iWave for Raiser's Edge NXT: Installation and User Guide

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1 Introduction

iWave for Raiser's Edge NXT allows users to send iWave Profiles to their Raiser's Edge NXT instance. The integration can both create a new constituent with iWave Score data and update score data for existing constituents.

This installation guide requires administrator access for Raiser's Edge NXT and for iWave.

2 Configure Raiser's Edge NXT

iWave for Raiser's Edge NXT uses certain constituent and custom fields that will need to be added to your Raiser's Edge NXT instance. **Note:** All values listed below must be exact to what is provided, including spacing - **do not copy and paste**. **These values are case sensitive.**

2.1 Sources and Types

Please ensure that following is present in your instance:

1) **Sources** table has an entry of "iWave"

2) **Address Types** table has an entry of "Home"

3) **Phone Types** table has an entry of "Home" (as a telephone number) and "Email" (as an email address)

2.2 Attributes (Custom Fields)

The table below outlines the **attributes** to be added in your Raiser's Edge NXT instance under **Configuration**:

Description	Data Type	Table Name	Allow Only 1 per Record	Required	Active
Has Business Affiliation	Yes/No		TRUE	FALSE	TRUE
Has SEC Insider Filings	Yes/No		TRUE	FALSE	TRUE
Planned Giving Annuity Opportunity	Yes/No		TRUE	FALSE	TRUE
Planned Giving Bequest	Yes/No		TRUE	FALSE	TRUE

Opportunity					
Planned Giving Trust Opportunity	Yes/No		TRUE	FALSE	TRUE
Political Giving Count	Number		TRUE	FALSE	TRUE
Political Giving Total Value	Currency		TRUE	FALSE	TRUE
Profile URL	Text		TRUE	FALSE	TRUE
Total Donations Count	Number		TRUE	FALSE	TRUE
Total Donations Value	Currency		TRUE	FALSE	TRUE
Total Properties Count	Number		TRUE	FALSE	TRUE
Total Properties Value	Currency		TRUE	FALSE	TRUE
iWave Verified	Yes/No		TRUE	FALSE	TRUE

2.3 Ratings

The following code table entries should be added to the **Ratings** code table:

Table Entry	Data Type
Affinity Category	Text
Affinity Score	Number
Capacity Score	Number
Estimated Capacity	Text
Estimated Capacity Source	Text
Propensity Score	Number
iWave Score	Number

Frequency Score	Number
Monetary Score	Number
Recency Score	Number
RFM Score	Number

3 Grant Access to iWave's Application

In order to grant access to iWave's application, you must have rights to the **Control Panel** of your NXT instance.

1) Navigate to **Control Panel** and click on **Applications**.
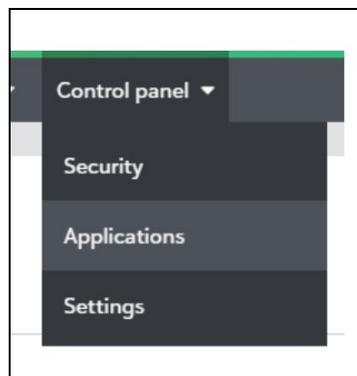
2) Select **Add An Application**.

3) Input the **Application ID** then click **Save**. Please contact support@iwave.com to receive the ID value if you have not received it already.

4 SKY API Subscription Key

In order to use iWave for Raiser's Edge NXT, your organization requires a SKY API subscription.

1) If you do not have one, create a **SKY API developer account** by navigating to developer.blackbaud.com and clicking the **Sign Up** button. Follow the prompts to create your account.
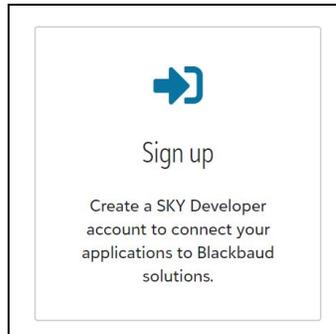
2) On your landing page, click on the **My subscriptions** page or navigate to developer.blackbaud.com/subscriptions.

3) Select **Standard APIs** and then select **Subscribe**.

4) From the confirmation page, click **Confirm**.
5) Your subscription information will appear. You can use your **Primary or Secondary access key** as your **Subscription Key** for iWave.

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5 Configure iWave

In order to configure the integration, you must be an **iWave Primary or Administrator** user.

1) Login to app.iwave.com.

2) Select **Account** on the bottom left corner then select **Global Settings**.
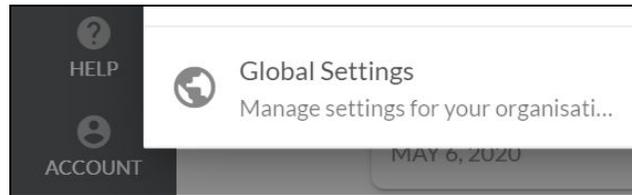
3) Under the **Send to CRM** section, select "Raiser's Edge NXT" from the drop down and enter your **Subscription Key** from NXT.

Note: If this section is not available, please contact support@iwave.com to get your API keys enabled.

6 Using iWave for Raiser's Edge NXT

6.1 Creating or updating a constituent

1) Navigate to the **iWave Profile** you would like to send to Raiser's Edge NXT. Ensure that **First Name**, **Last Name**, **City**, **State/Province**, and **Country** at minimum are all populated in the **Personal Information** section of the **General Information** tab.

2) Click the **Send** button on the bottom of the Profile.

3) If this is your first time using the integration or your connection is expired, you will need to authenticate with your Raiser's Edge NXT credentials and grant access to iWave. To grant access, click the **Authorize** button.
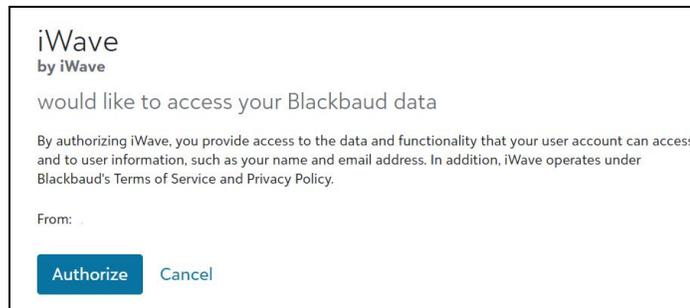

4) Once this is completed, the constituent will be created or updated. If the iWave Profile **Constituent Acct ID** field is blank, it will **create a new constituent** with score data and the new constituent's **System Record ID** (this can also be found in the URL of the constituent, see image below) will be populated. If the constituent's **System Record ID** is populated in the Constituent Acct ID field, **score data will update on the existing constituent** in Raiser's Edge NXT. **Note:** If you would like to include the Constituent ID from NXT in iWave, it is recommended to include it in the **Constituent Import ID** field.

6.2 Disconnecting from iWave

If you want to disconnect from your Raiser's Edge NXT instance or if your connection is not working, you can easily do so within iWave. **Note:** If you disconnect, you will need to authenticate the next time you want to send an iWave Profile to Raiser's Edge NXT.

1) Navigate to **Account** located in the bottom left corner of the screen. Select **Integrations**.
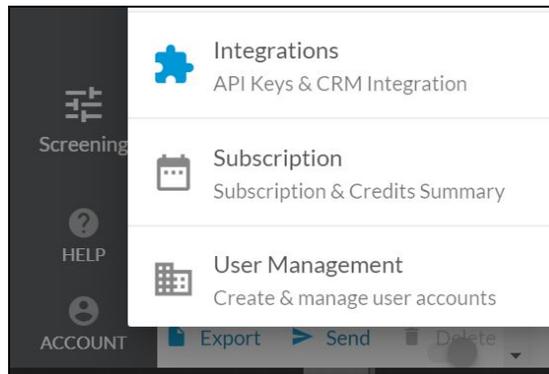
2) Under the **CRM Integration** section, locate the connection under **Raisers-Edge** and click the **Disconnect** button.
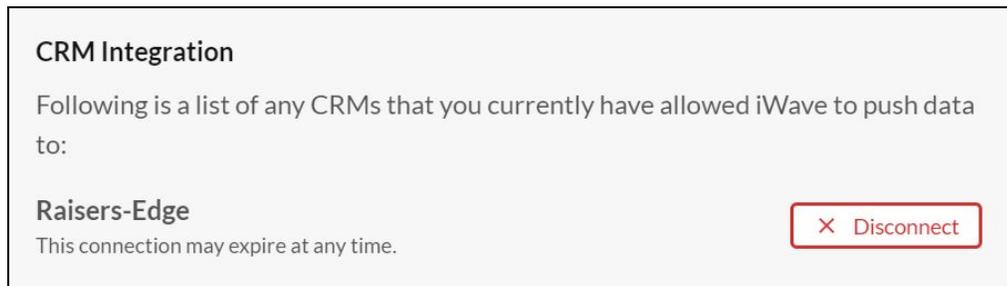
7 Frequently Asked Questions

Sometimes due to the manual configuration of the integration, there can be occurrences where sending the data to NXT may not function as expected. Below are some common questions that can come up while using the iWave for Raiser's Edge NXT integration.

7.1 When I send an iWave Profile to Raiser's Edge NXT, why is it showing as successful but nothing shows up or only part of the information?

When this occurs, usually that means that iWave sent the information but Raiser's Edge NXT could not save it. The following checks should be looked into:

1) Ensure that you have rights to create and edit Ratings and Attributes.
2) Confirm that Sources, Address Types, and Phone Types are all entered correctly.
3) Check the Attributes and Ratings tables to make sure that all fields are listed and that there are no typos. If you copied and pasted, there may be a problem with spacing. Manually add or update fields if needed.
4) Verify that all Attributes and Ratings have the correct Data Type and are active.
5) In iWave, verify that First Name, Last Name, City, State/Province, and Country are all populated.

7.2 I tried to send an iWave Profile with an ID I added manually, why is it not sending?

If this is the first time you are sending an iWave Profile, it is recommended to follow the steps in section 7.1 if it hasn't been done already.

If you had sent iWave Profiles successfully prior to this, ensure that the ID that was entered in the **Constituent Acct ID** field is the **System Record ID**. Using another ID such as the Constituent ID will not be successful.

7.3 Why can't I connect to the integration?

This may be due configuration in iWave or values provided may not be accurate. Follow these steps to verify your connection:

1) In iWave, if you are a Primary or Administrator, navigate to the **Global Settings** tab of the **Account** area. Verify that Raiser's Edge NXT is selected and contains the subscription ID under the **Send to CRM** section.
2) Verify that the Subscription ID provided is either the **Primary or Secondary access key** listed in your SKY API subscription (see section 4).

3) If the connection was working previously, try disconnecting and reconnecting to the integration in iWave from the **Integrations** tab (see section 6.2).

7.4 Everything was configured correctly and working earlier today, but now I have an error message, what went wrong?

If the configuration was working successfully and the iWave Profile has all of the correct information, it may be that you have hit your daily SKY API subscription limit. This can happen if a large number of iWave Profiles were sent in one day, or if you have multiple apps using your subscription. Visit http://developer.blackbaud.com/subscriptions/ to see if you have reached your limits for the day.

8 Questions?

If you have any questions, please contact support@iwave.com to get assistance.