

Raiser's Edge NXT Email: Pros and Cons

Email is a marketing feature in the web view of The Raiser's Edge NXT. It enables you to send email campaigns to queries of records and analyze responses within Raiser's Edge. There is extensive guidance from Blackbaud on how to set up and use this feature. This document looks at specifically at its pros and cons.

What I like about it

Options for creating lists of recipients

You can create a list entirely in web view (be very careful however to make sure you have excluded records with "Requests no email" in another way because this does not currently exist in web view lists). My preferred method is to create queries in database view of the records to include, merge out those to exclude (using the SUB operator), then use the resulting static query in a web view list.

Analyzing bulk responses is easy

Once an email has gone you can click on it to see a bunch of results about the number of recipients, opens, clicks, bounces and unsubscribes. Click any of these to pop out a list of records in a sidebar, then "Create list" to save it. I use this method to carry over static queries to database view that can be used to update Appeal response and double-check records of those that have opted out.

Shortcomings

Analyzing individual responses is not so easy

This is something that only lives in web view. Open a record and under the "Email" tile you can see what they've been sent and whether they opened, clicked or opted-out. This is handy for individual profiling but that's about all you can do with it as it does not carry over to how we see records in database view (see above for how to manually carry over email responses in bulk to database view).

Consent Source is missing

When an email recipient unsubscribes, a Consent is automatically added to their record to track when they opted out. "Consent Source", although an essential piece of information for privacy law compliance, is blank. The Consent has the username "NXT System User (Email)" which is enough to infer where the opt-out came from. However, it's frustrating that Consent Source is blank and is inconsistent with how the Consents feature is supposed to be used. The field itself is available in web view, so we can hope that perhaps it might be added to the automatic behavior of NXT Email in the future.

Email opt-outs only do half the job

When an email recipient unsubscribes, this goes through to the record as a global opt-out

Consent for email and the email address is marked DNC (do not contact). If you have set up a consent mapping for NXT email (see [“Set consent rules for Email”](#)) the Solicit Codes will also be updated. However, the “Requests no email” box is not checked. So you have to routinely inspect your unsubscribes, checking Requests No Email when they’ve opted out of everything, and leaving it unchecked if they’re still ok to receive email acknowledgements or other one-off messages (together with an appropriate Solicit Code). If you’re tracking email campaign responses in Appeals you also have to update this if you have an “Unsubscribed” Response. I don’t *mind* this inspection process as it’s a useful way of spotting opt outs that might have been in error, or donors that might be unhappy about what they’re being sent, but I’d prefer it be more complete in what it does automatically to avoid the risk of gaps being overlooked.

Email opt-outs are all or nothing

There is currently no granularity in NXT Email so if you use it for various topics and the recipient wishes to opt out of *one* of these, there is no function to reflect that. Once opted out, even if by mistake, the recipient has to opt themselves in again. You cannot do this for them.

The workaround is to make sure your emails contain a link to a preferences webpage. That page on your website should host a secure form for gathering preferences (email topics, frequency) which you regularly retrieve and update in database view. This is a manual workaround that database managers could do without but is about our only option right now while NXT Email remains insufficient.

Compare this to NetCommunity which has much better options for recipient preferences and opt-outs. If you currently use BBNC or another email platform and are considering moving to NXT email, carefully examine first whether this all-or-nothing issue is going to be a major problem for you.

[Blackbaud’s current guidance](#) (read “Opt-out link” → Tip box) hints that future releases of NXT will enable email recipients to manage their interests but it’s anyone’s guess when this will happen.