

The Raiser's Edge Integration Guide

11/10/2014 Blackbaud Direct Marketing 4.0 The Raiser's Edge Integration US

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Contents



- RAISER’S EDGE INTEGRATION 1
- Install The Raiser’s Edge Marketing Integration Component 1**
- Configure the Web Service Connection 1**
- Import Appeal Information into The Raiser’s Edge 3**
- Integrate With Raiser’s Edge Batch 6**
- Remove Constituent Appeal Information 8**
- Process Acknowledgements and Receipts 9**

Raiser's Edge Integration

Install The Raiser's Edge Marketing Integration Component	1
Configure the Web Service Connection	1
Import Appeal Information into The Raiser's Edge	3
Integrate With Raiser's Edge Batch	6
Remove Constituent Appeal Information	8
Process Acknowledgements and Receipts	9

The Raiser's Edge Marketing Integration Component enables members of your development office to create Appeals and Constituent Appeal records in *The Raiser's Edge* for people who were contacted via *Blackbaud Direct Marketing*.

Note: *The Raiser's Edge* data mart is used to store the constituent and gift information from Raiser's Edge for use in Blackbaud Direct Marketing. For more information about how to deploy the data mart, see the Blackbaud Data Mart Deployment Wizard section of the [Infinity Platform Installation and Upgrade Guide](#).

Install The Raiser's Edge Marketing Integration Component

To begin integration, you must first install the *The Raiser's Edge* Marketing Integration Component (REMIC). Running this application installs and registers all the files needed by *The Raiser's Edge* to import mailings from *Blackbaud Direct Marketing*.

Note: Make sure all users are logged out of *The Raiser's Edge* before you install *The Raiser's Edge* Marketing Integration Component.

1. From a workstation with *The Raiser's Edge* installed, open the application page for *Blackbaud Direct Marketing*.
2. Click **Utilities**. The Utilities, Gadgets and Reference page appears.
3. Under **ClickOnce Utilities**, click **Raiser's Edge Marketing Integration Component**.
4. On the Application Run screen, click **Run**.

Configure the Web Service Connection

After you install *The Raiser's Edge* Marketing Integration Component (REMIC), in *The Raiser's Edge*, a new item, **Marketing Services**, appears in the Raiser's Edge navigation bar on the left. The first time you click **Marketing**

Services, the Blackbaud Direct Marketing screen appears so you can configure the web service connection. This connection allows data to flow between **Blackbaud Direct Marketing** and **The Raiser's Edge** when performing tasks in **The Raiser's Edge** such as adding new constituents based on data from an acquisition list or adding constituent appeals for existing constituents in a **Blackbaud Direct Marketing** mailing.

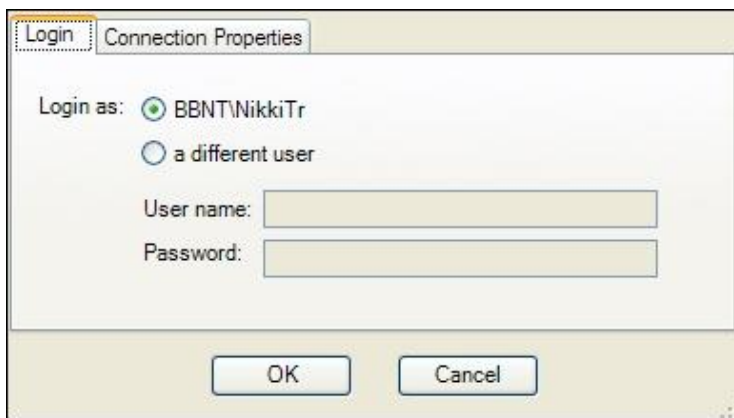
Warning: Add any **Raiser's Edge** users who will use **Marketing Services** to the "Raiser's Edge Integration Users" system role in **Blackbaud Direct Marketing Administration**. This will ensure they have all the necessary security rights to the **Marketing Services** features. To import the role, you must be working on a machine that has access to the `RaisersEdgeIntegrationRole.xml` file in the install directory. From **System Roles**, click **Import role definition**. On the Import Role Definition screen, in the **File** field, browse to `RaisersEdgeIntegrationRole.xml` in the System Roles folder of your installation directory (for example, `C:\bbappfx\MSBuild\SystemRoles`). Click **Import**. After processing, the "Raiser's Edge Integration Users" role appears in the System roles grid.

► Configure the Blackbaud Direct Marketing web service connection

1. From the Raiser's Edge bar on the left, click **Marketing Services**. The Blackbaud Direct Marketing screen appears.

Note: The Blackbaud Direct Marketing screen appears the first time you access the Marketing Services page or anytime after configuration when a connection to Blackbaud Direct Marketing is required but cannot be made. If your **Blackbaud Direct Marketing** server location changes, you can click **Edit Connection Settings** to edit your connection settings.

2. If you do not use Windows authentication, the Login tab appears so you can enter your login information for **Blackbaud Direct Marketing**.



The screenshot shows a dialog box with two tabs: "Login" and "Connection Properties". The "Login" tab is active. It contains the following elements:

- "Login as:" label followed by two radio buttons: BBNT\NikkiTr and a different user.
- "User name:" label followed by a text input field.
- "Password:" label followed by a text input field.
- "OK" and "Cancel" buttons at the bottom.

3. Select the Connection Properties tab.

4. In the **URL** field, enter the URL for the master **Blackbaud Direct Marketing** web service. For example, `http://<webserver>/bbappfx/AppFxWebService.asmx`. For hosted installations, you can find the Web Service URL on the BBNC Test Config page (<https://SITEID.bbnc.bbcust.com/testconfig.aspx>).
5. In the **Database** field, enter the name of the database to connect to that is stored in the web.config file on the **Blackbaud Direct Marketing** server. For hosted installations, these default for you.
6. In the **Record Source** field, select the record source for the **Raiser's Edge** database.

For hosted installations, the database and record source default for you.

7. Click **OK**. The Blackbaud Direct Marketing screen closes.

Import Appeal Information into The Raiser's Edge

After configuring the web service connection, you can access the Marketing Services page where you manage the integration between **The Raiser's Edge** and **Blackbaud Direct Marketing**. Using the **Import Appeal Information** link, you can import mailing data and associated appeal information. You can also create packages for the appeal, associate constituents with the appeal, and create a query of those constituents.

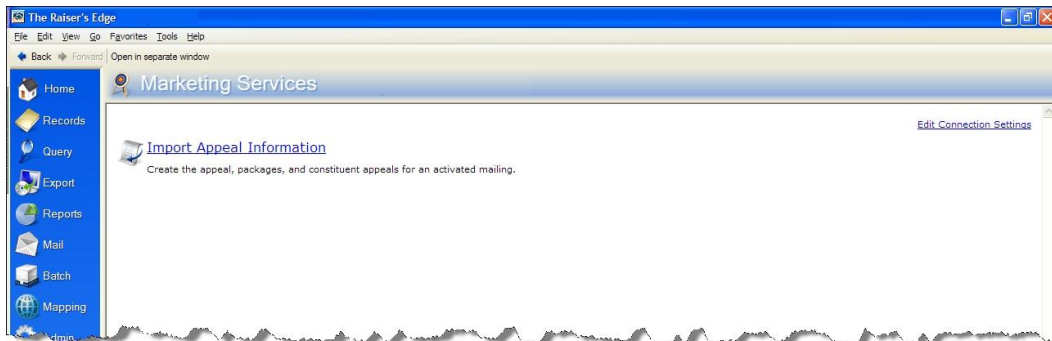
When you import appeal information, a connection is established. Now, when you refresh a mailing, **Blackbaud Direct Marketing** gathers any new gifts in **The Raiser's Edge** that match the appeal, looks at the source codes

and/or Mailing IDs on these gifts, and distributes them to appropriate segments when it can match up enough information.

It is important to note that if you change the name of the appeal in *The Raiser's Edge*, this change must be communicated to appropriate staff who can make the same change in *Blackbaud Direct Marketing*. The appeal ID and Descriptions must match in both programs in order for gifts entered in *The Raiser's Edge* to appear in *Blackbaud Direct Marketing* segments.

► Import appeal information into The Raiser's Edge

1. From the Raiser's Edge bar on the left, click **Marketing Services**. The Marketing Services page appears.



2. Click **Import Appeal Information**. The Import Marketing Information screen appears.

3. In the **Mailing** field, enter the name of or browse to the mailing in *Blackbaud Direct Marketing* whose information you want to import. After you select a mailing, information about the mailing is retrieved from *Blackbaud Direct Marketing* and then the Import tab displays the summary information.

Packages and **Quantity** indicate the number of unique packages that are part of this mailing and the offers sent.

- Appeal ID** and **Appeal description** display the ID and description for the appeal assigned to the mailing.
- To create **Raiser's Edge** appeal packages from the packages in the mailing, select the **Create packages for appeal** checkbox.
 - To add the appeal to the Appeals tab of constituent records included in the mailing, select the **Add appeal record to constituents** checkbox.
 - Select the **Date** to include on the Appeals tab of the constituent records and select a default **Response**. In the **Comment** field, you can enter a comment to include.
 - To group constituent records included in the mailing, select the **Create a constituent query for all those who received this mailing** checkbox. The **Query name** field displays the default name for the query. You can use this name or enter a different one.

The screenshot shows the 'Import' dialog box with the following details:

- Mailing Information:**
 - Mailing: RE7 Mailing
 - Packages: 1
 - Quantity: 0
- Appeal Information:**
 - Appeal ID: 2000PHONE
 - Appeal description: 2000 Annual Phonathon
 - Create packages for appeal
 - Add appeal record to constituents
 - Date: 10/03/2007
 - Response: <No Response>
 - Comment: (empty field)
- Constituent Query:**
 - Create a constituent query for all those who received this mailing
 - Query name: 2000 Annual Phonathon

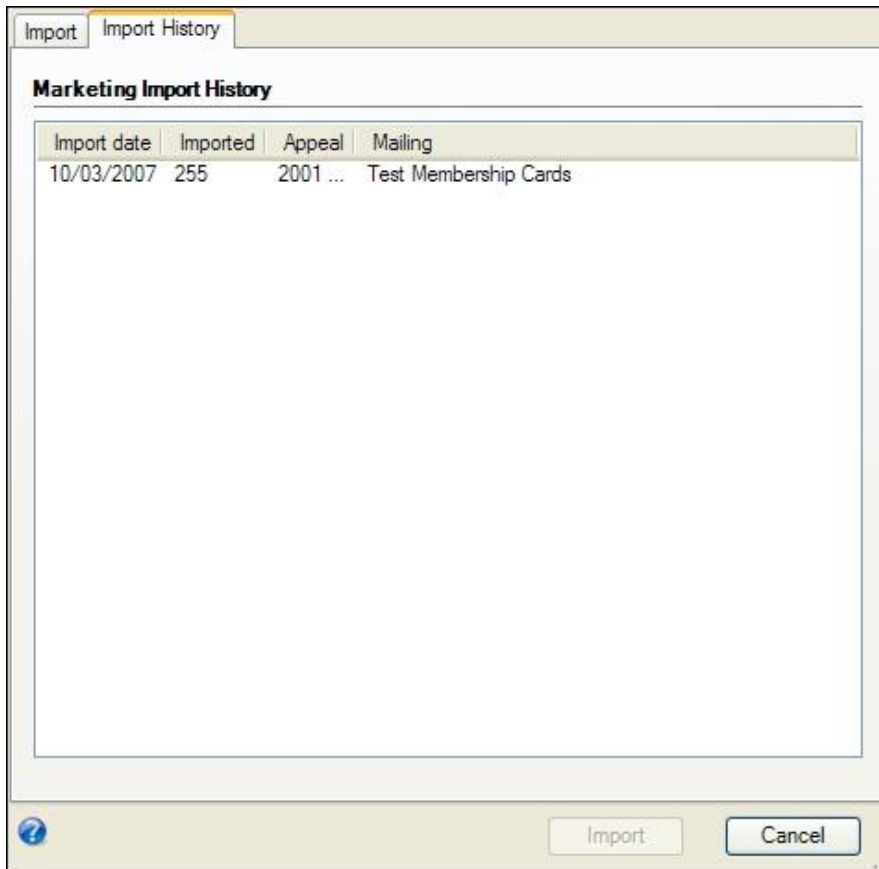
- Click **Import**. A processing screen appears while, if specified, the packages, constituent appeals, and query are created. After the import completes, the Import Complete screens appears.
- Click **OK** to close the Import Marketing Information screen and return to the Marketing Services page.

► View appeal import history in The Raiser's Edge

On the Import History tab, you can view information about previous appeal imports. REMIC tracks this information for reference purposes only.

- From the Raiser's Edge bar on the left, click **Marketing Services**. The Marketing Services page appears.
- Click **Import Appeal Information**. The Import Marketing Information screen appears.

3. Select the Import History tab. The Marketing Import History grid displays information about previous imports.



4. Click **Cancel** to return to the Marketing Services page.

Integrate With Raiser's Edge Batch

Once you establish a web service connection, you can automate gift, constituent, and constituent appeal data entry in *Raiser's Edge Batch* using the *Blackbaud Direct Marketing* finder number. When you enter a finder number into the **Finder Number** field column in a gift batch, *The Raiser's Edge* connects to *Blackbaud Direct Marketing* using the web service connection and pulls the gift, constituent, and appeal information assigned to the finder number into the batch automatically. Constituent appeals are added only for new constituents.

Constituent fields that transfer from *Blackbaud Direct Marketing* include:

Full name (This field is used only when the First name and Last name fields have no values. It is used as Last name on the constituent record.)	Address line 5
First name	City
Middle name	State

Last name	Post Code
Title	Phone number
Suffix	Email address
Address line 1	CART
Address line 2	DPC
Address line 3	LOT
Address line 4	Constituent System Record ID

Constituent appeal fields that transfer from **Blackbaud Direct Marketing** include:

Appeal (Enters "RE Appeal")	Marketing Source Code (Enters the segment source code)
Mailing ID (Enters the mailing's ID number)	Package (Enters "RE Package")
Date (Enters the mail date. If no mail date is defined on the mailing, enters the mailing's activation date.)	Total Given (Enters "\$0.00". A Raiser's Edge user must enter the amount.)
Response (Enters a blank value. A Raiser's Edge user must enter the response.)	Marketing Segment (Enters the mailing segment name)
Finder Number (Enters the finder number)	Comments (Enters "[Mailing list name]")

Gift fields that transfer from **Blackbaud Direct Marketing** include:

Appeal ID	Marketing Source Code
Mailing ID	Package

To speed the data entry process in *Batch*, you can format finder numbers so they can be read by a barcode scanning device. For example, if your scanner requires a "Code 3 of 9" format, you can print the finder number on reply cards using the "3 of 9" font. When a **Raiser's Edge** user enters gift batches, he can enter finder numbers by scanning the card, rather than entering the numbers manually.

Note: When *Batch* looks up finder numbers and finds a record in **Blackbaud Direct Marketing** that does not match a constituent in **The Raiser's Edge**, the New Individual screen appears so you can create a new constituent. Fields on this screen are filled automatically with information from **Blackbaud Direct Marketing** but the constituent is not added until you click **Save**. When you save the constituent, the program automatically checks for duplicates if you enabled duplicate checking in **Raiser's Edge Configuration**. While the New Individual screen is open, you can check the data from **Blackbaud Direct Marketing** to ensure that it matches the information on the response device. For example, if a responder updated his name or address on the response device, you can make those changes to the constituent record.

Remove Constituent Appeal Information

After running the **Remove members** task from an activated mailing in *Blackbaud Direct Marketing*, you can run the **Remove Constituent Appeal Information** marketing service in *The Raiser's Edge*. This process removes the appeal from the Appeals tab of constituents who were removed from the mailing.

► Remove constituent appeal information in The Raiser's Edge

1. From the Raiser's Edge bar on the left, click **Marketing Services**. The Marketing Services page appears.
2. Click **Remove Constituent Appeal Information**. The Remove Marketing Information screen appears.
3. In the **Mailing** field, select a mailing with removed members.

The **Quantity to remove** field displays the number of members removed from the selected mailing.

The **Appeal ID** and **Description** field displays the ID and description for the appeal associated with the selected mailing.

4. To group constituent records removed from the mailing, select the **Create a constituent query for all those who are removed from this mailing** checkbox. The **Query name** field displays the default name for the query. You can use this name or enter a different one.

Remove Remove History

Mailing Information

Mailing: Membership Catalog Email 2005

Quantity to remove: 22

Appeal Information

Appeal ID: MEM_2005

Appeal description: Membership 2005

Constituent Query

Create a constituent query for all those who are removed from this mailing

Query name: Membership 2005 (removed)

Remove Cancel

5. Click **Remove**. A processing screen appears. When finished, the screen closes and you return to the Marketing Services page.

► View remove members history in The Raiser's Edge

On the Remove History tab, you can view information about removal processes run previously. REMIC tracks this information for reference purposes only.

1. From the Raiser's Edge bar on the left, click **Marketing Services**. The Marketing Services page appears.
2. Click **Remove Constituent Appeal Information**. The Remove Marketing Information screen appears.
3. Select the Import History tab. The Remove Marketing Information History grid displays information about previous removal processes.

Import date	Removed	Appeal	Mailing
04/29/2008	5	MEM99: Membership Cards 2099	Membership Cards

4. Click **Cancel** to return to the Marketing Services page.

Process Acknowledgements and Receipts

Run the Process Acknowledgements and Receipts marketing service to update gift records in *The Raiser's Edge* that received acknowledgement mailings created in *Blackbaud Direct Marketing*. This process sets the **Acknowledge** field to "Acknowledged" and the **Receipt** field to "Receipted" on gifts, and adds the acknowledged/receipted dates and letter codes. You can create a query of gift records that are updated.

► Process acknowledgements and receipts

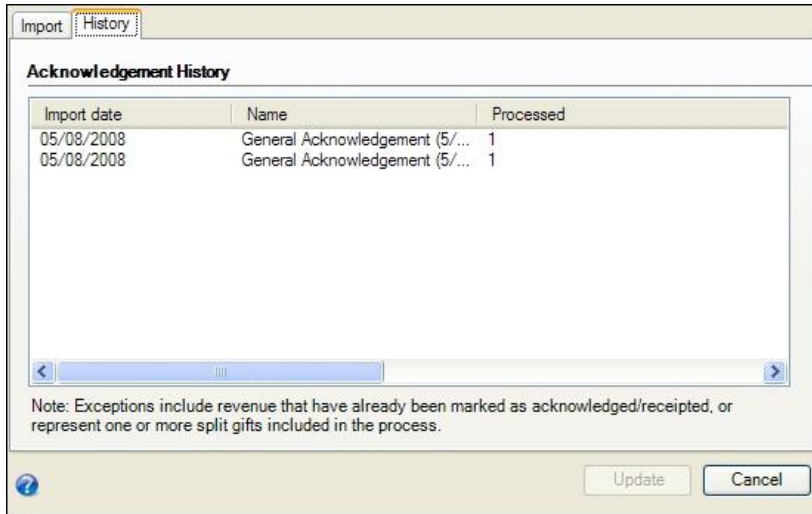
1. From the Raiser's Edge bar on the left, click **Marketing Services**. The Marketing Services page appears.
2. Click **Process Acknowledgements and Receipts**. The Process Acknowledgements and Receipts screen appears.

3. In the **Acknowledgements** field, select the acknowledgement mailing in **Blackbaud Direct Marketing** whose information you want to process. After you select an acknowledgement mailing, information about the mailing is retrieved from **Blackbaud Direct Marketing** and appears on the Import tab:
 - Acknowledgements — Displays the number of gifts that will be updated to “Acknowledged”.
 - Letter codes — Displays the number of letter codes included in the process.
 - Receipts — Displays the number of gifts that will be updated to “Received”.
4. To set the **Acknowledge** field to “Acknowledged” and the **Receipt** field to “Received” for gifts in **The Raiser’s Edge** associated with the selected acknowledgement mailing, select the **Update acknowledgement and receipt information** checkbox. Marking this option also adds the gift’s acknowledgement date from **Blackbaud Direct Marketing**.
5. If you have letter codes created in **Blackbaud Direct Marketing** that do not exist in **The Raiser’s Edge**, you can select **Create letter codes for acknowledgements**, to add these to the **Letters** table in **Raiser’s Edge Configuration**. The new letter codes are then added to the gift records to which they apply.
6. You can select **Override existing acknowledgement/receipt settings** to overwrite existing acknowledgement and receipt information on constituents. If this option is unmarked, acknowledgement/receipt information that was added manually to constituent records is not overwritten.
7. To group gift records updated by the import, select the **Create query for updated gifts** checkbox. The **Query name** field displays the default name for the query. You can use this name or enter a different one.
8. Click **Update**. A processing screen appears while the acknowledgements and receipts are processed and/or the query is created. After the process completes, the Update Complete screen appears.
9. Click **OK** to return to the Marketing Services page.

► View acknowledgement history in The Raiser’s Edge

On the History tab, you can view information about acknowledgement/receipt processes run previously. REMIC tracks this information for reference purposes only.

1. From the Raiser's Edge bar on the left, click **Marketing Services**. The Marketing Services page appears.
2. Click **Process Acknowledgements and Receipts**. The Process Acknowledgements and Receipts screen appears.
3. Select the History tab. The Acknowledgement History grid displays information about previous acknowledgement processes.



Import date	Name	Processed
05/08/2008	General Acknowledgement (5/...	1
05/08/2008	General Acknowledgement (5/...	1

Note: Exceptions include revenue that have already been marked as acknowledged/receipted, or represent one or more split gifts included in the process.

Update Cancel

4. Click **Cancel** to return to the Marketing Services page.

