

BlackbaudDirectMarketing

New Features and Enhancements Guide

080310

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New Features and Enhancements

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Before you begin using *Blackbaud Direct Marketing 2.7*, review the following notes which highlight new features and changes to existing features. It is important to share this information with all *Blackbaud Direct Marketing* users in your organization.

White Mail Segments

White mail may include a gift without a reply device so you cannot determine the finder number or source code of the campaign or department that prompted the gift. You can use white mail segments to track this type of revenue.

Unlike other types of segments, white mail segments have their own source codes so they function independently of a marketing effort. This allows you to use white mail segments in a variety of ways to best fit your organization's business processes. For example, you can create a white mail segment for all gifts received in 2011 or for all gifts received during the date range of your annual campaign.

On the status page for a white mail segment, you can view performance statistics including the number of responders and responses, the total amount given, and the average gift amount. The page also displays the segment's current status — active, active for only a defined period, or inactive. You can refresh the white mail segment to update the performance statistics or to reflect any changes made to the white mail segment record. Because white mail segments have their own source codes, the refresh process for white mail segments is similar to the marketing effort refresh. When you refresh a white mail segment, a “matchback” process runs automatically to find all gift records with source codes that match the source code for the white mail segment.

The screenshot displays the 'White Mail Segments' interface. On the left, there are two panels: 'Tasks' and 'Reports'. The 'Tasks' panel includes options like 'Edit white mail segment', 'Delete white mail segment', 'Refresh segment', 'View refresh status', 'Refresh', and 'Help'. The 'Reports' panel includes 'White mail segment summary'. The main content area shows details for a 'white mail' segment with source code 'bac'. It lists 'Record source: Constituent Marketing Information', 'Category:', 'Status: Active indefinitely', and 'Performance' statistics: 'Responders: 0 Total given: \$0.00', 'Responses: 0 Average gift: \$0.00', and 'Current as of:'.

Reports

There are three new marketing reports:

The Segmented house file counts report provides the record counts, source codes, and packages for each segment in an imported house file for a marketing effort.

The White mail segment summary report includes performance statistics for white mail segments including the number of responders and responses, the total amount given, and the average gift amount. The report also displays the segment's current status.

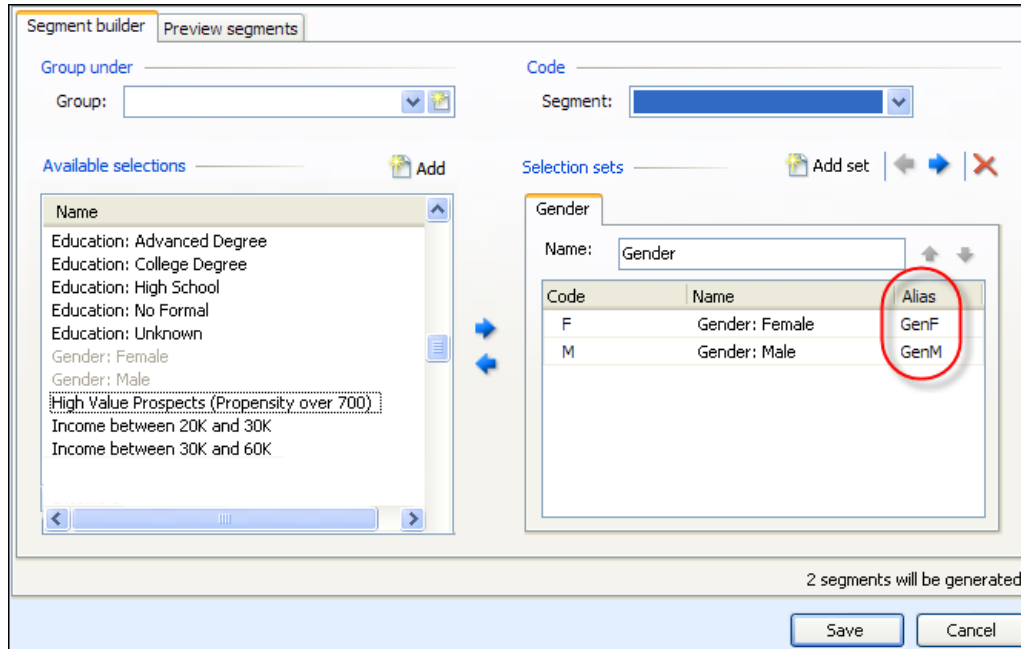
The Marketing effort exclusions report displays the total number of records excluded from an unactivated marketing effort and the reasons for their exclusion, such as the contact rules or exclusion selections. When you run the report, you can output the results to a *Microsoft* Excel pivot table or CSV file. The pivot table format supports the volume of the data returned in the report and allows you to manipulate the data to identify errors in your exclusion settings. You can add or remove filter fields to increase or decrease the level of detail included in the report. You can also drill down to view the individual constituents excluded from the report.

1	Exclusion Reason	Excluded from Segment	Donor Name	Count
2	☑ Contact Rules			31
3	☑ Do not mail			7
4	☑ Inactive	☑ Mid Donor	Willa J. Kiger	1
5			Cynthia Clover	1
6			Lisa Davis	1
7			Miles A. Yang	1
8			South Carolina Blood Bank	1
9			Jenny Rhodes	1
10			Jackson A. Holt	1
11			Joseph A. Mahoney	1
12			The Flower Patch	1
13			Dale J. Nolan	1
14	☑ Deceased			14
15	☑ Exclusions			2
16	☑ Included in "Global Excludes (Ad-hoc Query)"	☑ Mid Donor	George Andrews	1
17	☑ Included in effort "Annual Appeal 2010"	☑ Mid Donor	George Andrews	1
18	☑ Universe			47
19	☑ Top Donor			47
20	Grand Total			80
21				

Segments

The copy process for segments changed. When you copy a segment, the copy screen opens automatically so you can edit the settings on the new segment. Also, if the source code part assigned to the original segment is set to **Automatically increment source code values during data entry**, the source code field on the copy contains the next part value available according to the source code definition.

The program creates names for generated segments by combining the names of the selections you include. In the new **Alias** column on the Segment builder screen, you can enter an abbreviation to use for the selection in the generated segment name. For example, you could enter “GenF” as the alias for “Gender:Female.” Use aliases to prevent exceeding the 100 character limit for segment names.



You can refresh segment groups. From the Groups tab on the Segments page, click **Refresh**.

When you refresh segment groups, the program creates a list of all static selections used by the segments and processes these selections and all of their dependencies. Administrators can schedule the process (in *Administration*, **Manage Queues**) to ensure all inactive marketing efforts are up to date.

You can view the refresh status to see detailed information about your segment refreshes.

Name Formats

In *Blackbaud Enterprise*, new options appear on the Joint name formats tab of the Add name format options screen. Use these options to specify the conditions for excluding a spouse from the joint name format.

The screenshot shows the 'Add name format options' screen. At the top, there are fields for 'Name:', 'Description:', and 'Site:'. Below these are tabs for 'Individuals', 'Organizations', 'Households and groups', and 'Joint name formats'. The 'Joint name formats' tab is selected. Below the tabs, there is a text box explaining that Joint Name Formats are used to build an Addressee or Salutation by combining information from two related constituents. There are two radio button options: 'List the following constituent first when building the joint name format:' (selected) and 'List constituents from the following selection first:'. Below these are three dropdown menus for 'If both constituents are found in the selection, use the following:', 'If neither constituents are found in the selection, use the following:', and another 'Selected constituent' dropdown. A red box highlights the 'Advanced name options' section, which contains the following text: 'Use these options to control whether or not to remove a spouse name from a joint name format under select conditions. Remove the spouse name from the joint name format if: The spouse does not qualify or is excluded from the process Both spouses will be mailed separately within the process. These options only apply to the following communication processes: Marketing efforts, Marketing acknowledgements, Membership renewal efforts, Sponsorship efforts.'

- **The spouse does not qualify or is excluded from the process** — Select this option to exclude the spouse if they are not included in a segment for the effort or if they are included in a segment but are excluded from the effort because of solicit codes, mailing preferences, householding options, or some other type of exclusion. For example, a husband and wife both qualify for inclusion in a mailing, but the wife has a “Do not mail” solicit code, so she will be excluded from the mailing process. With this option selected, the wife will not receive the mailing and her name is removed from the joint name format on the husband’s record.
- **Both spouses will be mailed separately within the process** — Select this option to exclude the spouse from both records if they are both included in a segment for the marketing effort process. For example, the husband and wife both qualify for inclusion in a mailing and neither have any type of exclusion such as a “Do no mail” solicit code. With this option selected, the husband and wife will both receive a copy of the mailing addressed to them individually.



Note: These options work independently of each other.

Source Codes

To ensure revenue is associated with the correct marketing effort during data entry, you can now search for source codes when adding revenue records. For example, you receive a donation that does not include a reply device. When you add the gift record, you can use the source code search to find the source codes for all appeals sent recently to the donor. If you cannot find an appropriate appeal, you can search for other marketing efforts or assign a white mail source code.

The screenshot shows a software interface with three tabs: 'Payment information', 'Marketing', and 'Transaction details'. The 'Marketing' tab is active. It contains several input fields: 'Source code:', 'Appeal:', 'Effort:', 'Segment:', and 'Package:'. Each of these fields has a search icon (magnifying glass) to its right. A red circle highlights the search icon next to the 'Source code' field.

Also, when you copy a segment or marketing effort, if the source code part assigned to the original is set to **Automatically increment source code values during data entry**, the source code field on the copy contains the next part value available according to the source code definition.

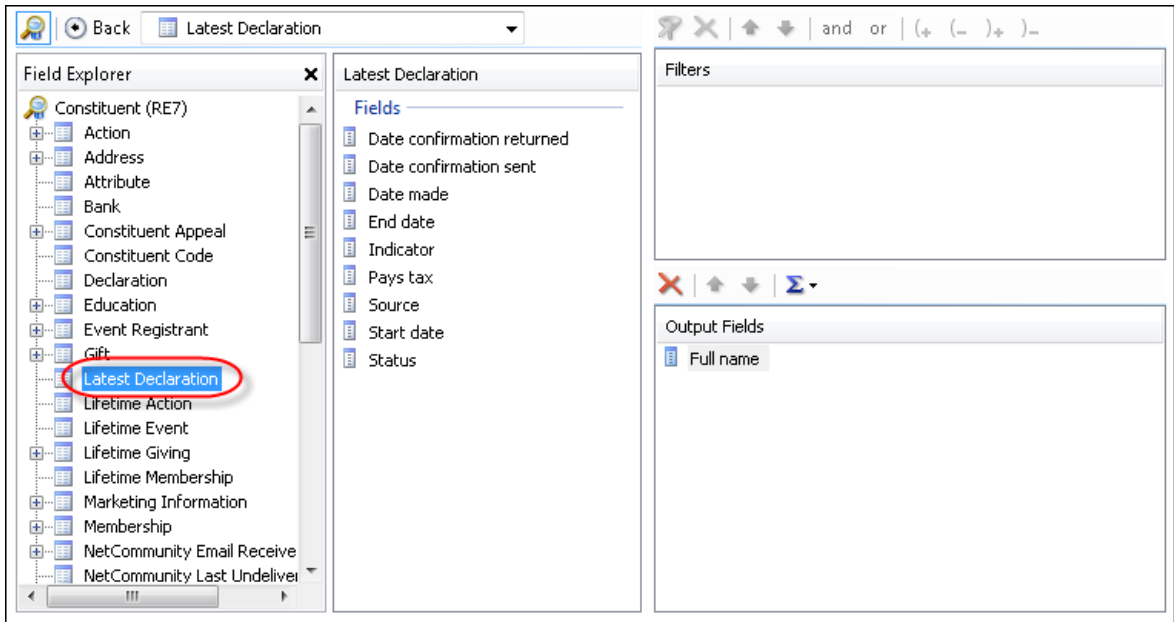
For information about source codes, see the Source Codes chapter of the *Blackbaud Direct Marketing Marketing Efforts Guide*.

Export Definitions

To create a new export definition that has many of the same settings as an existing definition, you can copy the existing export definition. You can use the copy as a starting point for your new export definition instead of creating it from scratch.

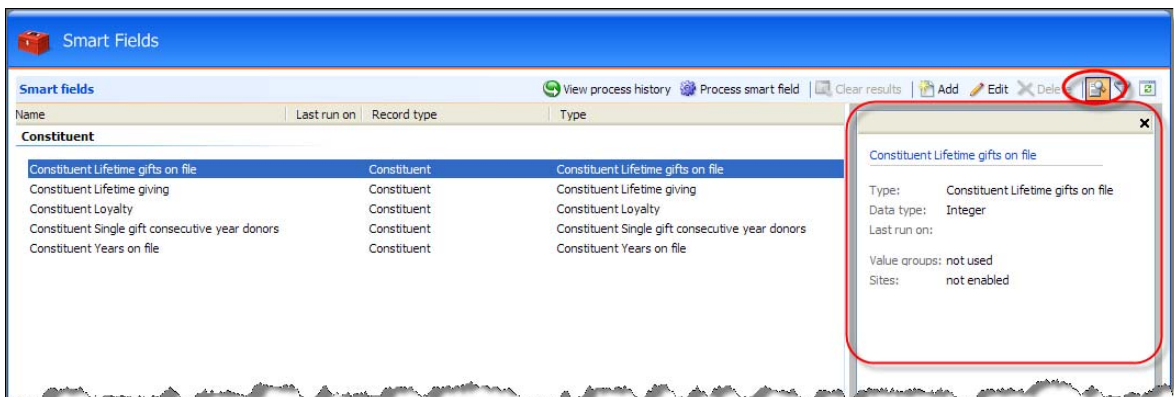
Data Mart

The UK version of the standard data mart for *The Raiser's Edge* now includes the Latest Declaration query view. Use this view to output information about the donor's latest gift aid declaration. When you create queries using the Constituent (RE7) record source, the Latest Declaration view appears under **Field Explorer** on the New Ad-hoc Query screen.



Smart Fields

To view details about a smart field, select the field in the **Smart fields** grid and click **Show details** on the action bar. The details window displays the date the field was last updated, the value groups used, and the sites associated with the field.



The General Tab on the Add or Edit smart field screen now includes a **Description** field so you can enter a description for the field, such as how it should be used.

Add constituent revenue dates smart field

General Parameters

General

Name:

Description:

Value groups

Value groups allow you to consolidate smart field values into groups based on a given value range. The highest valid range will be used when assigning a smart field value to a group.

Use value groups

Time period: Years

Values greater than or equal to | Value group name

Save Cancel

Selections

On the Selections page, there are additional filters you can use to find a selection.

Selections

All View by marketing effort

Selections grouped by type

Name: Type: Only show my selections

Sites: All sites Category: Only show mobilized

Apply Reset

Name	Query type	Type	Category	Description	Owner	Date added	Added by user
Constituent							
test	Ad-hoc	Constituent			BBNT\NikkjTr	05/26/2010	BBNT\NikkjTr