855	None

# PowerApps

- Allows us to add additional functionality to lists
- Such as a button that retrieves education data from Raiser's Edge and displays it in the sidebar

The screenshot displays a PowerApps interface for 'Flimflam'. The top navigation bar includes regional options: Alberta, Allegheny, Atlantic Coast, British Columbia, Central District, Central Plains, Eastern Canada, Eastern District, and Franconia. The main content area shows a list of pastors with columns for Title, Email, and Phone. The list contains three entries: Jamie B. Lynn, Eddie F. Felson, and Elizabeth Travis. A sidebar on the left contains navigation options: Home, Pastors, Congregations, Historically Held Credential..., Forms, Credentials, and Edit. A detailed view of a pastor's information is shown on the right, including fields for First, Middle, Last, Email, Phone, Address\_Lines, City, State, and Postal\_Code. Two buttons at the bottom of the detailed view are 'View Education' and 'View Ministry History'.

Title	Email	Phone
Jamie B. Lynn	jamie@lynn.com	(316) 548-7453
Eddie F. Felson	eddie@felson.com	
Elizabeth Travis	liz@travis.com	(316) 542-1855

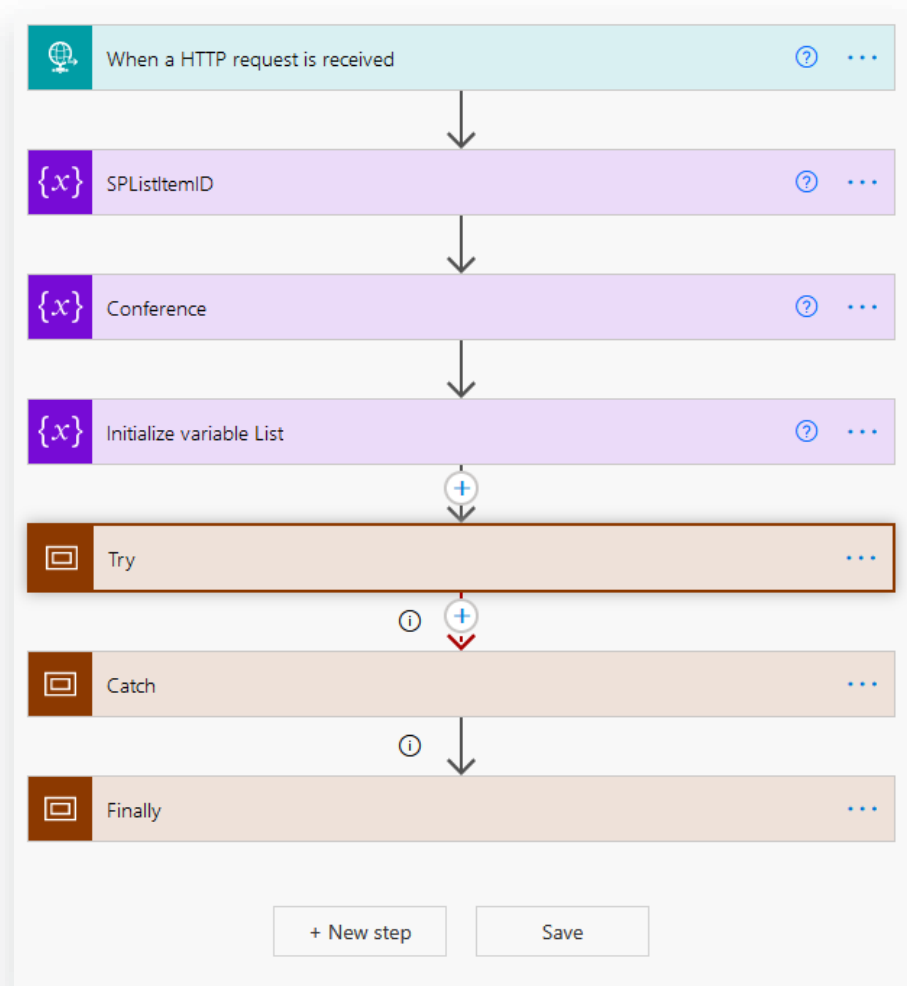
**Pastor Details:**

- First: Eddie
- Middle: Fast
- Last: Felson
- Email: eddie@felson.com
- Phone:
- Address\_Lines: c/o Lead Pastor, 123 Fake St
- City: Newton
- State: KS
- Postal\_Code: 67114

[View Education](#) [View Ministry History](#)

# Power Automate

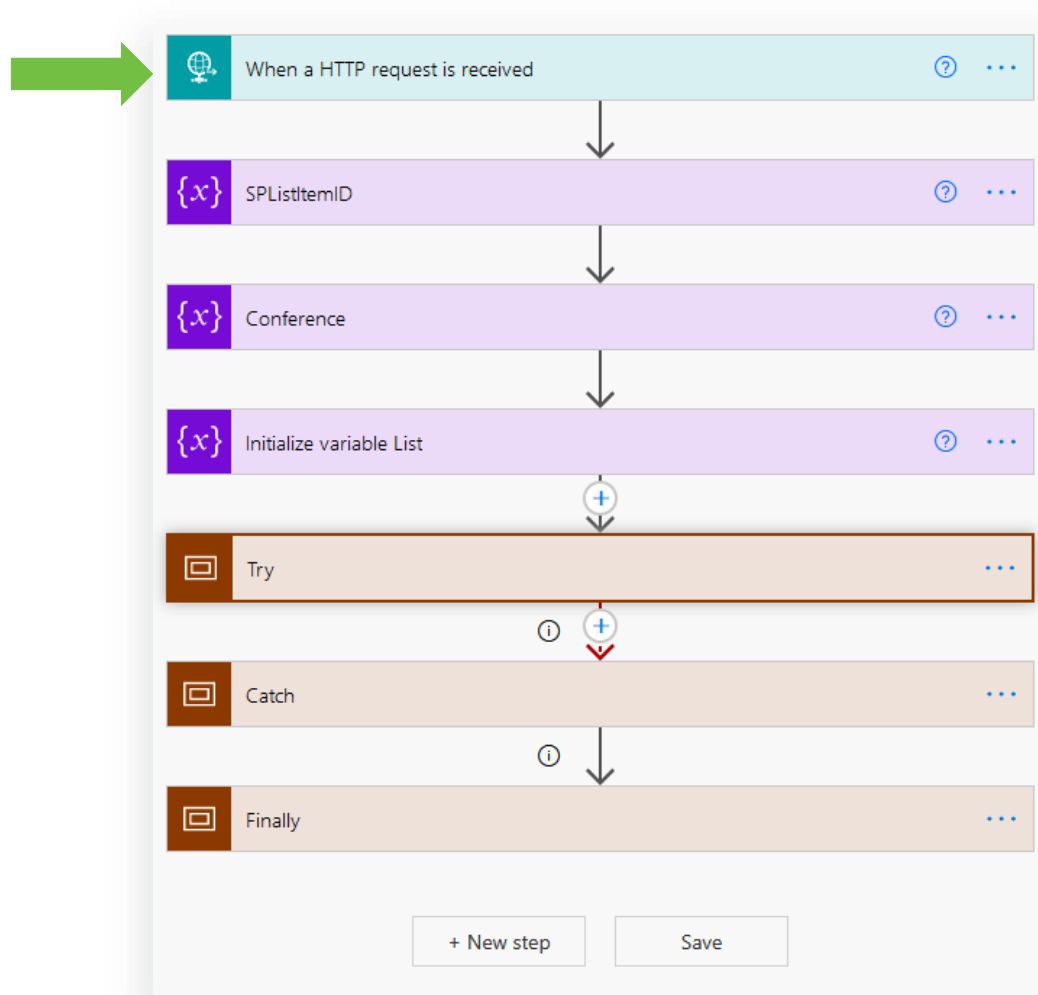
Everything you don't see



# Power Automate

## Tip #1 – Function Flows

- Using the HTTP trigger allows you to call a flow from another flow
- This allows you to do more modular development
- Less duplication within your flows, easier to manage future workflow changes



## Power Automate Tip

### #2 – SharePoint

### HTTP Requests

- This action allows you to make HTTP requests to the SharePoint REST API without having to deal with authentication
- Much more flexible and powerful than the built-in SP actions
- But... requires more research

The screenshot shows the configuration for the 'Send an HTTP request to SharePoint - Get Item' action. The fields are as follows:

- Site Address:** `first(...)`
- Method:** GET
- Uri:** `_api/web/lists/GetByTitle('{x} List ')/items('{x} SpListItemID ')?$select=Title,Last,First,Middle,Address_Lines,City,State,Postal_Code,Email,Phone,SystemRecordID,Editor/EMail,Editor/Title&$expand=Editor/ID`
- Headers:**

accept	application/json;odata=verbose
content-type	application/json;odata=verbose
Enter key	Enter value
- Body:** Enter request content in JSON

# Power Automate Tip #3 – Check for changes before sending approval

Save your approvers some time and hassle by checking to make sure something has actually been changed before sending them the approval.

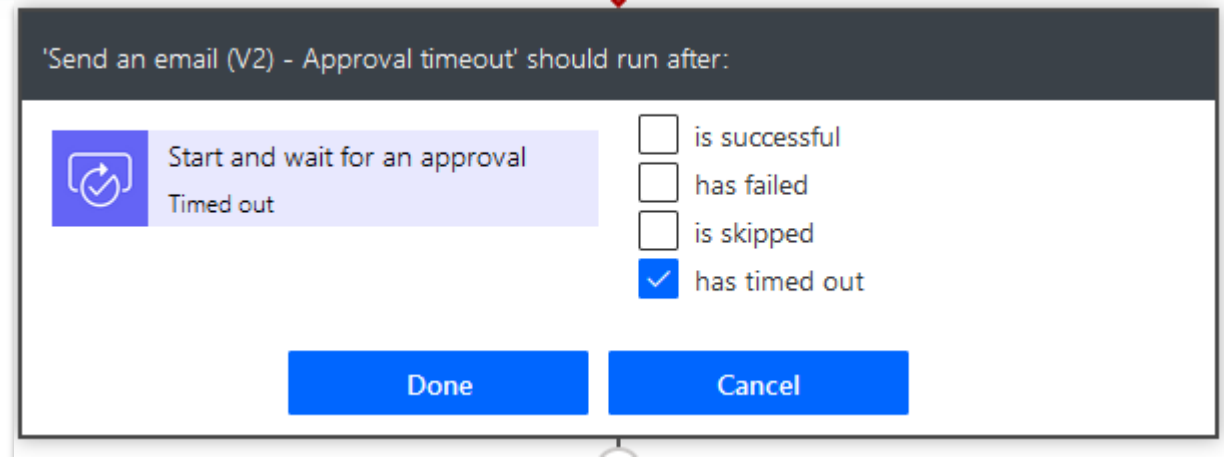
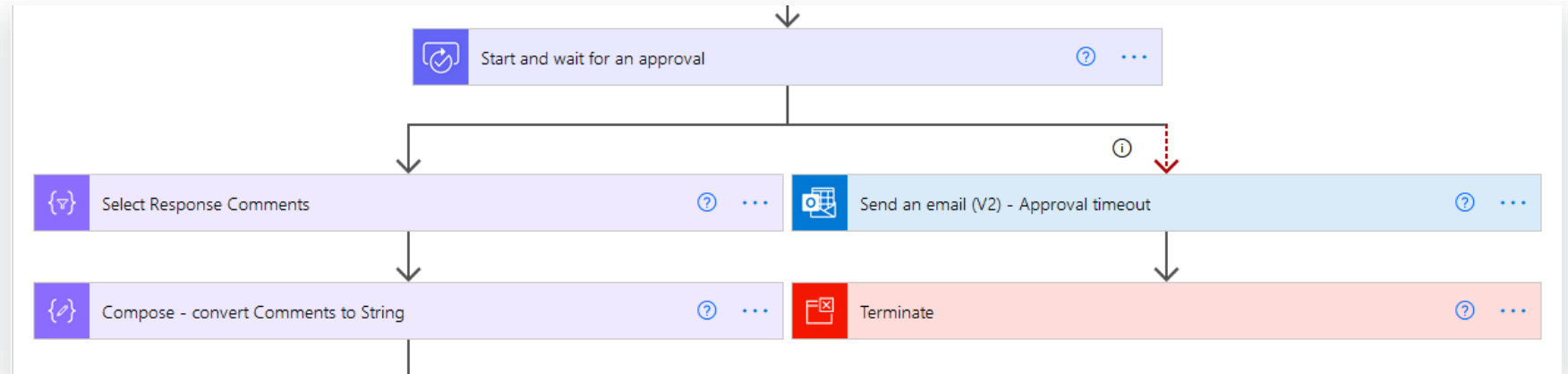
The screenshot shows a Power Automate condition step titled "Condition - Check if anything has changed". The condition is configured with an "Or" operator and nine individual checks. Each check consists of a checkbox, a field name, a comparison operator, and a value. The fields and values are as follows:

Field	Operator	Value
First	is not equal to	First name
coalesce...	is not equal to	coalesce...
Last	is not equal to	Last name
Email	is not equal to	first(...)
Phone	is not equal to	first(...)
Address_...	is not equal to	Preferred...
City	is not equal to	Preferred...
State	is not equal to	Preferred...
Postal_C...	is not equal to	Preferred...

At the bottom of the condition configuration, there is a "+ Add" button.

## Power Automate Tip #4 – Error handling on Approvals

- Approvals expire after 30 days
- Your flow will fail when the approval expires
- Add a branch that will run if the approval times out, and email the details of the expired request back to the approver







# What did we accomplish?

- We made our deadline
- Conference Ministers liked the more modern look and feel
- We used approvals to improve our data quality
- Power Automate proved to be a more flexible and powerful environment than we expected



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Thank you!