

SmartDOTDIGITAL guide

Setting up the two-way sync between Raiser's Edge NXT and Dotdigital

The Smart**DOTDIGITAL** integration keeps your Raiser's Edge NXT constituent records and your Dotdigital contacts in step with each other automatically. This guide covers what gets synced, how to build the constituent list that drives the integration, how the flows behave day-to-day, and what to look at first when something is not quite right.



How SmartDOTDIGITAL works

Smart**DOTDIGITAL** runs in the background to keep two systems in agreement: your **Raiser's Edge NXT** database, where the truth about your supporters lives, and your **Dotdigital** account, where you send marketing email. Whenever a record changes in one system, the integration mirrors the change into the other.

What gets synced, in plain terms

Four things move between the two systems automatically. First, **unsubscribes** in Dotdigital flow back into Raiser's Edge NXT as a consent record with response OptOut, so the database always reflects what supporters have told you. Second, **hard bounces and suppressions** in Dotdigital are treated differently: instead of being recorded as an opt-out (the supporter never asked to leave), the email address is marked **inactive** on the constituent record. Third, **new and updated contacts in Dotdigital** are matched against existing constituents, or created as new ones, and the integration writes the link back to Dotdigital so the two records are paired up. Fourth, **updates to constituents in Raiser's Edge NXT** — new gifts, address changes, stakeholder group changes — are pushed out to Dotdigital so your segmentation data stays current.

SOURCE OF TRUTH

Raiser's Edge NXT

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

MARKETING CHANNEL

Dotdigital

Holds a copy of relevant contact data and segmentation fields, and tells Raiser's Edge NXT when supporters unsubscribe or when an address bounces.

The CONSID link

Every Dotdigital contact carries a data field called **CONSID** that stores the matching Raiser's Edge NXT Lookup ID. This is what lets the two systems recognise each other across the sync. When a new contact appears in Dotdigital without a CONSID, the integration searches Raiser's Edge NXT for a match by email and name; if no match is found, a new constituent is created and CONSID is populated automatically.

Loop protection is built in

To stop changes ricocheting between the systems forever, each flow writes a marker to a shared storage pot whenever it makes a change, and checks that marker before processing the next inbound update. You will never see this in action — it just means the sync settles cleanly after each change.

What we need to get started

Onboarding is a guided process. The SmartTHING team will handle the technical wiring; your part is to provide access and to make some decisions about how you want the integration to behave. Here is what we will work through together.

1. Access to both systems

You will need an administrator in Raiser's Edge NXT to authorise the SmartSYNC connection, and a Dotdigital API user with permissions to read and write contacts, data fields, and lists. We will guide you through each authorisation step.

2. The constituent list that drives the sync

A single Raiser's Edge NXT constituent list determines who is eligible to be synced to Dotdigital. Section 03 of this guide covers exactly how to build it. Build it before onboarding day if you can — it is usually the longest item on the list.

3. Decisions about consent and preferences

We will agree which Raiser's Edge NXT consent channel, category and source values the integration should write when it records a Dotdigital opt-out, and what privacy notice and consent statement text should accompany those records. If your fundraising team already has standard wording, bring it.

4. Dotdigital data fields

The integration writes a number of named data fields on each Dotdigital contact (see Section 05). Most are created automatically; if you already use any of these field names for something else, flag it early so we can rename to avoid collisions.

Roughly how onboarding goes

- 1 Kick-off** — Walk through this guide together, agree scope and timeline.
- 2 Connect** — Authorise SmartSYNC against Raiser's Edge NXT and Dotdigital.
- 3 Configure** — Map fields, consent values, and your constituent list.
- 4 Pilot** — Run a controlled batch and review results together.
- 5 Go live** — Switch on the flows; SmartTHING monitors the first few days.

Building your Raiser's Edge NXT list

The Raiser's Edge NXT constituent list you provide is the single source of truth for who gets synced to Dotdigital. Build it with **solicit code filter criteria**, never with manual Add/Exclude, so the sync stays accurate as your data changes.

Why the list must be dynamic

Solicit codes are data attributes that already live on the constituent record. When your team adds or removes a code — processing an unsubscribe, recording a new opt-in — list membership updates instantly, and the sync responds in step. This is the only way to keep the two systems aligned over time without manual intervention.

Do not use the manual Add/Exclude feature

Raiser's Edge NXT lets you manually add or exclude individual constituents from a list using the Add/Exclude button. This is useful for ad-hoc reporting, but it must not be used on the list that drives your Smart**DOTDIGITAL** sync. Manual overrides become invisible to the integration, drift out of date as your data changes, and cause silent discrepancies between the two systems that are difficult to diagnose later.

AVOID

Manual Add/Exclude

Static. Invisible to the sync. Drifts out of date as your data changes. Causes silent discrepancies between Raiser's Edge NXT and Dotdigital.

USE

Solicit code filters

Dynamic. Driven by attributes on the constituent record. Updates automatically as your team manages consent. Fully auditable.

Include via solicit code

Require the presence of a specific solicit code that confirms the constituent has consent to receive marketing emails from your organisation. Only constituents bearing this code will appear in the list, and therefore be synced to Dotdigital.

EXAMPLE INCLUDE CODES

Marketing Email – Opt In
Email Consent

Exclude via solicit code

Remove constituents from the list by filtering out anyone who holds a suppression code. Common examples include codes that record an explicit do-not-email instruction, and a dedicated code for handling shared email addresses.

EXAMPLE EXCLUDE CODES

No Email
Any Purpose — No Email
Solicitation — No Email
SmartDOTDIGITAL Duplicate

One email address per constituent

Dotdigital uses the email address as the unique identifier for a contact, so each Dotdigital list can only contain a given email address once. Raiser's Edge NXT allows different constituents to share an email address — so your sync list must contain only unique emails.

Handling shared email addresses

Where two or more constituents share an email address, decide which one should be the active subscriber and add a dedicated exclusion solicit code — commonly **SmartDOTDIGITAL Duplicate** — to the others. Add that code to the list's exclude criteria. This keeps the list to one constituent per email address while preserving the underlying records.

Setup checklist

A list built the way Section 03 describes stays in step with your live data, gives you a clean audit trail, and makes the integration behave predictably. Before handing the list to the SmartTHING onboarding team, confirm each of the following.



The list is built entirely with filter criteria. The Add/Exclude button has not been used.



An **Include solicit code** is defined that records consent to receive marketing email.



One or more **Exclude solicit codes** are defined to suppress do-not-email constituents.



A solicit code (typically **SmartDOTDIGITAL Duplicate**) is in place to ensure the list contains only unique email addresses.



The list returns the expected number of records and a manual spot-check confirms the right people are included.

Need a hand choosing solicit codes?

If you are unsure which solicit codes to use, the SmartTHING team will advise during onboarding and configuration. Reach out at any point in the process.

How the sync works day-to-day

Smart**DOTDIGITAL** runs three flows in parallel. Each one watches for changes in one system and applies the appropriate update in the other. Once configured, they run continuously in the background.

RAISER'S EDGE NXT DOTDIGITAL

Flow 1 — Constituent changes push out to Dotdigital

Whenever a constituent on your sync list is added, updated, or has new gifts or custom field changes, this flow finds the matching Dotdigital contact (by CONSID, or creates one if missing) and updates the Dotdigital data fields — name, address, latest gift information, stakeholder group, last action date, and so on. Use this to power segmentation and personalisation in Dotdigital campaigns.

DOTDIGITAL RAISER'S EDGE NXT

Flow 2 — New or updated Dotdigital contacts come back into RE NXT

When someone subscribes through a Dotdigital signup form, or you import new contacts into Dotdigital from another source, this flow looks them up in Raiser's Edge NXT. If a constituent matches by Lookup ID, email, or first/last name + email, the existing record is updated. If no match is found, a new constituent record is created with the constituent code **DotDigital Contact**, and the new Lookup ID is written back to the Dotdigital contact's CONSID field for future lookups.

DOTDIGITAL RAISER'S EDGE NXT

Flow 3 — Unsubscribes, hard bounces and suppressions come back

Unsubscribes — via one-click unsubscribe, the preference centre, or a manual unsubscribe — are written to the matching constituent as a consent record with response **OptOut**. The consent record carries the channel, category, source, date, privacy notice and consent statement values you agree during onboarding.

Hard bounces and suppressions are treated differently. Rather than recording an opt-out — which would suggest the supporter chose to leave — the integration marks the email address **inactive** on the constituent record. The address no longer works, but consent has not been withdrawn; if a working address is added later, they continue to receive your email. You can also choose during setup to have the email type in Raiser's Edge automatically updated — for example to **DotDigital Hardbounce** or **DotDigital Suppression** — so the reason is recorded directly on the email address.

What data ends up in Dotdigital

The integration writes a set of named data fields onto each Dotdigital contact. This data from Raiser's Edge can be used to segment your lists and personalise content. During onboarding we will agree which of the fields below to sync — you can pick any combination, and we can extend the list later if other Raiser's Edge NXT data becomes useful.

CRM data you can choose to sync

- | | | |
|---|---|---|
| ☐ Preferred name | ☐ Constituent codes (Active) | ☐ Latest gift fund |
| ☐ Age | ☐ Custom Fields | ☐ Greatest gift amount |
| ☐ Birthdate | ☐ First gift amount | ☐ Greatest gift type |
| ☐ Constituent type | ☐ First gift type | ☐ Greatest gift date |
| ☐ Address: City | ☐ First gift date | ☐ Greatest gift fund |
| ☐ Address: State | ☐ First gift fund | ☐ Lifetime giving amount |
| ☐ Address: County | ☐ Latest gift amount | ☐ Last action category |
| ☐ Address: Country | ☐ Latest gift type | ☐ Last action date |
| ☐ Address: Postal code | ☐ Latest gift date | ☐ Assigned Fundraiser |

Adding more fields

Anything stored on a constituent record — custom fields, attributes, computed values, code table entries — can be added to the sync. If you have a specific segmentation idea, share it during onboarding and we will work out the best way to expose it in Dotdigital.

SmartDOTDIGITAL add-on

The SmartDOTDIGITAL add-on gives you the ability to use a Raiser's Edge NXT constituent list as the basis for a list in Dotdigital. It is an optional flow on top of the main sync, useful when you want to push a specific cohort — an event invitation list, a major donor stewardship group, a campaign-specific suppression list — into Dotdigital as a ready-to-use list.

How it works

Any constituent list in Raiser's Edge NXT whose name begins with the prefix **TAG:** is picked up by the add-on, and an equivalent list is created in Dotdigital. The Dotdigital list takes its name from the part of the RE NXT list name that follows the prefix.

EXAMPLE

RE NXT list name:	TAG: Spring Appeal 2026 Invitees
Dotdigital list:	Spring Appeal 2026 Invitees

Things to know

- **Imports are bulk.** Records are uploaded to Dotdigital in batches, so very large lists may take Dotdigital several minutes to process after the integration finishes.
- **The contact must exist in Dotdigital.** For a constituent to be added to the new Dotdigital list, a matching contact record must already exist in Dotdigital. How it got there does not matter — the main sync, a Dotdigital signup form, a manual import, or any other source is fine. What matters is that the contact is present in Dotdigital at the point the add-on runs; it does not need to be on the main sync list.
- **Email notifications.** A confirmation email is sent to your nominated team members each time a list is processed, with the RE NXT list name, the Dotdigital list name, and counts. Final counts in Dotdigital can differ from RE NXT counts because of Dotdigital's own deduplication, mailing preferences, and suppression handling.
- **Naming.** Pick the RE NXT list name carefully — whatever follows **TAG:** is what your marketing team will see in Dotdigital. Renaming the RE NXT list later will not automatically rename the Dotdigital list it has already created.

Want this enabled?

The SmartDOTDIGITAL add-on is an optional extra to the standard sync. If it would be useful for your team, mention it during onboarding and we will scope it in.

Ready when you are

**For pricing, more information and to
book your personal demo**

Whether you are ready to switch on the integration or still weighing it up, our team is happy to help. Head to the Smart**DOTDIGITAL** page on the SmartTHING website for full feature detail, pricing, and to arrange a one-to-one walkthrough with one of our team.

VISIT

smarththing.org/smartdotdigital

