BBIS & BBDM Integration Guide

11/10/2014 Blackbaud Direct Marketing 4.0 BBIS & BBDM Integration US

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Blackbaud Direct Marketing and Blackbaud Internet Solutions Integration

Integration Workflow **1**

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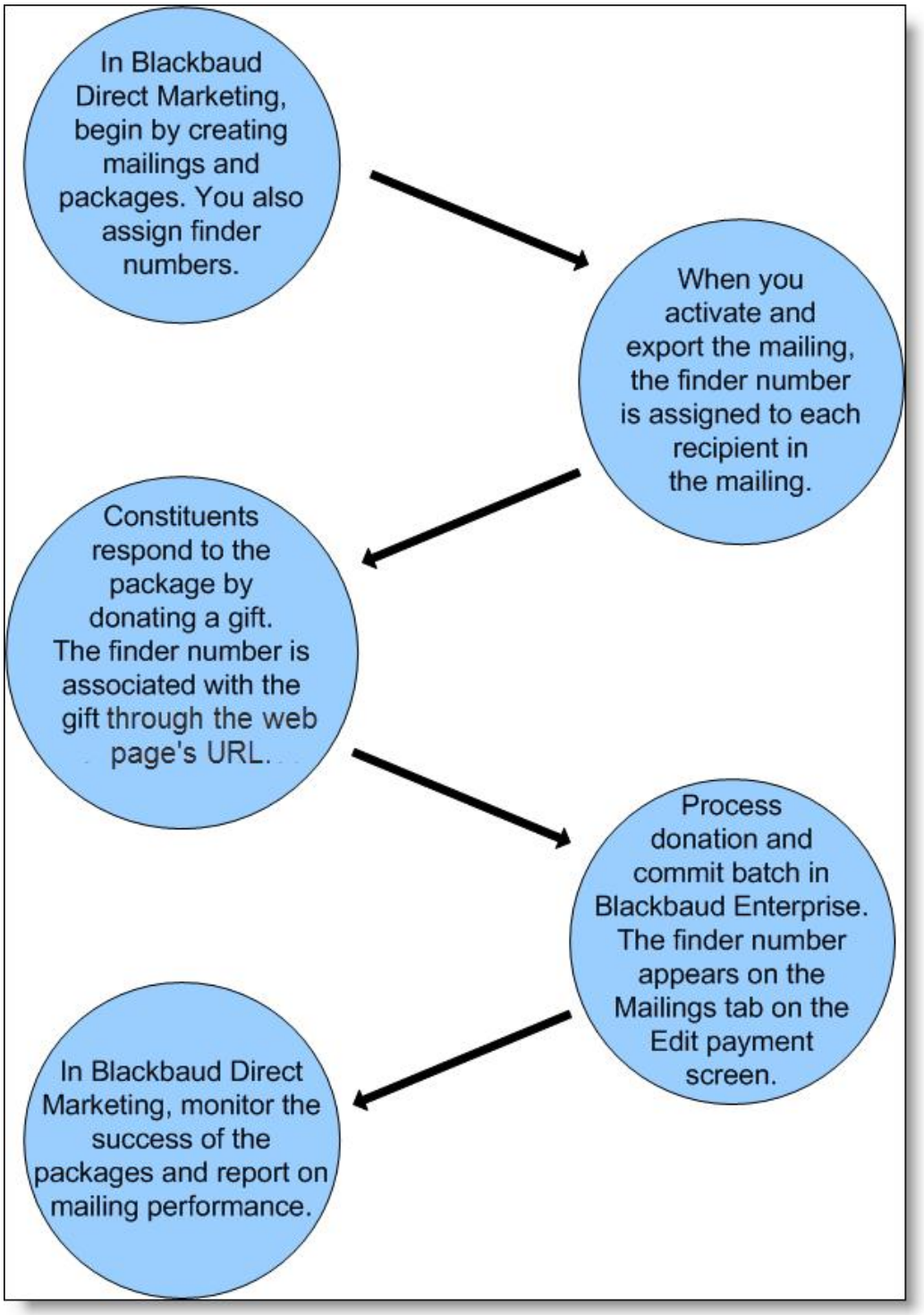
To improve email processing and enhance monitoring packages, Blackbaud Direct Marketing and Blackbaud Internet Solutions integrate.

Integration Workflow

Review the following diagram for information about the integration workflow and how it interacts with Blackbaud Enterprise.



Integration in Blackbaud Direct Marketing

When Blackbaud Direct Marketing integrates with Blackbaud Internet Solutions, you can send email messages targeted to segments in a marketing effort. Emails are merged with data from Blackbaud Direct Marketing to

personalize the content of each message. After the emails are sent, you can track their effectiveness using reports and KPIs.

Integration also adds features to Blackbaud Internet Solutions. For more information about these features, refer to Integration in Blackbaud Internet Solutions on page 8.

Configure Web Integration

Before you send emails from Blackbaud Direct Marketing, the system administrator must configure the integration with Blackbaud Internet Solutions so the two programs can share information.

After the integration package is loaded, the **Website integration** link appears under **Configuration** on the Marketing and Communications page. Click this link to configure the web service connection.

Configure the Blackbaud Internet Solutions Web Service Connection

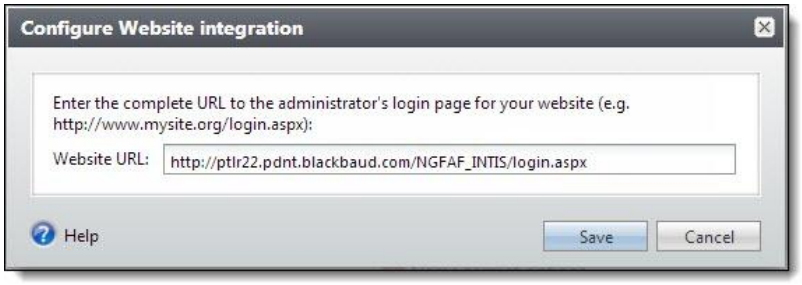
From the Website Integration page, you can configure the web service connection to Blackbaud Internet Solutions.

Configure the Blackbaud Internet Solutions web service connection

1. From the Marketing and Communications page, under Configuration, click **Website integration**. The Configure integration screen appears.
2. In the **Website URL** field, if it does not already appear, enter the complete web address to the administrator's login page for your organization's website. For example, http://www.mysite.org/login.aspx.

Note: If Secured Sockets Layer (SSL) is required to access the administration side of your website, make sure the address entered in the **Website URL** field begins with "https://".

Note: You must enter a fully qualified URL in the **Website URL** field.

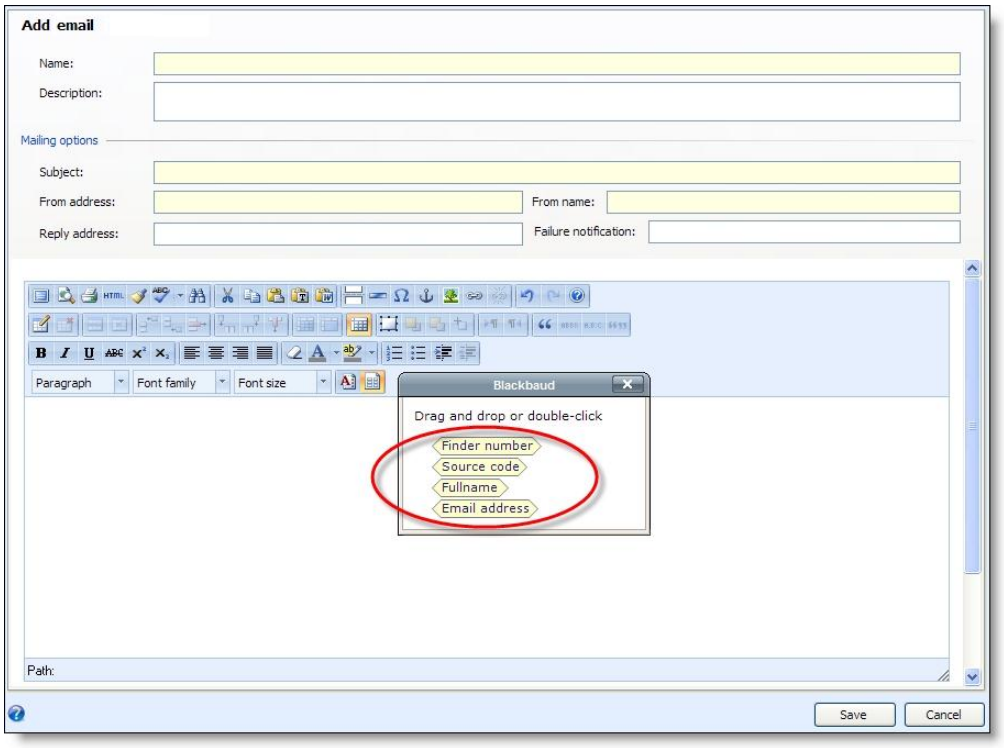


3. Click **Save**. You return to the Marketing and Communications page.

Create Export Definitions

From the Export Definitions page, create export definitions for the email channel. To access the Export Definitions page, click **Export Definitions** on the Marketing and Communications page. For more information about how to create email export definitions, see the Blackbaud Direct Marketing *Marketing Efforts Guide*.

The export definition serves as the data source for any messages the definition is assigned to. The data fields you include in the definition appear as merge fields on the email.



Warning: Always include the **Full name**, **Finder number**, and **Email address** fields in the export definition. These fields are required to create an email message. Also, when sending messages to an acquisition list, make sure the imported list file includes columns for all fields you include in the export definition. Otherwise, the final emails will contain blanks where they should include merged information.

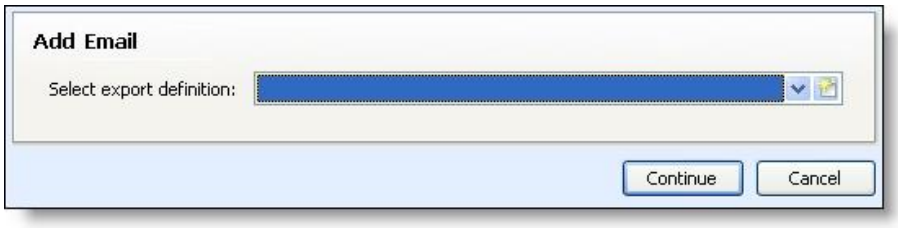
Create Email Messages

After you configure integration with Blackbaud Internet Solutions, **Email marketing** appears on the Marketing and Communications page. Click this link to access the Email marketing page. On this page, you can search for and view email messages, and create direct marketing and membership email messages.

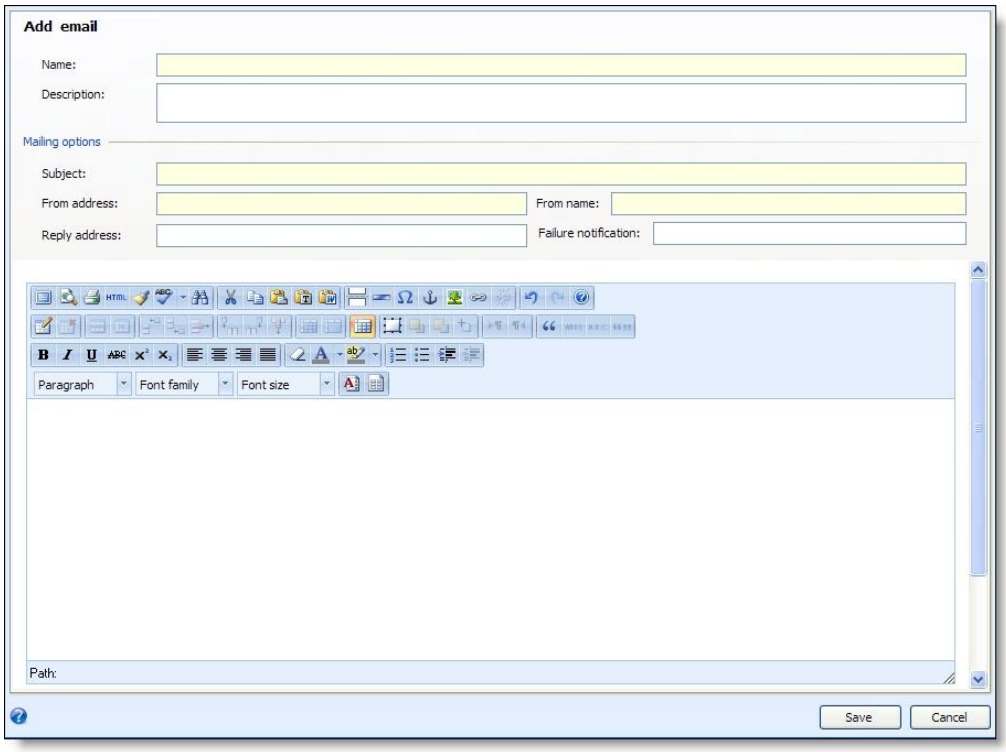
Note: You cannot create templates for emails sent through Blackbaud Direct Marketing. You can, however make a copy of an existing marketing email message and use that as a template. You can also copy the HMTL code from an email template created in Blackbaud Internet Solutions and paste it into a Blackbaud Direct Marketing message. Be aware that some functions available on Blackbaud Internet Solutions templates and messages, such as conditional content, are not available with Blackbaud Direct Marketing messages.

Add an email

1. From *Marketing and Communications*, click **Email marketing**. The Email marketing page appears.
2. Click **Add a direct marketing email**, **Add a membership email**, or **Add a sponsorship email**. The Add Email screen appears.



3. Select an email export definition. The export definition defines the merge fields available in the email. The selected definition must include the **Finder number**, **Full name**, and **Email address** fields. For more information about how to create export definitions, see the Blackbaud Direct Marketing *Marketing Efforts Guide*.
4. Click **Continue**. The Add email screen appears.



- This screen is similar to the email properties and design screens in Blackbaud Internet Solutions. For information about the items on this screen, see the Blackbaud Internet Solutions *Email Guide*.
- When you design an email message, you must include hyperlinks to the Privacy Page specified on the Settings tab in *Sites & settings* in Blackbaud Internet Solutions and to a User Email Preferences Form on your website.
- When you add a link in your message to a Blackbaud Internet Solutions web page, the URL contains valuable information to track data and to automatically populate biographical information on your web page. Use this example to identify each piece of data the URL includes: http://www.yourdomain.org/DonationForm&srcid=[source ID]&srctid=[source type ID]&erid=[email recipient ID]&efndnum=[email finder number]&trid=[tracking ID].

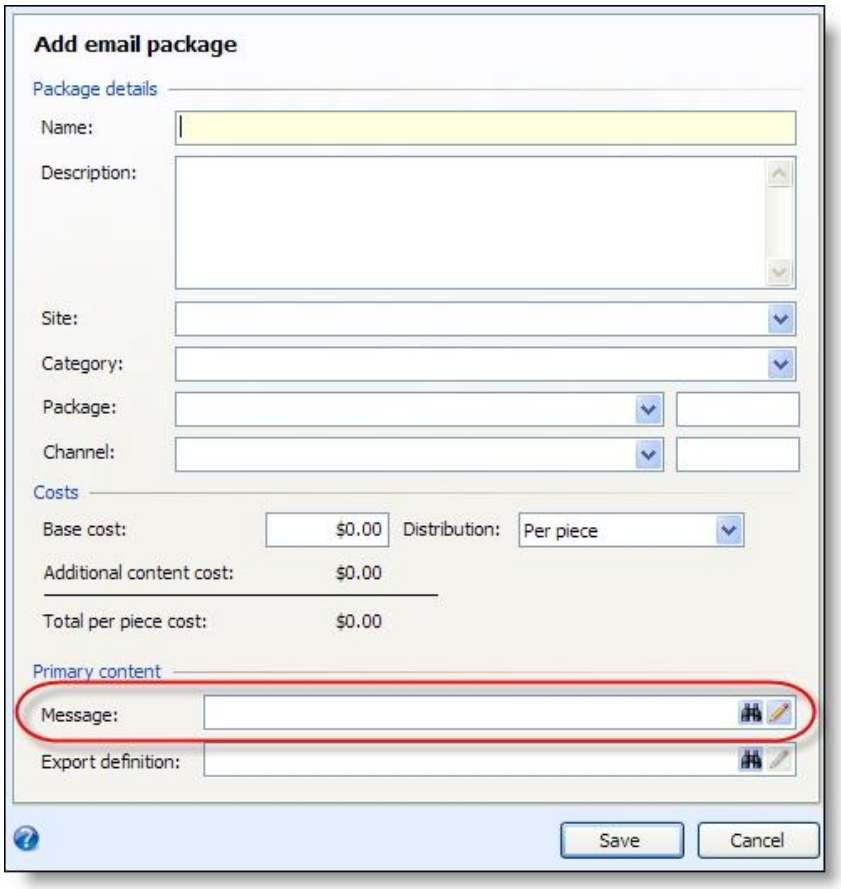
5. Click **Save** to save the email and return to the Email marketing page.

Create Email Packages

From the Packages page, create email packages to associate with email messages. You can assign email packages to segments to target specific groups of recipients with different email messages.

When Blackbaud Direct Marketing integrates with Blackbaud Internet Solutions, the **Primary content** frame appears on the Add email package screen. In the **Message** field, select an email message for the package. The **Export definition** field displays the email export definition assigned to the message. For more information about how to create an email message, refer to Create Email Messages on page 4.

For more information about how to create email packages, see the Blackbaud Direct Marketing *Marketing Efforts Guide*.



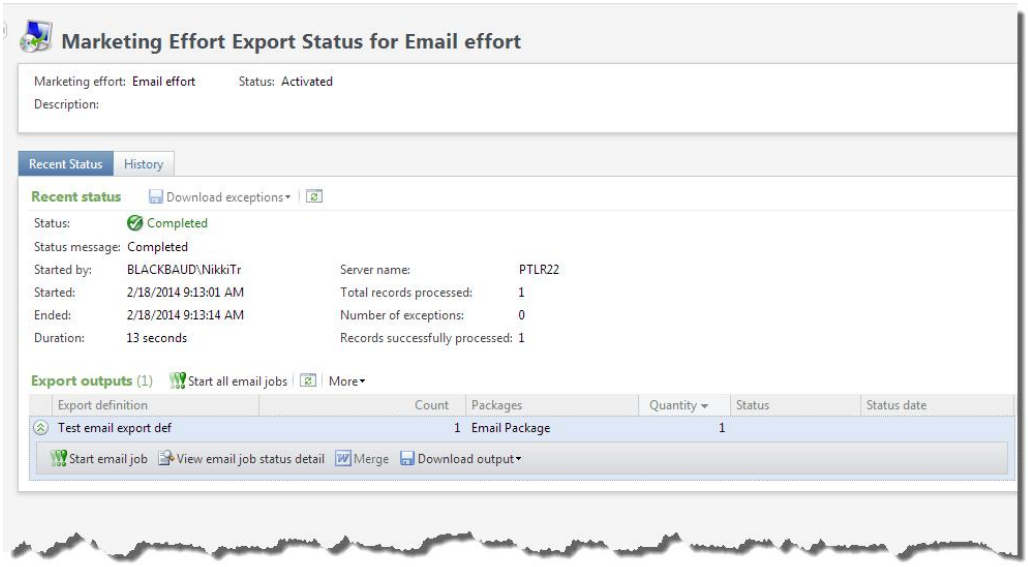
Create and Process the Marketing Effort

1. Create a marketing effort.
2. Add segments to the marketing effort to target specific groups of recipients with different email messages. Assign the email packages (with their associated messages) to the marketing effort segments.
3. Activate and export the marketing effort.

For more information about each of these marketing effort tasks, see the Blackbaud Direct Marketing *Marketing Efforts Guide*.

Start Email Job

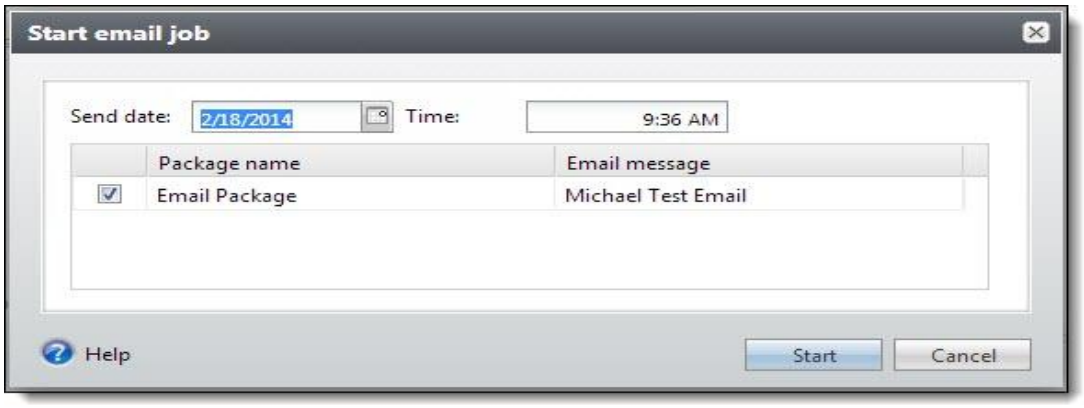
After you export the marketing effort, the Marketing Effort Export Process Status page displays the export definitions assigned to the marketing effort. When the marketing effort includes export definitions for the email channel, Email job options appear.



When you start an email job, it is queued and processed at the scheduled time by the website. The website creates the final email messages by merging data from the marketing effort's export definition into the appropriate fields in the email messages.

Send email messages

1. From the Marketing Effort Export Process Status page, click the double arrows next to the email process to expand the row, and then click **Start email job**. The Start email job screen appears.



2. In the **Send date** and **Time** fields, enter the date and time the email job starts.
3. Select each package to include in the email job.
4. Click **Start**. You return to the Marketing Effort Export Process Status page.

As the job processes, the **Status** column changes from Pending to Completed or Failed. You may need to click **Refresh** to view the most recent job status. To view details about the email job, select the job and click **View email job status detail**.

Integration in Blackbaud Internet Solutions

After you install Blackbaud Direct Marketing and Blackbaud Internet Solutions, Blackbaud Direct Marketing features become available in Blackbaud Internet Solutions.

Note: If you do not see Blackbaud Direct Marketing features in Blackbaud Internet Solutions, you must configure options in Blackbaud Direct Marketing for the integration. For more information, refer to Configure Web Integration on page 3.

Parts

When you integrate Blackbaud Direct Marketing and Blackbaud Internet Solutions, several parts in Blackbaud Internet Solutions allow you to include **Finder number** fields on your website so that website users can associate transactions with marketing efforts.

Finder numbers are sequential numbers assigned to the names on marketing effort lists, and you use them to match transactions to marketing efforts and then track and report on the performance of the marketing efforts.

For more information about finder numbers, see the Blackbaud Direct Marketing *Marketing Efforts Guide*.

The following parts include the finder number option:

- Donation Form
- eCards
- Event Registration Form
- Membership Form
- Personal Page Manager
- Payment
- Payment 2.0

For information about the parts, see the Blackbaud Internet Solutions *Parts Guide*.

When you include the **Finder number** field on a part, users can enter the finder numbers that they receive in mailing packages along with the other information that they enter during the transaction.

Note: Parts do not display the **Finder number** field when website users access them through links that you send in email messages as part of your marketing efforts. When users access forms through these links, their finder numbers are automatically associated with their transactions.

Note: If a website user accesses the donation page from the link in an email and then navigates to another page before making the donation, the finder number will not be associated with the transaction. More specifically, when an anonymous user accesses a donation form from an email link and uses the Payment 2.0 part to complete the transaction, if they navigate back to the donation form to make an additional donation, the finder number and related marketing effort information does not get applied to the second transaction. This does not occur for website users who are logged into the website.

The program does not consider finder numbers when it matches constituent information from online transactions to constituent records in your database. However, after the program associates a transaction with a

constituent record, it compares the constituent ID from the record to the constituent ID associated with the finder number to determine whether the transaction is a direct gift to the marketing effort.

- If the constituent IDs match, the program saves the transaction as a direct gift to the marketing effort. On the payment record, the program autofills the finder number, mailing ID, source code, and appeal ID.
- If the constituent IDs do not match but the finder number's constituent ID matches a different constituent record, the program saves the transaction as an indirect gift to the marketing effort. On the payment record, the program autofills the mailing ID, source code, and appeal ID but does not include the finder number.
- If the finder number's constituent ID does not match any constituent ID in your database because it was reserved for someone on an acquisition list, the program saves the transaction as a direct gift to the marketing effort. On the payment record, the program autofills the finder number, mailing ID, and source code.

Note: The program does not create payment records in Blackbaud Enterprise for free events on Event Registration Form parts. Therefore, finder numbers are not stored for free events.

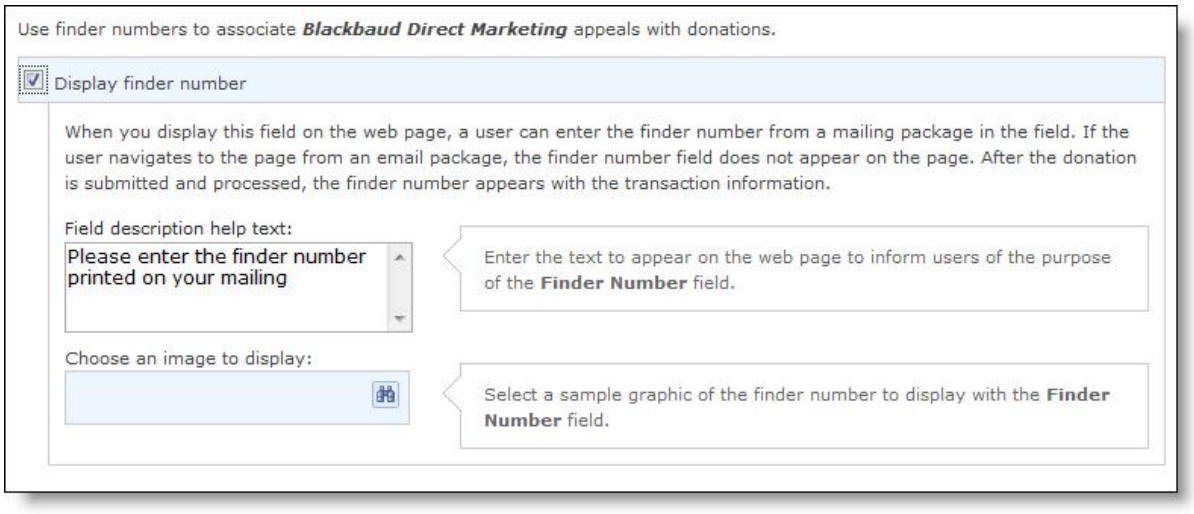
Configure finder numbers for parts

1. From the Design tab of an applicable part, scroll down to the finder number option.

   For the Payment and Payment 2.0 parts, the option is in the **Finder number** section. For other parts, it is in the section for payment settings.

   Note: For parts that with the option to route transactions to a shopping cart, the finder number option only appears when you select **Proceed directly to payment**.

2. To display a **Finder number** field so that website users can enter finder numbers that you send as part of marketing efforts, select **Display finder number**.



   For mailing packages, finder numbers are printed on reply forms. For email packages, finder numbers are added to the end of the URL as "efndnum=[finder number]." When website users access parts through the URLs in email packages, the parts do not display the **Finder number** field because finder numbers are automatically associated with the transactions.

   Tip: After you process a transaction, the finder number appears in Blackbaud Enterprise in the **Finder Number** row on the Review transaction data screen in the batch. After you commit the batch, the finder number appears on the Marketing Efforts tab of the Edit payment screen. For more information, refer to Process Transactions on page 10.

3. In the **Field description help text** box, enter text to explain the **Finder number** field to website users.

4. To include a sample graphic of a finder number to help explain the **Finder number** field , click the icon in the **Choose an image to display** field.

   For information about the parts that include the finder number option, see the Blackbaud Internet Solutions *Parts Guide*.

Process Transactions

Finder numbers download to Blackbaud Enterprise from Blackbaud Internet Solutions in two ways.

Mail package

A website user enters the finder number that is printed on their reply form in the **Finder Number** field on the donation page.

Email package

When you create the email message, include a link to the donation page. When the recipient clicks the link to navigate to the donation page, their finder number is added to the end of the URL as "efndnum=[finder number]." The **Finder Number** field does not appear on the web page to the website user but the number is automatically associated with the transaction in Blackbaud Enterprise .

Note: If a website user accesses the donation page from the link in an email and then navigates to another page before making the donation, the finder number will not be associated with the transaction. More specifically, when an anonymous user accesses a donation form from an email link and uses the Payment 2.0 part to complete the transaction, if they navigate back to the donation form to make an additional donation, the finder number and related marketing effort information does not get applied to the second transaction. This does not occur for website users who are logged into the website.

To view the finder number for a gift, you must process the donation from the Web Transactions page in Blackbaud Enterprise. After you process the donation, the finder number first appears in the **Finder number** row on the Review transaction data screen in the batch. After you commit the batch, the finder number defaults on the Marketing Efforts tab on the Edit payment screen.

Associate Blackbaud Internet Solutions Gifts With a Blackbaud Enterprise Constituent

Blackbaud Direct Marketing mail recipients may give reply forms to others and email recipients may forward your email to others. These actions may generate donations from website users who are not assigned finder numbers. Therefore, finder numbers are not used to link Blackbaud Internet Solutions gifts to constituents in Blackbaud Enterprise. To associate gifts to constituents, the program compares the constituent ID associated with the finder number to the constituent ID associated with the gift. When the gift transaction processes to batch, the gift is associated with a constituent in one of three ways.

- If the constituent IDs match, the finder number, marketing effort ID, source code and appeal ID appear on the Marketing Efforts tab on the Edit payment screen. The gift appears as a direct gift to the marketing effort because the donor is the direct mail recipient.
- If the constituent IDs do not match, but the constituent ID associated with the finder number matches a constituent ID in the Blackbaud Enterprise database, the marketing effort ID, source code and appeal ID appear on the Marketing Efforts tab on the Edit payment screen. The finder number does not appear on the tab. The gift appears as an indirect gift to the marketing effort because the donor is not the direct mail recipient.

- If the constituent ID associated with the finder number does not match any constituent ID in the Blackbaud Enterprise database, the finder number, marketing effort ID and source code appear on the Marketing Efforts tab on the Edit payment screen. The gift appears as a direct gift to the marketing effort because the donor received the marketing effort from an acquisition list.

For more information about processing transactions, see the Blackbaud Enterprise *Web Transactions Guide*. For more information about the Marketing Efforts tab on the Edit payment screen, see the Blackbaud Enterprise *Revenue Guide*.