Blackbaud Direct Marketing™

Blackbaud Direct Marketing New Features Guide

11/21/2011 Blackbaud Direct Marketing 2.92 Blackbaud Direct Marketing New Features US

BBDMNF-2011

Contents

New Features and Enhancements

Before you begin using ***Blackbaud Direct Marketing 2.92***, 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.

Database Diagrams and Changes

With each release, we capture information about database changes since the previous version of the program. With the Blackbaud Infinity SDK, you can access this data about any new, modified, and removed tables, views, procedures, functions, fields, indexes, triggers, and parameters.

To install the Blackbaud Infinity SDK, go to the Downloads page on the Blackbaud website at www.blackbaud.com. For more information, see the *Blackbaud Infinity SDK Installation Guide*.

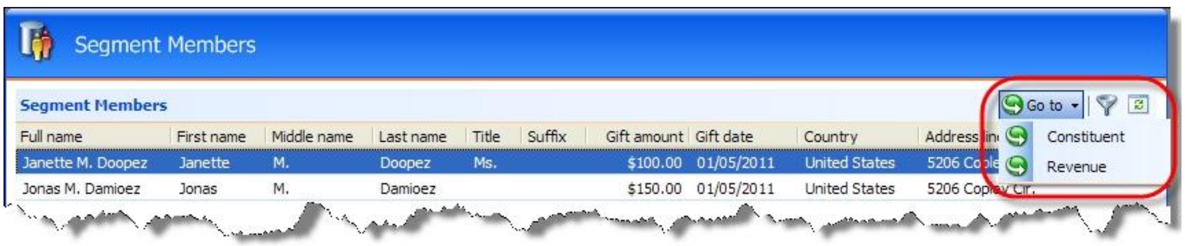
In the folder where you install the SDK, the \SDK\Documentation folder includes .chm files that describe the database schema. Open the RE7_DM_Schema_2.92.chm file and, click **View the list of changes** at the bottom of the main Database Reference page.

We also generate entity relationship diagrams (ERDs) for the database as PDF files. To access these diagrams, open the RE7_DM_Schema_2.92.chm file, select a table, and click **Entity-Relationship diagram** at the bottom of the page.

The Documentation folder also includes previous versions of the RE7_DM_Schema_2.92.chm file. You can view previous *.chm files for version-to-version changes.

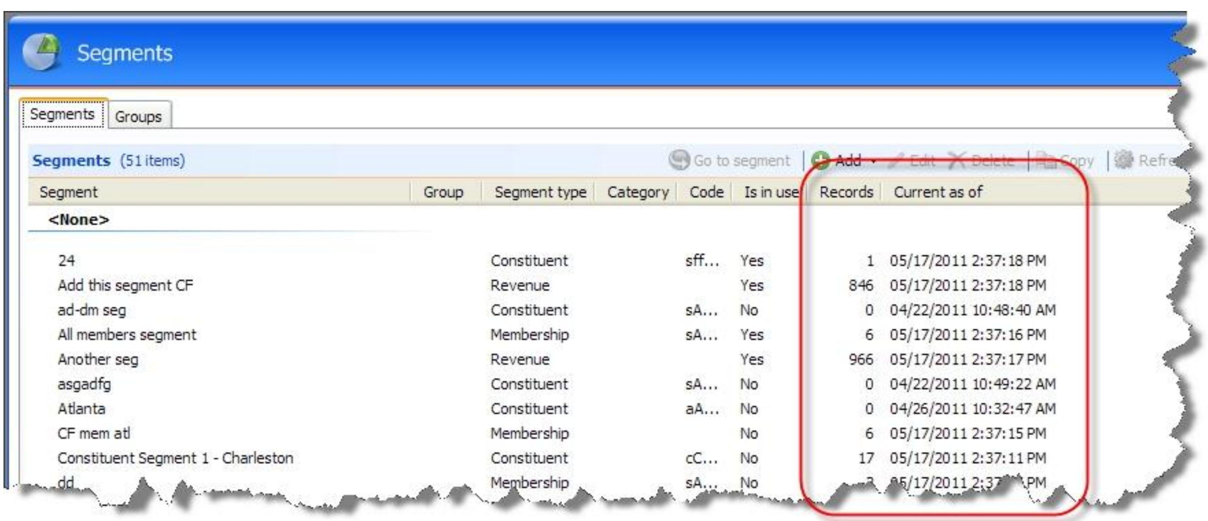
Segments

We made enhancements that allow you to quickly verify that segments and selections include the correct constituents. Use the new **Go to constituent** button to open a segment member's constituent record directly from the Current Members tab of a segment or from the Segment Members page of a marketing effort. For revenue segments, you also have the option to open the member's associated revenue record. For example, if you defined a segment to include "Donors who gave $25 - $49.99 once in the last 0-6 months," you can open a few constituents in that segment and view their revenue histories to verify they meet the segment's criteria.



The **Constituent lookup ID** and **Finder number** columns now appear on the Segment Members page of a marketing effort. The **Constituent lookup ID** column also appears on the Current Members tab of a segment. These columns provide another way to verify that a constituent belongs in the segment. For example, if you have two constituents with the same name, you can use the **Constituent lookup ID** column to verify that you have the correct one in your segment.

On the Segments tab of the Segments page, you can now view the date a segment was last refreshed as well as the number of records it included at that time.



When you search for a segment, the search results grid now includes the refresh date and record counts.

Segment Exclusions

On the Details tab of a marketing effort segment, you can now designate a segment as an exclusion. Segment exclusions (also known as "remainder" or "no mail" segments) allow you to quality check your marketing efforts and ensure that all donors are accounted for even if they do not receive the effort.

You can use segment exclusions to exclude records from particular segments but not from the whole marketing effort. For example, you need to make sure that none of your most responsive, premium donors are included in non-premium segments. To do this, select the **Exclude from effort but show counts** option for the All premium donors segment and order the segments on Segments tab of the marketing effort as shown below. The exclusion segment ensures that all premium donors are included in the first three segments, or excluded from the effort rather than receive the non-premium marketing.

Segment 1: Premium major donors

Segment 2: Premium mid-level donors

Segment 3: Premium basic donors

Segment 4: All premium donors (segment exclusion)

Segment 5: Non-premium major donors

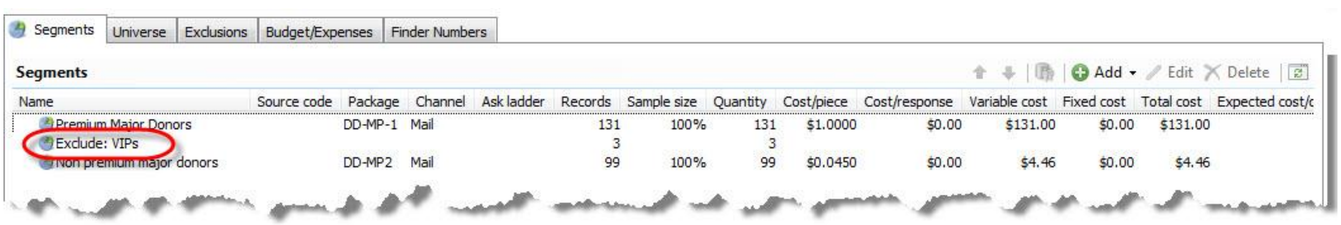
Segment 6: Non-premium mid-level donors

Segment 7: Non-premium basic donors

The **Exclude from effort but show counts** option appears on constituent and revenue segments.

The **Calculate segment counts** and **Activate marketing effort** tasks calculate and refresh the record counts for segment exclusions, but do not assign the exclusions to a constituent appeal, assign finder numbers, or apply source analysis rules.

Record counts for segment exclusions appear on the Segments tab of the marketing effort. You can view the segment's members to identify why those records were excluded from other segments in the marketing effort. You can also export an exclusion segment to a separate export file to perform quality checks.



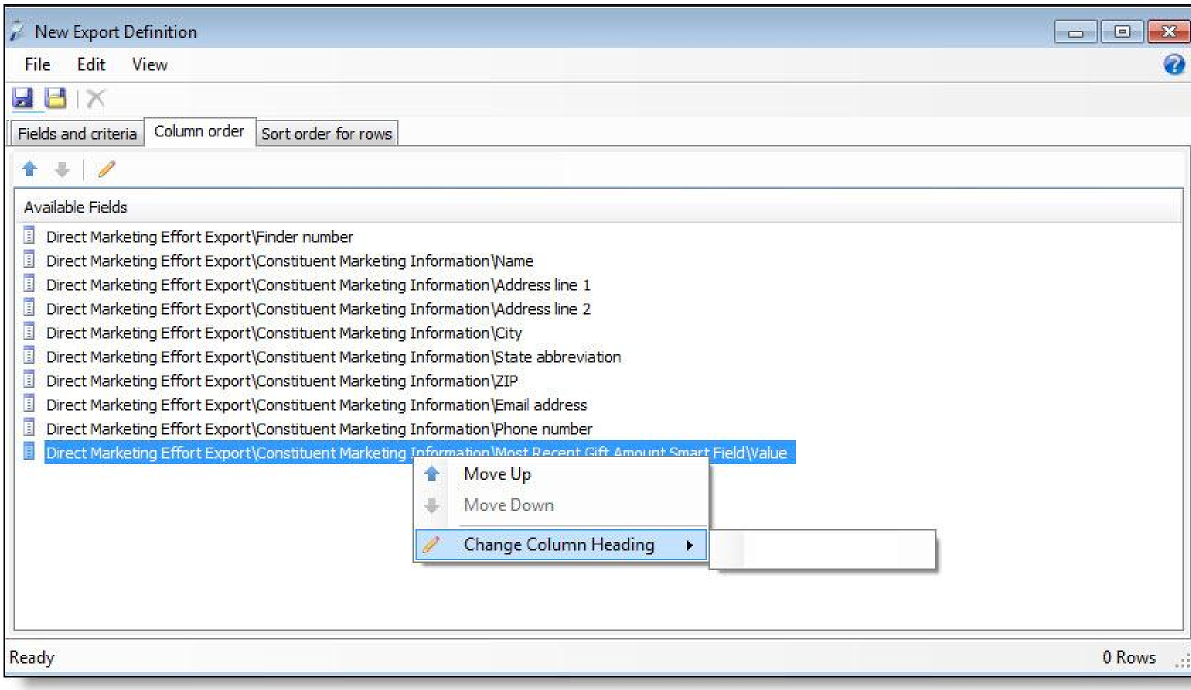
Export Definitions

Marketing export definitions now support the export of one-to-many fields in addition to one-to-one export fields. A one-to-one export field contains one value in your database. For example, Last name is a one-to-one export field because a segment member can have only one last name. A one-to-many export field contains several values in your database. For example, Interests is a one-to-many export field because constituents can have multiple interests assigned to their record.

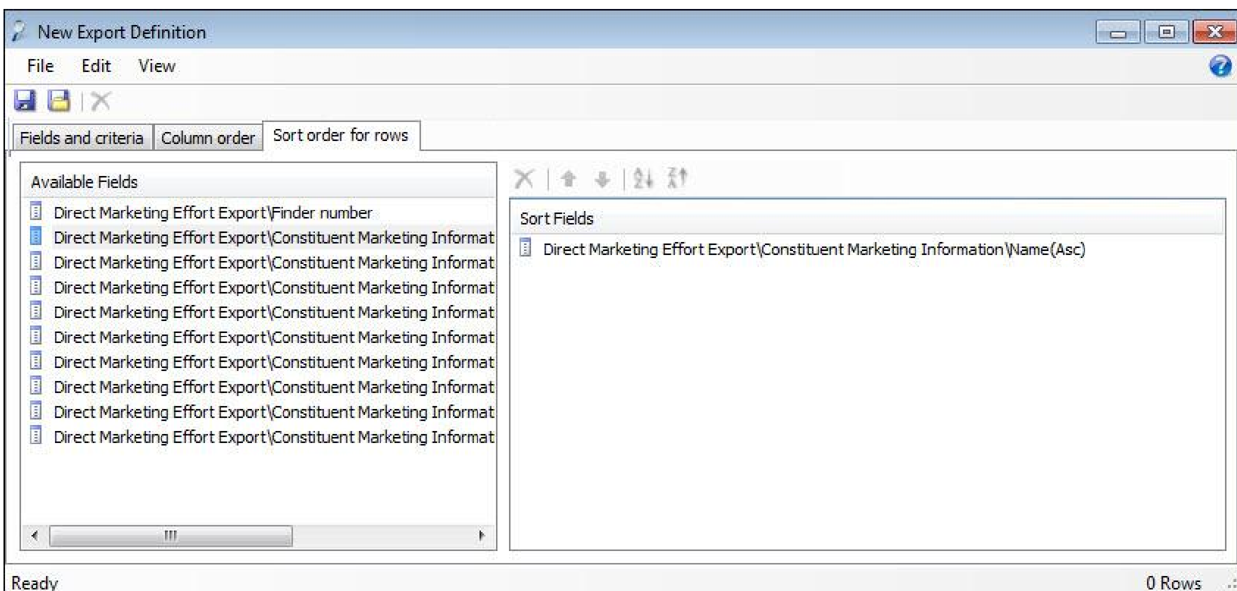
When you select a one-to-many field on the New Export Definition screen, the Criteria screen appears. From this screen, you can select the number to export and define how the export sorts and filters the fields.

We added two new tabs to export definitions.

From the Column order tab, you can reorder and rename column headings for the export file.

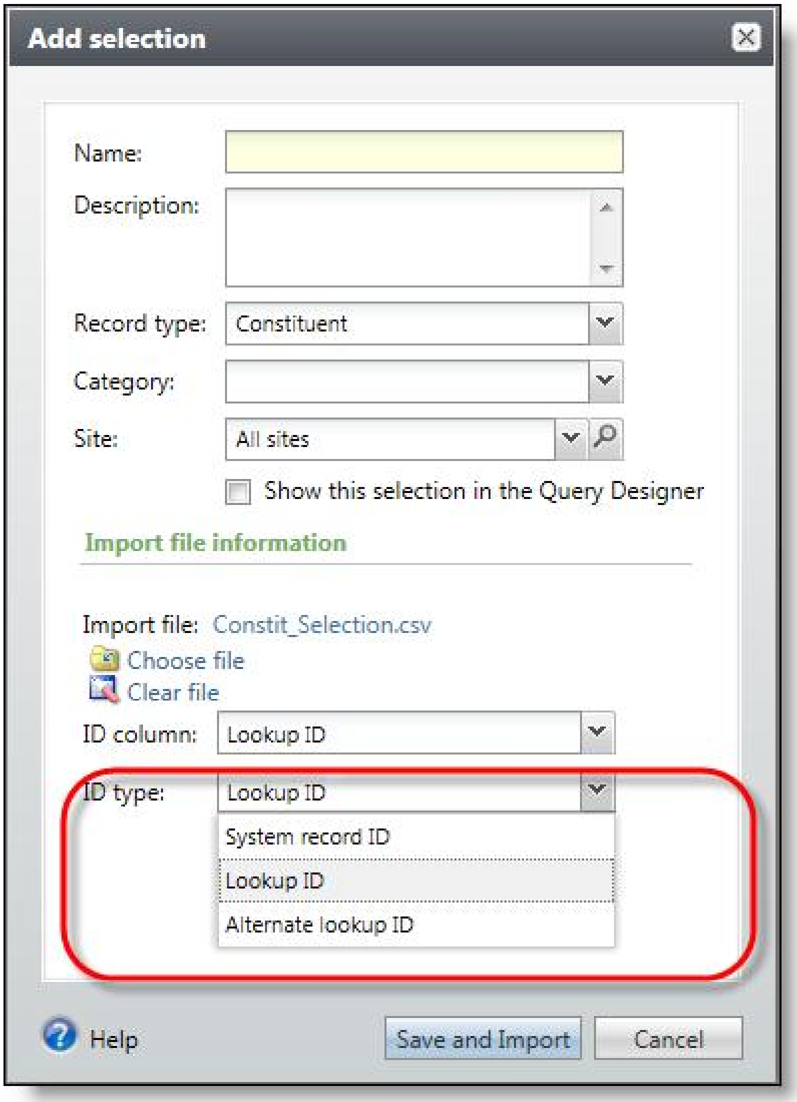


From the Sort order for rows tab, you can specify a sort order for the export. The sort order helps ensure that mail merge documents, such as envelopes or labels, are in the order required by vendors.

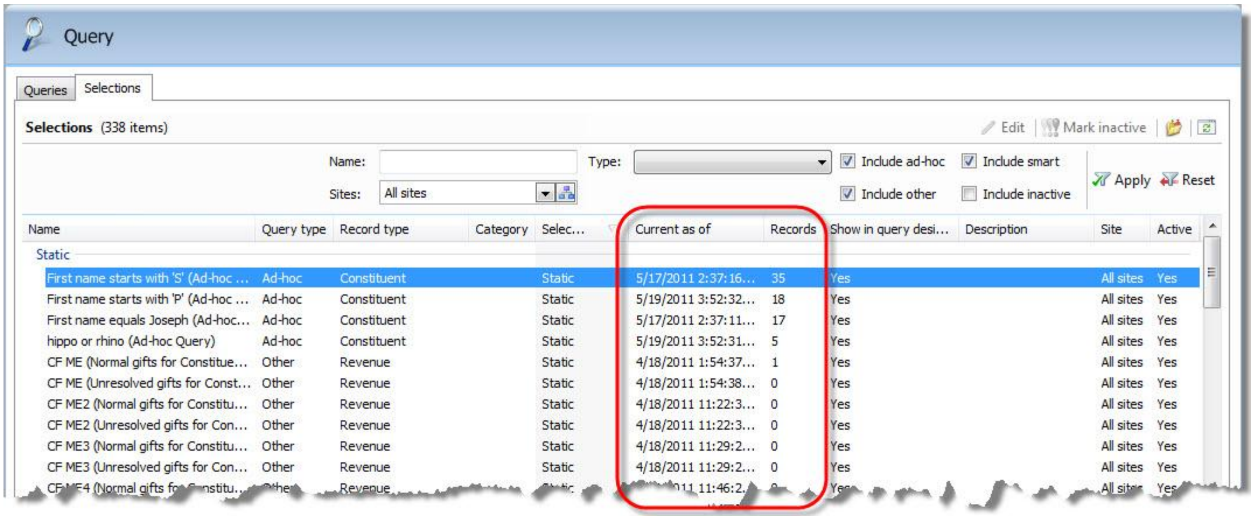


Selections

In previous versions, you could use only the system record ID to import a selection. Because vendors may use other types of ID, now you may also use the lookup ID to import a selection for some record types, such as Event or Revenue. For the Constituent record type, you can also use an alternate lookup ID. In the **ID column** field (previously called the **ID field**), select which column of the import file contains the record ID. In the **ID type** field, select whether to use the system record, lookup, or alternate lookup ID to identify records in the selection.



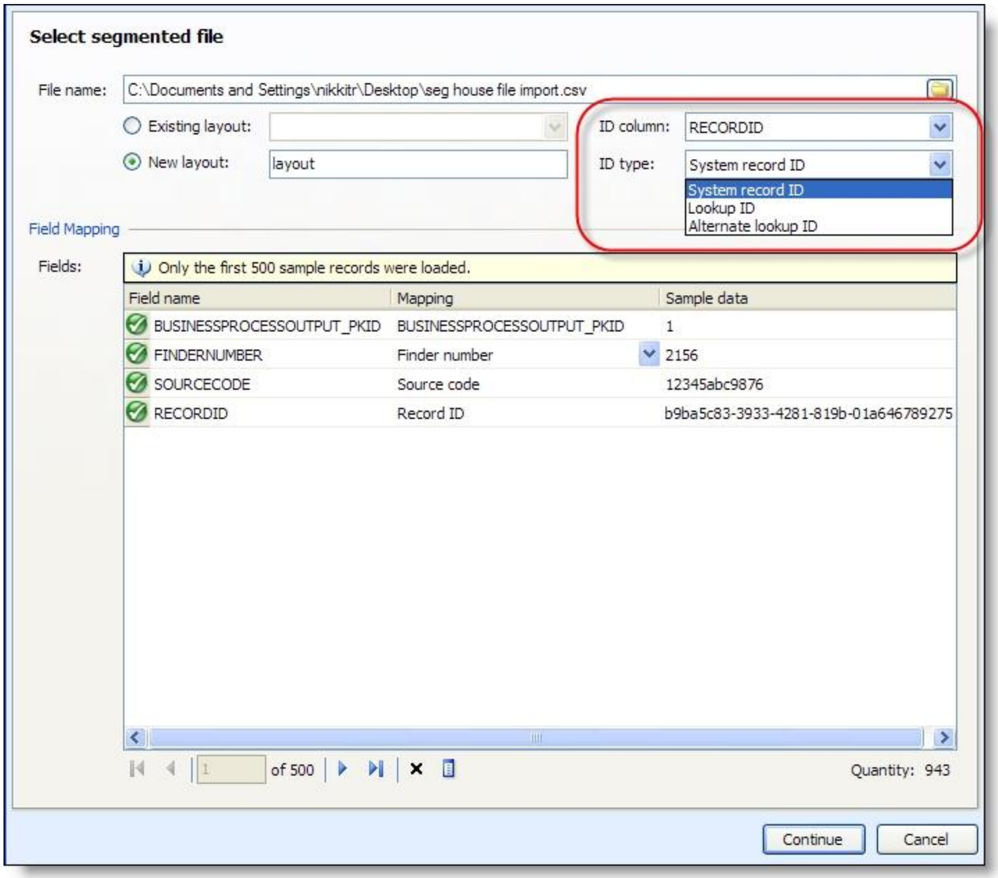
On the Selections tab of the Query page and on the Selections page in *Marketing and Communications*, you can now view the date a static selection was last refreshed as well as the number of records it included at that time.



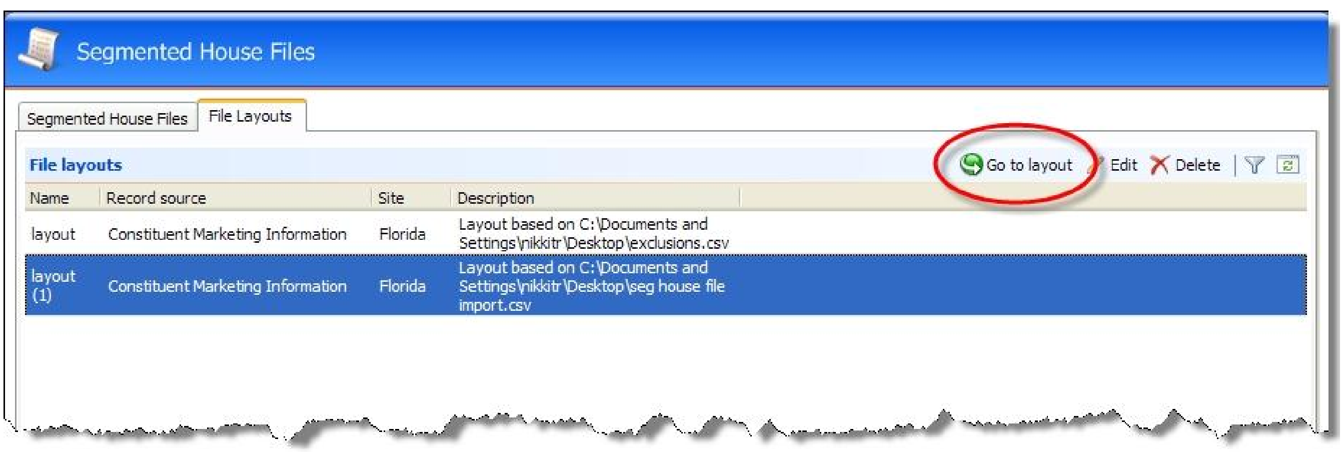
When you search for a marketing selection, the search results grid now includes the refresh date and record counts.

Segmented House Files

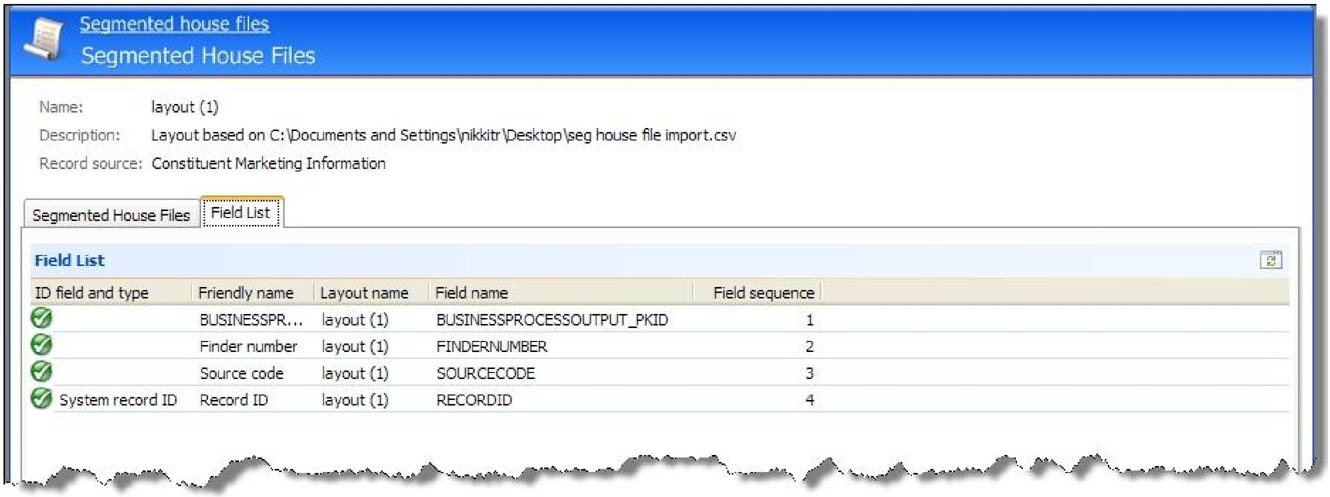
In addition to the system record ID or finder number, you can now use the lookup ID or alternate lookup ID as the record identifier when you import a segmented house file. In the **ID column** field, select which column of the import file contains the record ID. In the **ID type** field, select the type of record identifier you selected for the **ID column**: system record, lookup ID, or alternate lookup ID.



On the File Layouts tab, you can view summary information about your file layouts. To view detailed information about a file layout, select the layout and click the new **Go to layout** button.



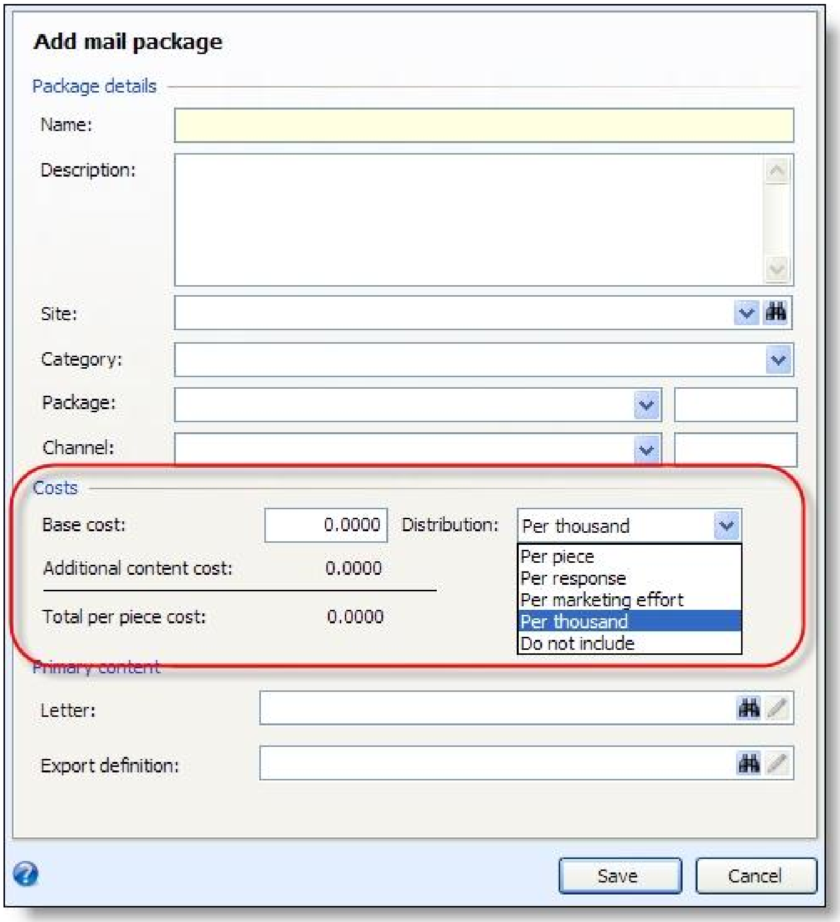
The Segmented House Files Layout page appears from which you can view a list of all imported segmented house files that use this layout. You can also view the field mappings for the layout.



Packages

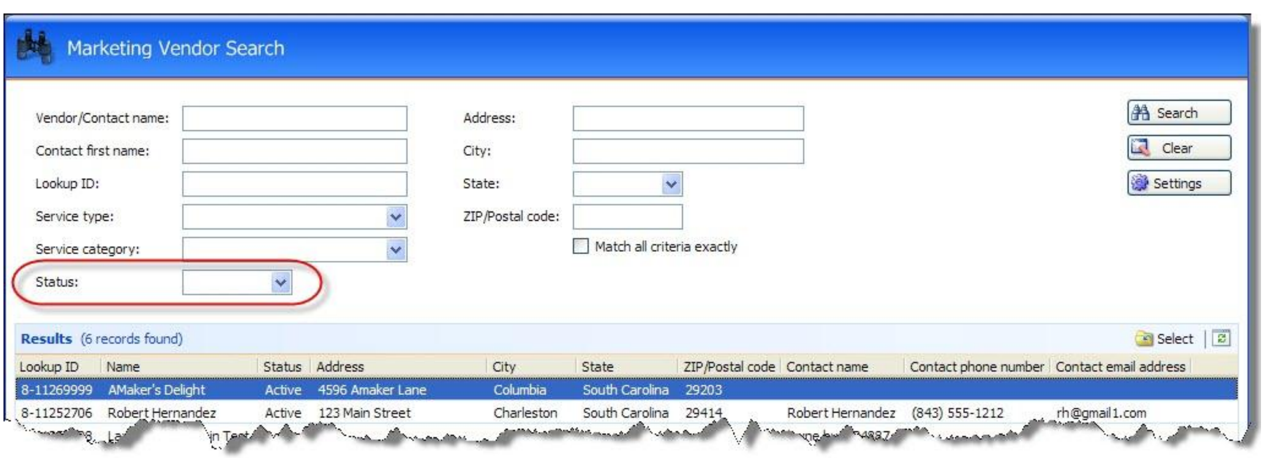
To calculate package costs more precisely, you can now enter the base cost for packages, creatives, documents, materials, and expenses using four decimal places. For example, if a vendor charges you $.0268 per piece, in previous versions you would have to round the amount up to $.03 or down to $.02, which in either case would make the total costs inaccurate.

If you purchase pieces in increments of a thousand, you can now select “Per thousand” as the distribution for the base cost of packages, creatives, documents, materials, and expenses.



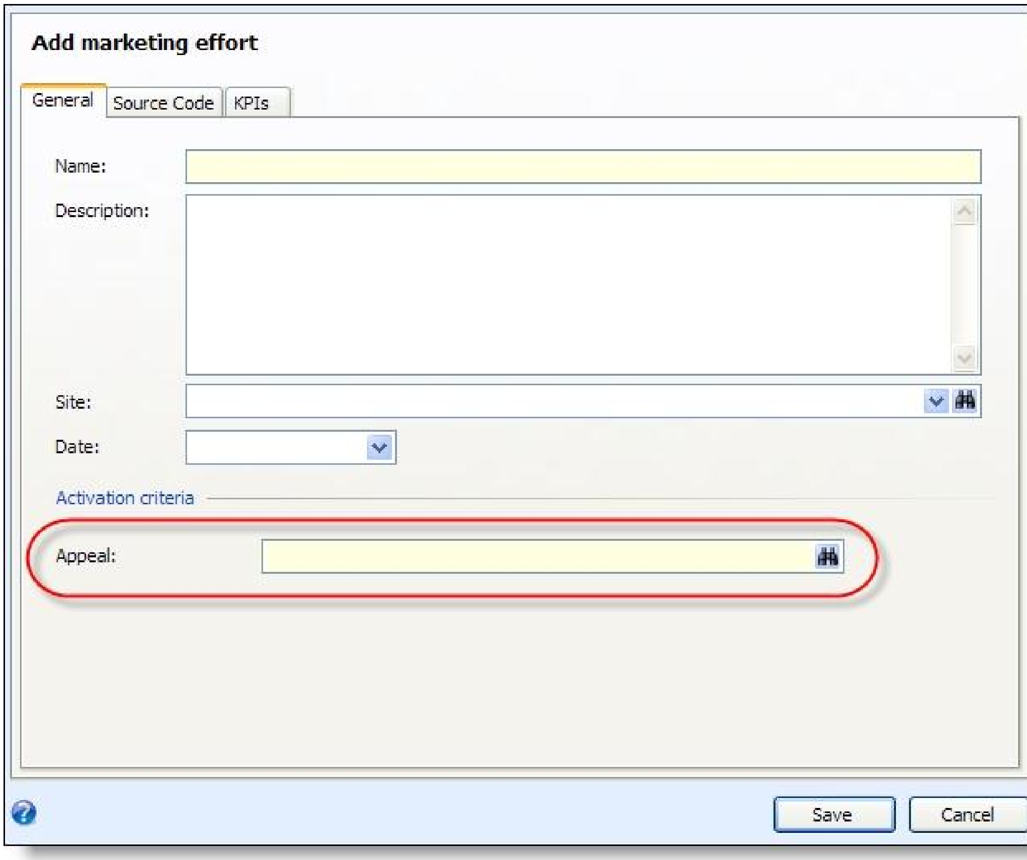
Vendor Search

The Marketing Vendor Search screen now includes a **Status** field so you can search for active or inactive vendors.



Public Media Marketing Efforts

Public media marketing efforts are now activated automatically when the effort is created, rather than as an additional task. In previous versions, you selected the appeal to associate with the marketing effort from the activation task. Now when you create a public media effort, the **Appeal** field appears on the General tab.



We also made the public media workflow more flexible. In the past, you could not add segments to a public media effort once it was activated. Now you can add new segments or edit the **Start/End date**, **Response rate**, and **Gift amount** fields on existing segments at any time. If no responses were processed yet for a segment, you can also edit its segment and package codes or delete it from the effort.

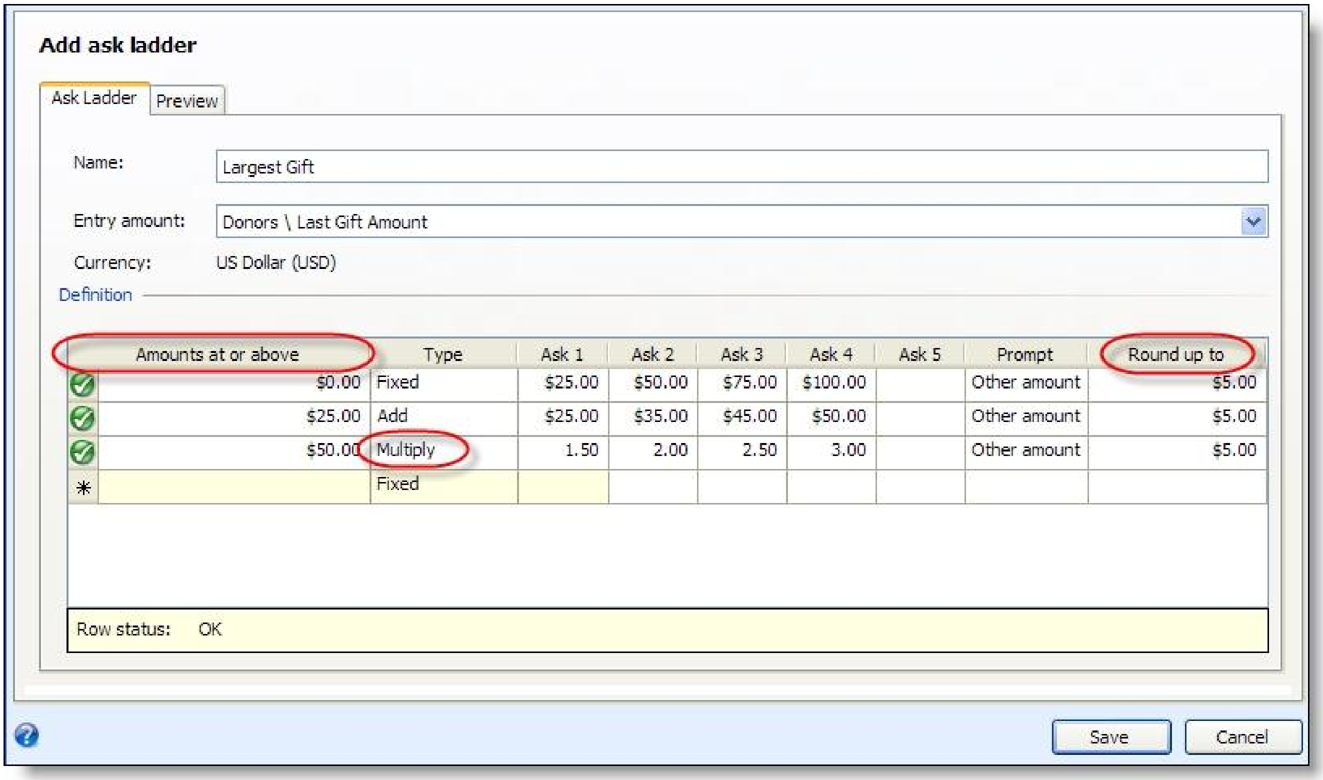
Ask Ladders

On the Add/Edit ask ladder screens, we changed the labels for screen items to better describe their purpose.

Show Me: Amounts over — This column is now labeled **Amounts at or above**

- Round to — This column is now labeled **Round up to**
- Multiple — This ask ladder type is now labeled **Multiply**

These changes do not affect how ask ladders function; they simply make these screens easier to understand.



Consolidated List

If your organization uses a consolidated list, the **Update consolidated list query view** task appears on the acquisition list segment page (if that segment is part of the consolidated list) and the export definitions page. You will need to run this process periodically to update the field information in the consolidated list query view so it matches the record source query view. For example, if you add a new smart field and want that field available for export from a list segment in the consolidated list, you need to run the process.

Batch Enhancements

In an effort to improve batch configuration and data entry, we have implemented numerous usability enhancements. The list below offers as a high-level description of those changes. For complete overviews and procedures related to these enhancements, see the *Batch and Import Guide*.

Batch Numbering Schemes

Once you upgrade to version 2.92, we recommend you review and verify the settings for any batch numbering schemes saved in the system prior to version 2.92.

- You can create 'manual' and 'auto-generated' numbering schemes. When you create a manual numbering scheme, you can specify the batch number you want to use for the specific batch. When you create an auto-generated numbering scheme, you can define the batch identifier and date format, and the order in which they appear. The program will assign the batch number automatically.

- You now have the ability to use leading zero formatting in the batch number sequence.
- As additional formatting options, you can now include separators between elements. We have also added four-digit year format options for dates.
- You now define exception batch numbering options on the Add a batch numbering scheme form. You can also preview the exception batch number on this form. In previous versions, the exception batch numbering options were defined on the Batch Workflow record.
- The limit of the starting batch number has changed from 10,000 to 1,000,000.
- We have renamed several fields on the Add a batch numbering scheme form.

  Default batch number is now **Batch number**.

  Label is now **Batch identifier**.

  Sequence start is now **Next sequence**.

  Preview default batch number is now **Preview batch number**.
- We removed the checkbox reset option for the sequence number on the Edit a batch numbering scheme form. Entering the ‘Next sequence’ number now resets both the sequence and next available number.

Batch Workflows

Once you upgrade to version 2.92, we recommend you review and verify the settings for any batch workflow saved in the system prior to version 2.92.

- We renamed batch workflow ‘state’ to batch workflow ‘status.’ We also renamed batch workflow ‘tasks’ to batch workflow ‘steps.’ These changes in terminology are reflected throughout the program.
- You now define batch workflow statuses and steps on one centralised batch workflow page.
- We renamed the ‘Available users’ tab to ‘Permissions tab.’ On this tab, you can specify the roles that have access to batches.
- You now select the numbering scheme to use with a batch on the Add a batch template form. In previous versions, the numbering scheme was selected on the Batch Workflow record.
- You now define exception batch numbering options on the Add a batch numbering scheme form. In previous versions, the exception batch numbering options were defined on the Batch Workflow record.

Batch Templates

Once you upgrade to version 2.92, we recommend you review and verify the settings for any batch template saved in the system prior to version 2.92.

- We renamed batch ‘designs’ to batch ‘templates.’ This change in terminology is reflected throughout the program.
- We added a Details pane and additional the columns on the main Batch Templates page.
- To make creating batch templates more intuitive, the Add a batch template screen is now a series of forms designed to walk you through the entire process of creating a batch template.
- We added an Enable auto-save checkbox to the Add a batch template form. Your selection defaults onto the Add a batch form once you select the template you want to use.

- You now select the batch type from a drop-down menu when you create the batch template. In previous versions, you selected the batch type on the Select a Batch Type form.
- The Import-only checkbox was replaced by the Template use field. Depending on the batch type, you can specify if the template should appear in batch entry, import, or both. We recommend you carefully review your batch templates as you make this decision.
- You can now specify commit parameters from the batch template. Keep in mind, the defaults you define do not apply to commit multiple batches.
- On the Available fields page of the Add a batch template form, there is now a ‘Locked’ column to denote columns that are required and cannot be removed. We also added multiple-select and drag and drop functionality.
- Batch template security is now defined on the Set permissions page of the Add a batch template form.

Note: When you create a batch template in version 2.92, you can define the default commit parameters to use when you commit a batch. Please be aware, the default commit parameters you define on the batch template apply only to new batches. Existing batches saved in the system prior to version 2.92 will not adhere to the commit options now defined on the batch template that was used to create the batch. We recommend you review the commit parameters for existing batches before you commit them.

Batch Entry

- We added a Details pane and new filters to the Committed and Uncommitted Batches tabs on the main Batch Entry screen.
- We redesigned the Add and Edit a batch forms to reflect the batch template and numbering scheme enhancements.

Commit Multiple Batches

- We renamed ‘Commit multiple batches processes’ to ‘Multiple batch commit processes.’ This change in terminology is reflected throughout the program.

Commit Batch Form

- We renamed ‘Exception batch name’ to ‘Exception batch number.’
- We changed the commit form to display the batch number that will be created if an exception occurs. If the exception parameters on the numbering scheme are set to ‘Use the next available batch number,’ the system defaults in ‘<Next available batch number>.’

Query

You can now set permissions for smart queries in addition to ad-hoc queries. When you first save or configure the properties of a smart query, the **Allow other users to modify this query** checkbox now appears. To allow all other users to access and manage the query, select this checkbox. To allow only users in specific system roles to access the query, click the new Advanced permissions button. From the Assign query permissions screen, you can grant and deny access by system role as necessary.