

## Raiser's Edge NXT Email: Pros and Cons

Email is a marketing feature in The Raiser's Edge NXT web/unified view. It enables you to send email campaigns to groups 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 specifically at my opinion on its pros and cons.

### What I like about it

#### Options for creating lists of recipients

You can create a list entirely in web view and these can dynamically update. My preferred method for larger databases is to create queries of the records to include in database view, merge out those to exclude (using the SUB operator), then use the resulting static queries in web view lists (but it's a few steps too long - see also Shortcomings, below).

#### 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 review records of those that have opted out (for example, one of my clients has a particular process for reviewing major donors and prospects who opt out). If you want to be able to track email campaigns in Appeal reports you have to do this (or just manually update Number Solicited in the Appeal record and/or on Packages). (Again, see also Shortcomings, below).

### Shortcomings (what frustrates me about it)

#### Options for creating lists of recipients

Currently you can only base an email campaign on a List, not a web view Query. It's great that query is now actually in web view but it's still a duplication of effort to have to make queries into lists to use them in Email. Why not just base Email on a query? Or enable lots more fields and filters in Lists so they can achieve the same results as merging queries does?

#### Analyzing individual responses is not easy

This is something that only lives in web view. Open a record and under the "Email History" tile you can see what they've been sent and whether they opened, bounced, clicked or opted-out, going back 13 months. This is handy for individual review but that's about all you can do with it as it does not correlate in any way to Appeals and Actions and 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).

In a [July 2025 Town Hall](#) (see "Sneak Peek...Powerful Tools") it was revealed that a "unified communications" tile would come to web view that October. It was supposed to show emails,

Appeals and some Actions in one place. It would replace the Email History tile and provide limited at-a-glance analysis on each item. It was unclear on how far back it would go (ie. further than the 13 month limit?) and if the metrics would translate into reports. Fast forward to now and this hasn't happened. Instead we have a "unified" Communications overview for everything, not a tile on each record. So for now we still have an apples and oranges situation – Appeals in one tile, Email History in another, Actions in yet another. I will update this resource if anything new is announced in the Spring 2026 Product Update Briefings. I would love to see an option in the Email Marketing process to choose to select an Appeal (and Packages!) and update the Number Solicited on these. At least then reports would be using one source of data.

### **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.

### **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 do not email/do not contact. If you have set up a consent mapping for NXT 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 have no other email addresses and have opted out of everything, and leaving it unchecked if they're still ok to receive emailed gift acknowledgements or other one-off messages (together with an appropriate Solicit Code), or have another email that can become their primary. If you're tracking email campaign responses in Appeals you also have to update this if you like to use an "Unsubscribed" Appeal 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.

There is of course the possibility that "Requests no email" is moving towards becoming redundant, since we also have DNC on each address, Consents and Solicit Codes. I wouldn't mind this at all; either way we just need consistency and reliability.

### **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 or you have to submit a request (in the Email options cog). 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 manually or via an import.

# A.D.

Compare this to NetCommunity which has much better (and industry standard) 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 guidance](#) (read "Tip" box under "Opt-out link") has been hinting for at least 3 years that future feature updates will enable email recipients to manage their interests but it's anyone's guess when this will happen.

As of July 2025 Blackbaud's developers were working on the idea of using Consent Category as a preference mechanism for email opt-outs and they are looking for early adopters to work with on this. Email campaigns would be tagged with a category. Once sent, an unsubscribe would opt-out the record just for that category. It was hoped this would be rolled out sometime in 2026. There is currently no timeline for a full email preferences tool (maybe it'll be added to the donor Portal?), meaning NXT Email will continue to lag behind other industry email tools for some time to come.

If any amazing news in this regard comes out of the Spring 2026 Product Update Briefings I will update this resource.