

PRODUCT GUIDE · BLACKBAUD PARTNER

How Smart**MAILCHIMP** works

The two-way sync between Raiser's Edge NXT and Mailchimp

A plain-English guide to what the integration does, the choices you can make when setting it up, and why fundraising teams use it to keep their supporter data and their email marketing in step.



What Smart**MAILCHIMP** does

SmartMAILCHIMP runs quietly in the background on the **SmartSYNC** platform, keeping two systems in agreement: Raiser's Edge NXT, where the truth about your supporters lives, and Mailchimp, where you send your marketing email. When a record changes in one system, the integration mirrors that change into the other.

SOURCE OF TRUTH

Raiser's Edge NXT

Constituent biographical data, giving history, consent records, solicit codes and custom fields all originate here.

MARKETING CHANNEL

Mailchimp

Holds a copy of the contact and segmentation data you choose to sync, and reports back when supporters unsubscribe or when an address bounces.

The link between records: the **RE_Const_ID** merge field

Every Mailchimp contact carries a merge field called **RE_Const_ID** that stores the matching Raiser's Edge NXT Lookup ID (Constituent ID). This is what lets the two systems recognise each other across the sync. Once a constituent and a Mailchimp contact are bound by this ID, future changes, such as a new primary email address or updated giving figures, are matched by ID rather than by email, so the correct record is always found and updated. Section 03 explains how matching works in each direction.

Real-time and transactional, not a nightly batch

The integration listens for individual changes as they happen: one supporter updating a preference, one new constituent meeting your list criteria. Each single change is passed across as it occurs. There is no overnight bulk job, so the two systems stay close to live with one another throughout the day.

One list drives everything

Which supporters sync to Mailchimp is decided by a single Raiser's Edge NXT constituent list, built from solicit-code filter criteria. The list also determines which email address is used for each constituent. Section 05 explains how the list, email selection and consent work together, and Section 06 sets out the settings you can configure.

What moves, and which way

SmartMAILCHIMP keeps the two systems aligned by watching for changes on both sides and applying the matching update on the other. Here is what happens in each direction.

RAISER'S EDGE NXT → MAILCHIMP

New and updated constituents push out to Mailchimp

When a constituent enters your sync list because they now meet its solicit-code criteria, **SmartMAILCHIMP** detects the change, searches your audience for a match, and either updates the existing Mailchimp contact or creates a new subscriber. The mapped Raiser's Edge data (giving figures, constituent codes, custom fields) is written to the contact's merge fields so you can segment and personalise campaigns. When that data later changes in Raiser's Edge, the Mailchimp contact is updated to match.

MAILCHIMP → RAISER'S EDGE NXT

New and updated subscribers come back into Raiser's Edge

When someone subscribes through a Mailchimp signup form, or is added to the audience, **SmartSYNC** looks them up in Raiser's Edge NXT using a hierarchy of criteria: first name, last name and email; then last name and email; then email alone. If a match is found, the existing record is updated. If no match is found, a new constituent is created with a constituent code that marks where it came from, and a consent record is added to reflect the subscription.

MAILCHIMP → RAISER'S EDGE NXT

Engagement and deliverability flow back too

Hard bounces and unsubscribes detected in Mailchimp are reflected on the constituent record. You can also view a contact's Mailchimp engagement, including their subscriber status, opens, clicks and the dates campaigns were sent, alongside the rest of their Raiser's Edge NXT record, so fundraisers see the full picture in one place.

Two directions, two matching keys

The outbound and return journeys use different keys to find the right record, and the difference is deliberate. Section 03 explains how matching works in each direction, and what it means for constituents who share an email address.

How records are matched, in each direction

The two directions of the sync use different matching keys, and the difference is deliberate. Understanding it explains how the integration behaves in situations that can otherwise look surprising, such as when constituents share an email address.

RAISER'S EDGE NXT → MAILCHIMP

Matched by Constituent ID

Outbound changes find the Mailchimp contact through the `RE_Const_ID` merge field: the Raiser's Edge NXT Lookup ID held on every synced contact. The binding is one to one, so the correct contact is always found.

MAILCHIMP → RAISER'S EDGE NXT

Matched by email address

Changes that originate in Mailchimp come back keyed on the email address, because the email address is Mailchimp's own identifier for a contact within an audience.

Why the Constituent ID matters

During onboarding, the `RE_Const_ID` merge field is added to your Mailchimp audience and populated for every synced contact. It is what creates the one-to-one relationship between a Raiser's Edge NXT constituent and a Mailchimp contact. Because the two records are bound by ID rather than by email address, a change of primary email in Raiser's Edge updates the existing Mailchimp contact instead of creating a duplicate, and merge-field data such as giving figures always lands on the right contact.

Why the return journey is matched on email

Mailchimp's world revolves around the email address: it is the unique identifier for a contact, and it is the address, not any one database record, that a supporter subscribes or unsubscribes. So when an event originates in Mailchimp, the email address carries the meaning. New and updated subscribers are matched using the name-and-email hierarchy described in Section 02. Unsubscribes and hard bounces are matched on the email address alone: **SmartSYNC** searches Raiser's Edge NXT for the address and applies the update to the constituents it finds.

Shared email addresses and opt-outs

Raiser's Edge NXT allows several constituents to hold the same email address. When an unsubscribe or hard bounce comes back from Mailchimp, the opt-out consent is recorded against every active constituent holding that address, including any who are not in your sync list. This is deliberate: the opt-out belongs to the person behind the inbox rather than to a single constituent record, so it is honoured wherever that address appears. That is the cautious interpretation your consent records should reflect, and it keeps every record aligned with the supporter's actual preference.

This also explains the dedicated duplicate exclusion code described in Section 05: the outbound list is kept to one constituent per address, while the return journey still respects an opt-out across every record that shares it.

The data you choose to sync

First name, last name and email always sync; they underpin the match between the two systems. Beyond those, you choose from the defined set of Raiser's Edge NXT fields below. Each one you select travels to Mailchimp as a merge field you can segment and personalise on. This is the complete list of fields available to sync.

Category	Fields you can select
Contact and personal	Preferred name, age, birthdate, constituent type
Address	City, state, county, country, postal code
Constituent data	Constituent codes (active), custom fields
GIVING	
First gift	Amount, type, date, fund
Latest gift	Amount, type, date, fund
Greatest gift	Amount, type, date, fund
Lifetime giving	Lifetime giving amount
ENGAGEMENT AND RELATIONSHIP	
Activity	Last action category, last action date
Stewardship	Assigned fundraiser

Custom Fields is the one extensible option

The fields above are the standard set available to sync. The Custom Fields option is where you can go beyond them: nominated Raiser's Edge custom fields are mapped during onboarding, for example a membership level or a segmentation flag, so you can tailor the data within a defined, agreed set rather than the menu being open-ended.

One email address per contact

Mailchimp uses the email address as the unique identifier for a contact, so each audience can hold a given address only once. Raiser's Edge NXT, by contrast, allows different constituents to share an address. The sync therefore sends one constituent per email address. Section 05 explains how a dedicated solicit code keeps the list clean where supporters share an address, which email address is chosen from each record, and Section 03 explains how opt-outs behave when an address is shared.

Your list, solicit codes and consent

A single Raiser's Edge NXT constituent list decides who syncs to Mailchimp, and the same solicit codes that build that list are how consent is respected. Getting this right is the foundation of an accurate, auditable audience.

The list is built from solicit codes, not manual selection

The sync list is defined by solicit-code filter criteria, never by the manual Add/Exclude button. Solicit codes are attributes that already live on the constituent record: an **include** code brings eligible supporters in, and **exclude** codes keep others out. Because the list is rule-based, membership updates automatically as your team adds or removes codes, so the audience stays dynamic and you can always see exactly why someone is, or is not, being synced.

Which email address is synced

The email address used for each constituent is the one your Raiser's Edge NXT list returns. The list pinpoints the address marked as **preferred** on the record; where several addresses exist and none is marked preferred, Raiser's Edge NXT chooses the one it judges to be preferred, based on recency. To confirm which address will sync, export the list and review the email address column: the address shown is the one **SmartMAILCHIMP** will use. If it is not the address you expect, mark the intended address as preferred on the record and the sync will follow.

How consent is respected

Consent is managed through the codes you already maintain. The include code confirms a supporter has the right to receive marketing email, so only consenting constituents reach Mailchimp; suppression codes such as a do-not-email instruction are added to the exclude criteria. When consent changes in Raiser's Edge, the codes change, and both list membership and the Mailchimp audience follow automatically.

How consent is recorded back in Raiser's Edge

When someone subscribes via Mailchimp, **SmartMAILCHIMP** writes a consent entry onto the constituent record. The **source** (Mailchimp) and **channel** (Email) are fixed and always the same. The consent **category** is your choice: you tell us which category to record against (for example Communications) and it is used consistently for every subscriber.

Pre-filtering is built in

Before syncing, **SmartMAILCHIMP** automatically excludes constituents with no email address and any marked do-not-contact or inactive, so you do not need to build those rules into the list yourself. A dedicated exclusion code (commonly `SmartMAILCHIMP Duplicate`) is used where supporters share an address, keeping the list to one constituent per email.

A dedicated guide

The companion guide *Building your Raiser's Edge NXT list for SmartMAILCHIMP* walks your team through choosing include and exclude codes step by step. The SmartTHING team will also advise during onboarding.

The choices you can make

SmartMAILCHIMP ships with sensible defaults, so most organisations go live with very little to decide. Where your processes differ, the settings below can be tuned during onboarding. The green marker shows the standard default; the grey marker shows an option set up on request.

Record matching key	Lookup ID (Constituent ID) via the <code>RE_Const_ID</code> merge field STANDARD
Fields synced	Your selection from the available Raiser's Edge fields (see Section 04)
Email address synced	The address your Raiser's Edge NXT list returns: the preferred email on the record, chosen by recency where none is marked preferred (see Section 05)
New constituent code	Applied to records created from Mailchimp, so their origin is identifiable
Creating / updating records	Choice of six processing modes; the default protects biographical data DEFAULT (see Section 07)
Unsubscribe handling	Unsubscribes originate in Mailchimp and are synced back to Raiser's Edge NXT STANDARD (see Section 08)
Hard bounce handling	Mark the email inactive in Raiser's Edge DEFAULT Or relabel the email type, or apply a do-not-email setting ON REQUEST
New email from Mailchimp	Old address marked inactive; the newer address becomes primary
Consent recorded as	Source Mailchimp and channel Email are fixed; the consent category is your choice
Tagging add-on	Optional. Apply Mailchimp tags from a Raiser's Edge NXT constituent list or query named with the <code>TAG:</code> prefix (see Section 09)
Mailchimp profile → Raiser's Edge syncing	Off DEFAULT Can be enabled to write web-form edits back

Defaults are the right answer for most teams

The defaults are chosen so the integration behaves predictably and protects your data. Every setting can be revisited after go-live: talk to the SmartTHING team and the change is made for you in **SmartSYNC**.

How records are created and updated

When a Mailchimp subscriber flows back into Raiser's Edge, you control how much the integration is allowed to do, from creating and fully updating records, to only matching them without changing anything. Six processing modes are available, and the default protects your core biographical data.

Processing mode	What it does
Add or update records, but do not update biographical data DEFAULT	Creates new constituents and updates mapped fields, but never overwrites names, date of birth or other biographical data.
Add or update records, but do not update names	Creates and updates records, including other biographical data, while leaving names untouched.
Add or update records (all fields)	Creates and updates records, allowing every mapped field, names included, to be updated from Mailchimp.
Only update matched records	Updates existing matches only. A subscriber with no match is never created as a new constituent.
Only update matched records, do not update names	Updates existing matches only, and never changes names. Nothing new is created.
Only match records	Matches and links records only. Nothing is created and nothing is updated. Useful for a read-only check.

Which mode suits you

The default fits most teams: Mailchimp can keep contact and segmentation data current, while your carefully maintained names and dates of birth stay protected. The stricter modes suit organisations that never want Mailchimp creating new records, or that manage all biographical data exclusively in Raiser's Edge.

Unsubscribes and bounces

How supporters opt out, how failing addresses are handled, and what each one writes back to Raiser's Edge NXT so your consent and deliverability records stay clean.

Where unsubscribes happen: in Mailchimp

Unsubscribes originate in Mailchimp. When a contact is unsubscribed there, the change flows back to Raiser's Edge NXT automatically and an opt-out consent record is written, so the constituent record always reflects the supporter's choice. Changes made on the Raiser's Edge side do not unsubscribe a contact in Mailchimp: keeping Mailchimp as the single place where unsubscribes happen protects your audience from accidental changes and gives every opt-out one clear, auditable route back into your database.

SUPPORTER SELF-SERVICE

The unsubscribe link

A supporter clicks unsubscribe in any campaign email. Mailchimp records the change instantly, and the sync writes the opt-out back to Raiser's Edge NXT.

STAFF ACTION

Unsubscribe in Mailchimp

Where your team needs to opt someone out, unsubscribe the contact in the Mailchimp audience. The sync carries the change back and records consent in exactly the same way.

How hard bounces are handled

When Mailchimp reports a hard bounce (a permanently invalid address), the default is to mark that email inactive in Raiser's Edge, keeping a clean archive of which addresses bounced. Two alternatives are available on request where a team prefers a different audit trail.

DEFAULT

Mark email inactive

The bounced address is set inactive on the record. Simple, reversible, and keeps the address on file for reference.

ON REQUEST

Relabel the email type

Change the email type to a label such as Mailchimp bounced, so bounced addresses are easy to query as a group.

ON REQUEST

Apply do-not-email

Set a do-not-email instruction, for teams that treat a hard bounce as a suppression event.

New email addresses

When Mailchimp holds a newer address for someone, the old address is marked inactive in Raiser's Edge and the newer one becomes primary, so the record always reflects the address that is actually reachable.

Tagging your audience

Alongside the main sync, an optional tagging add-on lets you apply a Mailchimp tag to a chosen group of contacts straight from Raiser's Edge NXT. Build the group as a constituent list or a constituent query, and the matching contacts in your Mailchimp audience are tagged, ready to use in a campaign.

How it works

Any Raiser's Edge NXT constituent list or constituent query whose name begins with the prefix **TAG:** is picked up by the add-on. Saving the list or query is the trigger: **SmartSYNC** picks it up within around ten minutes and applies the tag in Mailchimp. The tag takes its name from the part of the name that follows the prefix, so that text is exactly what your marketing team will see in Mailchimp.

EXAMPLE

RE NXT list or query name: TAG: Spring Appeal 2026 Invitees
Mailchimp tag: Spring Appeal 2026 Invitees

FROM A CONSTITUENT LIST

Quick cohorts

The simplest route. Build a constituent list, name it with the **TAG:** prefix and save. Ideal for straightforward groups such as event invitees or a stewardship cohort.

FROM A CONSTITUENT QUERY

Complex segments

For groups a list cannot express. Build a constituent query, dynamic or static, with Constituent ID as the first output field, name it with the **TAG:** prefix and save.

Use the full power of Raiser's Edge NXT to build your Mailchimp segments

The add-on comes into its own where a segment is complex and needs multi-layered criteria, such as giving history combined with event attendance, constituency and location. Criteria like these are only available in a Raiser's Edge NXT query, so build the segment there and the tag arrives in Mailchimp ready to use.

Good to know

Tags are added, never removed

Each run applies the tag to the current members of the list or query and never removes a tag from anyone. To take a tag off contacts, remove it in Mailchimp, or rename the list or query to create a fresh tag.

The contact must already be in the main sync

Tags can only be applied to Mailchimp contacts that exist through your main sync. Anyone outside it is skipped, which is the usual reason a tag count is lower than the records you started with.

You get an email confirmation

Nominated team members are emailed when a tag is processed, with the list or query name, the tag name and counts. Tags are applied in batches, so a large group can take a few minutes to finish.

A dedicated guide

The companion guide *Tagging your Mailchimp contacts from Raiser's Edge NXT* covers both methods step by step.

Why teams choose Smart**MAILCHIMP**

The integration removes the manual export-and-import cycle and keeps your marketing audience accurate as a by-product of the work your team already does in Raiser's Edge NXT.

- **No more list exports**

Constituents flow to Mailchimp automatically as they meet your criteria, with no CSV files to build, clean and upload.

- **An audience that stays accurate**

Because the sync is real-time, your Mailchimp audience reflects opt-ins, opt-outs and data changes without anyone re-running an export.

- **Richer segmentation**

The Raiser's Edge fields you choose (giving, constituent codes, custom fields) travel with each contact, so you segment and personalise on real data.

- **Consent handled through codes**

Solicit codes drive who syncs and capture opt-outs, and subscriptions are written back with a documented, auditable consent trail.

- **One source of truth**

Raiser's Edge NXT stays authoritative; Mailchimp holds only the copy it needs, and your default keeps core biographical data protected.

- **Configured to your processes**

Sensible defaults out of the box, with field choices, processing mode, consent category and deliverability tuned to how your team works.

Built on a trusted platform

SmartMAILCHIMP runs on **SmartSYNC**, SmartTHING's integration platform for Blackbaud products. SmartTHING is a member of the Blackbaud Partner Network and holds ISO 27001 (information security) and ISO 9001 (quality) accreditation, with integrations used by organisations around the world.

GETTING STARTED

See how it would work for your data

Onboarding is guided: the SmartTHING team helps you define the sync list, choose the fields you want and set the few options that matter for your processes. Most of the defaults in this guide will be exactly right.

smarththing.org