

Achieve Success with Blackbaud Financial Edge NXT®

Blackbaud Financial Edge NXT Project Prep Checklist

We are excited to be partnering with you on your Blackbaud Financial Edge NXT project! We have developed a best practice checklist to help ensure your team is ready to begin your implementation project. Please work through the action items below to prepare for your project.



Create a Blackbaud ID

Each Blackbaud Financial Edge NXT user will need a Blackbaud ID (BBID) to access Blackbaud.com, Financial Edge NXT, Blackbaud University, and Customer Support. Your initial organization administrator will receive an email invitation prompting them to accept their BBID. They can then [invite other admins](#) or [invite other users](#).



Sign up for Training

Blackbaud University's mission is to accelerate the success of your organization. You should begin taking the recommended Implementation trainings right away to begin building your skillset in your new solution. These trainings will give you a better understanding of you solution and how to design the system and are critical to your overall success.

Financial Edge NXT Implementation Training:

[Pre-design and Design Phase](#)

[Testing Phase](#)



Complete the Pre-consultation Survey

This survey serves as a tool for your Blackbaud Financial Edge NXT Project. It is designed to assist you in making important organizational decisions. When paired with the recommended training from Blackbaud University and a design session with your Business Consultant, you will have a great foundation for your implementation. [Download the survey here](#).



Gather Financial Documents & Reports

Along with the Pre-consultation Survey, your Business Consultant will also want to review copies of the following:

1. Current chart of accounts
2. Financial reports you currently require (Income Statement and Balance Sheet)
3. Last completed external audit report

Steps to securely upload these documents and the Pre-consultation Survey are on the last page of the survey.



Review Import Templates

You should also review the Import Templates Master Set. This template includes all the data that will be collected and imported into Financial Edge NXT. Your team can begin filling this out prior to your kickoff meeting, especially the AP Vendors (as applicable) in this file. [Download the Import Templates Master Set here](#).