

# **Blackbaud**DirectMarketing

New Features and Enhancements Guide

042910

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# New Features and Enhancements

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Before you begin using *Blackbaud Direct Marketing 2.6*, 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.



**Tip:** For more details about new features in *Blackbaud Direct Marketing 2.6*, see the [Bullseye blog](#).

## Source Codes

For certain record types, such as segments, lists, and packages, you may manage a very large number of records that require a large number of unique code values. Because there are so many records, it may not be important that you can recognize the code value for a particular record; you just need it to be unique. In this case, you can select **Automatically increment source code values during data entry** for a source code part and the program will automatically generate a unique part value when you add a list, package, segment, or marketing effort record. For example, if the package code format is ###, when you add the first package record, the program will assign it a package code of 001. The package code will increase incrementally for each package record added subsequently (i.e., 002, 003, etc.).

**Add source code part**

Name:  Type: User defined

Description:

Source code part values

Description	Format/Value	Sample	Delimiter

Format options: A - Z, 0 - 9, @ = any letter, # = any number, ? = any letter or number.

Automatically increment source code values during data entry

Save Cancel

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

## Test Segments

To create test segments in previous versions, you created sample groups using percentages or a specified number of records. Now you can also use fractions. For example, to test a new acquisition list, you can divide the list evenly into thirds and assign each group a different package.

When you use the “Fraction” option, the program evenly distributes records across test segments including any remainder amounts. For example, if you have a sample size of 10,000 records and create three test segments that each include 1/3 of the records, two test segments would include 3,333 records and one would include 3,334. This balances the segments as evenly as possible. If you use the “Percentage” option for the same test segments, you would have to decide how to account for the remaining records — either use 33% for each segment and exclude the 100 remaining records or use 33% for two segments and 34% for the third. In both cases, the samples would not be exactly even.

For information about test segments, see the Marketing Efforts chapter of the *Blackbaud Direct Marketing Marketing Efforts Guide*.

## Export and Activation

You can now export a marketing effort before you activate it. For example, you may want to create a marketing effort and export a file of constituents for quality checks or to send to your strategy vendor. In previous versions, you could only export after you activated the effort, which would lock down the constituent IDs associated with the effort.

You must run the Calculate segment counts process before you can export an unactivated effort. Two new options appear with this process:

- **Refresh segment selections and filters** — Select this option to refresh all selections associated with the marketing effort, including those associated with the universe, exclusions, and segments.
- **Capture source analysis rule data** — Select this option to snapshot all donor attributes defined by the source analysis rules.

**Activate marketing effort**

General | KPIs

This process should be used when all changes to the marketing effort are complete and you are ready to receive donations. During this process, the system will lock down the members of this effort and the segmentation, and snapshot the cost and coding details.

Appeals

Appeal:

Processing options	Last run
<input checked="" type="checkbox"/> Calculate segment counts This process will change your segment counts. It will reevaluate records for inclusion based on the state of the selections underlying the segments, as well as the current universe, exclusions, contact rules and address processing options.	Not run
<input type="checkbox"/> Refresh segment selections and filters This option will refresh all selections associated with the universe, exclusions and segments.	Not run
<input checked="" type="checkbox"/> Capture source analysis rule data	Not captured

Start Cancel

The **Calculate segment counts** option also appears on the Activate marketing effort screen. When you activate the effort, you can run the process again to update the counts, refresh the selections, and update the source analysis rules data. You can clear these options if you do not want to update this information. For example, if you perform quality checks on the marketing effort file prior to activation and verify that the file is ready to send to the processing house, you probably will not want to update the counts. Furthermore, you probably want to snapshot the source analysis rules data when the marketing effort file is first exported for quality checks, not when the effort is activated. If you wait until the effort is activated, then the source analysis rules data will likely be out of date.

Finder numbers are now assigned during the Calculate segment counts process rather than when you activate the effort. If new records are added when you recalculate segment counts, the program automatically adds finder numbers to the existing range. If the extended range reaches the point of overlapping with another range, the program creates a new range of finder numbers. If you end up with extra finder numbers or ranges, you can delete these under certain conditions.

For information about activation and export, see the Marketing Efforts chapter of the *Blackbaud Direct Marketing Marketing Efforts Guide*.

## Import Marketing Efforts

If you use strategy vendors to segment an exported file of your constituents, after they do the segmentation, they will return a segmentation definition file that defines the structure of the marketing effort and contains, at a minimum, the source codes applied to each segment as well as the marketing effort name, segment name and code, and package name and code. You can use *Import* and *Batch entry* to validate and import this file. The import process assigns the lists, segments, and packages to the marketing effort.

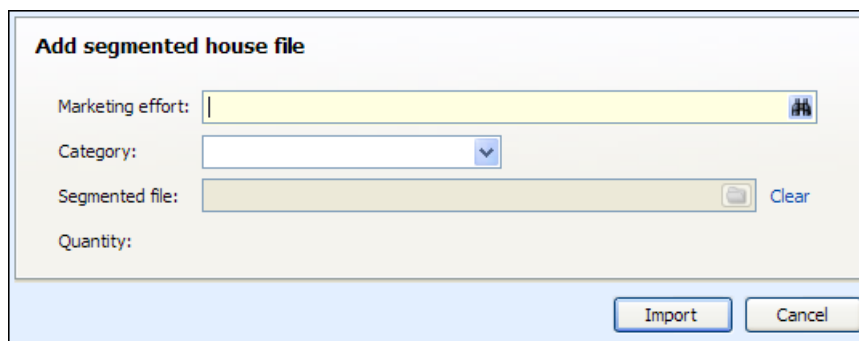
The import and batch features work the same as for other imports. For marketing efforts, you use the Direct Marketing Acquisition Batch Design.

After you process the import file, the imported marketing effort data appears in a new batch in *Batch entry*. You can validate the data and fix any errors before you commit the batch. For detailed information about how to use *Import* or *Batch entry*, see the *Batch and Import Guide*.


For information about marketing effort import fields and processing rules, see the Marketing Efforts chapter of the *Blackbaud Direct Marketing Marketing Efforts Guide*.

## Import Segmented House Files


If you use strategy vendors to segment an exported file of your constituents, after they do the segmentation, they will return a file to you that contains the constituent IDs as well the source codes and finder numbers they assigned to each record. You can use the Segmented house files feature to import the file into an existing marketing effort and place the constituents into the segments specified by the vendor.



**Add segmented house file**

Marketing effort:  

Category:

Segmented file:   Clear

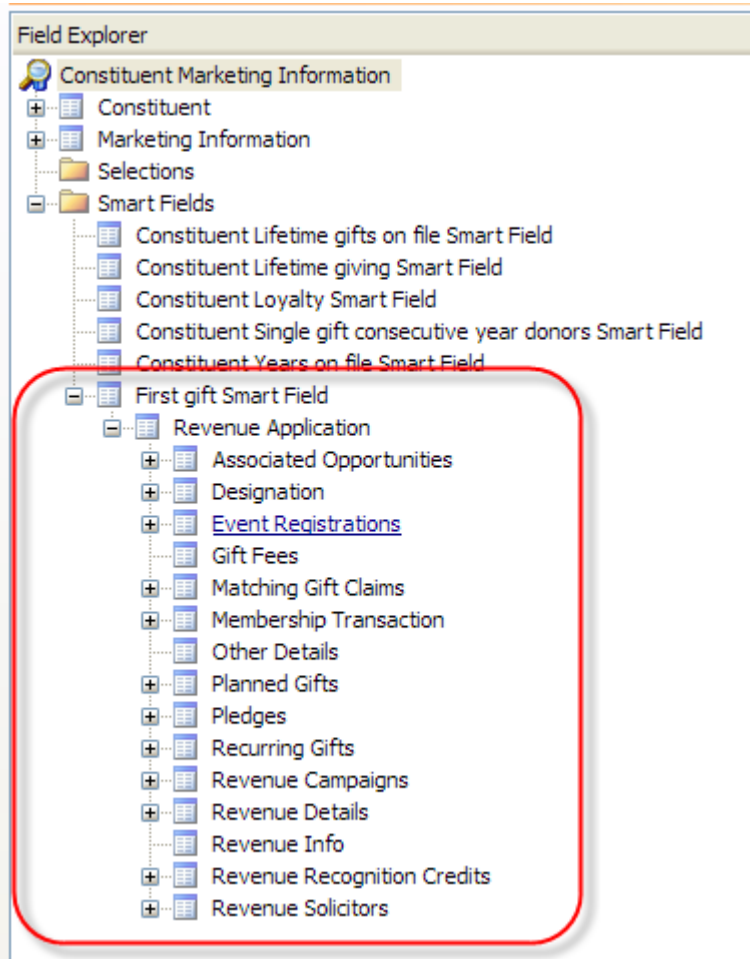
Quantity:

For more information about how to import segmented house files, see the Segments chapter of the *Blackbaud Direct Marketing Marketing Efforts Guide*.

# Smart Fields

There is a new type of smart field that returns records rather than single values. For *The Raiser's Edge* users, the program now includes the Gift split smart field and for *Blackbaud Enterprise CRM* users, it includes the Constituent revenue application smart field.

These smart fields return the revenue application record IDs for the selected type of revenue. For example, you can set the parameters so the field returns all “First gift” records. The “First gift Smart Field” then appears as a query node under Smart Fields in all constituent queries. The query node includes field information associated with the first gift record, such as the appeal name or package ID.



For more information about smart fields, see the Smart Fields chapter of the *Blackbaud Direct Marketing Administration Guide*.

