

Blackbaud Direct Marketing New Features Guide

04/03/2013 Blackbaud Direct Marketing 3.0 Blackbaud Direct Marketing New Features US

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New Features for Blackbaud Direct Marketing 3.0



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Before you upgrade and begin to use **Blackbaud Direct Marketing 3.0**, take a moment to review the following information that highlights new features and changes to existing features. It is important to share this information with **Blackbaud Direct Marketing** users in your organization.

Administration

The following *Administration* enhancements are available in **Blackbaud Direct Marketing 3.0**. For more information about these features, see the *Administration Guide*.

Page Designer in Web Shell

You can now use the design mode in web shell. The design mode allows system administrators to change the design of pages in the application and manage permissions directly from each page. Previously, system administrators could access design mode only from the click once version of the application.

To use page designer, you must select the design mode. To toggle design mode on and off, click the design mode button at the top right corner of the application.



Business Processes Tab

To more effectively track and assign business process ownership, on the Business Processes page, we added a new Business Processes tab. This tab displays business processes and their owners, and lists details such as process name and type, security folder, and creation date. You can also filter processes by type or owner.

From the new Business Processes tab, you can also change the owner of a business process. You may find it necessary to edit a process owner, for example, when a change in staff occurs at your organization. You can edit business process ownership for a single process or multiple processes at once. Select a business process and click **Edit owner** to access the Edit business process owner screen where you can use the Application User Search screen to locate a different user. A business process may have only one owner at a time.

Note: Security permissions for the business process owner may determine which records are processed when a business process runs.

On the Business Processes page, we renamed the Business process statuses tab to “History.” Continue to use this tab to view all business process activity executed in the program.

Business Process Ownership Tab

To more effectively track and assign business process ownership, on the application user record, we added a new Business Process Ownership tab. This allows all business processes that the application user owns to display in one location. Note that an application user becomes a business process owner in one of two ways: an application user creates a business process or an administrator assigns business process ownership to an application user. This tab displays business processes and their owners, and lists details such as process name and type, security folder, and creation date. You can also filter by process type.

Note: To access an application user record, from *Administration*, click **Security**. From the Security page, click **Application users**.

On the Business Process Ownership tab, you can change the owner of a business process. You may find it necessary to edit a process owner, for example, when a change in staff occurs at your organization. You can edit business process ownership for a single process or multiple processes at once. Select a business process and click

Edit owner to access the Edit business process owner screen where you can use the Application User Search screen to locate a different user. A business process may have only one owner at a time.

Note: Security permissions for the business process owner may determine which records are processed when a business process runs.

Batch

The following *Batch* enhancements are available in **Blackbaud Direct Marketing 3.0**. For more information about these features, see the *Batch and Import Guide*.

General Features

The following general features enhancements are available in **Blackbaud Direct Marketing 3.0**. For more information about these features, see the *General Features Guide*.

Shortcuts Added

To replace the **Favorites** functionality, we added the **Shortcuts** feature. This new feature creates shortcuts to pages and records that you access frequently. When you specify pages as shortcuts, you can quickly access them from the **Shortcuts** menu on the explorer bar.

In addition, you can organize, rename, delete, and email shortcuts.

Tabs and Headings

We changed the way tabs and headings appear on records and pages. Tabs are now visually delineated. Section headings on tabs are larger and green for increased visibility, and include an item count for each section.

We also added options to **Expand all** and **Collapse all** for tabs with more than one section heading. You can still use the arrows next to each section to expand or collapse just that section.



Column Width in Search Screens

When you adjust a column width on a search screen, the program now remembers your preferred column width. The next time you use that screen, your previously-selected column width is displayed.

Also on search screens, the background color of the **Results** grid is now white to ensure that the **Add** button is not overlooked. And to make it more clear when no search results are found, a new message appears in the grid when this happens.