

CASE STUDY

# A major donor gives on Tuesday. The assigned officer does not see it until Thursday. The acknowledgment window is already gone.

A national nonprofit organization managed its donor development operation in Raiser's Edge NXT. The data was there, but it did not move. Staff had to log in, filter gift records, cross-reference assignments, and route updates manually. Armely built a Power Automate flow that pulls new gifts every morning at 8 AM and delivers a personalized digest to every assigned staff member automatically.

### Does this describe your development team?

- Gift records sit in Raiser's Edge until someone logs in and pulls them manually.
- The assigned major gift officer, solicitor, and supervisor do not all learn about a gift at the same time.
- Someone has to know every donor-staff relationship and forward updates to the right people.
- Acknowledgment timelines slip because staff find out about gifts days after they post.
- Gifts tied to leadership donors, board members, and planned giving prospects get the same treatment as everything else.
- There is no formatted summary of the full gift record: staff piece together details from multiple screens.

### What Armely built for a national nonprofit

**Context:** A national nonprofit with a portfolio of leadership donors, board members, major donors, and planned giving prospects. Development staff, solicitors, and supervisors all need to know about new gifts tied to their assigned donors.

**What Armely built:** A 155-action Power Automate flow that triggers daily at 8 AM, pulls new gifts from Raiser's Edge NXT, enriches each record with full constituent and fundraiser data, evaluates constituent codes to filter for priority segments, and routes a personalized HTML digest email to every assigned staff role through Office 365.

**The result:** Every development officer, solicitor, and supervisor sees the gifts linked to their donors by 8 AM the next morning. No one has to log in, pull a report, or forward an email. Gifts without a resolved staff assignment route to a fallback recipient so nothing is missed.

Before	After
Staff had to log into Raiser's Edge NXT and pull gift records manually each day	<b>Power Automate flow pulls new gifts automatically at 8 AM and delivers a digest by email</b>
Gift notifications depended on someone knowing every donor-staff relationship	<b>Role-based routing delivers to every assigned officer, solicitor, and supervisor automatically</b>
Acknowledgment timelines slipped because staff learned about gifts days late	<b>Same-morning awareness: gifts posted yesterday appear in the 8 AM digest today</b>
Gift records arrived as partial information requiring cross-referencing in Raiser's Edge	<b>Full enriched record in each digest: amount, type, appeal, campaign, fund, donor details</b>
Donors without a clear staff assignment had gifts that went unacknowledged	<b>Unresolved assignments route to a fallback recipient so no gift reaches a dead end</b>
No filtering for priority segments: all gifts treated the same regardless of donor level	<b>Constituent code filtering targets leadership donors, board members, and major donors</b>

### Book a free nonprofit technology review

We look at your donor management system, your staff notification workflows, and what automation would look like for your development team.

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