Blackbaud Raiser’s Edge NXT® Product Update Briefing Questions and Answers

We appreciate the level of engagement during the May Product Update Briefings. Below are the top questions asked at each session.

Gift Management

Gift Processing

Resources:
On-Demand InsideTrack to the Unified View: Gift Management
InsideTrack Scoop: Gift Management Highlights
Blackbaud Raiser’s Edge NXT® Grid View Batch Town Hall #1, #2 and #3: Your Questions, Answered

Where is the Gift Reference field on a gift, as well as the miscellaneous gift notes?
The Gift Reference field was renamed to Gift Comment in web view, but it is still tied to the same backend database field. Gift Notes will be fully available on the gift record in Q2 (April-June) and then added to the batch experience in Q3 (July-September).

Will gift processing include Gift Constituency?
Gift Constituency and Gift Code will be added to the web view grid batch experience by the end of May.

Is there a timeline for having more control over the format of gift receipting?
We have plans to modernize all gift communications in 2026. Work will begin with Acknowledgements and Reminders in Q2 (April-June), including bulk processing and both email and print capabilities. This will also introduce full customization through merge fields so organizations can design the complete look and feel of their communications. Receipts and Giving Statements will follow later in the year using the same workflow pattern.

When will we be able to delete gifts in web view?
Gift deletion is already available in web view today. However, some gifts are restricted from deletion for specific reasons, such as being posted or having related transactions attached. In those cases, we recommend adjusting or refunding the gift if it is no longer valid. As part of our future prescriptive reconciliation work, we want to avoid situations where gifts are deleted while still existing in Financial Edge or Blackbaud Merchant Services. We are actively reviewing customer feedback around expanding deletion capabilities and recently enabled deletion for gifts processed using a merchant account in Test Mode.

The columns in Gift Batch are too wide. Will we be able to resize or narrow them?
We've received this feedback and have plans to revisit the batch layout once we are confident all core database view workflows have been fully brought into web view batch. At that point, we will focus on additional quality-of-life improvements like column sizing and layout flexibility.

When will users be able to change or add a solicitor to an already committed gift?
Full editing and adjustment capabilities will be available in web view by the end of Q2 (April-June). This will allow users to fully manage existing gifts without needing to switch back to database view.

Will there be a report similar to the existing commit report when a gift batch is committed?
Yes. Batch Validation and Batch Control Reports are expected to be completed and released in web view by the end of Q2 (April-June).

When should we expect the ability to add Tributes in web view batch?
Tributes and Opportunities will be fully manageable in web view batch by the end of Q2 (April-June). We expect the remaining linking capabilities — including Events, Memberships, Benefits, Matching Gifts, and more — to be delivered in Q3 (July-September).

Did I hear correctly that global changes will be available in Gift Batch?
The capability coming to Batch is a full field update feature. Once import functionality is available and gifts are flowing into batch for processing, users will be able to update an entire column with a single value. While this is not a full Global Change feature, it will provide batch-level bulk column updates.

Can you set up defaults with templates for gift processing?
Yes — this functionality is already available today. Users can define which columns appear, set their order, and configure default values for new rows. Templates can also be applied to existing batches to create a consistent view and workflow experience.

When will we see the Stock Gift type in web view?
The Stock Gift type is already available in the single gift add form today and will be added to the batch experience in Q3 (July-September). The ability to sell an existing stock gift is expected by the end of Q2 (April-June).

Online Data Review

Resources:
Online Data Review for Event Registrations in Blackbaud Raiser's Edge NXT

Where can I access Online Data Review?
Online Data Review can be accessed from several locations in web view, including:
- The Needs Attention link on the Gift Management page (Gifts > Overview)
- Event notifications on the Events list page (Events > Overview)
- Individual Event records
- The Participant Work Center for a specific event

These access points only appear when records are available for review. Users can also bookmark the Online Data Review page for quicker access.

Does Online Data Review support free events?
Yes. Online Data Review supports both paid and free events.
How does Online Data Review work with registration and donation pages in Blackbaud NetCommunity?
Online Data Review does not currently display transactions from Blackbaud NetCommunity. At this time, it only supports event registrations created through Raiser's Edge NXT events.

Why is new constituent data review located within Gift Management?
Online Data Review was originally created to support the review of donation-related records within Gift Management. As the experience expanded to include additional record types, it remained centralized there for consistency and streamlined review workflows. Plans are in place to continue evolving and further separating the experience over time.

Data Management and Analysis

Single-Row Query

Resources:
On-Demand InsideTrack to the Unified View: Query and Reimagined Export
InsideTrack Scoop: Query and Reimagined Export Highlights

When will Single Row Query be available?
Single Row Query is currently planned for release in Q3 2026 (July–September). API early adopter access is already underway, with UI early adoption beginning soon.

Will we be able to use a template for query exports, or will we need to add output fields each time?
Yes. With the new Select From functionality, you can reuse a base query across multiple single-row queries, making it easier to create reusable templates for output fields.

Will Consent Codes still be available as query criteria?
Yes. Consent codes are available today and will continue to be supported.

Will gift summaries be available in Single Row Query like they are in Export?
Yes. You'll be able to include multiple summary columns, such as last year giving, current year giving, and lifetime giving totals.

Will email addresses still appear in the same location as phone numbers?
For now, email addresses and phone numbers will continue to be grouped in the same location.

Can the same field be added multiple times with different filters?
Yes. You can add the same field into multiple columns and apply different filters to each one.

What happens to exports currently tied to multiple queries?
Existing exports will migrate with their associated queries already populated in the Select From field. After migration, you can update the selected query if needed.

Will we be able to use one query for multiple exports?
Yes. You'll be able to reference the same base query across multiple single-row queries and exports.

Can Single Row Query apply filters to individual output fields like Export does today?
Yes. Single-row queries will support filtering capabilities similar to Export, including selecting from other queries. Additional gift-to-gift filtering is also planned.

Will existing Export reports automatically convert to single row queries?
Exports will not migrate automatically, but a bulk migration tool is planned. Once initiated, your existing exports can be converted without rebuilding them manually.

Will there be more detailed security settings for Query?
Yes. Organizations will be able to control access separately for single-row layouts, multi-row layouts, and export capabilities.

Will queries support opportunity-based data instead of only constituent-based data?
Yes. Existing Export fields will be included in the initial release, with additional proposal and opportunity-related web view fields planned for future updates.

Will Query identify invalid phone numbers during export?
The underlying phone number functionality is not changing at this time. If you're experiencing display or formatting issues, please contact Support.

Will users be able to view all query results directly in the interface?
Yes. Users will be able to preview exports in-browser before downloading, and Single Row Query results can be worked with directly in the interface. Very large result sets may still require export for performance reasons.

Single row vs Multi-row Query: Will we control permission between these two types?
Yes. Single-row result layout will have its own permission in web view that can be set for users separately from multi-row queries.

Export

When is Export coming to web view?
Export functionality is being redesigned as part of Single Row Query in web view, currently planned for Q3 2026 (July–September).

Will we still be able to use the same export across multiple queries?
Yes. The new *Select From* functionality allows one base query to support multiple exports and single-row queries.

Will validation and control reports be available in NXT?
Yes. Control reports are being updated to work with Single Row Query.

Will Export still support calculations and summary functionality?
Yes. Frequently used Export capabilities will continue to be supported, including summary fields, many-to-one filtering, address processing, and head-of-household rules.

Will scheduled exports be available?
Scheduled exports are planned shortly after the initial release. At launch, exports will run in the background.

Will users need to rebuild existing exports?
No. Users will need to initiate the migration process, but a bulk migration tool will convert existing exports without requiring them to be rebuilt.

Will Export allow field-specific criteria?
Yes. Many-to-one fields will support robust filtering capabilities, including applying different filters to the same field across multiple columns.

Will export templates still work across multiple queries?
Yes. Existing exports will migrate with their associated query in the Select From field and can later be updated to point to a different query if needed.

Will Single Row Query integrate with tools like Power BI?
Yes. Single-row queries will be available through the API, supporting integrations with Power BI, partner applications, and Power Automate workflows.

Will acknowledgment workflows like envelope printing still work?
Yes. Address processing will continue to be supported, and Quick Letters functionality is planned.

Will users be able to rename export column headers?
Yes. Custom column header names can be saved in the redesigned export experience.

What happens to current exports in database view?
Exports will remain available in database view, but they will not sync with web view. Migration is one-way, meaning changes made in web view will not sync back to database view.

Will exports still support pulling constituent information alongside gift data?
Yes. Cross-record field inclusion will continue to be supported.

Can exports still be used for duplicate cleanup processes?
Yes.

Will Single Row Query support narrowing criteria similar to Export?
Yes. Many-to-one filtering capabilities will provide even more flexibility than current Export functionality.

Refreshed Constituent Record

When will the refreshed constituent record layout be available?
The refreshed constituent record experience is currently targeted for Q3 2026 (July–September).

Will users be able to keep the current tile view?
At this time, there are no plans to retain the tile view. The move to tabs is intended to improve navigation and performance, though feedback will continue to help shape the experience.

Will users be able to switch back to tiles?
No. A toggle back to the tile layout is not currently planned.

Will there be indicators showing which tabs contain data?
This is still being evaluated based on customer feedback.

Will users be able to customize tab order or default tabs?
These capabilities are not currently planned, but the feedback has been shared with the product team for consideration.
Will the timeline feature still be available?
Yes. Timeline functionality will remain available within the Overview tab.

How will the redesigned record work on mobile devices?
On smaller screens and mobile devices, navigation will use a dropdown menu instead of tabs.

Where will Relationships appear in the new layout?
Relationships will be located under the Biographical tab.

Will constituent codes still appear at the top of the record?
Constituent codes will move to the *Personal Information* section within the Overview tab, which is designed to surface frequently referenced information.

Why does contact information appear in multiple places?
The Personal Information section is intended to provide quick access to commonly referenced details. More detailed information may still appear in other areas of the record.

How will partner or add-in tiles be handled?
By default, partner content will appear in the Add-ins section, though it may also be assigned to a specific tab.

Will administrators control Overview tab layouts for all users?
No. Overview personalization settings will be managed individually by each user.

Will compact views be available to fit more information on screen?
While compact formatting is not planned broadly across all tabs, several tabs — including Giving, Notes, Attachments, and Actions — are designed to display more information in a list-style layout.

Import and Global Change/Bulk Update

Resources:
On-demand InsideTrack to the Unified View: Import for Impact
Inside Scoop: Import for Impact Highlights

Will Imports still rely on ID mapping?
Yes. To match imported data to existing records, users will still need to provide a System Record ID, Constituent ID, or Import ID.

Will import and export capabilities be built directly into Raiser's Edge NXT?
Yes. Native Import and Export functionality will be available directly within the web view experience. Organizations will also have the option to work with Imports and Exports through the APIs if preferred.

Will relationship imports be supported?
Yes. Relationship imports are included as part of the Constituent work currently in development and are planned for the initial release.

Will the new Import experience support Action imports?
Additional import types — including Campaigns, Funds, Appeals, and Events — are planned first. Other import types, such as Actions, are planned for future updates.

How will Global Change/Bulk Update work in web view?
To clarify, Global Change in web view will continue to be query-based tool – it will not require a CSV or for you to use the new import process. In web view, you'll continue to run Global Changes by selecting a query to make changes to records.

Will Global Change/Bulk Update include Add and Delete?
Yes, you'll continue to be able to add, update, and delete through Global Change once it's available in web view.

Drive Engagement and Raise More

Recognition Programs

Will we be able to apply filters to Recognition Programs (e.g., Campaigns, Funds)?
Yes. You'll be able to define which Campaigns, Funds, and other criteria are included when setting up recognition levels and totals.
Do Recognition Programs support cumulative giving programs?
Not yet. We are currently building Lifetime Programs to support cumulative giving. We recommend waiting until those are available before creating a recognition program based on cumulative giving.

Are Recognition Programs included in Raiser's Edge NXT or they an additional cost?
Recognition Programs are included as part of the Raiser's Edge NXT core experience at no additional cost.

Can Recognition Programs be manually adjusted for specific constituents?
Yes. You can choose either a fully automated approach or a hybrid model where qualified constituents are reviewed and adjusted manually as needed.

Do Recognition Programs support soft-credited gifts?
Yes. Soft-credited gifts are supported within Recognition Programs.

Can additional constituents (e.g., family foundations) be included in a donor's recognition totals?
Yes. When soft credits or matching gifts are linked to a qualifying gift, they can be included in the program's configuration rules.

Where can Recognition Programs be found in Raiser's Edge NXT?
Recognition Programs are available under Constituents in the left-hand navigation menu

Will recognition levels be based on fiscal year?
Not yet. Future Annual Programs are planned to support time-bound recognition based on fiscal year or calendar year. We recommend waiting for those releases before configuring time-based recognition structures.