

Get Started with Financial Edge NXT Guide

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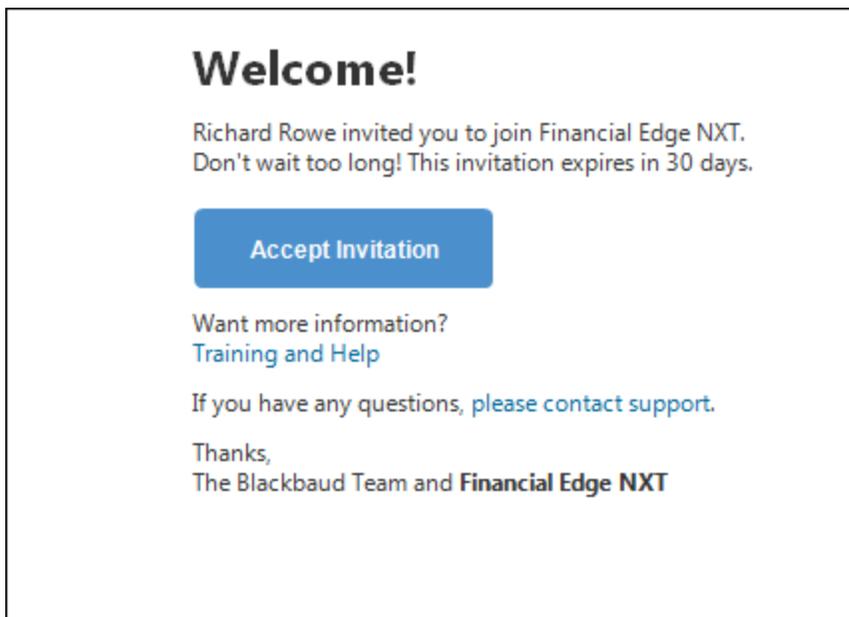
Get Started Guide-2017

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Get Started with Financial Edge NXT!

Before we get started, let's talk about how to sign into **Financial Edge NXT**. You'll receive a Welcome email invitation from your administrator. The subject of this email is "You have been invited to Financial Edge NXT!" Once received, you select **Accept Invitation** and simply sign in to **Financial Edge NXT** with your Blackbaud account.



Tip: The **Training and Help** link in the email is a great resource to help you get started and answer any questions you have. We also recommend that once you log in to **Financial Edge NXT**, you bookmark the homepage for easy access.

Once you accept your invitation, you need to sign in. When you sign in, keep this in mind:

- If you already have a Blackbaud account, enter the email address and password. Before you click **Sign in**, ensure the email address you entered is your Blackbaud email. Once you select **Sign in**, you just need to confirm your account.

Tip: You can mark **Remember my email** on the sign in screen so that you don't have to enter your credentials next time you sign in.

- If you don't have a Blackbaud account, select **sign up** to create one and, when you receive another Welcome email message, confirm your email address again.

Note: Admins! You can send users invitations to join **Financial Edge NXT** from **Control Panel**.

What is Financial Edge NXT?

Financial Edge NXT is the next generation of Blackbaud's financial solutions. **Financial Edge NXT** is the web view accessed from your web browser, and **The Financial Edge** is the database view accessed through *Citrix*. You can move seamlessly back and forth between these two interfaces to access the same underlying information, as we continue to extend the functionality of **Financial Edge NXT**.

Since **Financial Edge NXT** is web view, you can securely access the program from anywhere, on your desktop, laptop or tablet! The web view experience offers a user-friendly, intuitive interface, as well as new features and enhancements to the existing database view.

Note: To view requirements and compatibility information for **Financial Edge NXT**, see the [system requirements](#) on Blackbaud.com.

When you create a record in **Financial Edge NXT**, you can access that record in the database view as well. Likewise, configuration settings and business rules created in the database view affect web view functionality.

Some of the navigation and functionality is different depending on how you access it. We recommend you familiarize yourself with these differences before you start to work in **Financial Edge NXT**.

Web Browser Considerations

The ability to access **Financial Edge NXT** through a web browser provides more flexibility in how and where you access the program. Web browser settings and options, such as toolbar views and shortcut keys, can vary from browser to browser. To maximize the web view user experience, we recommend you familiarize yourself with your web browser's settings.

- For optimal performance, access the program through a supported browser. We currently support the following browsers:
 - *Chrome*
 - *Internet Explorer 11*
 - *Firefox*
 - *Edge*
 - *Mac Safari*
 - *Mac Chrome*
- Consider the number of toolbars you actively display in your browser. Numerous toolbars can decrease the area on your screen, which can require the need to scroll more. You can easily remove or hide toolbars as necessary.
- Review your browser's shortcut keys. For example, you can use shortcut keys in your browser to navigate web pages or open Help. At this time, there are no shortcut keys for data entry within **Financial Edge NXT**.
- Here is a [list](#) of Keyboard Shortcuts for the *Chrome* browser.
- Adjust the magnification, or "zoom," level for your browser as necessary. For example, larger zoom levels decrease the area in which the program appears and can require you to scroll.

Access Multiple Databases

If you have rights to multiple databases, you can switch between these databases as you work in **Financial Edge NXT**. If you plan to access multiple databases at the same time, please review the following browser behaviors:

- To access multiple FE databases at the same time from your browser, you must be logged in as the same user (who has access/an auth ID to those databases).
- You cannot be logged in as different users on different tabs of the same browser.
- When you sign in to the first tab of a browser, every tab afterward points to the same tenant/user combination. You must change databases from each tab.
- When you sign out of one tab in a browser, you automatically sign out of all of them. Therefore, you cannot log out of one database on one tab, without logging out of all the tabs.
- You can be logged in as different users in different browsers (Chrome = user A, Firefox = User B).

Features and Navigation

With the web view user experience, you will notice enhancements to features such as navigation, searches, and data lists. The more familiar you are with these differences, the easier it will be as you move back and forth from the web view and database view.

Database view

Financial Edge NXT is the web view accessed from your web browser. **Financial Edge** is the database view accessed through *Citrix*. You can move seamlessly back and forth between these two interfaces to access the same underlying information. To access the database view from **Financial Edge NXT**, select **Open database view** on the action bar to manage your data through *Citrix*.

New navigation

The product navigation at the top of the page provides quick access to all areas of **Financial Edge NXT**. You can use the drop-down menus to access specific areas of the program.

	Deposit number	Deposit date	Account name	Deposit ID	Description	Subledger	Amount	Status
...	424	10/29/2017	Credit Card	qqwe		Treasury	\$113.00	Open
...	526	08/17/2017	Operating Cash	701		Treasury	\$70.00	Open
...	527	08/17/2017	Operating Cash	703		Treasury	\$13.00	Open
...	528	08/17/2017	Operating Cash			Treasury	\$70.00	Open
...	529	08/17/2017	Operating Cash	704		Treasury	\$40.00	Open
...	530	08/17/2017	Operating Cash	1001		Treasury	\$70.00	Open
...	423	05/12/2017	Credit Card	1234567		Treasury	\$0.00	Open
...	524	11/02/2016	Operating Cash			Treasury	\$0.00	Open
...	523	09/28/2016	Operating Cash			Treasury	\$0.00	Open

Note: In the database view, you access different modules from a drop-down menu on the toolbar.

List pages

In the web view, list pages are the central hub for all your record tasks. Each record type in *Financial Edge NXT* has its own list page. For example, the Invoices list displays all the invoices you have in the system.

Invoice date	Invoice #	Description	Vendor name	Due date	Amount	Status
11/30/2012	Invoice	Payroll liabilities through <11/1/2012 to 11/30/2012>	Department of the Treasury IRS	11/30/2012	\$41,673.51	Paid on 11/30/2012 Check #179
11/30/2012	Invoice	Payroll liabilities through <11/1/2012 to 11/30/2012>	Metlife Investors Group	11/30/2012	\$16,062.06	Paid on 11/30/2012 Check #182
11/30/2012	Invoice	Payroll liabilities through <11/1/2012 to 11/30/2012>	South Carolina Dept of Revenue	11/30/2012	\$8,497.33	Paid on 11/30/2012 Check #183
11/30/2012	Invoice	Payroll liabilities through <11/1/2012 to 11/30/2012>	Metlife Insurance Group	11/30/2012	\$253.65	Paid on 11/30/2012 Check #181
11/30/2012	Invoice	Payroll liabilities through <11/1/2012 to 11/30/2012>	Daniel Island Benefits Administration	11/30/2012	\$1,511.35	Paid on 11/30/2012 Check #178

The number of records included in the list appears above the list.

List search, filters and columns

From lists, you can search and use filters to make locating records in a list easier and faster. The search field and filters appear above the list. When you search for a record, the search results provide direct links to the record.

Filters are also useful in creating specific lists of records. For example, you can create a list of accounts based on an account segment, or a list of invoices based on invoice status.

You can also choose columns to appear in a list.

Invoice date	Invoice #	Description	Vendor name	Due date	Amount	Status
11/30/2012	Invoice	Payroll liabilities through <11/1/2012 to 11/30/2012>	Department of the Treasury IRS	11/30/2012	\$41,673.51	Paid on 11/30/2012 Check #179
11/30/2012	Invoice	Payroll liabilities through <11/1/2012 to 11/30/2012>	Metlife Investors Group	11/30/2012	\$16,062.06	Paid on 11/30/2012 Check #182
11/30/2012	Invoice	Payroll liabilities through <11/1/2012 to 11/30/2012>	South Carolina Dept of Revenue	11/30/2012	\$8,497.33	Paid on 11/30/2012 Check #183
11/30/2012	Invoice	Payroll liabilities through <11/1/2012 to 11/30/2012>	Metlife Insurance Group	11/30/2012	\$253.65	Paid on 11/30/2012 Check #181

Note: In the database view, you define search criteria and search for records from the Open screen.

Page tiles

In the web view, record information is displayed on a series of tiles that appear on the record page. You can add and edit information directly from these page tiles.

Account #0.0000.000-0161
 Credit Cards - return
 Properties
 Contra-asset account

Report classification
 Class: Unrestricted Net Assets
 Cash flows: Cash Flows from Operating Activities
 Working capital: Current Assets

Go back Edit More actions

Activity

Actual/encumbrance: USD0.00 Fiscal year: 2015

Beginning balance: USD0.00 Ending balance: USD0.00 Net change: USD0.00

Period	Beginning	Debits	Credits	Ending
1 Jan	USD0.00	USD0.00	USD0.00	USD0.00
2 Feb	USD0.00	USD0.00	USD0.00	USD0.00
3 Mar	USD0.00	USD0.00	USD0.00	USD0.00

Budget

Actual/encumbrance: USD0.00 Fiscal year: 2015 Budget scenario: USD0.00

FY 2015 Budget FY 2015

Favorable/(unfavorable) from budget FY 2015: 0.000%

Period	Actual	Budget	Favorable/(unfavorable)
1 Jan	USD0.00	USD0.00	USD0.00 0.000%
2 Feb	USD0.00	USD0.00	USD0.00 0.000%
3 Mar	USD0.00	USD0.00	USD0.00 0.000%

Note: In the database view, this information appears on a series of tabs.

Record management

Records in **Financial Edge NXT** contains all kind of information. To help focus on only what matters to you, you can manage how the information on a record appears.

- To rearrange the order of the tiles on a record, move it by its anchor .
- To hide or show information, select its Collapse  or Expand .
- To quickly hide or show all information on a record, select Collapse all  or Expand all .

Custom fields

In **Financial Edge NXT** we refer to attributes as custom fields. You use custom fields to add additional information to a record, and to further filter records when you search. While the program provides many fields to track information about the record, you may want to add additional fields to store other details.

In the web view, the **Custom fields** tile appears on each view page.

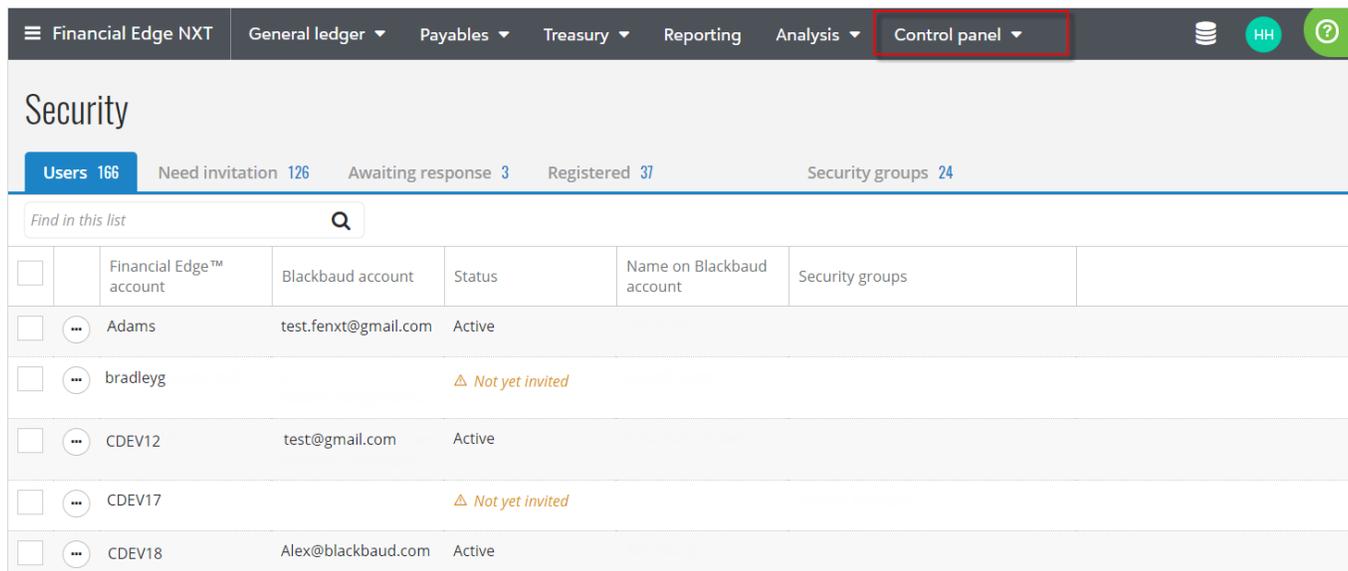
Note: In the database view, custom fields are called attributes, and you create them in *Configuration*.

Control panel

In the web view, **Control panel** is where you manage security and options for features throughout **Financial Edge NXT**.

- From the Security page, you can invite your users to join the system. The tabs in Security help to manage this process, and you can easily view your active users as well as those who still need an invitation.
- From the Settings page, you can add and edit fiscal year details, and work with account and code setup information.

To access the Control panel, select **Control panel** at the top of the page.



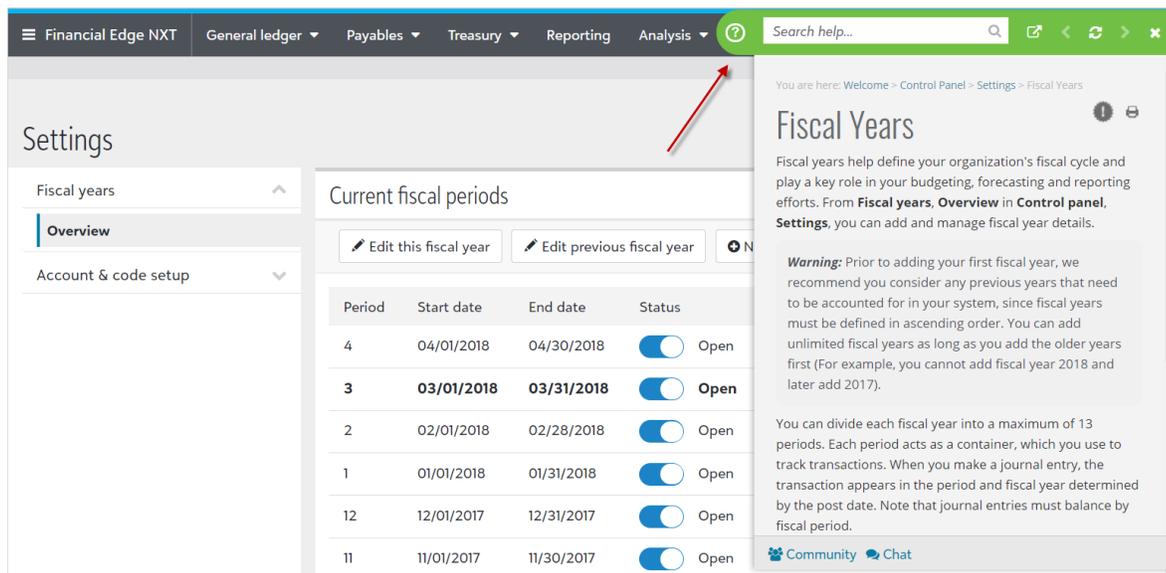
	Financial Edge™ account	Blackbaud account	Status	Name on Blackbaud account	Security groups
<input type="checkbox"/>	Adams	test.fenxt@gmail.com	Active		
<input type="checkbox"/>	bradleyg		△ Not yet invited		
<input type="checkbox"/>	CDEV12	test@gmail.com	Active		
<input type="checkbox"/>	CDEV17		△ Not yet invited		
<input type="checkbox"/>	CDEV18	Alex@blackbaud.com	Active		

Note: In the database view, you manage security from *Administration*.

Help file

When working in *Financial Edge NXT*, if a question should arise, simply click the ? in the upper right of the screen for content based on what you're working with at the time, in context of the application so you can continue to work and refer to the Help side-by-side. (You can also undock the Help to move it around, should it cover up where you're working.) As you read the Help, expand or collapse sections to help focus on only what content pertains to your question.

You can also access the Community, Knowledgebase, or Chat support from the Help file.



The screenshot shows the Financial Edge NXT interface with the 'Settings' page open. The 'Fiscal Years' section is selected in the left sidebar. The main content area displays 'Current fiscal periods' with a table of periods and their status. A red arrow points to the question mark icon in the top navigation bar. The Help panel is open on the right side of the screen, displaying the 'Fiscal Years' article.

Period	Start date	End date	Status
4	04/01/2018	04/30/2018	Open
3	03/01/2018	03/31/2018	Open
2	02/01/2018	02/28/2018	Open
1	01/01/2018	01/31/2018	Open
12	12/01/2017	12/31/2017	Open
11	11/01/2017	11/30/2017	Open

Fiscal Years

Fiscal years help define your organization's fiscal cycle and play a key role in your budgeting, forecasting and reporting efforts. From **Fiscal years, Overview** in **Control panel, Settings**, you can add and manage fiscal year details.

Warning: Prior to adding your first fiscal year, we recommend you consider any previous years that need to be accounted for in your system, since fiscal years must be defined in ascending order. You can add unlimited fiscal years as long as you add the older years first (For example, you cannot add fiscal year 2018 and later add 2017).

You can divide each fiscal year into a maximum of 13 periods. Each period acts as a container, which you use to track transactions. When you make a journal entry, the transaction appears in the period and fiscal year determined by the post date. Note that journal entries must balance by fiscal period.

[Community](#) [Chat](#)

Note: In the database view, you access the help file using **F1**.

Security in Financial Edge NXT

Security in the web view leverages the existing security settings defined in the database view. For example, the security groups you created in the database view, appear in the web view.

To get your database view users started in *Financial Edge NXT*, you must send invitations and get them registered. To invite a user of the database view to use the web view, mark the checkbox next to their name on the **Users** or **Need invitation** tab, select **Send invitation**, and then enter their email address and click **Send invitation**. After the user receives the invitation, they appear on the **Awaiting response** tab.

Security					
Users 87		Need invitation 43	Awaiting response 9	Registered 35	
Find in this list <input type="text"/>					
<input type="checkbox"/>	Financial Edge account	Blackbaud account	Status	Name on Blackbaud account	Security groups
<input type="checkbox"/>	Supervisor		⚠ Not yet invited		
<input type="checkbox"/>	ErinUh		⚠ Not yet invited		RO - FAWeb Group
<input type="checkbox"/>	KingaVa		⚠ Not yet invited		RO - FAWeb Group
<input type="checkbox"/>	JennLk		⚠ Not yet invited		RO - FAWeb Group

You can perform the following tasks from web view:

- Manage all users in the system, including those who need invitations, who have not responded yet, and those who are already registered.
- View users who need invitations.
- Invite database view users to **Financial Edge NXT**.
- Disconnect accounts.

These **Security** tasks must be performed in the database view:

- Create and manage security groups.
- Add new users to the system.

Issues with Invitations?

From **Control panel, Security**, you can easily invite people at your organization to use **Financial Edge NXT**. However, if the email recipient has trouble logging in, or perhaps never receives the invitation, here are a few things that might help resolve the issue.

Someone didn't get their invitation?

If someone doesn't receive their invitation, verify you have their correct email address. You can resend an invitation and update the recipient's email address if necessary.

If the email address is correct, check your organization's email filters or the recipients junk mail to see if it was marked as spam. To ensure people at your organization receive their invitations, make sure your email servers allow messages from Blackbaud.

- Set your email server, proxy server, and firewall to allow email from these domains:
 - @blackbaudondemand.com
 - @blackbaudemail.netcommunity1.com
- Whitelist these Internet protocol (IP) ranges on your email servers or network appliance:
 - 205.139.104.0/22 (205.139.104.1 - 205.139.107.254)
 - 206.79.6.0/24 (206.79.6.1 - 206.79.6.255)
 - 216.235.196.0/22 (216.235.196.1 - 216.235.199.254)
 - 216.235.200.0/21 (216.235.200.1 - 216.235.207.254)

Someone got their invitation but can't log in?

If someone tries to access **Financial Edge NXT** but gets Blackbaud's company website instead, they need to first accept their invitation. If someone accepted their invitation but can't successfully log in, make sure they use the email address and password used to set up their Blackbaud account.

Tip: To create an account with Blackbaud, visit [Blackbaud's website](#) and select **Sign in** in the upper right corner.

Reporting in Financial Edge NXT

Reporting in **Financial Edge NXT** leverages existing reports and settings defined in the database view. For example, the reports and tags you created in the database view, also appear in **Financial Edge NXT**. You can move seamlessly back and forth between these two interfaces to access the same underlying information.

Before you begin to work with **Reporting**, please review the following list of reports available in **Financial Edge NXT** and the tasks you still must perform in the database view.

You can perform the following **Reporting** tasks from the web view:

- Create new reports
- Export reports to *Excel*, *Word*, and *PDF* files
- View reports and tags created in the database view

These **Reporting** tasks must be performed in the database view:

- Create and manage report tags

General Ledger in Financial Edge NXT

General ledger in **Financial Edge NXT** leverages existing account and project information defined in the database view. For example, the accounts and projects you created in the database view, also appear in **Financial Edge NXT**. You can move seamlessly back and forth between these two interfaces to access the same underlying information.

Before you begin to work with **General ledger**, please review the following information about the tasks you perform in **Financial Edge NXT** and the tasks you perform in the database view.

You can perform the following **General ledger** tasks from the web view:

- View, add, edit, and delete journal entry batches.
- Copy and reverse batches.
- View, add, edit and delete accounts.
- View, add, edit and delete projects.
- View, add, edit and delete grants.
- View, add, edit, and delete budget scenarios.

These **General ledger** tasks must be performed in the database view:

- All setup and configuration, including administration tasks and setting up business rules.
- Visual Chart Organizer.
- Posting and validating.
- Budget scenario distributions and adjustments.

New Features in General Ledger

When you access **General ledger** from the web view, you will notice changes and enhancements to fields and features like search, lists, and navigation. Here are a few of those enhancements:

Active and inactive account records

In the web view, you can choose to prevent data entry by locking the account from any data entry. You can also prevent posting after a future date by marking the **Prevent posting after** checkbox and entering a date. When marked, a notification appears at the top of the account record with this information.

Account activity and budget information

In the web view, the Budget and Activity tiles on the account record display the full summary amounts regardless of the project security in place. When you drill down into a period, all amounts that make up the summary number are displayed, however, the project ID and project description are masked.

In **Financial Edge** database view, the summary amount displayed is reduced based on project security settings.

Project activity and budget information

In the web view, the Budget and Activity tiles on the project record display the full summary amounts regardless of the account security in place. When you drill down into a period or category, all amounts that make up the summary number are displayed, however, the account ID and account description are masked.

In the database view, the summary amount displayed is reduced based on account security settings.

Post subledgers to the general ledger

You can validate and post the Payables, Cash receipts, and Cash management subledgers in the web view.

When you post Payables and Cash receipts, you select post parameters to use from the database view.

Tip: The ability to select post parameters for Payables and Cash receipts from the web view will be added in a future release.

When you post bank adjustments for Cash management, you select the banks to include.

Tip: In the database view, you post bank adjustments from the Banks page.

Separate reports for validation and post to general ledger

When you post batches for a subledger, only valid transactions post to the general ledger in the web view. Invalid transactions do not post. This improvement helps eliminate the potential for data corruption during the post process. In *Financial Edge*, there was the potential for data corruption should there have been an interruption during the post process.

After processing completes, posted transactions appear in the Post Report, and invalid transactions appear in a separate Batch Validation Report. These reports replace the single General Ledger Report in *Financial Edge* that combined invalid and posted transactions on the same report.

Budgets

The list of budgets stores all the information you need to track a budget.

Features. You can add attachments, such as images, PDFs, *Word* documents, or *Excel* spreadsheets, to a budget scenario in the web view.

View. When you view a budget's scenario in the web view, you can select to view totals and distributions for an account, project, or grant (or a combination using two of them) when you apply groups to the list. After the list, total amount rows appear for each column that calculates revenue and expense.

Add. You add a scenario from the list of budgets. As you add a scenario, you can also create a new scenario ID if the one you need doesn't exist. To save time, you can also select to copy an existing scenario to default the data you need for the new one. This allows you to default the same account, project, or grant from the existing one. You can also select if you want to copy the existing scenario's values or if you want to default 0 amounts in the new scenario.

Note: When you copy a scenario in the web view, all data for the existing scenario copies to the new scenario. At this time, you cannot select to copy specific data, such as only one project. Also, a different project or grant cannot be selected to associate with the new scenario. If you need to do this, select the project and grant to associate with the new scenario *after* the copy is complete.

Edit. When you edit a budget, you'll discover many new features that provides a way for you to easily view and modify data in a way that is most valuable to you and your daily workflow. For example, you can add and delete rows, view error messages to help you resolve issues, and enter notes for a row to track unique information.

Delete. You can delete a scenario unless it has been finalized.

Excel add-in. To quickly enter budget data in a Microsoft *Excel* spreadsheet, then submit the data and monitor the data in the web view, download the Budget Creator for Financial Edge NXT add-in from the Microsoft's *Office Store*. This enables bulk data entry and saves time, especially when entering similar data.

Payables in Financial Edge NXT

Payables in *Financial Edge NXT* leverages existing invoice and vendor information defined in the database view. For example, the vendors and invoices you created in the database view, also appear in *Financial Edge NXT*. You can move seamlessly back and forth between these two interfaces to access the same underlying information.

Before you begin to work with **Payables**, please review the following information about the tasks you perform in **Financial Edge NXT** and the tasks you perform in the database view.

You can perform the following **Payables** tasks from the web view:

- View, add, edit and delete invoices.
- View interfund entries for invoices.
- View and manage invoice distribution and adjustment information.
- View, add, edit and delete vendors.
- Add vendor default distribution information.
- View vendor activity.
- View, add, edit and delete credit memos.
- Add 1099-MISC information.
- Attach media to a vendor.
- View purchase orders
- Print checks.
- Post to GL.

These **Payables** (*Accounts Payable*) tasks must be performed in the database view:

- All setup and configuration, including administration tasks and setting up business rules.
- Add, edit, delete purchase orders.
- Add, edit, delete, or view recurring invoices.
- FAST! entry.

New Features in Payables

When you access **Payables** from the web view, you will notice changes and enhancements to fields and features like search, lists, and navigation. Here are a few of those enhancements:

Payables

In the web view, **Payables** is where you manage your invoices, vendors, and credit memos. In the database view, **Payables** is referred to as *Accounts Payable*.

Credit memos

In the web view, you create and view credit memos directly from a vendor. You can add credit memos from the **More actions** menu, or from the **Activity** tile on the vendor.

A+ Office Supplies1
ID: 1031

Tax ID number: *****2222 Show
Customer number: AOS689741234
1099 vendor: Yes
Status: Active

Go back Edit More actions

Contact info

Add

Payment Address
171 Deerberry Road
Charleston, SC 29414

Business (843) 555-8895
Email: apsupervisor@someplace.com

test
Web Address: http://www.google.com

Show 4 more

Activity

Add an invoice Add a credit memo

\$2,175.78 Total balance due
\$2,386.89 Past due

37 records

Date	Transaction	Amount	Status
06/19/20...	Invoice #Load test invoice	\$200.00 \$150.00 balance	Partially paid Past due Due 06/19/2015
06/19/20...	Invoice #...	\$200.00	Approved Past due

Note: In the database view, you create credit memos from the *Accounts Payable* records page, or from the Vendor Activity tab.

Remit to address

In the web view, the **Remit to** address on the invoice displays the vendor's full address and description.

Note: In the database view, you must open the address form on the vendor record to view and edit the full address.

Treasury in Financial Edge NXT

Treasury in *Financial Edge NXT* leverages existing bank account and deposit information defined in the database view. For example, the banks and deposits you created in the database view, also appear in *Financial Edge NXT*. You can move seamlessly back and forth between these two interfaces to access the same underlying information.

Note: In the database view, **Treasury** is referred to as *Banks*.

Before you begin to work with **Treasury**, please review the following information about the tasks you perform in *Financial Edge NXT* and the tasks you perform in the database view.

You can perform the following **Treasury** tasks from the web view:

- Add, edit and close bank accounts.
- View bank register.
- Add, edit and void deposits.
- View miscellaneous cash receipts.
- View reconciliation history.
- Set default clear date.

- Add, edit, delete bank account adjustments.
- Add, edit, delete adjustment categories.
- Bank feeds. Helps you maintain accurate, up-to-date cash balances, and review and clear transactions daily in preparation for reconciliation.
- Bank reconciliation.

These **Treasury** (*Banks*) tasks must be performed in the database view:

- All setup and configuration, including administration tasks and setting up business rules.

Analysis in Financial Edge NXT

From **Analysis, Dashboards** in *Financial Edge NXT*, you can access *SKY Reporting*™ dashboards. To increase the impact on your mission and inform your next steps, it's important to keep your finger on the pulse of your organization's financial activity. With *SKY Reporting*™, you can — at a glance — assess your organization's overall accounting performance and effectiveness.

In **Analysis, Dashboards**, you can quickly assess your organization's financial efforts across several areas using the following dashboards:

- **Payables** — review invoice balances for a specific timeframe based on post or payment status, as well as credits with your organization's vendors. Use this dashboard to determine what efforts need to be paid and when.
- **Accounts** — examine general ledger accounts based on filters such as post date, encumbrance, budget scenario, and account category. Use this dashboard to determine how your accounts are performing against various budgets.
- **Projects** — compare budget information with the actual activity of projects and accounts. Use this dashboard to determine if your project's budget — across accounts — is on target.
- **Transaction Code** — review your organization's transaction activity for a specific transaction code across all accounts.
- **Metrics** — examine the health of your organization's data by tracking what is added in your system.
- **History of Changes** — examine the health of your organization's data by reviewing changes made to your organization's system over time.
- **Project Income and Expenses** — quickly assess your organization's income and expenses for one or more projects.
- **Net Assets** — quickly assess your organization's current net assets as well as trends.
- **Development Overview** — review your organization's overall fundraising efforts.
- **Receivables** — review incoming payments (including expected and past due funds) based on due date, post status, and clients.

Note: *SKY Reporting*™ is only available from the web view.

Note: The ability to design your own metrics and build a personalized dashboard is currently in our Early Adopters Program (EAP). Throughout the EAP, we will continue to enhance and improve this feature in preparation for general availability.