

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

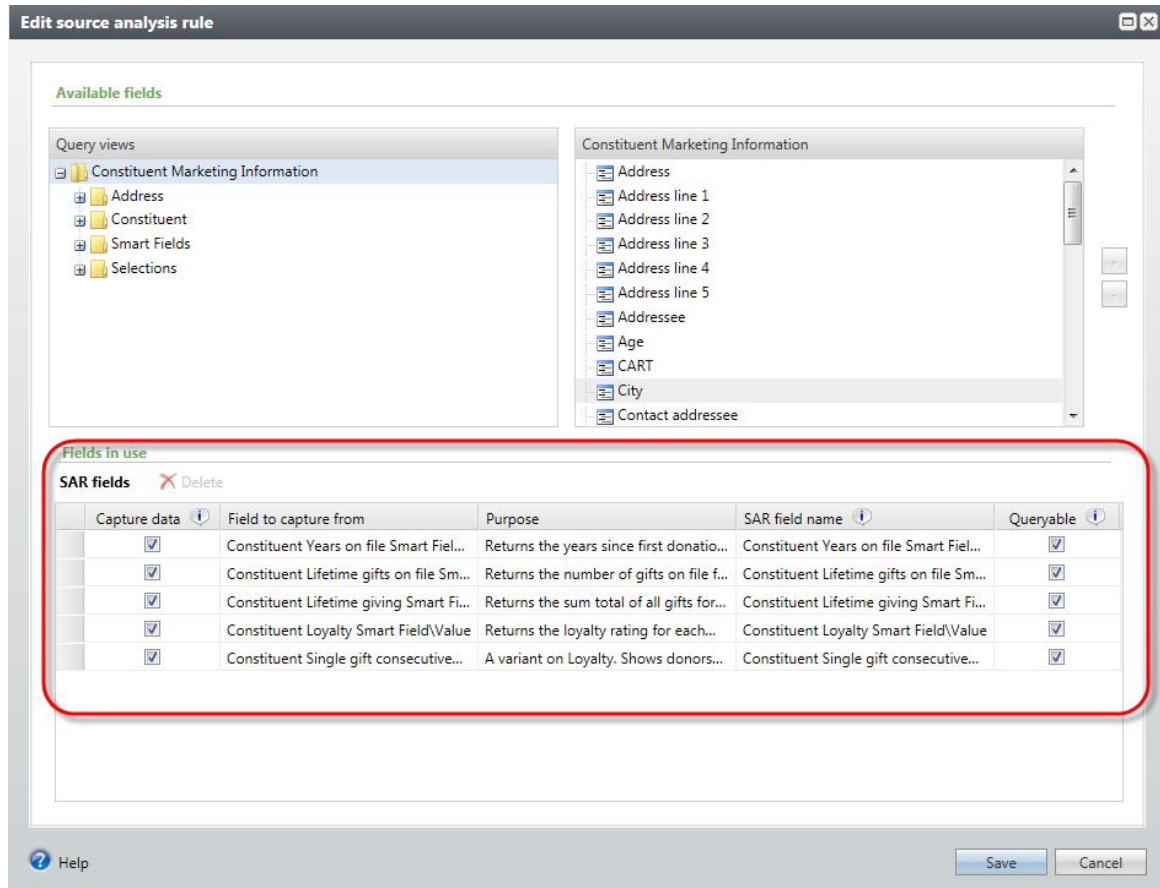
The following *Administration* enhancements are available in **Blackbaud Direct Marketing 3.0**. For more information about these features, see the *Administration Guide*.

Source Analysis Rules

We reorganized and enhanced the Source Analysis Rules tab and editor. Several changes were made to the columns:

- The **Capture data** column indicates if the SAR field is currently active. If you deselect **Capture data** for a field, the program no longer captures its data for reports and queries. However, data from earlier captures is still available.
- **Field name** was renamed **Field to Capture from**.
- To explain why you included a specific field in the source analysis rule, enter a description for the field in the **Purpose** column.
- In the new **SAR field name** column, you can enter a name such as "SAR–Constituent Lifetime Giving" to identify the captured data in reports and queries.

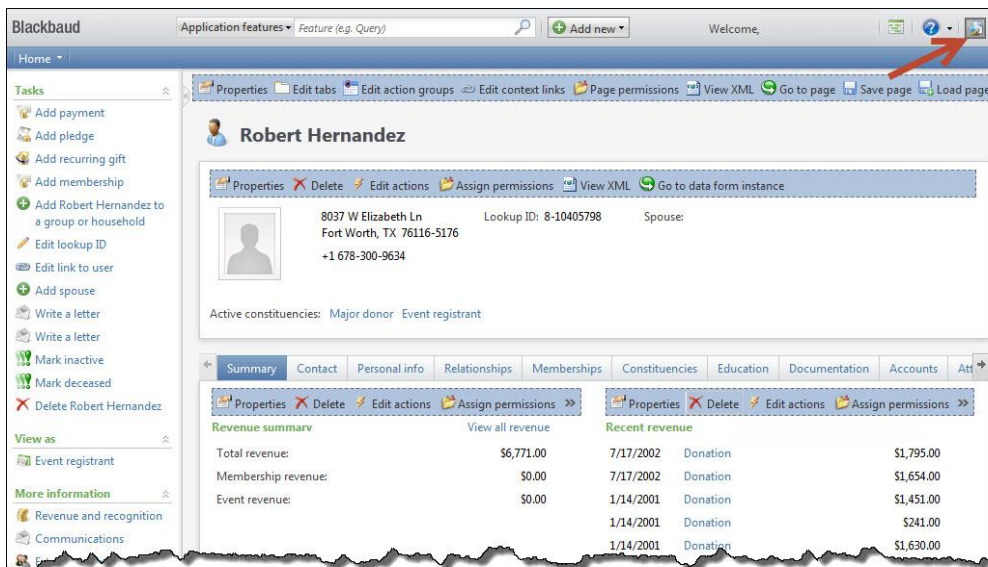
- Use the new **Queryable** column to select whether the SAR field appears in ad-hoc queries. If you use a large number of SAR fields, you can deselect **Queryable** for any fields that you do not need available in queries. If you deselect **Capture Data**, you may leave **Queryable** selected so you can still query historical data.
- You can also delete a SAR field to permanently remove it from all reports and queries.



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*.

- The batch screen menu bar now includes a **Filter** option that allows you to filter a batch by exception type.
- For exception batches, the details pane that expands beneath the selected batch lists the exception types in the batch. Each exception type is a link that allows you to correct the exceptions. In the case of duplicates, the link takes you to the duplicate resolution screen. For other exception types, the link opens the batch with a filter applied to display only rows that contain the selected exception message.
- For exception batches, the details pane that expands beneath the selected batch includes a link to the original batch that generated the exception batch.
- For imported batches, the details pane that expands beneath the selected batch includes a link to the import process that generated the batch.

Batch Numbering Schemes

To keep batch numbers consistent and prevent duplicate batch numbers, you can now apply one numbering scheme to all auto-generated batches, regardless of batch template type. Select a numbering scheme in the grid and click **Use globally**. After you make a numbering scheme "global," all existing and future batch templates use this scheme.



Note: Numbering starts with the next batch number in the global scheme that is not a duplicate of an existing batch. For example, if the next number available in the global scheme is 50, but there are already existing batches using numbers 51 through 120, the global scheme starts numbering at 121 to prevent duplicates.

To turn off the global numbering scheme, select the numbering scheme and click **Do not use globally**. The global numbering scheme is no longer applied to all batches; however, this scheme remains the default on existing batch templates unless a different scheme is selected.

Direct Marketing

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

Marketing Exclusions Report

The Marketing Exclusions Report process runs automatically when you activate or calculate segment counts for a marketing effort. Because processing the report can slow performance, you now have the option to turn it off when not necessary, such as for weekly acknowledgement mailings.

The **Run marketing exclusions report** option appears on the Activation tab of a new effort or on the Edit marketing effort activate process screen for an existing effort. It also appears on the Calculate segment counts screen. **Run marketing exclusions report** is selected by default so the report always processes for an effort unless you clear this checkbox.

The screenshot shows the 'Add direct marketing effort' dialog box with the 'Activation' tab selected. The 'Run marketing exclusions report' checkbox is checked and highlighted with a red circle. The dialog box includes the following elements:

- Tabbed interface: General, Source Code, Universe, Exclusions, Contact Rules, Address Processing, **Activation**, Business Units, KPIs.
- Export marketing effort when activation completes: (unchecked)
- Appeal:
- Refresh segment selections and filters: (unchecked). Description: This option will refresh all selections associated with the universe, exclusions and segments before activation.
- Capture source analysis rule data: (checked). Description: This option will overwrite any previously captured Source Analysis Rule data associated with this marketing effort.
- Run marketing exclusions report: (checked). Description: This option will generate a report with the total number of records excluded from the marketing effort and the reasons for their exclusion.**
- Default export options section:
 - Export description:
 - Mail export definition: (with search and edit icons)
 - Email export definition: (with search and edit icons)
 - Phone export definition: (with search and edit icons)
- Buttons: Help, Save, Cancel.

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

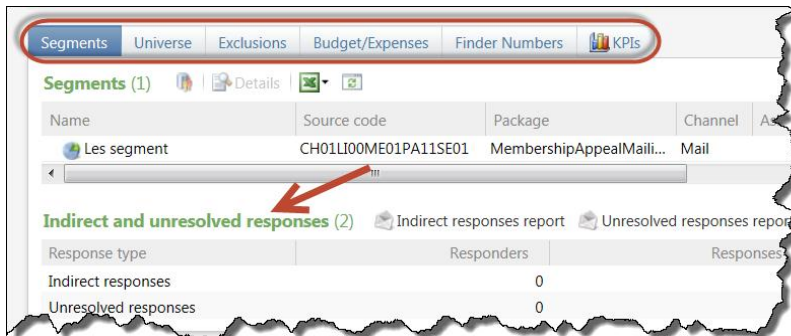
To replace the **Favorites** functionality, we added the **Shortcuts** feature. This new feature creates shortcuts to pages and records that you access frequently. When you specify pages as shortcuts, you can quickly access them from the **Shortcuts** menu on the explorer bar.

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.



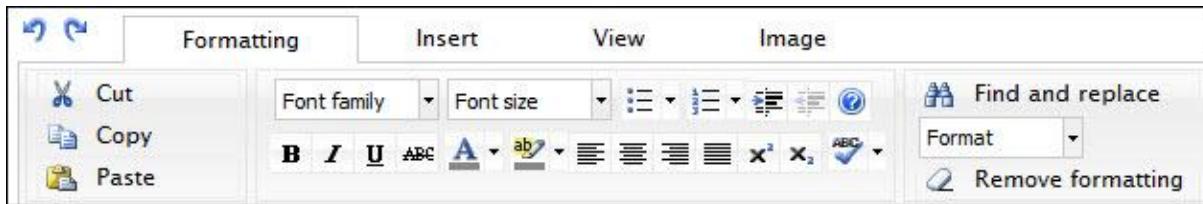
Column Width in Search Screens

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.

HTML Editor Toolbar

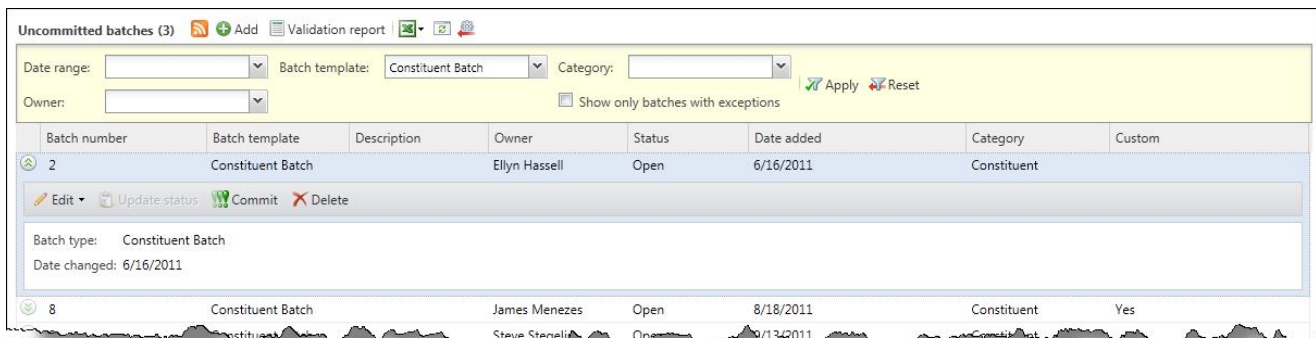
Use the new HTML editor ribbon toolbar to quickly find the commands you need when you format content, such as email messages. The tasks on the toolbar ribbon are grouped together under tabs for **Formatting**, **Insert**, **View**, and **Image**. If you insert a table, an additional tab for **Table** displays when you select the table.



Data List Enhancements

To help ease data management, we have made several enhancements to the data lists that appear throughout the program.

Previously, the actions you performed on a data list and its items appeared in the upper right corner of the action bar at the top of the data list. To provide quicker and easier access, actions that affect the data list as a whole, such as **Add** and **Filters**, now appear in the upper left of the action bar, immediately after the title of the data list. Actions that affect only an item in the data list, such as **Edit** or **Delete**, now appear with each item. To perform these actions on an item, simply expand or right-click on the item's row in the data list.



With some data lists, you can select and act on multiple items at one time. In these data lists, a column of checkboxes appears so you can select which items to manage. When you select multiple items, the applicable actions, such as **Delete**, appear at the top of the data list, just below the action bar.

From all data lists, you can now export the data as a comma-separated values (CSV) file or a Microsoft *Excel* spreadsheet. On the action bar, click **Export list** and select **Download to CSV** or **Download to XLSX**.

Import

We made several enhancements to the import process to reduce the amount of time necessary to configure imports and resolve data issues.

For more information about these features, see the *Batch and Import Guide*.

Add Import Process Screen

We updated the Add import process screen to include a series of forms that walk you through the steps of creating an import process. You can use the **Previous** and **Next** buttons to move from form to form, or click the links at the top of the screen. A blue circle indicates the form you are currently working on. If you have not

entered required information on a form, a yellow warning appears. To add an import process, click **Add** on the Import page.

Add import process

Configure import file | Map fields | Set options

Name:

Description:

Site:

Batch owner:

Batch template: Constituent Update Batch

How often will you use this import and where is the file stored?

Import type: Once Recurring First row is header

Import source:

File:

Tips
If you choose a recurring import type, only SFTP import sources are available for selection.

Help Previous Next Save Cancel