

**Raiser's Edge Orientation
NPCA Affiliate Group Network**

Creating Campaigns and Appeals

Updated: July, 2024



Terminology

Campaign

- Why is your organization asking for gifts?
- The overall objective of the fundraising effort

Fund

- What is your organization asking for gifts for?
- The specific financial purposes of the donation
- Note: Fund is always a required field when entering a gift

Appeal

- How will your organization be soliciting these gifts?
- The solicitation effort that resulted in the gift

Package

- Records different levels or different versions of a solicitation effort
- Represents how you will segment constituents when creating an Appeal
- Is part of an Appeal record

Accessing Database View

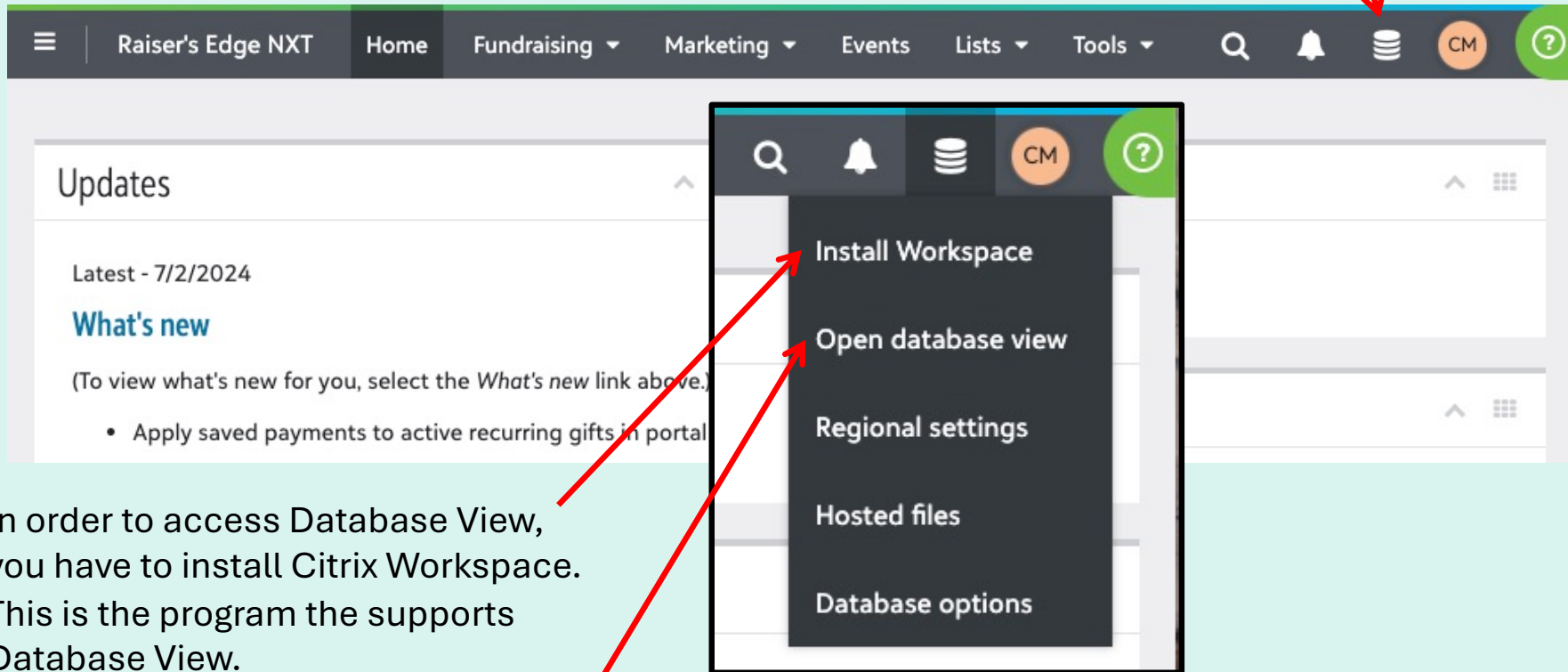
- There are two versions of Raiser's Edge
 1. **NXT / Web View** – This is the version you are logging into to access your records, send emails, create forms, etc.
 - <https://app.blackbaud.com>
 2. **Database View** – Database view is the older version of Raiser's Edge that is being brought into NXT. It houses certain features that have not yet migrated to NXT.
 - Database View is accessed through NXT.
 - Currently the only place to add Campaigns and Appeals.
 - Other than creating campaigns and appeals, NPCA does not expect groups need to use this feature.

* The last product briefing mentioned that they expect to have all Database View features migrated to NXT in 2025 *



Accessing Database View

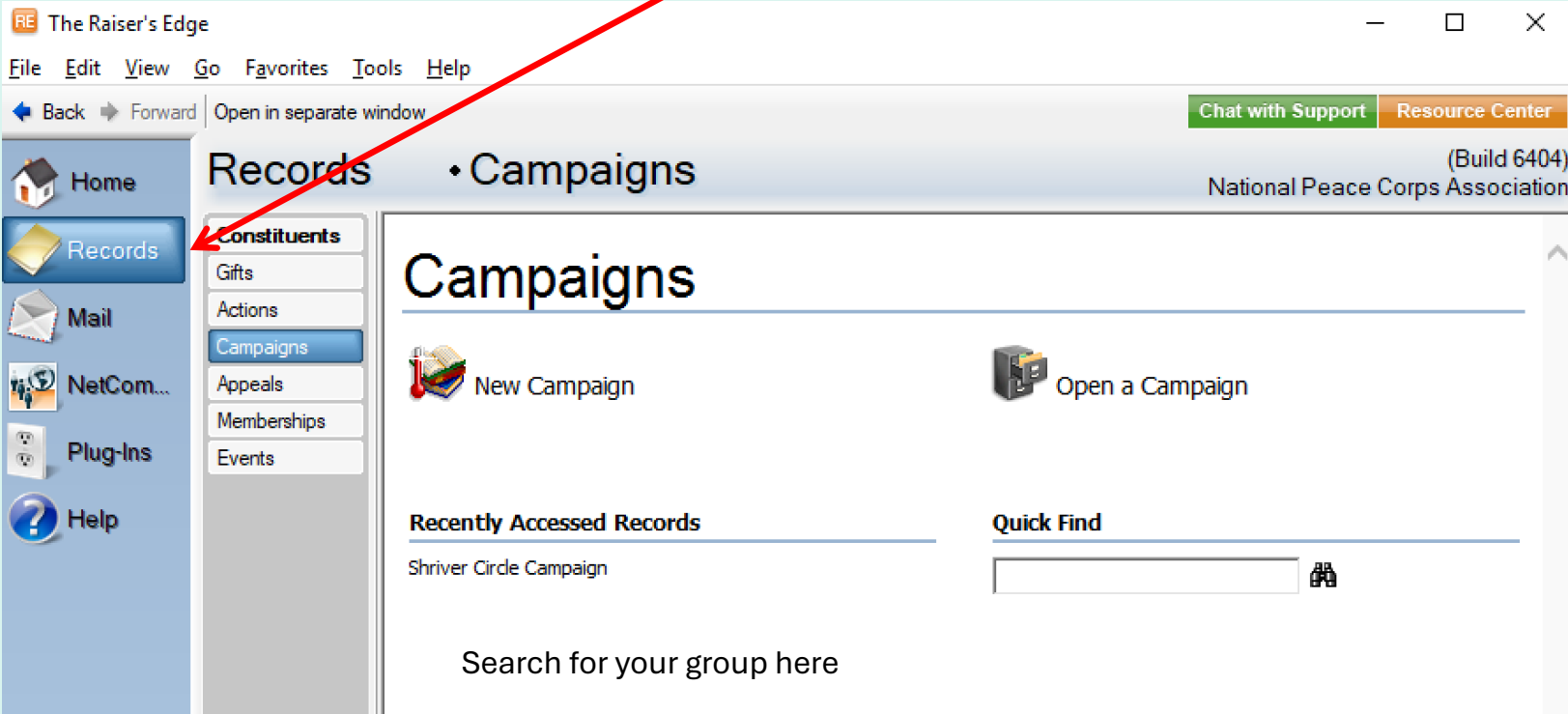
This icon opens the Database View menu



- In order to access Database View, you have to install Citrix Workspace. This is the program that supports Database View.
- Once you have installed Citrix, you can click on “Open Database View”

Creating Campaigns and Appeals

When accessing Database View, click on Records.



Creating Campaigns and Appeals

The screenshot shows the 'The Raiser's Edge' software interface. The main window is titled 'Records' and has a sub-tab for 'Appeals'. On the left sidebar, there are navigation options: Home, Records, Mail, NetCom..., Plug-Ins, and Help. The 'Records' section is expanded to show 'Constituents', 'Gifts', 'Actions', 'Campaigns', 'Appeals', 'Memberships', and 'Events'. The 'Appeals' sub-tab is active, showing a 'New Appeal' button and an 'Open an Appeal' button. A 'New Appeal' dialog box is open, showing a form with the following fields: 'Appeal ID:', 'Description:', 'Start date:', 'End date:', 'Appeal category:', 'No. solicited:', 'Notes:', 'Overall goal:', 'Default gift amount:', and 'Default Benefits'. The 'General' tab is selected, and the 'Save and Close' button is visible at the top left of the dialog box. The date '7/8/2024' is shown at the bottom right of the dialog box.

1. Access the Campaign or Appeal Tab.
2. For your Appeal, click New Appeal.
3. This box will open. All the fields in blue are required.
4. You can add further details by clicking through the available tabs
5. Save and Close.

Other Items to Consider

- Once a Campaign/Appeal is created, it cannot be edited or deleted.
- Pay attention to the Updates on the Home page of NXT. This will discuss any new features that have been added to NXT.
- Please only use campaigns and appeals that were created for your group only.
- For additional support, please review the extensive Blackbaud Knowledgebase: <https://kb.blackbaud.com/knowledgebase/>. You should be able to find most answers to your questions here.



Thank you!

Travis Matthews

Development Manager, National Peace Corps Association

development@peacecorpsconnect.org

