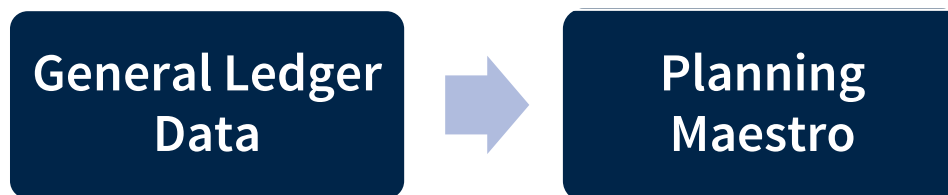


CENTAGE DATA INTEGRATION FOR BLACKBAUD

Planning Maestro enables you to upload current data from your accounting or ERP system to analyze or use in your budget. After you set up an integration between Planning Maestro and your accounting system, Planning Maestro can extract data every night to use for the next day.



Planning Maestro can integrate with many accounting systems, including **Blackbaud**.

This Implementation guide shows you, a Planning Maestro and **Blackbaud Administrator**, how to authorize Centage to access your **General Ledger** data in **Blackbaud**.

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Integration Overview

Centage’s integration can pull in core **General Ledger** structures and information from **NetSuite**. It extracts data every night to ensure fresh data is populated into Planning Maestro for the following day.

We extract the following information:

1. General Ledger Dimensions (Standard)

Department
Fund
Project

2. General Ledger Transaction Details (Optional)

Fields that would be available in Excel Drill-through

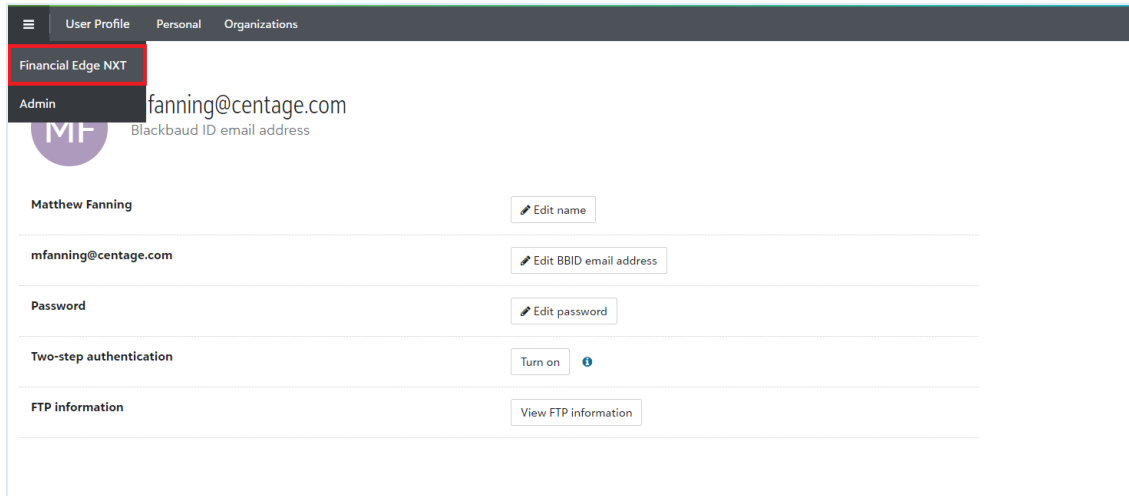
AccountClass	ModifiedBy
AccountNumber	PostDate
AddedBy	PostStatus
BatchId	Reference
DateAdded	TransactionAmount
DateModified	TransactionCodeValues
DistributionAmount	TransactionId
DistributionId	TypeCode
Encumbrance	UiProjectId
Journal	

Optional data that may be included: Transaction Details.

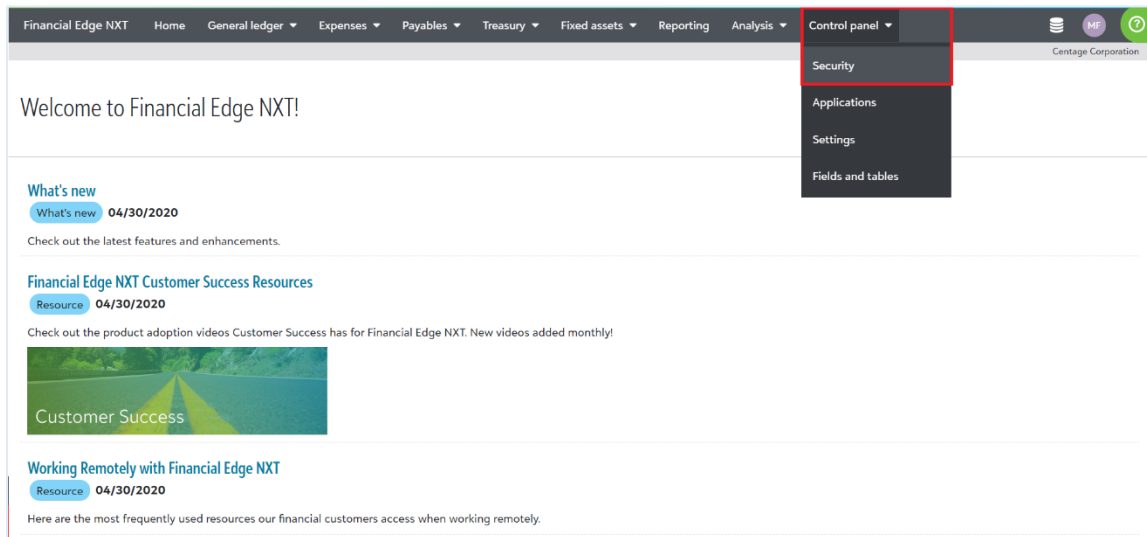
Including optional data may impact performance depending on data volume and is excluded unless otherwise requested.

Admin Invites Centage

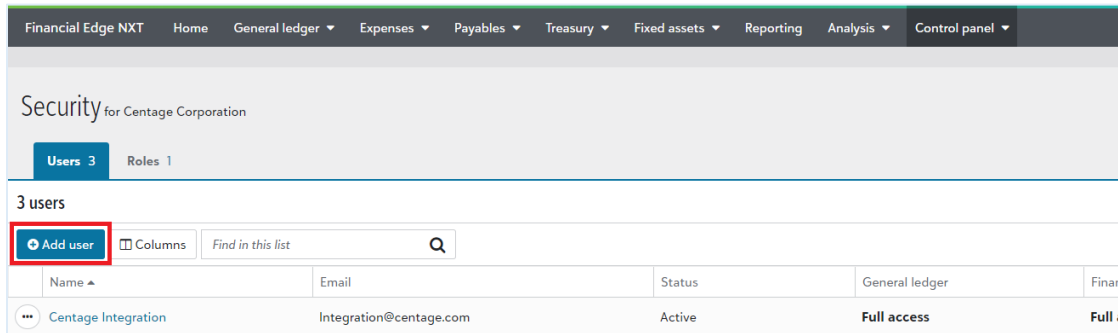
Step 1: Log into blackbaud.com and go to Financial Edge NXT.



Step 2: Go to Control Panel > Security.



Step 3: Click Add user.



Step 4: Enter the name and email address.

- **Name** – Centage Integration
- **Email** – integration@centage.com
- **Admin Roles** – Selected

Step 5: Click Send Invite.

Centage Accepts Invitation

After you complete the invitation, we will receive a notification and will begin the integration process. If we have any issues, we will reach out to you.

What's Next?

Centage's Integration team will receive an email automatically from Blackbaud. We will confirm permissions have been configured properly and will notify you if any modifications are necessary. No further action will be required at this time unless otherwise requested. Once the integration has been completed, the **Centage Consulting** team will validate the data and will reach out if necessary.

If you have any questions or need assistance, please contact **Centage Integration** by email at Integration@Centage.com or by phone at 508.948.0048.