Marketing Efforts Guide

11/08/2020Blackbaud Direct Marketing 4.0 Marketing Efforts US

MarketingEfforts-2016

Contents

Communications Configuration

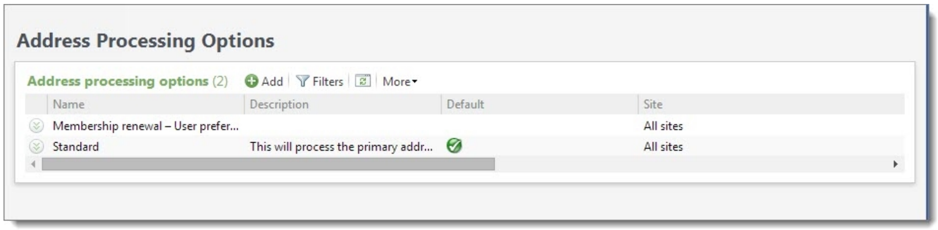
Before your organization creates and sends communication efforts, set configuration options for *Marketing and Communications*. You can access these options from the Marketing and Communications page, under **Configuration**.

Address Processing Options

On the Address Processing Options page, you can manage sets of address processing options for your various marketing efforts and correspondence. Address processing options determine which constituent address (home, business, summer home, etc.) to use for a communication effort. For example, you can create a set of address processing options for your holiday appeal that specifies to use the mail preferences from constituent records and to use seasonal addresses when available. For each set of address options, you can choose which address to use for individuals, organizations, and households/groups.

When you run a communication effort process, the program first applies exclusions (deceased, inactive, solicit codes, exclusion selections, previous mailings, etc.) to the selection of records included in the effort. The program then checks address processing options (mail preferences set on the Communications tab of constituent records or addresses selected for the **1st choice** and **2nd choice** fields), as well as the **Do not send** checkbox on mail and email addresses. If no valid address is found, the program either removes the constituent from the effort or includes the constituent without an address .

To access the Address Processing Options page from *Marketing and Communications*, click **Address processing options** under **Configuration**.

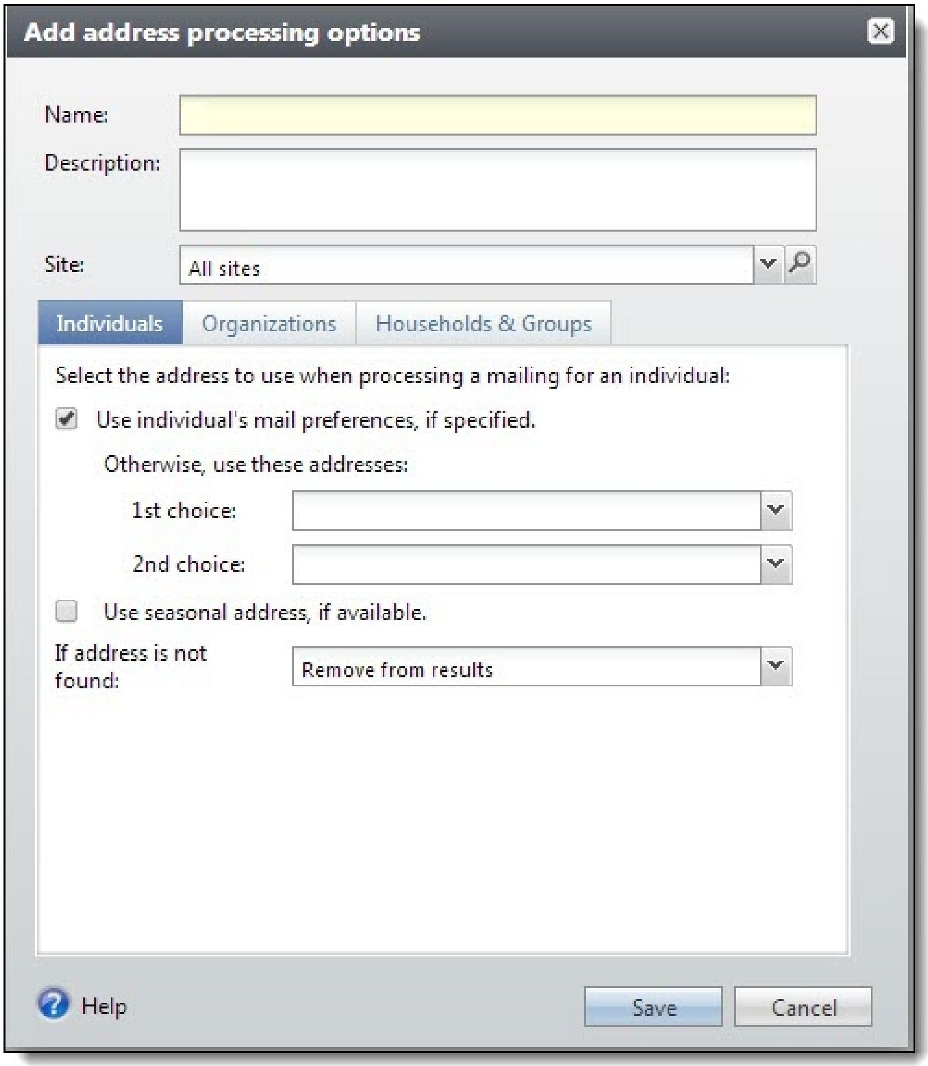


Add Address Processing Options

When you add an address processing option, you can select whether to use the address types specified by the mail preferences from individual, household, and group constituents included in the communication effort. You can also select backup addresses to use if no mail preferences are defined on the constituent record.

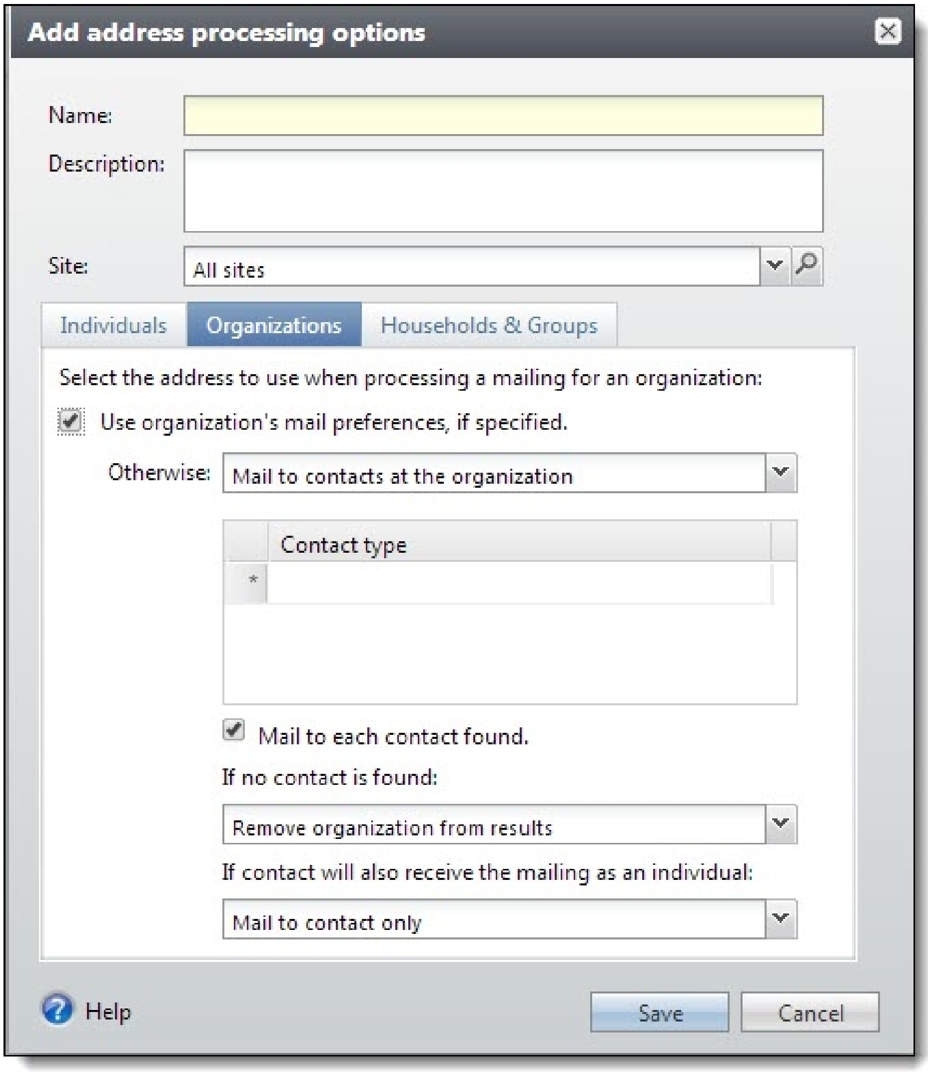
Add an address processing option

1. From *Marketing and Communications*, click **Address processing options** under **Configuration**. The Address Processing Options page appears.
2. In the **Address processing options** grid, click **Add**. The Add address processing options screen appears.



3. Enter a unique name and description to help identify the address processing option. For example, enter the type of communication to use this option.
4. If your organization uses site security, in the **Site** field, select which site to associate with the address processing option. Only users associated with the selected site can use this option.
5. Select the Individuals tab to choose the address types to use for individual constituents included in the communication effort.
   a. To use the mail preferences from individual constituent records, select **Use individual's mail preferences, if specified**.
   b. Under **Otherwise, use these addresses**, select the address types to use as an alternative to mail preferences or when mail preferences are not set up for an individual.
   c. To use seasonal addresses for individuals who have them, select **Use seasonal address, if available**.
   d. In the **If address is not found** field, select whether to include individuals without addresses from the communication output.

6. Select the Organizations tab to choose the address types to use for organization constituents included in the communication effort.



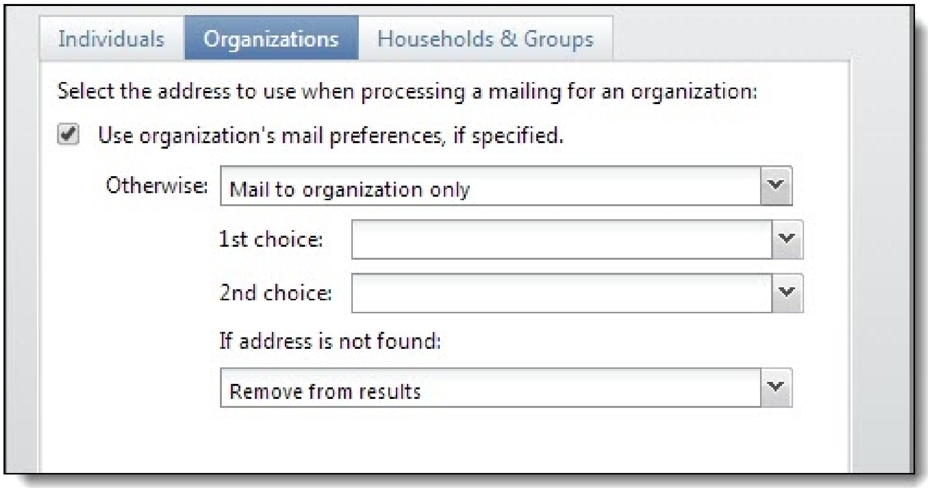
   a. To use the mail preferences from organization constituent records, select **Use organization's mail preferences, if specified**.

   b. In the **Otherwise** field, select the address to use as an alternative to mail preferences or when mail preferences are not set up for an organization.

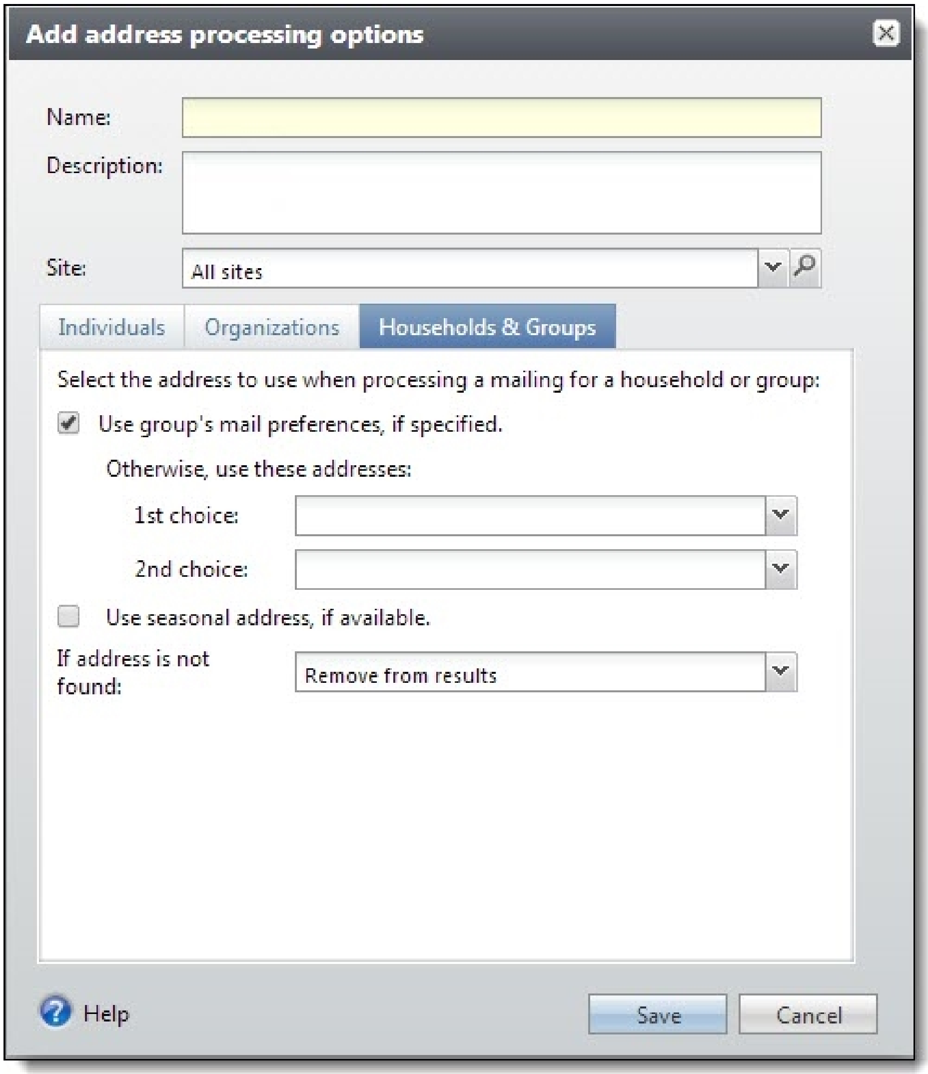
      If you select "Mail to contacts at the organization," in the **Contact type** box, select the type of contacts to receive the communication effort, in order of priority. To include contacts that meet all selected types, select **Mail to each contact found**. In the **If no contact is found** field, select whether to include or remove organizations without contacts from the communication effort output. In the **If contact will also receive the mailing as an individual** field, select whether to include the contact in the communication effort as a contact, an individual, or both.

Note: If you do not select **Mail to each contact found**, the communication effort includes only contacts of the type listed first in the **Contact type** box.

If you select "Mail to organization only," in the **1st choice** and **2nd choice** fields, select the address types to use. In the **If address is not found** field, select whether to include organizations without addresses from the communication output.



7. Select the Households & Groups tab to choose the address types for constituent groups and households included in the communication effort.



a. To use the mail preferences from group and household constituent records, select **Use group's mail preferences, if specified**.

b. Under **Otherwise, use these addresses**, select the address types to use as an alternative to mail preferences or when mail preferences are not set up for a group or household.

c. To use seasonal addresses if available for a household, select **Use seasonal address, if available**.

d. In the **If address is not found** field, select whether to include groups and households without addresses from the communication output.

8. Click **Save**. You return to the Address Processing Options page.

Set an Address Processing Option as the Default

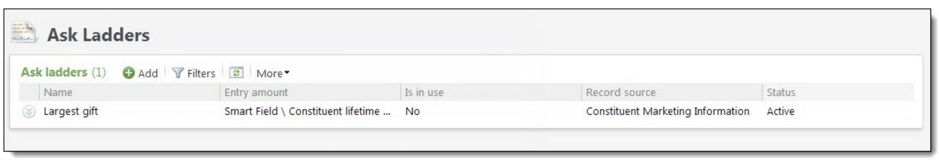
On the Address Processing Options page, you can select a default address processing option. This address processing option is selected by default anywhere you can choose an address processing option for a communication effort.

Under **Address processing options**, select the option to set as the default and click **Mark as default**. In the grid, the **Default** column displays a checkmark to indicate which addressing processing option is the default.

Ask Ladders

Ask ladders (also known as ask amounts or ask strings) are sets of fixed or calculated ask amounts based on a constituent's giving history. You assign ask ladders to segments in a marketing effort to ensure each recipient receives the appropriate ask amount on their marketing effort. For example, if a donor's last gift was $50, on the appeal mailing, you can suggest they give $75, $100, or $125. If another donor's last gift was $150, the same ask ladder would suggest they give $225, $300, or $375.

On the Ask Ladders page, you can manage the ask ladders your organization uses. To access this page from *Marketing and Communications*, click **Ask ladders** under **Configuration**.



Under **Ask Ladders**, you can view the name, entry amount, and record source of each ask ladder. You can also view whether an ask ladder is active or in use. To include only ask ladders with a specific status in the grid, click **Filter**, select whether to view inactive or active ask ladders, and click **Apply**. To update the information in the grid, click **Refresh List**.

Note: From a marketing effort, you can create ask ladder overrides to apply different ask ladders to selections than the one specified for their segment.

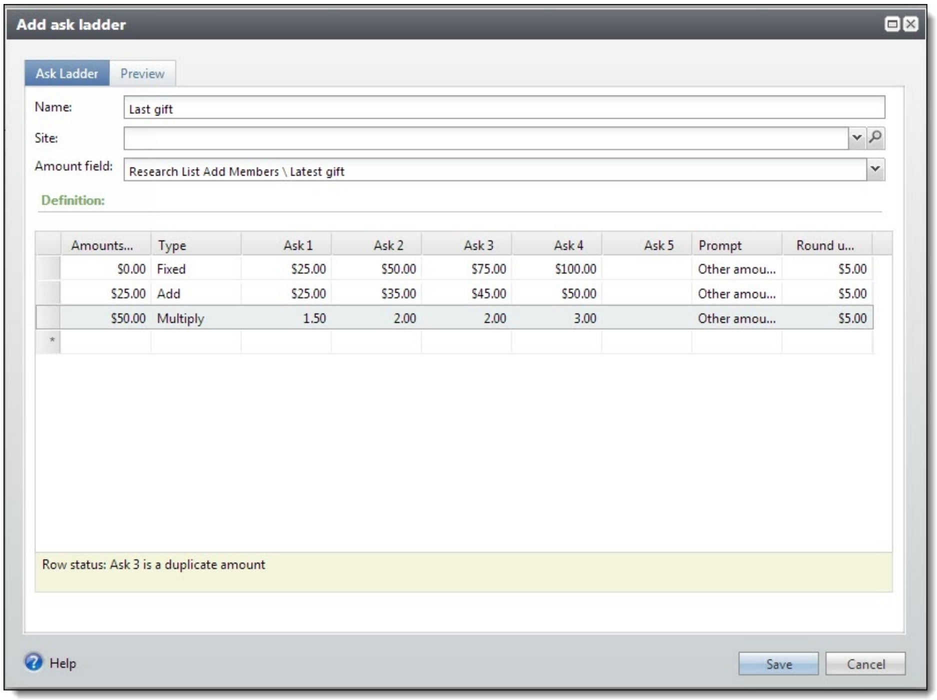
Add Ask Ladders

When you create an ask ladder, you define the calculations for ask amounts based on an "entry amount" value from the constituent's giving history, such as the most recent or largest gift amount. The parameters you define for an ask ladder determine the lower and upper limits of an entry amount range and the ask amount calculations that apply to constituents who fall within that range. To calculate ask amounts, the program adds a specified amount to the entry amount, or multiplies the entry amount by a specified value. For fixed ask ladders, you define the ask amounts used for all constituents. This table demonstrates each type of ask ladder (Add, Multiply, and Fixed) and how ask amounts are calculated for each type.

Amounts at or above	Type	Ask 1	Ask 2	Ask 3	Round up to	Ask Ladder
0 (Entry amount range = $0 - 24.99)	Fixed	25	50	75	1	$25, $50, $75 Applies to all entry amounts less than $25
25 (Entry amount range = $25 - 49.99)	Add	25	35	45	5	$25 (+25, +35, +45) = $50, $60, $70 $30 (+25, +35, +45) = $55, $65, $75 $35 (+25, +35, +45) = $60, $70, $80 $40 (+25, +35, +45) = $65, $75, $85 $45 (+25, +35, +45) = $70, $80, $90
50 (Entry amount range = $50+)	Multiply	1.5	2	2.5	10	(50*1.5, 50*2, 50*2.5) = $75, $100, $125 (60*1.5, 60*2, 60*2.5) = $90, $120, $150 (70*1.5, 70*2, 70*2.5) = $105, $140, $175 Etc.

Add an ask ladder

1. From *Marketing and Communications*, click **Ask ladders** under **Configuration**. The Ask Ladders page appears.
2. Click **Add**. The Add ask ladder screen appears.



3. On the Ask Ladder tab, enter a unique name to help identify the ask ladder.
4. If you have multiple record sources defined, the **Record source** field appears. Select the record source to use for this ask ladder.
5. If your organization uses site security, in the **Site** field, select which site to associate with the ask ladder. Only users associated with the selected site can use this ask ladder.
6. In the **Amount** field, select the type of entry amount to use for this ask ladder. The values available for this field are smart fields or amount fields associated with the record type, such as Last Gift, Largest Gift, or Average Gift. To create an ask ladder with fixed values, select "<none>."

   For information about smart field ask ladder values, see Smart Fields for Ask Ladders on page 25.
7. Under **Definition**, enter the parameters for ask ladder calculations. Each row defines the lower and upper limits of an entry amount range and the ask amount calculations that apply to constituents who fall within that range.
   a. In the **Amounts at or above** column, enter a value for the lower limit of an entry amount range. For example, if you enter 0, 25, 50, 75, and 100 in the **Amounts at over above** column, the entry amount ranges for the ask ladder are:

      $0 - 24.99

      $25 - 49.99

      $50 - 74.99

      $75 - 99.99

      $100+

Note: To ensure that each constituent receives an ask ladder, we recommend that you use $0 as the first value in the **Amounts at or above** column. If you do not have a constituent's giving history, such as when the constituent comes from an acquisition list or has a constituency of Relation only, then their entry amount is considered $0.

b. In the **Type** column, select the method to calculate ask amounts.

"Add" — Select this option to add the values entered in the **Ask** columns to entry amounts.

"Multiply" — Select this option to multiply the entry amount by the amounts entered in the **Ask** columns.

"Fixed" — Select this option to use the values entered in the **Ask** columns for all constituents in this entry amount range. Fixed ask ladders are useful for acquisition mailings where there is no history of prior giving.

c. In the **Ask** columns, enter values according to the calculation method selected in the **Type** field.

If you select "Add," enter the values to add to the entry amount, such as 50, 75, and 100. For a constituent with an entry amount of $30, the ask ladder included on the marketing effort would be $80, $105, $130 (if rounded to 1 or 5).

If you select "Multiply," enter the values to multiply by the entry amount, such as 1.5, 2, and 2.5. For a constituent with an entry amount of $30, the ask ladder included on the marketing effort would be $45, $60, $75 (if rounded to 1 or 5).

If you selected "Fixed," enter the fixed values to use for the entry amount range, such as 50, 75, 100. For all constituents in the entry amount range, the ask ladder included on the marketing effort would be $50, $75, and $100.

d. In the **Prompt** field, enter the text to appear on the marketing effort for write-in ask amounts, such as "Other Amount."

e. In the **Round up to** field, enter a whole number to round up calculated ask amounts. For example, if you enter 10, the program rounds all calculated ask amounts up to the tens place value.

Note: If you select <none> in the **Entry amount** field, you can define only one row in the grid because that ask ladder is used for all constituents included in the marketing effort.

8. To test the parameters of calculated ask amounts, select the Preview tab.

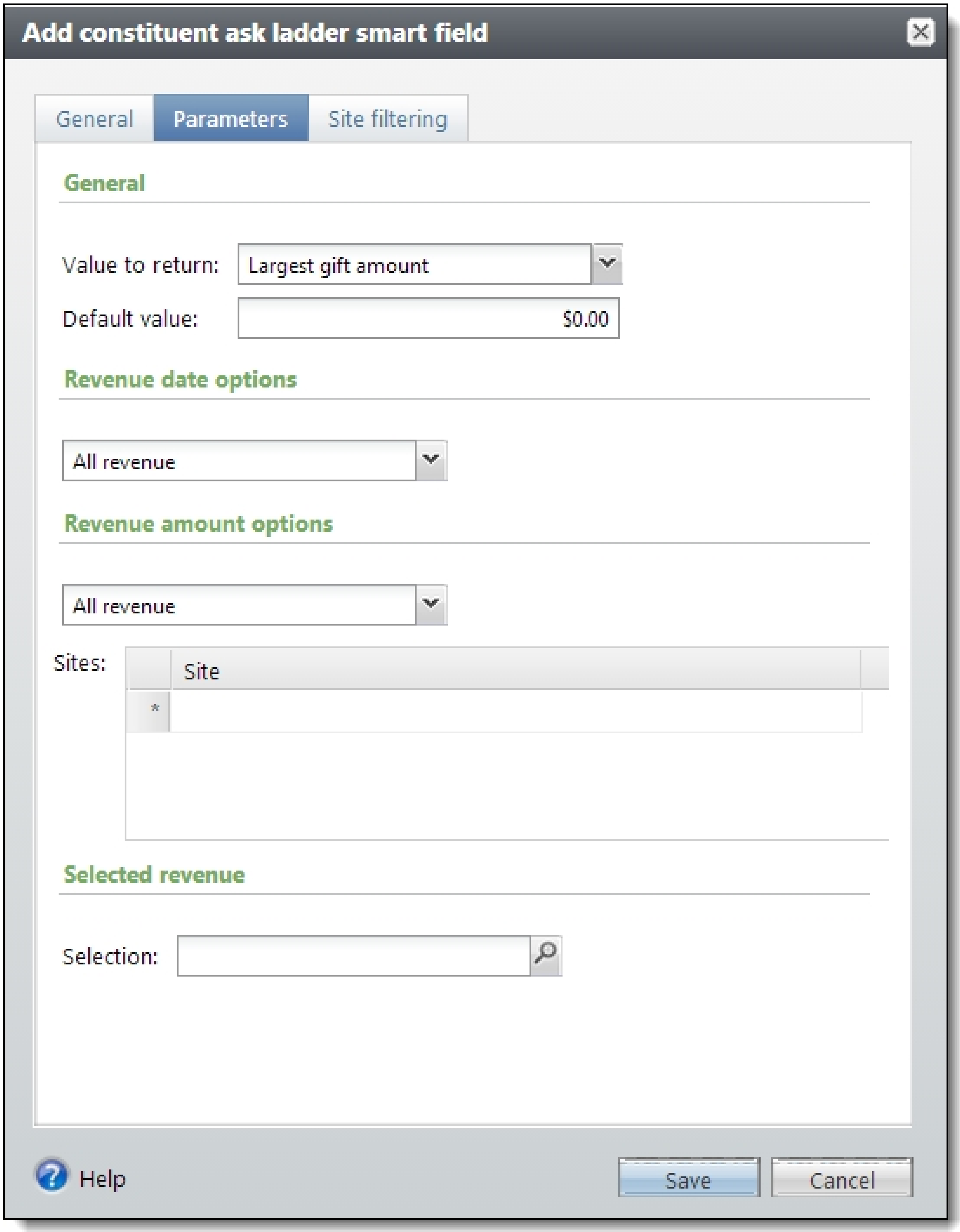
   a. In the **Entry amount range** field, select an entry amount range based on the values entered in the **Amounts at or above** column. The grid displays the calculated ask amounts for all entry amounts included in the range.

   b. In the **Interval** field, select the place value to round to. Ask amounts update in the grid based on rounding.

9. Click **Save**. You return to the Ask Ladders page.

Smart Fields for Ask Ladders

The **Constituent Ask Ladder** smart field calculates values for ask ladder entry amounts based on criteria you define. The calculation considers only revenue that falls within the date and amount parameters you set on the Parameters tab of the Add constituent ask ladder smart field screen. For more information about smart fields, see the *Administration Guide*.



The table below explains each field on the Parameters tab:

Screen Item	Description
Value to return	Select “Largest gift amount,” “Smallest gift amount,” “Last gift amount” (the most recent gift), or “Average gift amount.”
Default value	Enter the entry amount to use when a value can not be calculated.
Revenue date options	Select “All revenue,” “This calendar year,” “Past {n} months.” or “Specific range.” If you select “Past {n} months,” enter the number of months. If you select “Specific range,” enter a starting and ending date.
Revenue amount options	Select “All revenue” or “Specific range.” If you select “Specific range,” enter a dollar amount range in the fields.
Selected revenue	Select a revenue selection from *Query*. Use this field for more specific filtering; for example, finding revenue based on gift type.

Communication Templates

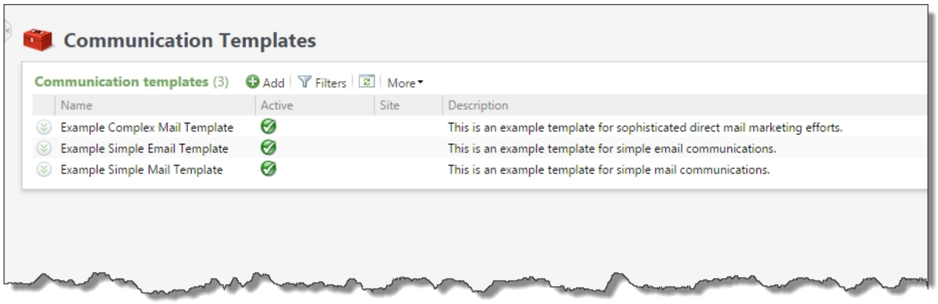
Use communication templates to streamline and standardize the creation process for direct marketing efforts. Administrators can build templates that include only the features and options your organization uses for direct marketing efforts. To maintain consistency and simplify setup, you can lock settings on a template so they cannot be viewed or edited by users who create marketing efforts from the template. You can also enter default values for fields on a template but leave them unlocked so users can change the values on marketing efforts.

Communication templates define default settings for direct marketing efforts and simplify the setup process by including only the options you need to create the effort. With communication templates, you can create direct marketing efforts that are as simple or complex as your organization needs. You can choose which features to make available for a direct marketing effort. For example, if your organization does not track KPIs, you can leave the KPIs grid blank and lock it so the KPIs tab is completely hidden for users who create marketing efforts based on that template.

The program provides 3 template examples you can evaluate and modify to meet your organization’s needs. The program also includes an example name pattern used by the simple email and mail templates.

- Example Complex Mail Template: This is an example for sophisticated direct mail marketing efforts. All features are turned on and unlocked.
- Example Simple Email Template: This is an example for simple email communications. Features not typically used with email efforts are turned off. Other options, such as activation and export formats, are set to use the program defaults and locked.
- Example Simple Mail Template: This is an example for simple mail communications. Features not typically used with simple mailings are turned off. Other options, such as activation and export formats, are set to use the program defaults and locked.

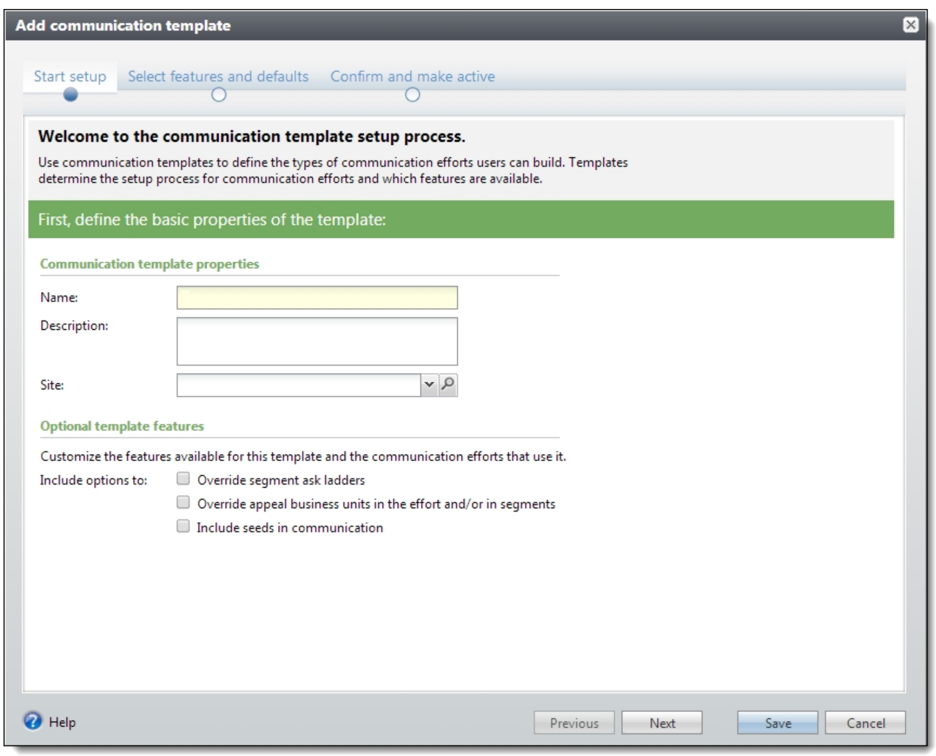
To access the Communication Templates page from *Marketing and Communications*, click **Communication templates** under **Configuration**. From the Communication Templates page, you can create new templates and manage existing ones.



Add Communication Templates

From the Marketing and Communications page, click **Communication templates** under **Configuration**. The Communication Templates page appears.

Click **Add**. The Add communication template screen appears. On this screen is a series of forms that walk you through the communication template setup 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.

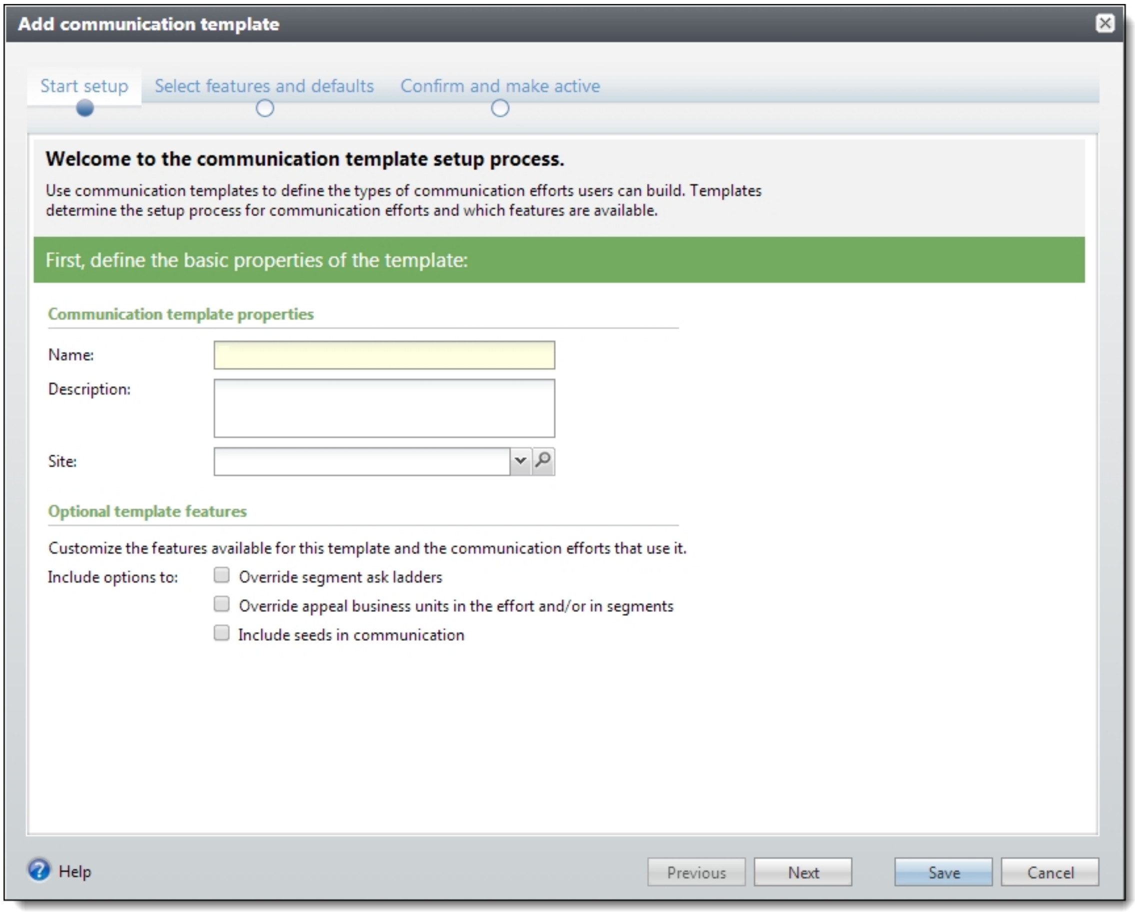


Start Setup

On the Start setup form, define basic properties for the communication template.

Define template properties on the Start setup form

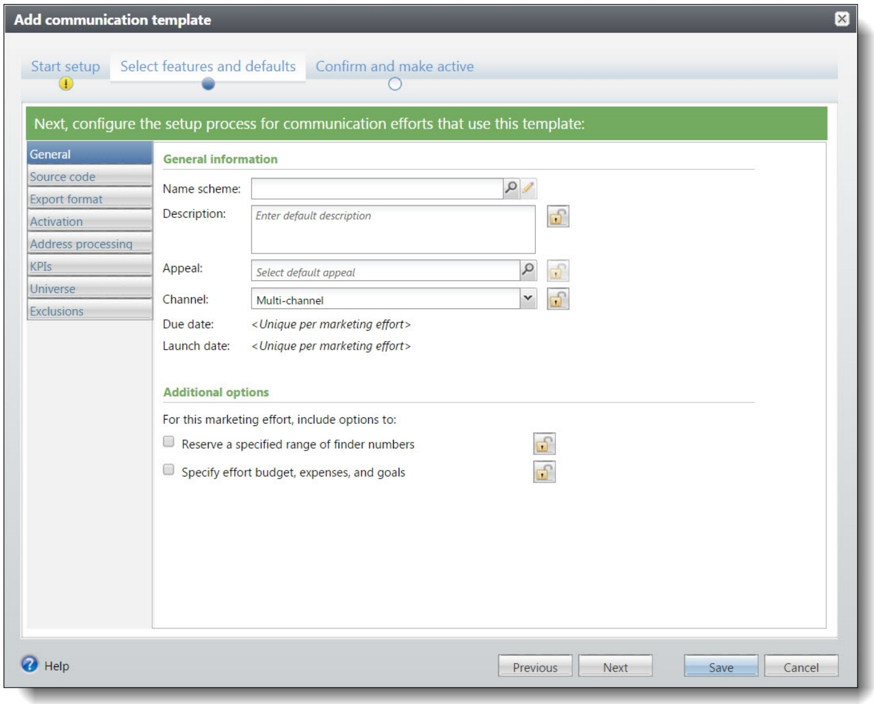
1. From the Communication Templates page, click **Add**. The Add communication template screen appears displaying the Start setup form.



2. Under **Communication template properties**, enter a name and description for the communication template.
3. If your organization uses site security, in the **Site** field, select which site to associate with the template. Only users associated with the selected site can access the template.
4. Under **Optional template procedures**, select additional features to configure for the template. If your organization does not use these features, leave the options unmarked to keep the tabs hidden on the template.
   - **Override segment ask ladders**—Displays the Ask Ladders tab.
   - **Override appeal business units in the effort and/or in segments**—Displays the Business Units tab.
   - **Include seeds in communication**—Displays the Seeds tab.
5. Click **Next** to continue the setup process or **Save** to save and close the communication template.

Select Features and Defaults

On the Select features and defaults form, configure features and settings for the communication template. This form is divided into a series of tabs you can navigate between to set up various parts of the template.



On each tab of the Select features and defaults form, you can:

Enter Default Values

Enter default values for fields on marketing efforts created from the template. For example, you can enter a default source code for marketing efforts.

Lock and Unlock Fields

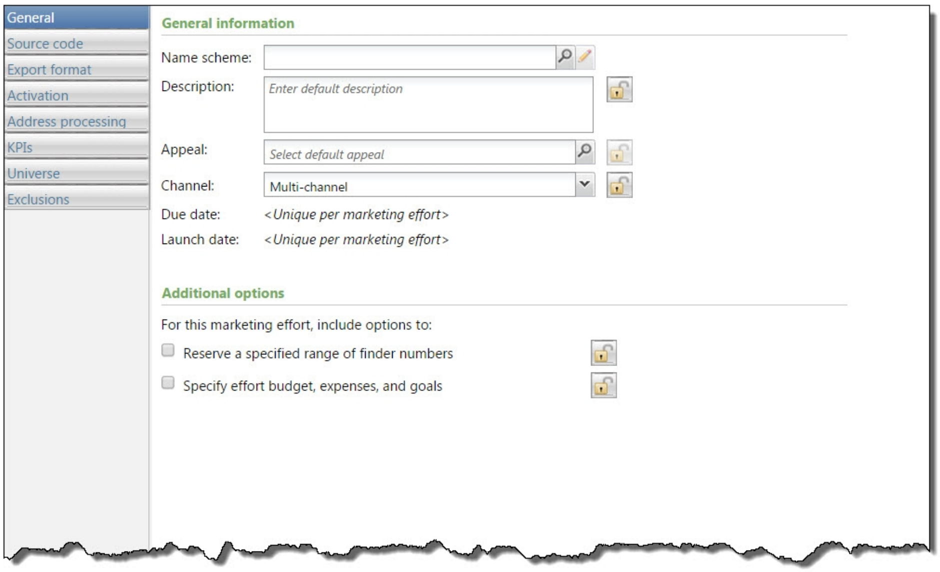
You can choose which fields are editable by users who create marketing efforts from the template. If a field is unlocked, users can edit its value on the marketing effort. If a field is locked, the field is hidden on the marketing effort and the value selected on the template is always used. For example, if you lock the appeal selected for a template, users cannot edit that appeal on marketing efforts created from the template. If you lock all fields and options on a tab, in most cases that tab will not appear at all on marketing efforts created from the template. To display hidden tabs as well as the values defined for locked fields and options, users can click **Show locked fields** on the marketing effort.

General Tab

On the General tab, define basic information for marketing efforts created from the communication template.

Define general information for marketing efforts on the General tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the General tab.



3. In the **Name pattern** field, select a name pattern or create a new one. For more information, see Communication Name Patterns on page 46.
4. To add a default description that identifies marketing efforts created from the template, enter it in the **Description** field.
5. In the **Appeal** field, select the appeal to associate with marketing efforts created from the template.
6. In the **Channel** field, select the means of distribution for marketing efforts created from the communication template—mail, email, phone, or multi-channel.

Note: You can lock individual fields and options on the General tab. Users who create marketing efforts from the template can view values for locked fields, but they cannot edit them.

7. **Due date** and **Launch date** are completed by the users who create marketing efforts from the template. Use these fields for planning and tracking purposes. For example, **Due date** is typically the date by which the marketing effort must be completed with segment counts for the vendor or printing house. **Launch date** is the date to send the marketing effort to the post office.
8. If your organization uses finder numbers, you can select **Reserve a specified range of finder numbers** to allow users to reserve a range of finder numbers for marketing efforts created from the template. Finder numbers are assigned to each potential donor included in the marketing effort when you run the Calculate segment counts process. If you do not select this option, the Finders Numbers tab is hidden on the marketing effort. For more information about finder numbers, see Reserve Finder Numbers on page 127.

9. To use the budgeting tools for marketing efforts created from the template, select **Specify effort budget, expenses, and goals**. When you select this option, users can enter the amount budgeted for the effort and quickly view whether the effort exceeds the budget. If you do not select this option, the Budgets/Expenses tab is hidden on the marketing effort. For more information about budgets and expenses, see Troubleshoot Budget/Expenses for Marketing Efforts on page 129.

Note: If you leave the **Reserve a specified range of finder numbers** or **Specify effort budget, expenses, and goals** options unlocked on the template, users can set these options on the Create effort form when they create efforts with this template. If you unmark and lock these options, the options and tabs are completely hidden on all marketing efforts created from this template.

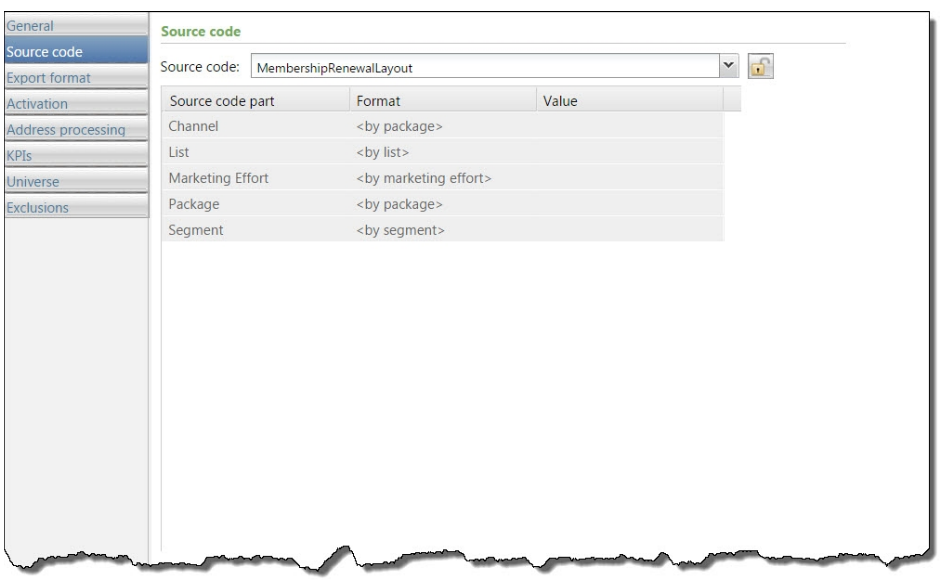
10. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

Source Code Tab

On the Source code tab, select the source code layout to apply to marketing efforts created from the communication template.

Define source code information for marketing efforts on the Source code tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the Source code tab.



3. In the **Source code** field, select a source code layout. The grid displays the source code parts defined for the selected layout.

   Source code layouts are configured from the Source Codes page in *Marketing and Communications*. For more information, see Manage Source Codes on page 309.

Note: You can lock the source code layout so it cannot be changed on marketing efforts created from the template. However, if the layout includes user-defined source code parts, users can enter or select values for those parts on the marketing effort. To automate the source code on marketing efforts created from a template, select **Automatically increment source code values during data entry** on the source code parts for the template and tell users not to edit the resulting source code on the marketing effort.

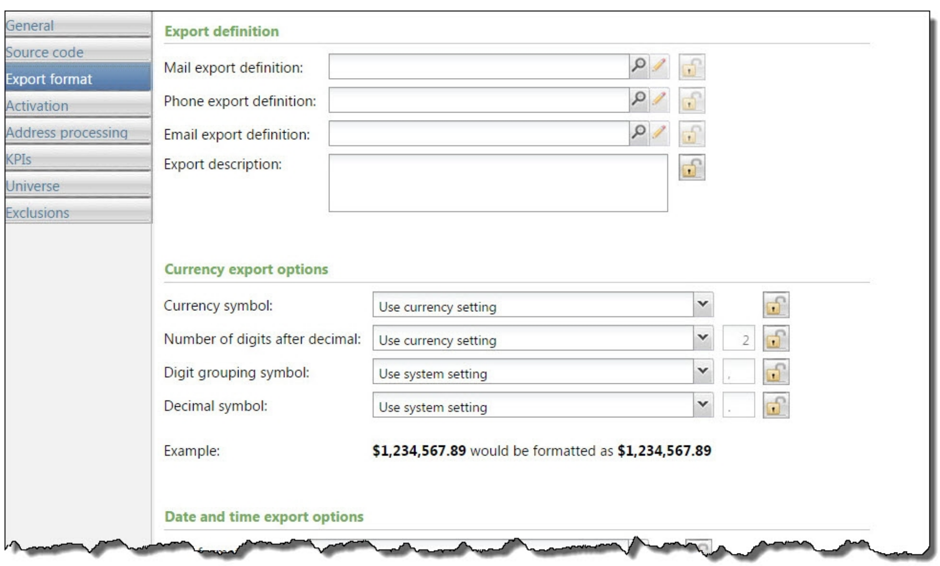
4. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

Export Format Tab

On the Export format tab, specify how to format exports for marketing efforts created from the communication template.

Define export format information for marketing efforts on the Export format tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the Export format tab.



3. Under **Export format**, select an export definition for the mail, phone, and/or email channel. These definitions are used for any packages assigned to the marketing effort that do not have an export definition defined already.

Tip: If you select **Export marketing effort when activation completes** on the template or marketing effort, we recommend that you always add export definitions to use as defaults. While export definitions are not required on marketing efforts, if you include packages without export definitions, the marketing effort will not export automatically when activated. For more information about export definitions, see Export Definitions on page 370.

In the **Export description** field, you can enter a description that identifies the export process.

4. Under **Currency export options**, you can specify how to format currency in the export file.
   a. **Currency symbol**: Select the currency symbol to use. You can choose one of these options:

Use currency setting — Uses the currency setting you selected for the currency. This can be the ISO code, symbol, or both depending on the default currency type for the region.

Display ISO code — Uses the ISO code associated with the currency.

Display symbol — Uses the currency symbol associated with the currency.

Display no symbol — Uses no currency symbol.

b. **Number of digits after decimal**: Select the number of digits to use after decimals. You can choose one of these options:

Use currency setting — Uses the number of digits associated with the currency.

Use custom value — Uses the number of digits you enter in the field.

c. **Digit grouping symbol:** Select the digit grouping symbol to use. You can choose one of these options:

Use system setting — Uses Windows Region and Language settings.

Display space — Uses a blank space rather than a symbol.

Display custom symbol — Uses the custom symbol you enter in the field.

Display no symbol — Digits are not grouped.

d. **Decimal symbol:** Select the decimal symbol to use. You can choose one of these options:

Use system setting — Uses Windows Region and Language settings.

Display space — Uses a blank space rather than a symbol.

Display custom symbol — Uses the custom symbol you enter in the field.

5. Under **Date and time export options**, select how to format dates and times in the export.

a. **Date format:** specify the format to use to display complete dates in the exported data. You can select the format from the drop-down list or enter date specifiers to create a new format.

Note: Marketing efforts are exported as CSV or XLSX output files and formatted as specified. For example, if you open the CSV file in a text editor, you can see dates in the date format you specified. However, if you open the CSV file in *Excel*, *Excel* tries to recognize what the different fields and values represent and format them according to your system date settings, which may not match the date format you specified.

b. **Fuzzy date format:** Specify the format to use to display incomplete, or fuzzy, dates in the exported data. You can select the format from the drop-down list or enter date specifiers to create a new format.

c. **Month/day format:** Specify the format to use to display dates that include only the month and day in the exported data. You can select the format from the drop-down list or enter date specifiers to create a new format.

d. **Hour/minute format:** Specify the format to use to display times in the exported data. You can select the format from the drop-down list or enter time specifiers to create a new format. You cannot include seconds or timezone offsets in the format.

6. Under **Line break character options**, select the line break character(s) to use in export files for letter merges and communications exported to CSV:

a. **Unchanged:** Displays the line spacing of the export file in the line spacing of the output.
b. **CR:** Displays carriage return breaks in the line spacing of the output.
c. **LF:** Displays line feed breaks in the line spacing of the output.
d. **CR+LF:** Displays both carriage return breaks and line feed breaks in the line spacing of the output.

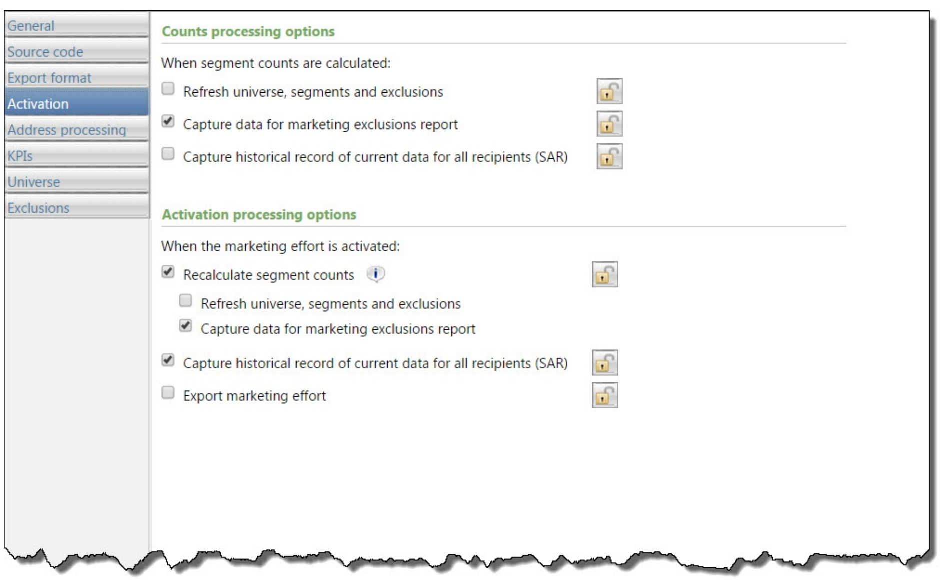
7. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

Activation Tab

On the Activation tab, select which tasks occur when a user activates a marketing effort created from the communication template.

Define activation tasks for marketing efforts on the Activation tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the Activation tab.



3. Under **When generating counts for a communication, which actions would you like to perform?**, select which actions should occur as part of the Calculate segment counts process prior to activation.

- **Refresh all selections used in the communication**: Select this option to refresh all selections associated with the marketing effort, including those associated with the universe, exclusions, and segments.
- **Generate data for marketing exclusions report**: Select this option to capture data for the marketing exclusions report before you activate the effort. Running this report can hinder performance so you may want to turn if off for certain efforts, such as weekly acknowledgement mailings.

- **Capture source analysis rule (SAR) data for all recipients**: Select this option to snapshot donor attributes as defined by your source analysis rules. For more information about source analysis rules, see the *Administration Guide*.

4. Under **When activating a communication, what actions would you like to perform?**, select which actions should occur as part of the activation process.
   - To run the calculate segments counts process again after activation, select **Recalculate segment counts**. When you select **Recalculate segment counts**, you can also select which actions should occur as part of the refresh.
   a. **Refresh all selections used in the communication**: Select this option to refresh all selections associated with the marketing effort, including those associated with the universe, exclusions, and segments. Because segments and selections are refreshed from ad-hoc queries, you may want to turn this option off for some marketing efforts to avoid performance issues.
   b. **Generate data for marketing exclusions report**: Select this option to capture data for the marketing exclusions report before you activate the effort. Running this report can hinder performance so you may want to turn if off for certain efforts, such as weekly acknowledgement mailings.
   - To snapshot donor attributes as defined by your source analysis rules, select **Capture source analysis rule (SAR) data for all recipients**. For more information about source analysis rules, see the *Administration Guide*.
   - To export the marketing effort automatically when activated, select **Export the communication**.
5. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

Address Processing Tab

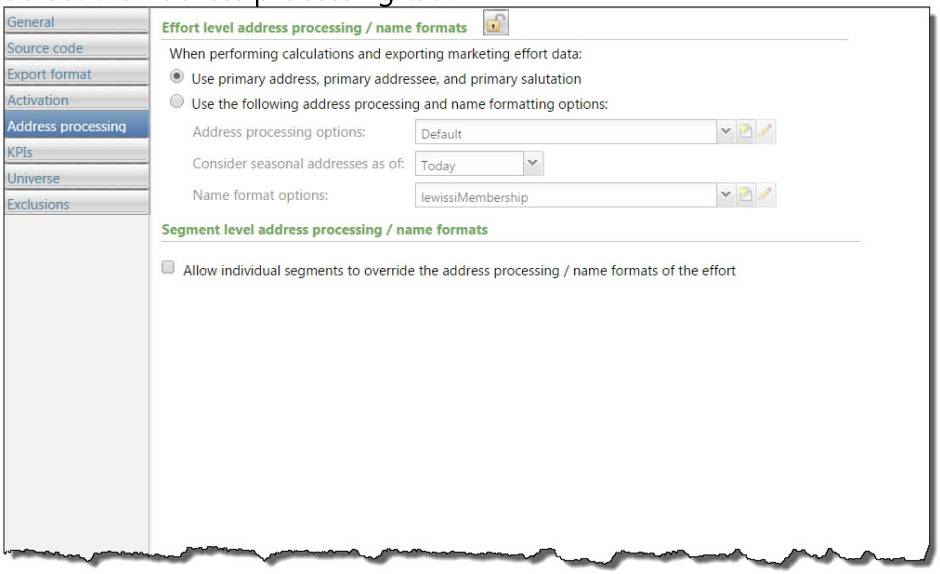
On the Address processing tab, select the address processing and name format options to use for marketing efforts created from the communication template.

> ***Note:*** Configure name format and address processing options in *Marketing and Communications*, under **Configuration**. For more information, see Address Processing Options on page 16.

Define address processing and name format options for marketing efforts on the Address processing tab

1. From the Add a communication template screen, select **Select features and defaults**.

2. Select the Address processing tab.



3. Under **Effort level address processing/name formats**, select which name format and address processing options to use:

- **Use primary address, primary addressee, and primary salutation**—Select this option to use the primary address, addressee, and salutation selected for records included in the marketing effort. If a constituent has no primary address, primary addressee, or primary salutation, then the record is exported with a blank address, addressee, or salutation. To ensure that every constituent has a proper addressee and salutation, make sure to define at least one default name format with a specified primary addressee and primary salutation.
- **Use the following address processing and name formatting options**—Select this option to choose custom address processing and name format options for the marketing effort. For example, you can use a unique address processing option set for your holiday appeal.

  Address processing options — Select a pre-defined set of address processing options or create a new set.

  Consider seasonal addresses as of — Select a date to take seasonal addresses into consideration when a marketing effort is processed to ensure delivery to the correct location. For example, if a constituent stays at a vacation home in December, you can send your marketing effort there rather than the primary address.

  Name format options — Select a pre-defined set of name format options or create a new set.

4. To allow users to choose different addressing processing or name formats for segments, under **Segment level address processing/name formats**, select **Allow individual segments to override the addressing processing/name formats of the effort**.
5. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

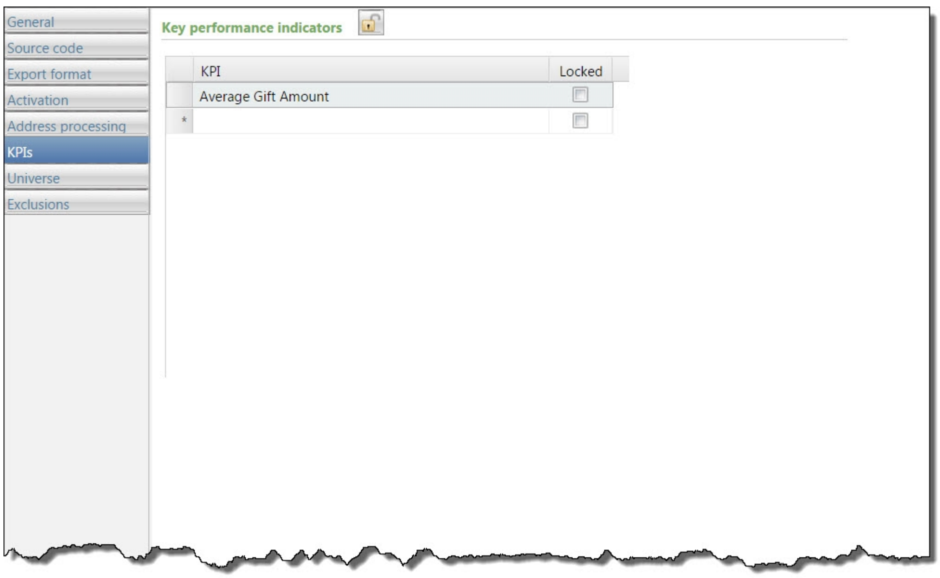
KPIs Tab

On the KPIs tab, select which KPIs (Key Performance Indicators) to include on marketing efforts created from the communication template. Use KPIs to monitor your progress toward goals set for the effort, such as the average gift amount, response rate, and return on investment (ROI). When a user creates a marketing effort, the program automatically creates an instance of each selected KPI.

For more information about how to configure marketing Key Performance Indicators, see the *Reports and KPIs Guide*.

Select key performance indicators for marketing efforts on the KPIs tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the KPIs tab.



3. Use the **Key performance indicators** grid to select which KPIs to track for marketing efforts created from the template. In the **KPI** column, select a KPI.

Note: If you lock the grid, the selected KPIs always appear on marketing efforts created from the template—users cannot remove these KPIs or add different ones. If you lock an individual KPI row, that KPI always appears on the marketing effort and users cannot remove it.

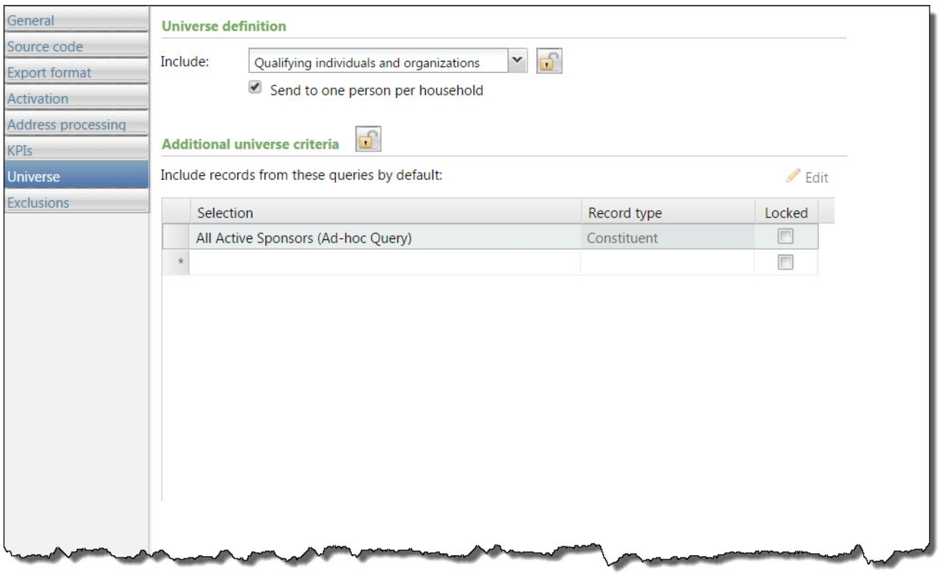
4. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

Universe Tab

On the Universe tab, define the pool of potential records to explicitly include in marketing efforts created from the communication template.

Define the universe for marketing efforts on the Universe tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the Universe tab.



3. Under **Universe definition**, select one of these options in the **Include** field:
   - All qualifying constituents — Sends the marketing effort to all constituent records (individual/organization or household) that meet the segmentation criteria.
   - Qualifying individuals and organizations — Sends the marketing effort to all individual and organization constituent records that meet the segmentation criteria.

   If you select Qualifying individuals and organizations, the **Also include qualifying households which do not have any members** option appears. Select this option to include households that do not have members. If a household is linked to any individual or organization in the database, then the household is excluded, but not the individual or organization.

   If you select "Qualifying individuals and organizations," the **Send to one person per household** option also appears. Select this option to send the marketing effort to only one person in each household, even if other household members are included in the selection.

   - Qualifying households — Sends the marketing effort to all household constituent records that meet the segmentation criteria.

   If you select "Qualifying households," the **Also include qualifying individuals who are not members of any household** option appears. Select this option to also include individual constituents that are not members of a household. If an individual is linked to any household in the database, then the individual is excluded, but not the household.

4. Under **Additional universe criteria**, in the **Include records from these queries by default** grid, you can select universe selections to reduce the universe of potential records to only those that meet the specified criteria. In the row, browse to the selection to include in the universe.

Note: By specifying groups of records for inclusion, when you later create segments for the marketing effort, the potential pool of records for those segments is limited to only those records that meet the criteria of the universe selections you specify here. No matter which selections you choose for each segment, they will not include any records that do not exist in the universe selections you specify.

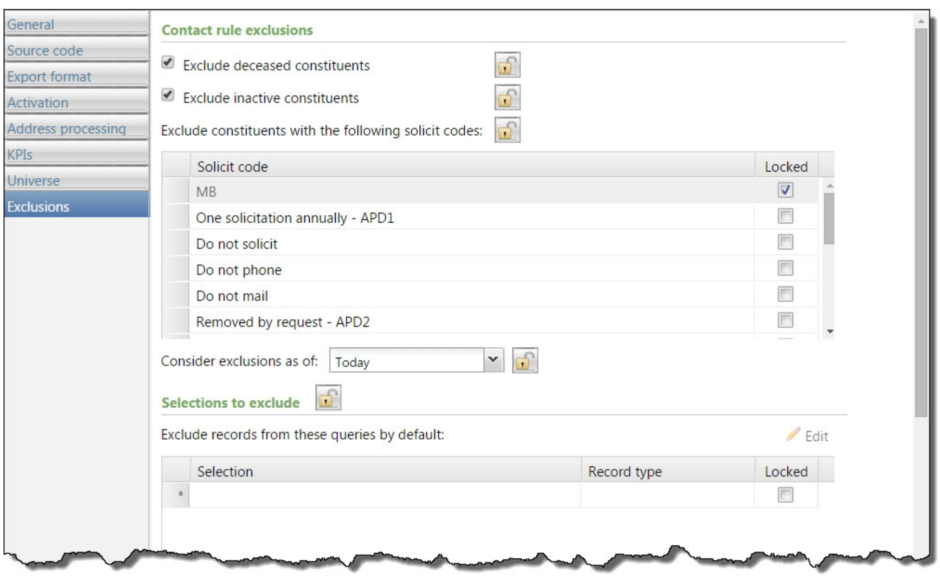
5. You can lock individual rows of the grid. Users who create marketing efforts from the template can view a locked selection, but they cannot edit it. If you lock the entire universe grid, the grid is hidden on marketing efforts created from the template.
6. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

Exclusions Tab

On the Exclusions tab, specify which records to explicitly exclude from marketing efforts created from the communication template.

Define exclusions for marketing efforts on the Exclusions tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the Exclusions tab.



3. Under **Selections to exclude**, in the **Exclude records from these queries by default** grid, you can define a set of donors to exclude from the marketing effort.

   In the row, browse to the selection to exclude.

Note: When you specify exclusion selections, all record sources are still available when you later create segments for the marketing effort (unlike when you define the marketing effort's universe). Excluded constituents are excluded from every segment in the marketing effort. If you do not specify any exclusion selections, all constituents in the defined universe are available for the marketing effort.

4. You can lock individual rows of the grid. Users who create marketing efforts from the template can view a locked selection, but they cannot edit it. If you lock the entire exclusions grid, the grid is hidden on marketing efforts created from the template.
5. Under **Contact rule exclusions**, define exclusions by contact rules.
6. To exclude deceased constituents from the marketing effort, select **Exclude deceased constituents**. When an individual is marked deceased, a status of "Deceased" appears in the profile summary frame of the constituent page. This option appears only for system administrators and other users who were granted the **Show Exclude Deceased Constituent Checkbox** system permission found under Configuration, Exclusions in *System Roles*.
7. To exclude inactive constituents from the marketing effort, select **Exclude inactive constituents**. When an individual or organization is marked inactive, a status of "Inactive" appears in the profile summary frame of the constituent page. This option appears only for system administrators and other users who were granted the **Show Exclude Inactive Constituent Checkbox** system permission found under Configuration, Exclusions in *System Roles*.
8. Use the **Exclude constituents with the following solicit code** grid to exclude constituents from a marketing effort based on the contact preferences stored on their constituent records. In the **Solicit codes** column, select the solicit codes to exclude from the marketing effort.

   For example, one way to remove constituents with invalid or missing addresses is to add "Do not mail" as the solicit code on their constituent records. Then select the "Do not mail" solicit code in this grid to exclude those constituents from the marketing effort.

   A solicit code can be marked optional, default, or required. If the solicit code is optional, you can add it to the exclusions of the marketing effort as applicable. If the solicit code is a default, it will automatically appear as an exclusion for a marketing effort, but you can remove it. If a solicit code is required, it will automatically appear as an exclusion for all communication templates, as well as all marketing effort, and cannot be removed.

Note: If you lock a solicit code, users who create marketing efforts from the template can view the code, but they cannot edit it.

9. For the **Consider exclusions as of** field, select whether to determine exclusion status based on solicit code as of today or a specific date in the future.
10. To allow users to select activated marketing efforts as exclusion criteria, under **Previous marketing effort exclusions**, select **Allow the exclusion of constituents who received previous communications**. If you do not select this option, the **Previous marketing effort exclusions** grid is hidden on the marketing effort's Exclusions tab.
11. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

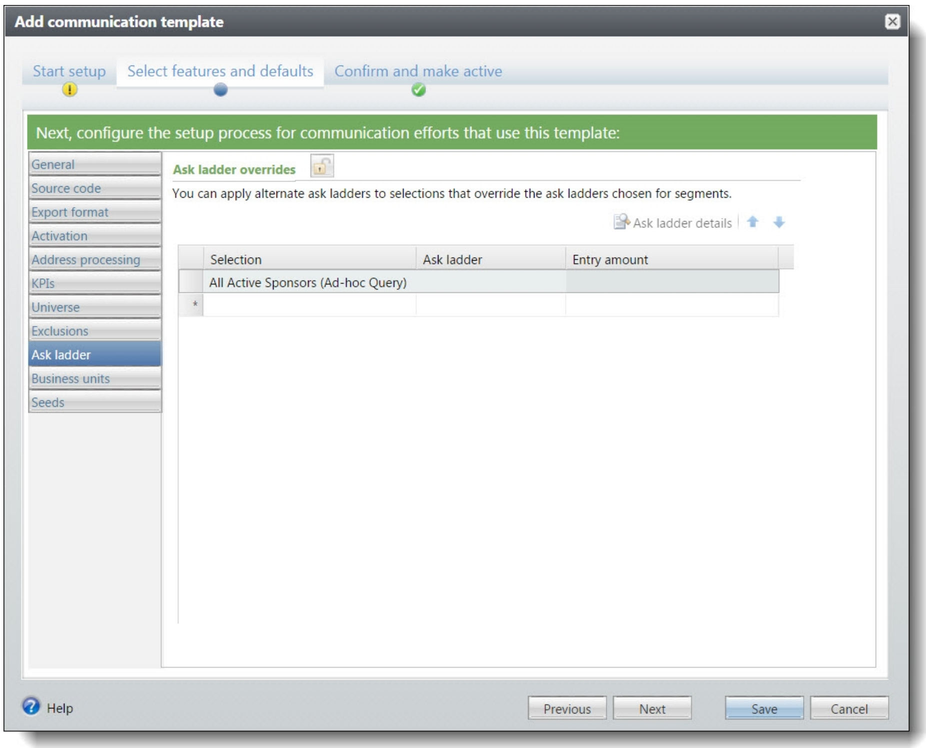
Ask Ladder Tab

Note: The Ask Ladder tab appears only when you select **Override segment ask ladders** on the Start setup form of the communication template.

You assign ask ladders to segments to ensure each recipient receives the appropriate ask amount on their marketing effort. On the Ask Ladder tab, you can choose alternate ask ladders for selections that override the one specified for a segment. For example, you can create an override for high-value constituents to ensure they receive the same ask ladder regardless of which segment they may fall into. For more information about how to configure ask ladders, see Ask Ladders on page 22.

Select ask ladder overrides for marketing efforts on the Ask ladder tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the Ask Ladder tab.



3. In the **Selection** column of the grid, choose the marketing selection the ask ladder applies to.
4. In the **Ask ladder** column, select the ask ladder to apply to the selection. The **Entry amount** column displays the type of entry amount assigned to the selected ask ladder, such as a smart field or dollar amount.
5. If you add multiple ask ladder overrides, use the arrows to define the order in which they are applied. The program applies overrides from top to bottom. For example, if a constituent falls into more than one selection in the grid, the program applies the override closest to the top.
6. You can lock individual rows of the grid. Users who create marketing efforts from the template can view a locked ask ladder, but they cannot edit it. If you lock the entire ask ladders grid, the grid is hidden on marketing efforts created from the template.
7. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

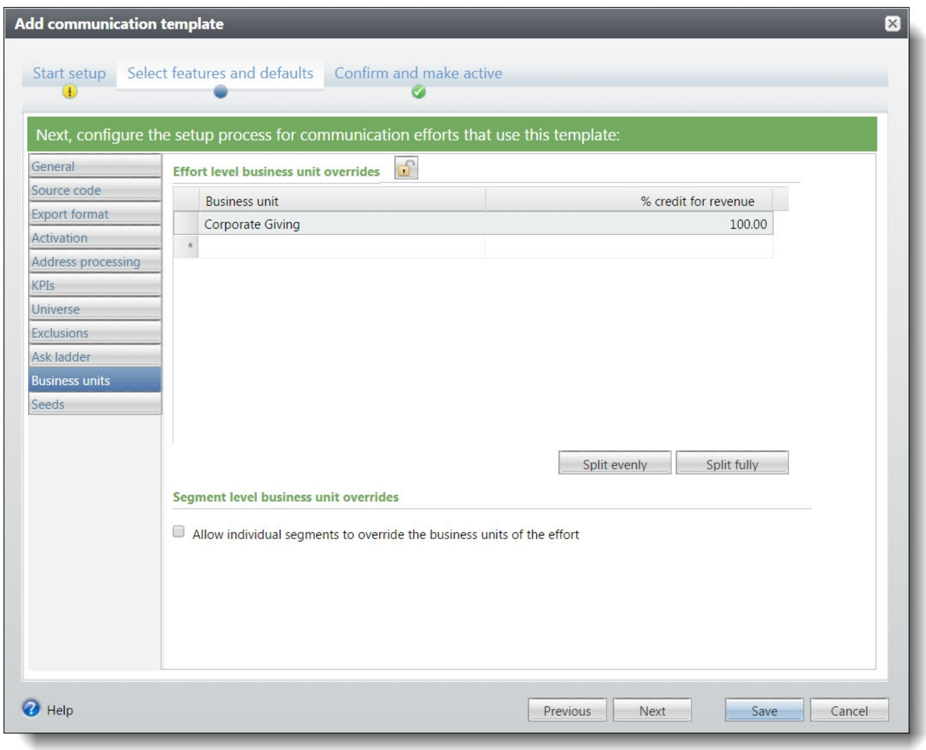
Business Units Tab

Note: The Business units tab appears only when you select **Override appeal business units in the effort and/or in segments** on the Start setup form of the communication template.

On the Business units tab, you can override business units associated with the communication template's selected appeal. You can define which business units to credit with revenue generated as a result of marketing efforts created from the template. You can specify overrides that occur at the marketing effort level and/or segment level.

Define business unit overrides for marketing efforts on the Business units tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the Business units tab.



3. Under **Effort level business unit overrides**, you can specify which business units to override for the marketing effort. In the **Business unit** column, select a unit to credit for the revenue.
4. In the **% Credit for revenue** column, enter the percentage of the revenue to credit to the selected business unit.
5. To divide the credit amount evenly among the selected business units, click **Split evenly**. To give each unit full credit for the revenue, click **Split fully**.

Note: If you lock the business units grid, the grid is hidden on marketing efforts created from the template.

6. To allow users to choose different business units for segments, under **Segment level business unit overrides**, select **Allow individual segments to override the business units of the effort**.
7. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

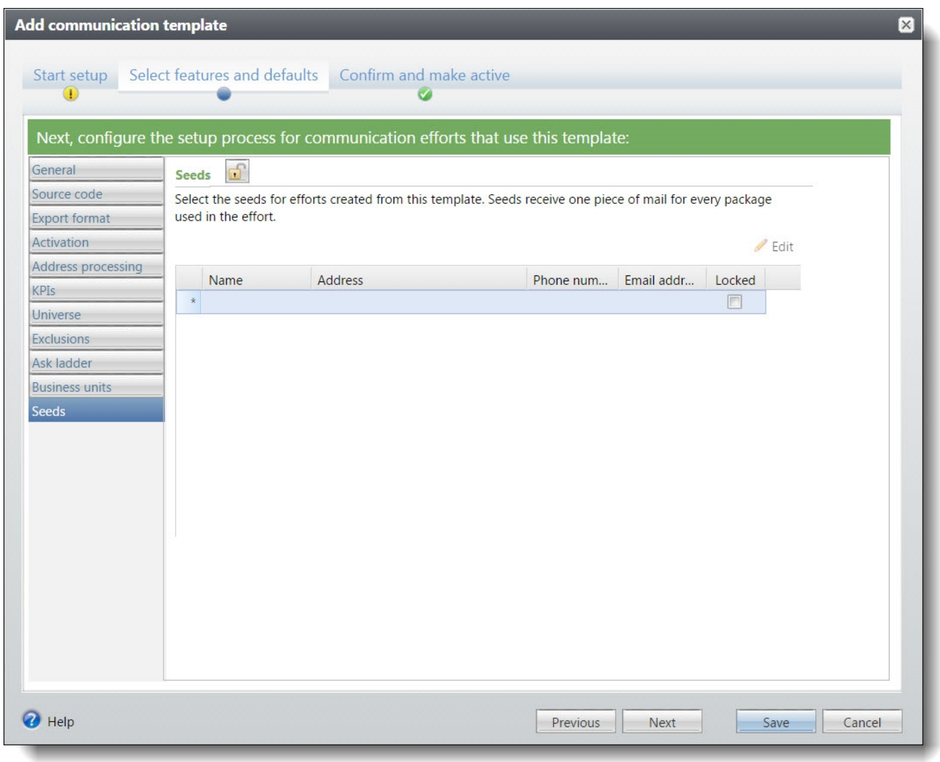
Seeds Tab

On the Seeds tab, you can assign seeds to marketing efforts created from the communication template. Seeds are usually people at your organization you include in marketing efforts to verify that the vendor or printing house sends out marketing effort pieces correctly.

Note: The Seeds tab appears only when you select **Include seeds in communication** on the Start setup form of the communication template.

Select seeds for marketing efforts on the Seeds tab

1. From the Add a communication template screen, select **Select features and defaults**.
2. Select the Seeds tab.



3. In the **Name** column on the grid, select a seed to associate with marketing efforts created from the template. The selected seed's address, phone number, and email address appear in the grid.
4. To edit a seed's name or contact information, select the seed in the grid and click **Edit**.

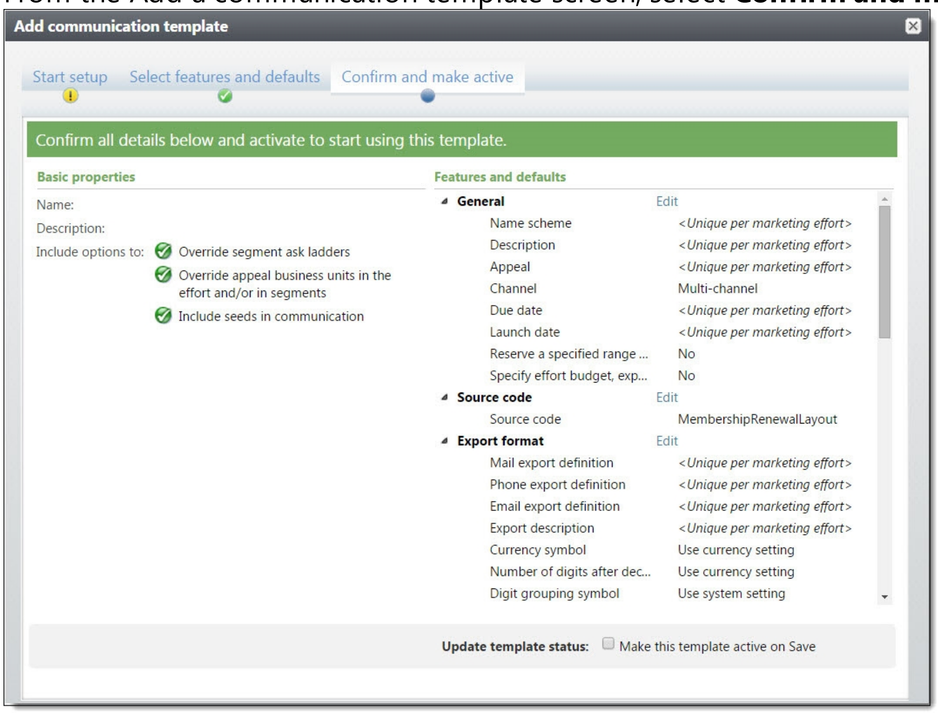
5. You can lock individual rows of the grid. Users who create marketing efforts from the template can view a locked seed, but they cannot edit it. If you lock the entire seeds grid, the grid is hidden on marketing efforts created from the template.
6. Select another tab on the Select features and defaults form, or click **Next** to continue the setup process.

Confirm and Make Active

On the Confirm and make active form, you can review the settings defined for the communication template and make changes before you make it available for use.

Confirm settings for the communication template on the Confirm and make active form

1. From the Add a communication template screen, select **Confirm and make active**.



- Under **Basic properties**, you can view properties defined on the Start setup form including optional template procedures.
- Under **Features and defaults**, you can view settings defined on the various tabs of the Select features and defaults form. To open a tab and make changes to its settings, click **Edit**.

2. To make the template active and available to users, select **Make this template active on Save**.
3. Click **Save** to save and close the communication template.

Tip: After you save a communication template, you can quickly preview its settings from the Communication Templates page.

Edit Communication Templates

From the Communication Templates page, you can view the defined settings for saved communication templates, such as the universe and source code. To edit a template's settings, select the template in the list and click **Edit**.

> ***Note:*** When you edit a communication template, changes apply to only new marketing efforts created from the template, not existing marketing efforts.

Communication Name Patterns

On the Communication Name Patterns page, you can manage name patterns for marketing efforts. Name patterns allow you to generate unique but consistent names for all marketing efforts created from a communication template.

To access the Communication Name Patterns page, from the Marketing and Communications page, click **Communication name patterns** under **Configuration**.

The **Communication name patterns** grid displays the name patterns saved in your database. From this grid, you can edit existing name patterns or add new ones.

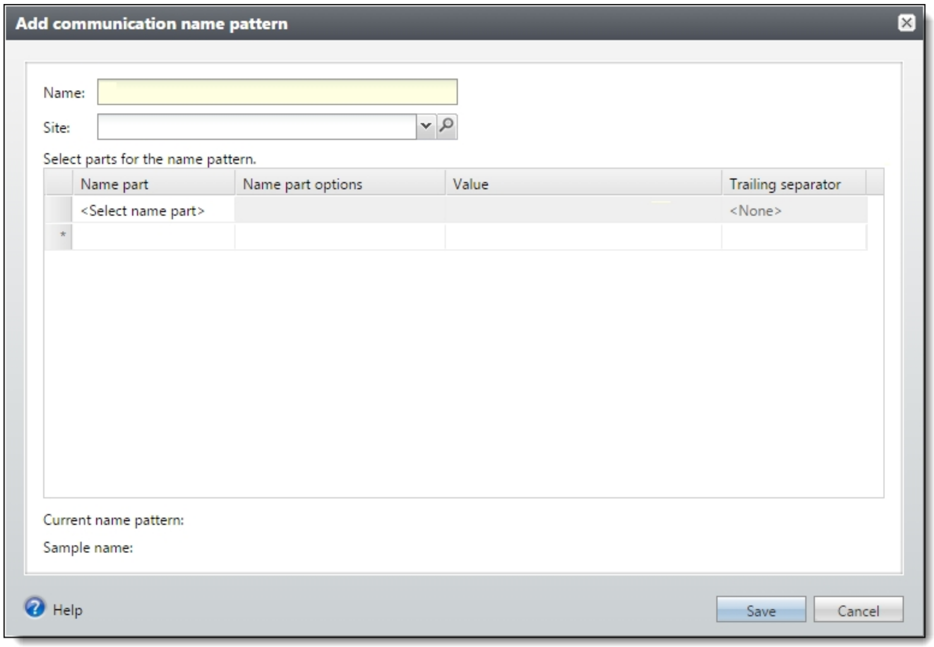
> ***Note:*** The program includes a simple name pattern you can use as an example for how to create your own.

Add Communication Name Patterns

When you build a communication name pattern, you select parts that make up the name. Some parts are dynamic and will populate automatically when a user creates a marketing effort from the communication template. For example, if you include the Appeal code or Channel part, those values are pulled from the appeal or channel assigned to the communication template. The Static identifier and Counter parts are defined on the name pattern and populate automatically when a user creates a marketing effort from the template. If you include a Free-form part, the user who creates the marketing effort must enter a text value for that part of the name.

Add a communication name pattern

1. From the Marketing and Communications page, under **Configuration**, click **Communication name patterns**. The Communication name patterns page appears.
2. On the action bar of the **Communication name patterns** grid, click **Add**. The Add a communication name pattern screen appears.



3. In the **Name** field, enter a unique name to help identify the name pattern. For example, enter a name that reflects the type of communication template that will use this name pattern.
4. If your organization uses site security, in the **Site** field, select which site to associate with the name pattern. Only users associated with the selected site can access this name pattern.
5. In the grid, select parts to build the name pattern.
   a. In the **Name part** column, select the type of part to include.

      If you select an Appeal code, Channel, Date created, Due date, Launch date, or Site name part, the **Value** column displays "<set by communication effort>". These values are pulled from their respective fields on the General tab of the communication template or from the marketing efforts generated from the template if those fields are blank and unlocked on the template.
   b. If you select a Date created, Due date, or Launch date name part, in the **Name part options** column, select the date format to use, such as MM-DD-YY.
   c. If you select a Counter name part, in the **Name part options** column, select the number of leading zeros to use for the counter. The number of zeroes plus the # sign represent the number of digits required for the first number of the count. In the **Value** column, enter the starting number for the count. For example, if you selected "00#", enter a 3 digit starting number such as "001". The program will automatically increase the count each time you add a marketing effort that uses this name pattern.

Note: The leading zeros format does not determine the maximum number of digits allowed; the program will continue adding digits as the count increases. To maintain consistency among marketing efforts that use this name pattern, select the leading zeros format for the maximum number of digits you plan to use. For example, If you plan to increment marketing efforts to a maximum of 3 digit numbers, select 00# for the leading zeros format and enter "001" in the **Value** column.

d. If you select a Static identifier name part, in the **Value** column, enter a text value that is not editable by users who create marketing efforts from the template. For example, you can enter "Reminder" if this name pattern will always be used by the communication template for reminders.

e. If you select a Free-form name part, in the **Name part options** column, enter placeholder text that describes what the user who creates the marketing effort should enter, such as "Enter program name."

f. In the **Trailing separator** column, select the separator to use between name parts.

Note: The **Current name pattern** displays the selected parts and separators in the order you defined. The **Sample name** displays the defined name pattern using sample part values.

6. Click **Save**. You return to the Communication Name Patterns page. The new name pattern appears in the grid.

Edit Communication Name Patterns

After you add a communication name pattern to the database, you can edit its name or default settings. To edit a name pattern, select it in the **Communication name patterns** grid and click **Edit**.

Note: When you edit a name pattern, those changes do not apply to marketing efforts that currently use the scheme.

Finder Number Settings

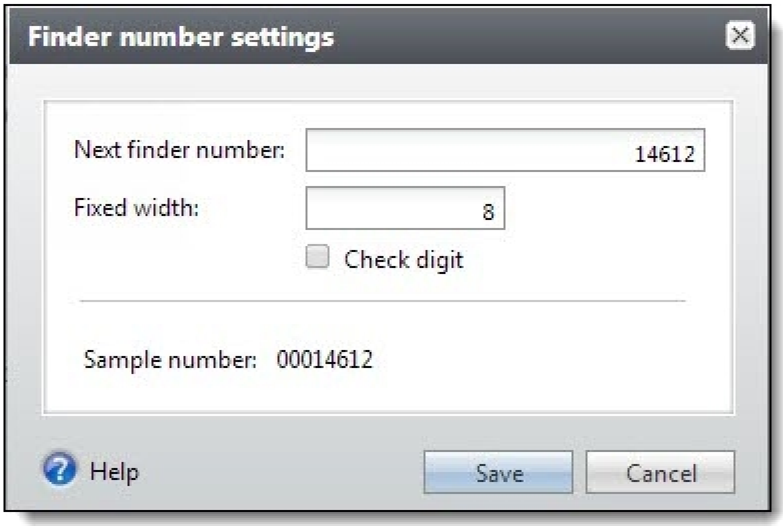
A finder number is a unique, sequential number assigned to each record in a marketing effort. Finder numbers provide an identifier for each list name in the finder file or acquisition list, as well as each constituent in a house mailing. Finder numbers are typically printed on the reply device and can be formatted for barcode scanners. Using finder numbers for prospects and current donors ensures greater accuracy and efficiency when entering responses to marketing efforts. During gift entry, users enter or scan the finder number and the batch automatically populates the donor’s name, address, and source code.

In *Configuration*, specify the first number of the finder number sequence and the number of characters available. These settings are typically configured once and never changed. However, the settings are editable if you need to make a change such as increasing the number of characters in the **Fixed Width** field.

When you calculate segment counts, the program automatically assigns a finder number to every record in the marketing effort using the next available number in the sequence. On the Finder Numbers tab of a marketing effort, you can reserve a range of finder numbers for a vendor or for internal use with imported lists.

Set finder numbers

1. From *Marketing and Communications*, click **Finder number settings** under **Configuration**. The Finder number settings screen appears.



2. In the **Next finder number** field, enter the next finder number available in the sequence. In most cases, you should set this to 1.
3. In the **Fixed width** field, enter the number of characters for your finder numbers. The default width of 8 characters allows for 99,999,999 finder numbers before the program needs to reuse a finder number. We recommend that you use 17 characters, the largest width allowed. You can increase the number of characters, but you cannot decrease it below the width of the highest assigned or reserved finder number.
4. To use the Mod 10 algorithm to validate finder numbers, select **Check digit**. The algorithm detects single-digit errors as well as transpositions of adjacent digits. A single digit is appended to each finder number to generate the validation calculation. For information about how the program calculates the check digit, see Calculate Check Digits on page 49.

Note: Once you choose to use a check digit with your finder numbers, you cannot turn it off. Also, the check digit functionality applies to only the number in the **Next finder number** field and any number that occurs afterward, not finder numbers already in use.

The **Sample number** field displays a preview of sample numbers based on your settings.

5. Click **Save**. You return to *Marketing and Communications*.

Calculate Check Digits

Tip: We recommend that you use a check digit to ensure finder numbers are entered accurately during gift entry.

If you use a check digit with your finder numbers, the program uses the Luhn, or mod 10, algorithm to validate finder numbers. The algorithm detects single-digit errors as well as transpositions of adjacent digits. To generate the validation calculation, the program appends a single digit to each finder number.

To calculate a check digit, the program uses this algorithm:

1. The program starts with the last digit in the finder number and, as it moves to the left, doubles the value of every other digit. For example, to calculate the check digit for finder number 56789:

9	9 * 2 = 18	18
8		
7	7 * 2 = 14	14
6		
5	5 * 2 = 10	10

2. The program adds the individual digits of the doubled numbers to the undoubled numbers from the original finder number.

9	9 * 2 = 18	18	1 + 8 = 9	9
8				8
7	7 * 2 = 14	14	1 + 4 = 5	5
6				6
5	5 * 2 = 10	10	1 + 0 = 1	1
				9 + 8 + 5 + 6 + 1 = 29

Note: The modulo operation finds the remainder when you divide a number. X modulo Z (abbreviated as X mod Z) is the remainder when you divide X by Z. For example, "7 mod 3" equals 1, while "9 mod 3" equals 0.

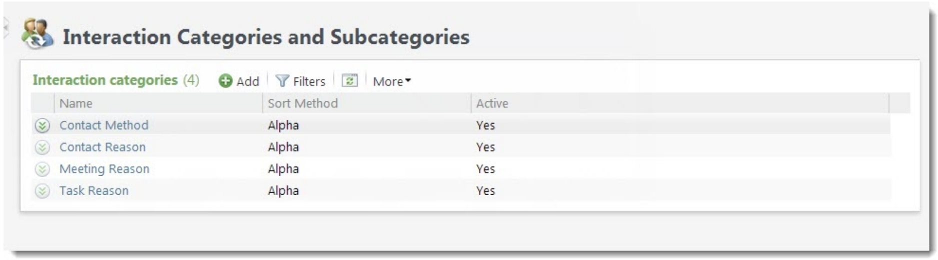
3. The program calculates the sum of the digits mod 10. For this example, 29 mod 10 = 9. (29 divided by 10 = 2 with a remainder of 9.)
4. For the check digit calculation, the program subtracts the remainder from 10. For example, 10 - 9 = 1. The check digit equals 1.

In our example, the full "valid" finder number (including check digit) is 567891. If the final value in the finder number was any number other than 1, then the finder number would be "invalid" or corrupt. Numbers like 567892, 567893, 567894, 567895, 567896, 567897, 567898, 567899, and 567890 are all "invalid" or corrupt finder numbers because 1 is the only valid check digit number for finder number 56789.

Interaction Categories and Subcategories

In *Constituents*, you use interaction categories and subcategories to specify communication activities and actions taken to build a relationship with a constituent. For example, you can create a Contact Method interaction category with subcategories of Casual Interaction, Digital, Event, Face-to-Face, Internal Marketing, Mail, Task, Telephone.

From *Marketing and Communications*, you can manage the types of interactions available to users in *Constituents*. To view the interaction categories available to users, from *Marketing and Communications*, click **Interaction categories and subcategories** under **Configuration**. The Interaction Categories and Subcategories page appears.



Under **Interaction categories**, you can view the sort method and active status of each category. To view inactive categories in the grid, click **Filter**, select **Include inactive**, and click **Apply**.

To view or manage the subcategories of an interaction category, click the name of the category in the grid. The subcategories page for the category appears. For information about this page, see Manage Subcategories on page 51.

Add Interaction Categories

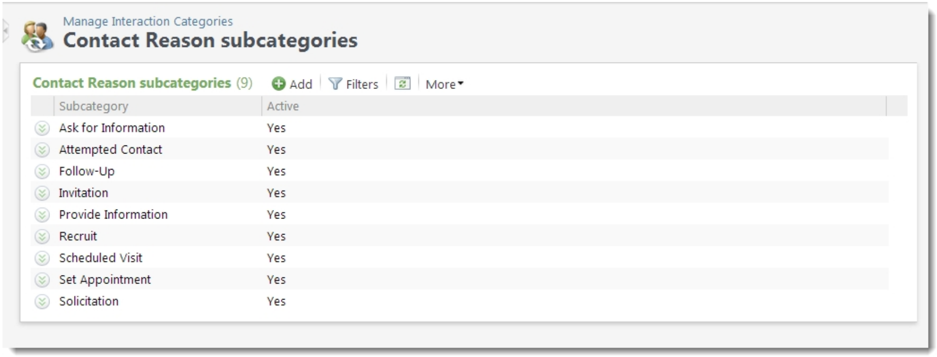
In *Constituents*, you use interaction categories and subcategories to track communication activities and actions taken to build a relationship with a constituent. From *Marketing and Communications*, you can add the types of interactions available to users in *Constituents*.

Add an interaction category

1. From *Marketing and Communications*, click **Interaction categories and subcategories** under **Configuration**. The Interaction Categories and Subcategories page appears.
2. Under **Interaction categories**, click **Add**. The Add an interaction category screen appears.
3. Enter a unique name to help identify the category.
4. In the **Sort method** field, select whether to arrange the categories alphabetically or in a user-defined arrangement.
5. Click **Save.** You return to the Interaction Categories and Subcategories page.

Manage Subcategories

To further define and expand an interaction category, you can assign it subcategories to break down its definition into multiple types. For example, you can create a Contact Reason interaction category with subcategories of Follow-up, Schedule Visit, and Solicitation. To view the subcategories of an interaction category, click the name of the category in the grid. The subcategories page for the category appears.



In the grid, you can view the active status of each subcategory. To view inactive subcategories, click **Filter**, select **Include inactive**, and click **Apply**.

Add Interaction Subcategories

To further define and expand an interaction category, you can add subcategories to break down its definition into multiple types. For example, for a Phone interaction category, you can add subcategories of Home, Office, and Mobile.

Add subcategories to an interaction category

1. From *Marketing and Communications*, click **Interaction categories and subcategories** under **Configuration**. The Interaction Categories and Subcategories page appears.
2. Click the interaction category's name to access its subcategories page.
3. Click **Add**. The Add a subcategory screen appears.
4. Enter a unique name to help identify the subcategory.
5. Click **Save.** You return to the subcategories page.

Reorder Interaction Subcategories

For an interaction category with a user-defined sort method, you can reorder the subcategories. For example, you can arrange the subcategories so the common subcategories appear first in the list.

Arrange the order of user-defined subcategories

1. On the subcategories page for the interaction category, click **Re-order subcategories**. The Re-order subcategories screen appears.
2. Under **Subcategory**, select the subcategory to arrange in the order and click the up or down arrow as necessary.
3. Click **Save**. You return to the subcategories page.

Letter Template Library

In the Letter Template Library, you can add and manage Microsoft *Word* templates for use with communications such as membership cards and correspondence with constituents. For example, after you add a constituent letter template, you can use it to send letters to constituents. To send a letter to a constituent, from the constituent's record, click **Write a letter** on the Contact tab or under **Tasks**. For more information about the Write a Letter feature, see the *Constituents Guide*.

The Letter Template Library is a repository for many types of letter templates. Most letter template types are available from the constituent "Write a letter" process. Membership card letter templates are available to use when printing membership cards. However, acknowledgement letter templates are not available in acknowledgement or marketing acknowledgement processes. Planned gift acknowledgement templates are not available for the planned gift acknowledgement process. Reminder letter templates are not available for the reminder process. Receipt letter templates are not available for the receipt process. Correspondence templates are not available in the manage correspondence process. Tribute acknowledgement templates are not available in the tribute acknowledgement process. These types of templates can be stored for reference in the Letter Template Library, but you will need to search for and select them separately for use in the standard processes.

Add Letter Templates

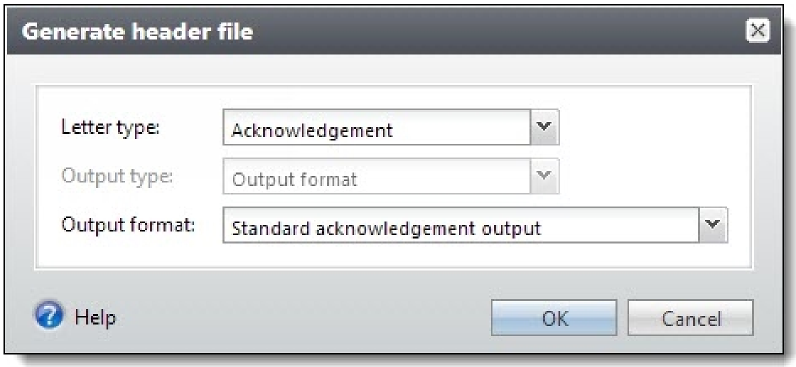
From the Letter Template Library page, you can add templates to use in various types of communication efforts.

Generate a Header File for Letters

From the Letter Template Library, you can generate a header file that includes the merge fields available for a letter template. The fields included in the header file are determined by the selected output format or export definition. When you create a mail merge letter in *Word*, use the generated header file for your record source.

Generate a header file for letters

1. From *Marketing and Communications*, click **Letter template library** under **Configuration**. The Letter Template Library page appears.
2. Under **Tasks**, click **Generate header file**. The Generate header file screen appears.



3. In the **Letter type** field, select the type of communication to generate a header file for.
4. If you select “Constituent Letter” as the letter type, the **Output type** field is enabled. In this field, select “Output format” to use a program-defined set of export fields or “Export definition” to use a user-defined set of export fields.

Note: During implementation, Blackbaud Professional Services likely customizes output formats to fit the needs of your organization.

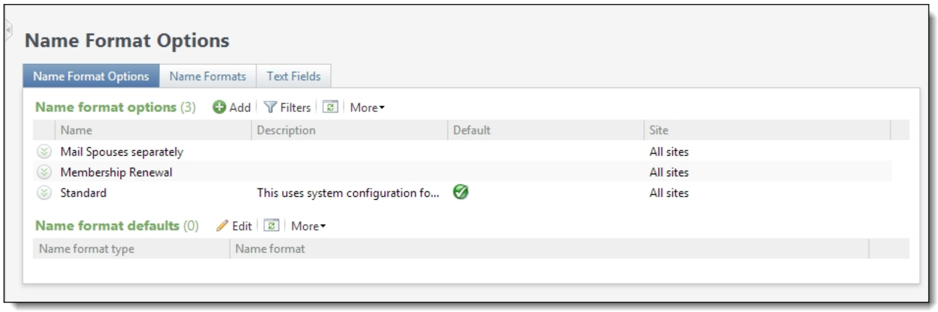
5. If you selected “Export definition” as the output type, select a constituent export definition in the **Export definition** field. Only constituent export definitions created in *Administration* with **Allow definition to be used by other areas of the application** selected on the Set save options tab can be used for constituent letters.
6. Click **OK**. The .csv file downloads automatically. (This process varies according to your type of browser.)

Name Format Options

Name formats determine how to names are formatted in a marketing effort, as well as elsewhere throughout the program. For example, for marketing efforts such as event invitations and appeals or for use on a membership card, you may use a more formal format that includes titles and suffixes (Mr. William H. Smith Jr.). For marketing efforts like alumni letters, you may use a less formal format such as the nickname and last name (Willie Smith). The program provides many common name formats, but you can add custom formats if needed.

Name format options are parameter sets that specify which name formats to use for addressees and salutations for individuals, organizations, and households and groups, as well as how to format joint names. From the Name Format Options page, you can create multiple sets of name format options that are tailored for different types of marketing efforts and correspondence.

To access the Name Format Options page from *Marketing and Communications*, click **Name format options** under **Configuration**.

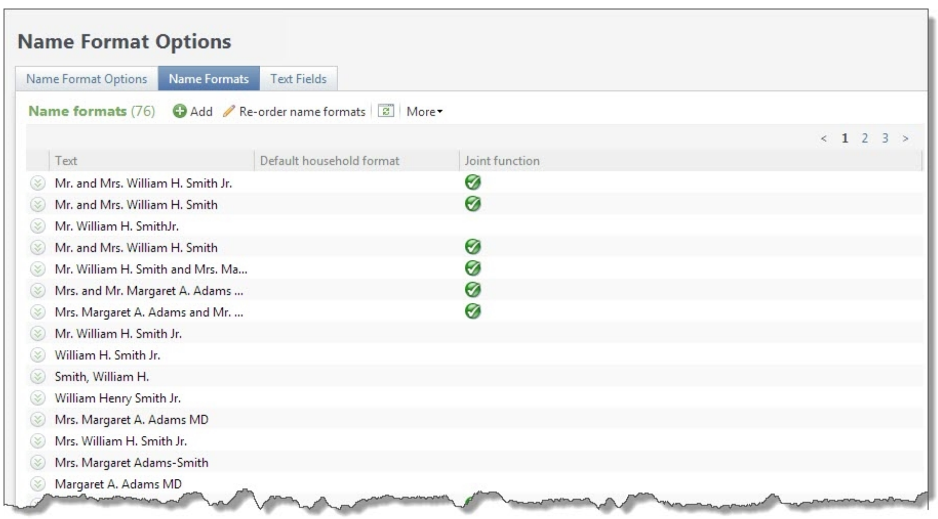


Name Formats

Name formats are used throughout the system as a way to let you choose how to address each constituent. For example, for some correspondence it might be more appropriate to use formal salutations, while for others you would use informal salutations. While the program provides many common name formats, you can also build new ones to suit your organization.

You can also specify which name formats to use as the default **Primary salutation** and **Primary addressee** on new constituent records. You can edit the order of name formats so that ones you use most often appear at the top of the list and are more accessible.

You can specify which name formats to use as defaults when new constituent records are added to the database. Default name formats appear automatically on the Personal Info tab of new constituent records. You can also select which name formats to use as the default for the Primary addressee or Primary salutation.

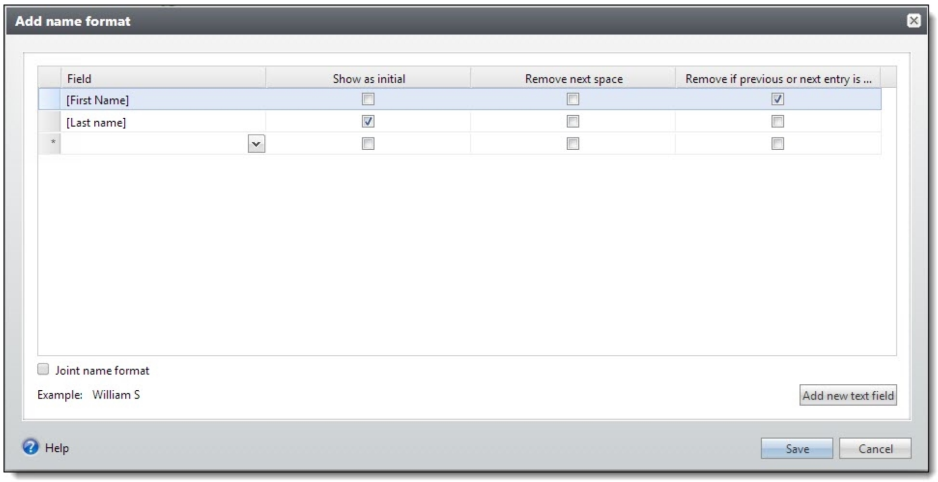


Add Name Formats

You can add name formats to use throughout the program, such as when sending appeals to constituents. You can specify the fields and parameters to use to build the name format.

Add a name format

1. From *Marketing and Communications*, click **Name format options** under **Configuration**. The Name Format Options page appears.
2. On the Name formats tab, click **Add**. The Add a name format screen appears.



3. In the **Field** column, select a name field to include in the name format.
4. To display the field as an initial only, select Show as initial. For example, instead of a constituent's middle name, you can show only the middle initial. A period automatically follows each initial.
5. To remove the space following the field, select **Remove next space**. For example, if you include both first and middle names as initials, you can remove the space after the first name initial to get a name format similar to "W.H. Smith" instead of "W. H. Smith."
6. To handle missing name fields, you can select **Remove if previous or next entry is blank**. With this option marked, the program checks the next field in the format. If no value is present for that field, the program removes the value of the field before it. For example, if the name format is "Mr. and Mrs. Smith," you can select **Remove if previous or next entry is blank** for the text field "and." This way, if there is not a spouse (and therefore no spouse title), the program leaves them out of the name format.
7. If the name format includes more than one constituent, select **Joint name format**. When you add name format options, on the Joint name formats tab, you can specify which person appears first when the name is built.
8. To add a text field for the format, click **Add new text field**. For example, to address a family as "The Smith Family," you can create text fields for "The" and "Family." For more information about how to add text fields, see Text Fields for Name Formats on page 57.

Note: An example of the name format appears below the grid.

9. Click **Save**. You return to the Name formats tab.

Text Fields for Name Formats

You can use text fields to create additional words or symbols to incorporate into your name format options, such "Friend of" or "&." After you create text fields, they can be used as the building blocks of the name formats you create.

Add a text field for name formats

1. From *Marketing and Communications*, click **Name format options** under **Configuration**. The Name Format Options page appears.
2. On the Text fields tab, click **Add**. The Add a text field screen appears.
3. Enter the text value to display in name formats, such as "&."
4. Click **Save**. You return to the Text fields tab. The text field you entered is available to use in name formats.

Edit the Order of Name Formats

You can edit the order of name formats so that ones you use most often appear at the top of the list and are more accessible.

Edit the order of name formats

1. From *Marketing and Communications*, click **Name format options** under **Configuration**. The Name Format Options page appears.
2. On the Name formats tab, click **Re-order name formats**. The Re-order name formats screen appears.
3. Select a name format and click the arrows to move it up or down in the list. This is the order of the name formats available when you set name format options or when you add a name format to a constituent.
4. Click **Save**. You return to the Name formats tab.

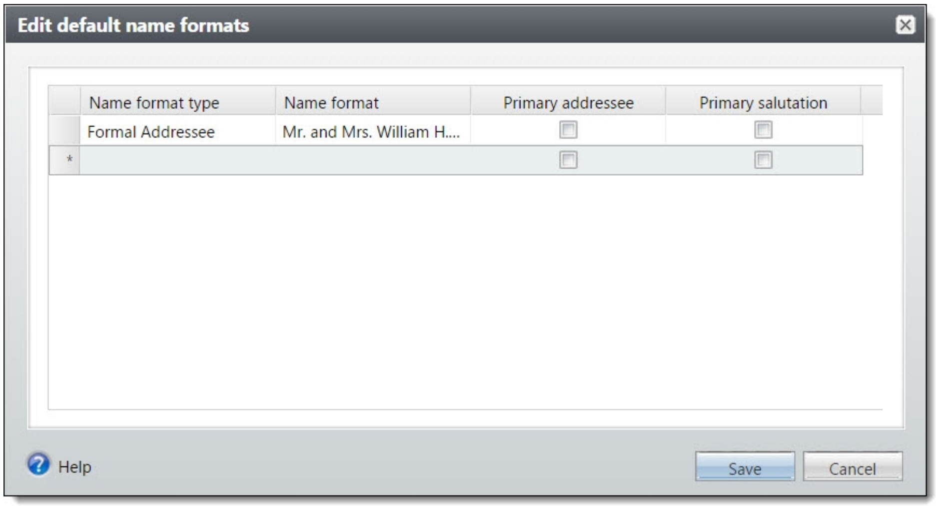
Set Default Name Formats

On the Name Format Options tab, you can specify which name formats to use as defaults when new constituent records are added to the database. Default name formats appear automatically on the Personal Info tab of new constituent records. You can also select which name formats to use as the default for the Primary addressee or Primary salutation. On the Name Formats tab, you can select which name format is the default for household records.

Set default name formats

1. From *Marketing and Communications*, click **Name format options** under **Configuration**. The Name Format Options page appears.

2. Select the Name format options tab.
3. Under **Name format defaults**, click **Edit**. The Edit default name formats screen appears.



4. In the **Name format type** column, select the type of name format, such as Formal Addressee or Informal Salutation. This type will help users identify which name format to assign to a constituent. The program provides several name format types, but you can add new ones as needed.
5. In the **Name format** column, select the name format to use.
6. To use the name format as the default for the primary addressee or primary salutation, select the checkbox in the appropriate column.
7. Click **Save**. You return to the Manage Name Format Options page.

Set a Default Name Format for Households

You can select a name format to use as the default for households. On the Name formats tab, select a name format to use with households and click **Set default household name format**. A green checkmark appears in the **Default household format** column of the grid.

Add Name Format Options

Create name format options to define which name formats to use for various communication types. You can specify one set of name format options as the default to use on new communication efforts. While you can create just one set of name format options to use as the default for all communication efforts, we recommend that you add multiple sets to provide more flexibility for addressing and greeting constituents in communication efforts.

Add a name format option

1. From *Marketing and Communications*, click **Name format options** under **Configuration**. The Name Format Options page appears.
2. Select the Name format options tab.

3. Under **Name format options**, click **Add**. The Add name format options screen appears.
4. In the **Name** and **Description** fields, enter a unique name and description to help identify the name format processing option. For example, enter a explanation of the type of communication effort to use with the option.
5. If your organization uses site security, in the **Site** field, select which site to associate with the name format option. Only users associated with the selected site can use this name format option.

Note: The program applies formats to a constituent using the order defined in the grid. The program tries to apply the first format in the list; if that format is not included on the constituent's Personal Info tab, the program tries to apply the second format, and so on. If none of the formats listed are on the constituent's Personal Info tab, the program uses the format specified in **Otherwise, use this format**.

6. Select the addressee and salutations for individuals included in the communication effort.
   a. Select the Individuals tab.
   b. Under **Addressee**, in the **Use format defined on individual's record** grid, select the default name formats from constituent records to use for addressees. Use the up and down arrows to change the order of name formats in the grid.
   c. In the **Otherwise, use this format** field, select the name format to use if none of the selected name formats appear on the constituent's record.
   d. Under **Salutation**, in the **Use format defined on individual's record** grid, select the name formats from constituent records to use for salutations. Use the up and down arrows to change the order of name formats in the grid.
   e. In the **Otherwise, use this format** field, select the name format to use if none of the selected name formats appear on the constituent's record.
7. Select the addressee and salutations for organizations included in the communication effort.
   a. Select the Organizations tab.
   b. Under **Addressee**, select whether to use the name formats defined on the contacts' constituent records or a standard configured name format to address the organization contacts.

      Under **Use formats defined on contact's record**, select the name format to use from the constituent record. such as Primary addressee. In the **Otherwise, use this format** field, select the format to use if the first selection is not defined.
   c. Under **Salutation**, select whether to use the organization's name, the contact's name, or another name as a greeting in the communication. If you select Other name, enter the name to use.
8. Select the addressee and salutations for households and groups included in the communication effort.
   a. Select the Households and groups tab.
   b. Under **Addressee**, select whether to use the name formats defined on the primary members' constituent records or a standard configured name format to address the primary members.

Under **Use formats defined on primary member's record**, select the name format to use from the constituent record, such as Primary addressee. In the **Otherwise, use this format** field, select the format to use if the first selection is not defined.

c. Under **Salutation**, select whether to use the group or household's name, the primary member's name, or another name as a greeting in the communication. If you select Other name, enter the name to use.

9. To select the addressee and salutation to use when a name format includes both spouses of a household, select the Joint name formats tab.

- To consider one spouse the primary constituent, or the one listed first, for all joint communications to the household, select **Apply the following rule to all constituents** and select the constituent to consider the primary.
- To consider a spouse the primary constituent when he or she appears in a selection, select **List constituents from the following selection first** and search for and select the selection of constituents to consider the primary.

If you select **List constituents from the following selection first**, select the constituent to consider the primary if both spouses or neither spouse appear in the selection.

- Under **Advanced name options**, you can specify the conditions for excluding a spouse from the joint name format. These options work independently of each other.

- **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.

10. Click **Save**. You return to the Name Format Options page. Under **Name format options**, the new name format parameter appears.

Make a Name Format Option the Default

After you establish name format options, you can mark one as the default to use on new marketing efforts and correspondence.

Mark a name format option as the default

1. From *Marketing and Communications*, click **Name format options** under **Configuration**. The Name Format Options page appears.
2. On the Name format options tab, select a name format option and click **Mark as default**. A checkmark appears beside the name format option.

When you make another one the default, the checkmark is removed from the previous default and a checkmark appears beside the new default. Only one name format option can be the default.

Receipt and Acknowledgement Preferences

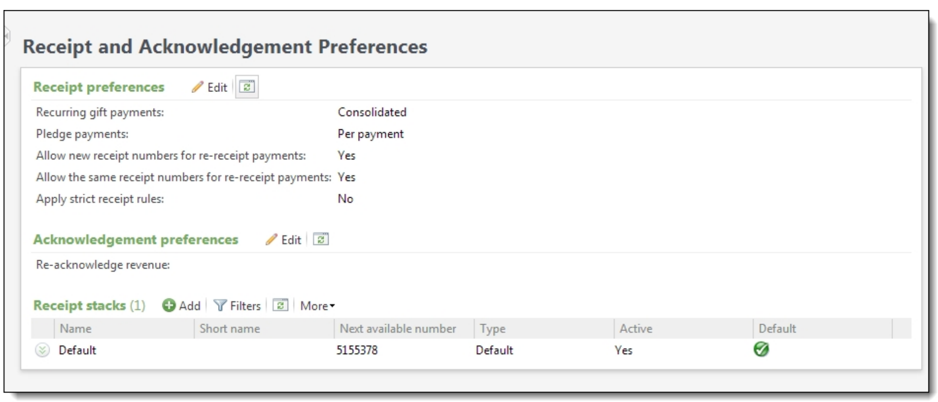
Constituents can choose how they want to receive receipts — one receipt for each payment or one receipt that includes multiple payments. If a constituent has a receipt preference, it is stored under **Mail preferences** on the Communications tab of the constituent record. On the Receipt and Acknowledgement Preferences page, you can configure how to receipt payments for recurring gift payments and pledge payments for constituents who do not have a receipt preference. Other gifts, such as a one-time cash gift, default to a per payment receipt type automatically.

You can also specify whether users can re-receipt and re-acknowledge payments to generate new receipts and acknowledgements for previously receipted and acknowledged payments. For re-receipts, you can choose to generate new receipt numbers and/or use the same receipt numbers.

You can also create receipt stacks which allow you to configure groups of receipts. After you create a receipt stack, you can select it from the Receipt process and enter the criteria for the program to include in the process. For example, if you have paper and online receipts, you can create stacks for each and configure the process to only include online receipts for the online stack and paper receipts for the paper stack. For information about receipt stacks, seeReceipt Stacks on page 63.

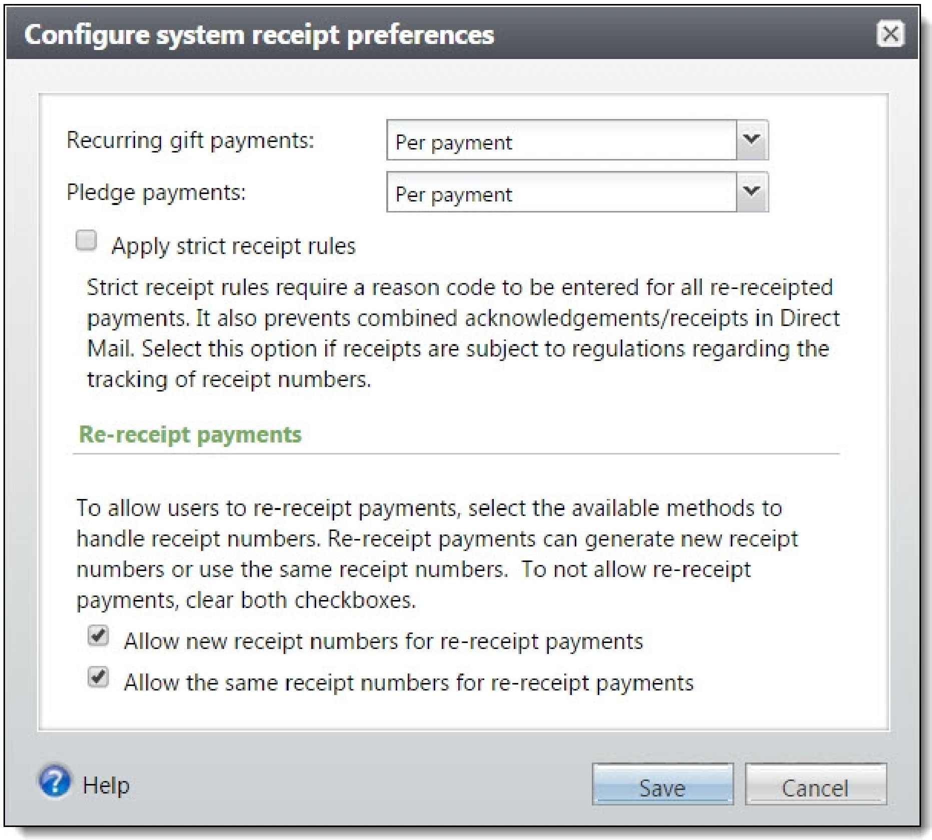
Note: Using separate receipt stacks to track different types of receipts is required by law in Canada and other countries. Check with your local tax authority.

To configure the preferences for acknowledgements and receipts, from *Marketing and Communications*, click **Receipt and acknowledgement preferences** under **Configuration**. The Receipt and Acknowledgement Preferences page appears.



Configure system receipt preferences

1. From *Marketing and Communications*, click **Receipt and acknowledgement preferences** under **Configuration**. The Receipt And Acknowledgement Preferences page appears.
2. Under **Receipt preferences**, click **Edit**. The Configure system receipt preferences screen appears.



3. The "Per payment" preference processes a receipt for each payment from a constituent. The "Consolidated" preference processes one receipt for multiple payments from one constituent.

   By default, the program is set to receipt recurring gifts and pledge payments per payment. To change the system default setting to consolidate receipts, select "Consolidated" in the **Recurring gift payments** field or **Pledge payments** field. These settings apply to constituents who do not have a receipt preference on the constituent record.

4. To comply with regulations that require an explanation for reprinted or reissued receipts, select **Apply strict receipt rules**. When you select this option, the program requires a reason code when users re-receipt payments. **Apply strict receipt rules** also disables the option to include receipts with marketing acknowledgement letters.

5. To allow users to process new receipts for payments previously receipted, select which methods to allow for receipt numbers. The selected methods appear as options when users mark a payment for re-receipt and on the receipt process.

   - To generate new receipt numbers for previously receipted payments, select **Allow new receipt numbers for re-receipt payments**. With this option selected, users can opt to generate a new receipt number when they mark a receipt for re-receipt.
   - To process the same receipt number for previously receipted payments, select **Allow the same receipt numbers for re-receipt payments**.

6. Click **Save**. You return to the Receipt And Acknowledgement Preferences page.

Configure system acknowledgement preferences

1. From *Marketing and Communications*, click **Receipt and acknowledgement preferences** under **Configuration**. The Receipt And Acknowledgement Preferences page appears.
2. Under **Acknowledgement preferences**, click **Edit**. The Configure system acknowledgement preferences screen appears.
3. To process new acknowledgements for previously acknowledged revenue, select **Re-acknowledge revenue**.
4. Click **Save**. You return to the Receipt And Acknowledgement Preferences page.

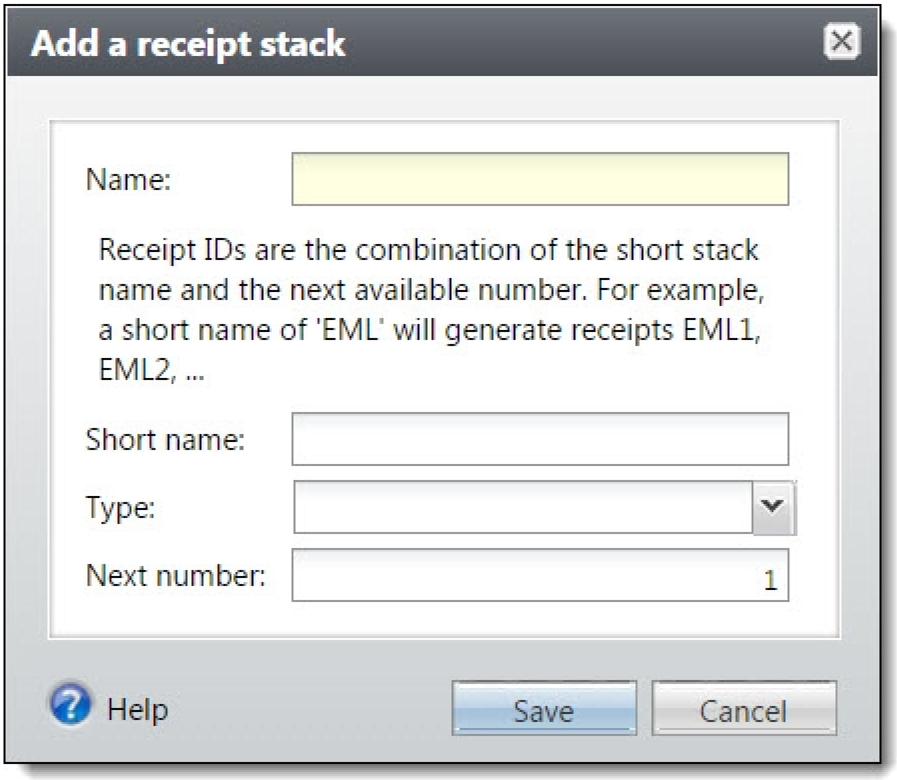
Receipt Stacks

Receipt stacks allow you to re-use receipt numbers and still meet regulatory requirements. For example, if your organization has multiple departments that receipt gifts, rather than make everyone share a single group of receipt numbers, you can create a receipt stack for each department so they each have their own set of receipt numbers. To do this, you would add a "short name" to the receipt stack that identifies the department. When departments print receipts from their stacks, the receipt numbers include their department identifier so there is no issue if the same receipt number is used more than one department. For example, the resulting receipt numbers might be Department A, Receipt Number 102 and Department B, Receipt Number 102.

After you add a receipt stack, from *Receipts* you can create a process that includes specific receipts for that stack. If receipt stacks have not yet been configured, a default receipt stack is used that has a blank short name.

Add a receipt stack

1. From *Marketing and Communications*, under **Configuration**, click **Receipt and acknowledgement preferences**. The Receipt and Acknowledgement Preferences page appears.
2. Under **Receipt stacks**, click **Add**. The Add a receipt stack screen appears.



3. In the **Name** field, enter the name of the receipt stack
4. In the **Short name** field, enter a short name for the receipt stack. For example, if the receipt stack is for preprinted forms used for gifts to the General Fund, you can enter GF. The short name is used by the receipt process along with the next available receipt number to generate a unique receipt number for each payment. For example, “GF1011.”
5. In the **Type** field, enter a description for the receipt stack. For example, if the receipt stack is for pre-printed receipts, you could enter pre-printed.
6. In the **Next number** field, enter the receipt stack start number for the process. For example, if the process should begin the receipt stack count with 3 then enter “3.”
7. Click **Save**. You return to the Receipt and Acknowledgement Preferences page.

Set receipt stack as default

1. From *Marketing and Communications*, under **Configuration**, click **Receipt and acknowledgement preferences**. The Receipt and Acknowledgement Preferences page appears.
2. Select the receipt stack to make default and click **Set as default**.

Response Categories and Responses

From the Response Categories and Responses page, you define response categories used by your organization. Within each category, you also define valid responses. Use these to track responses constituents provide to specific contacts. For example, you can include a response card in a communication that asks whether the recipient is interested in volunteer work at your organization. To track this contact, you create a response category of "Volunteer Interest" and responses of “Interested” and “Not Interested.” When the recipient returns the completed response card, you can enter their response on the Communications tab of their constituent record.

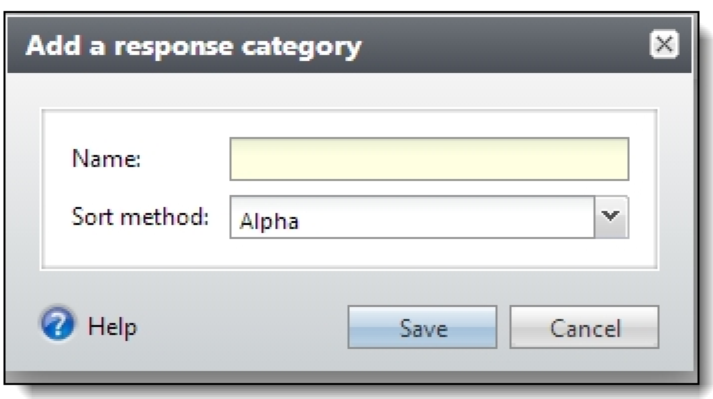
Response categories and responses are available for constituent interactions, appeals, and correspondence. To access the Response Categories and Responses page, from *Marketing and Communications*, click **Response categories and responses** under **Configuration**.

Add Response Categories

You can configure the response categories available for constituent interactions, appeals, and correspondences. Use response categories to track the responses you receive from constituents, such as an interest in volunteer opportunities.

Add a response category

1. From *Marketing and Communications*, click **Response categories and responses** under **Configuration**. The Response Categories and Responses page appears.
2. Under **Response categories**, click **Add**. The Add a response category screen appears.



3. Enter a unique name to help identify the response category. The name appears in the **Response Categories** grid of the Response Categories page and in the areas of the program that use response categories, such as constituent interactions, appeals, and correspondences.
4. In the **Sort Method** field, select whether to arrange the responses alphabetically or in a user-defined order.

5. Click **Save**. You return to the Response Categories page. Under **Response categories**, the new category appears.

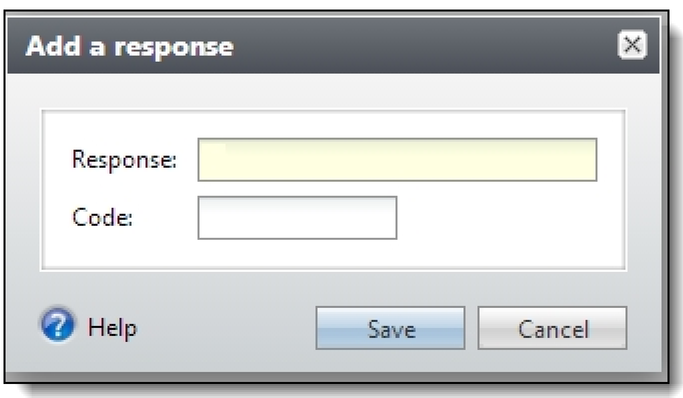
Add Responses to a Response Category

After you configure response categories, you need to add response options to the category. For example, if you ask constituents if they would like to learn more about planned giving, you have a category for "Planned Giving Interest," you may add responses for "Interested" and "Not Interested."

Note: For information about how to add responses categories, see Add Response Categories on page 65.

Add a response to a response category

1. From *Marketing and Communications*, click **Response categories and responses** under **Configuration**. The Response Categories and Responses page appears.
2. Under **Response categories**, select a response category and click **Add**. The Add a Response screen appears.



3. In the **Response** field, enter a unique name to help identify the new response. The name appears in the **Responses** grid of the Responses page and in the areas of the application that use the associated response category, such as constituent interactions, appeals, and correspondences.
4. In the **Code** field, enter a code to associate with the response. The code must be unique within its response category.
5. Click **Save**. You return to the Responses page. In the grid, the new response appears.

Reorder Responses

For a response category with a user-defined sort order, you can easily change the order of responses to make them easier to find in a list. On the responses page for the response category, click **Re-order responses**. On the Re-order responses screen, use the arrows to move responses up and down in the list.

Solicit Codes

Solicit codes allow constituents to globally opt out of solicitations and communications. For example, for constituents who do not want to receive email of any type, you can configure a “Do not email” solicit code and assign it to the Communications tab of their constituent records. When you run a marketing effort, you can exclude constituents based on solicit codes. For example, you can exclude constituents with a "Do not email" solicit code from all email blasts or constituents with a "Do not call" solicit code from all telemarketing efforts.

To access the Solicit codes page, from *Marketing and Communications*, click **Solicit codes** under **Configuration**.

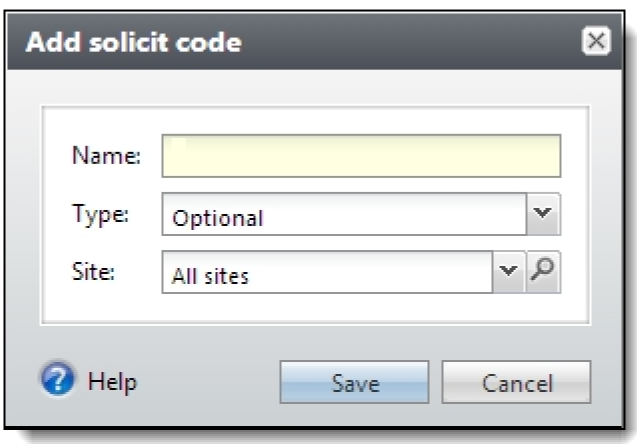
Note: To define more nuanced rules for solicitations and communications, use mail preferences or constituent attributes. For example, you can set mail preferences for a constituent who wants to receive appeals by mail, but receipts by email. You can create even more precise mail preferences, for example, a constituent wants to receive invitations to sporting events, but not auctions. For custom rules that cannot be configured through mail preferences, create constituent attributes. For example, if a constituent does not want the calendar that is typically mailed with the holiday appeal, you can create an attribute for "Include no calendar." For more information about mail preferences and constituent attributes, see the *Constituents Guide*.

Add Solicit Codes

From the Solicit Codes page, you can configure solicit codes that allow constituents to globally opt out of solicitations and communications. For example, if a constituent requests to never receive phone calls for solicitations, you can add a "Do not call" solicit code to ensure they are excluded from all telemarketing.

Add a solicit code

1. From *Marketing and Communications*, click **Solicit codes** under **Configuration**. The Solicit Codes page appears.
2. Under **Solicit codes**, click **Add**. The Add a solicit code screen appears.

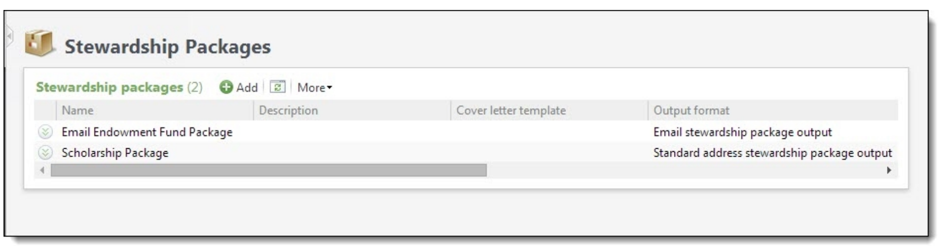


3. Enter a unique name to help identify the solicit code.
4. In the **Type** field, select whether the solicit code is optional, default, or required when users generate communications.
   - If you select Optional, users can add the solicit code to the exclusions of a communication as applicable.
   - If you select Default, the solicit code automatically appears as an exclusion for a communication process, but users can remove it as necessary.
   - If you select Required, the solicit code automatically appears as an exclusion for a communication process, and users cannot remove it.
5. To restrict use of the solicit code to a specific site at your organization, in the **Site** field, select the site to use the code. If it is valid for all sites, select All sites.
6. Click **Save**. You return to the Solicit Codes page.

Stewardship Packages

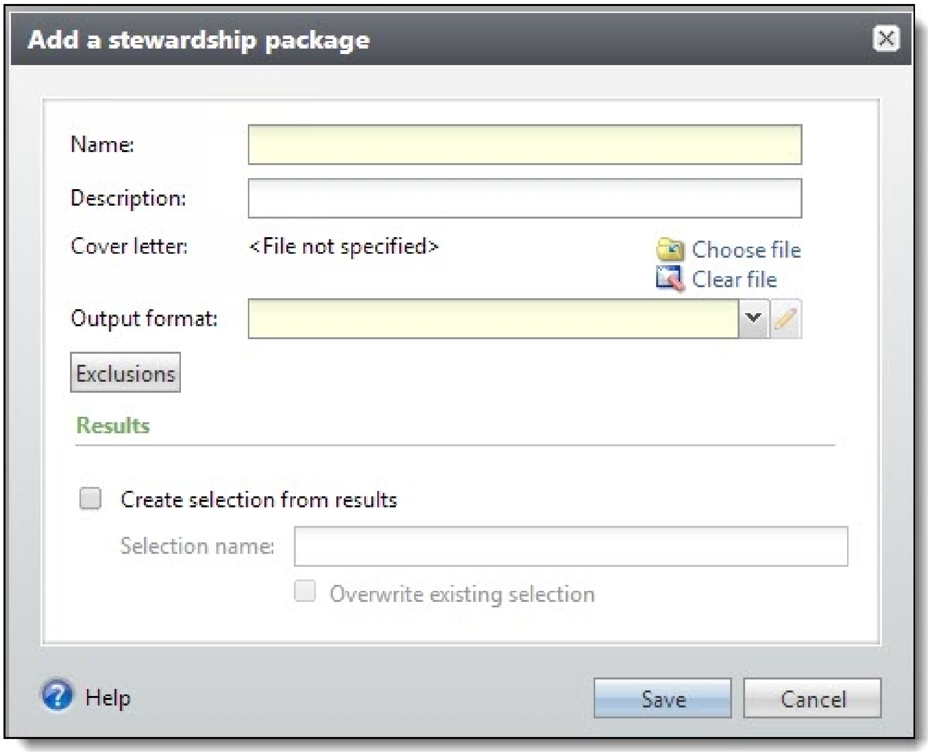
A stewardship package is a mail merge process you create for fundraising purposes. The package includes a cover letter and a stewardship report. You determine how often you generate the package and which donors and constituents receive the information. Before you configure a stewardship package process, you can create a cover letter for each fundraising purpose you intend to steward.

You can create and link a stewardship package to a fundraising purpose at any time. You can add a different package to each fundraising purpose or you can use the same package for multiple purposes. To view all stewardship packages, click **Stewardship packages** under **Configuration** in *Marketing and Communications*.



Add a stewardship package

1. From *Marketing and Communications*, click **Stewardship packages** under **Configuration**. The Stewardship Packages page appears.
2. Click **Add**. The Add a stewardship package screen appears.



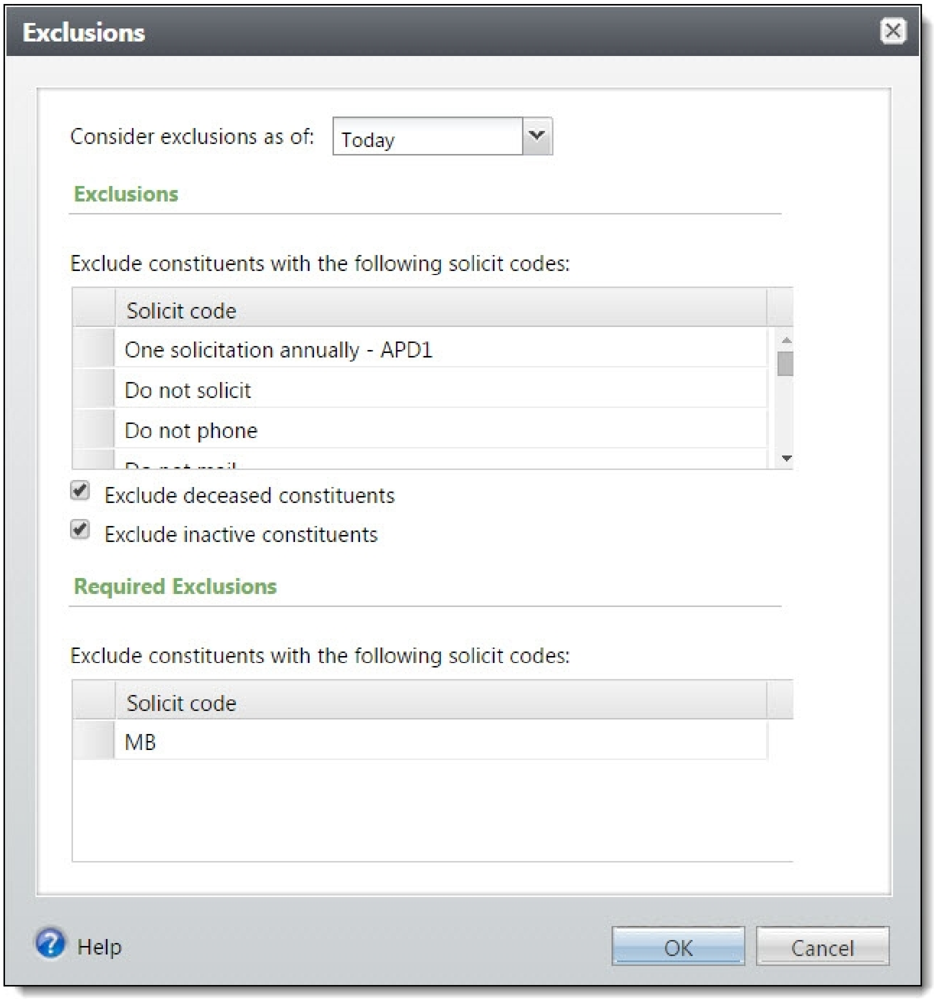
3. In the **Name** and **Description** fields, enter a name and description for the package.
4. To select a cover letter, click **Choose file**. For *Microsoft Word* documents, after you select a file, you can click the link to edit the document. To remove the file, click **Clear file**.
5. To determine how to export address information, select an output format. For example, a standard output format uses the constituent's primary address, while a seasonal output format uses a seasonal address. To change the name and address outputs for the format, click **Edit processing options** and select an **Address format** and **Name format**.
6. To select the mail or solicitation preferences to exclude, click **Exclusions**. For example, you can exclude inactive constituents or constituents with a "Do not mail" solicit code.
7. To create a selection based on the process results, select the **Create selection from results** checkbox and enter a name in the **Selection name** field. To overwrite the previous selection results the next time you run the process, select the **Overwrite existing selection** checkbox. The selection appears on the Selections tab in *Query*.
8. Click **Save**. You return to the Stewardship Packages page.

Set Exclusions for a Stewardship Package

When you create a stewardship package, you can exclude certain constituents from its selection of recipients. You can select whether to exclude deceased or inactive constituents or constituents with selected solicit codes.

Exclude constituents from a stewardship package

1. On the Add a stewardship package screen, click **Exclusions**. The Exclusions screen appears.



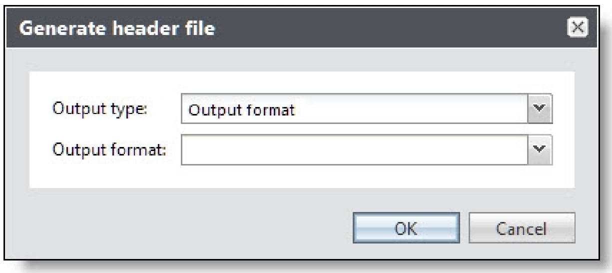
2. In the **Consider exclusions as of** field, select whether to exclude constituents that meet the exclusion criteria as of the current date or another date. If you select **Specific date,** select the date in the additional field that appears.
3. Under **Exclusions**, select the solicit codes of the constituents to exclude from the stewardship package and select whether to exclude deceased or inactive constituents.
4. Click **Show required exclusions** to see the solicit codes that are automatically excluded from the stewardship package.

Note: Under **Required Exclusions**, solicit codes that have been configured as required by your system administrator appear. The program automatically excludes constituents with these solicit codes from all stewardship packages and all other communication processes.

5. Click **Save**. You return to the Add a stewardship package screen.

Generate a Header File

To personalize a communication with information specific to its topic or recipient, you can use merge fields in your Microsoft *Word* (.docx) document. To specify the merge data to include in the document, you must generate a header file that includes the merge fields. When you generate a header file, you create a comma-separated values (*.csv) file based on an output format, with fields defined by the program, or an export definition, with fields you define. In *Word*, you can use this header file to merge the data with your document. To generate a header file for a communication, click **Generate header file** under **Tasks**. The Generate header file screen appears.



In the **Output type** field, select whether to use fields from a standard output format or an export definition.

- If you select Output format, select the output format that contains the merge fields to include.
- If you select Export definition, search for and select the export definition that includes the merge fields to include. For information about how to set up an export definition, see the *Query and Export Guide*.

When you click **OK**, the browser downloads the header file, based on the selected output format or export definition, for use in *Word*.

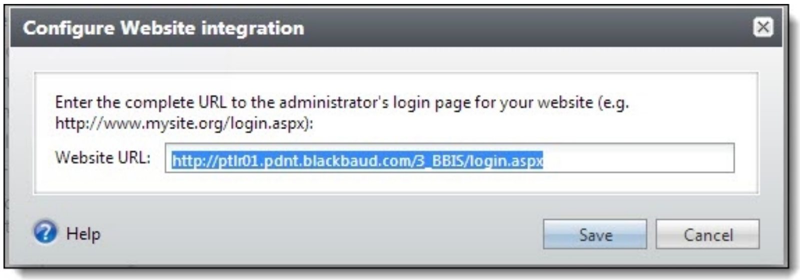
Website Integration

When ***Blackbaud Direct Marketing*** integrates with ***Blackbaud Internet Solutions***, you can send email messages targeted to segments in a marketing effort. Emails are merged with data from ***Blackbaud Direct Marketing*** to personalize the content of each message. After the emails are sent, you can track their effectiveness using reports and KPIs.

Before you send emails from ***Blackbaud Direct Marketing***, the system administrator must configure the integration with ***Blackbaud Internet Solutions*** so the two programs can share information.

After the integration package is loaded, the **Website integration** link appears under **Configuration** on the Marketing and Communications page. Click this link to access the Configure Website integration screen.

For more information about how to configure integration with ***Blackbaud Internet Solutions***, see the ***Blackbaud Direct Marketing*** *Blackbaud Internet Solutions Integration Guide*.


Configure Website integration
Enter the complete URL to the administrator's login page for your website (e.g. http://www.mysite.org/login.aspx):
Website URL:
http://ptlr01.pdnt.blackbaud.com/3_BBIS/login.aspx
Help
Save
Cancel

Marketing Efforts Overview

Marketing efforts enable you to segment donors based on a wide variety of characteristics. For direct marketing efforts, such as appeals to existing donors, you can segment donors by recent giving history and wealth. For public media efforts, such as broadcast and online advertisements, you can segment recipients based on marketing locations and media outlets.

To increase the effectiveness of your fundraising, you can target your best prospects with customized content. A marketing effort can use a variety of packages that appeal to the interests and demographics of your segments.

Using the features in the program, you can plan and execute all aspects of marketing efforts.

- In *Administration*, an administrator must configure the record sources to include an effort. When you set up a record source, the **Gift Record Source** is required to activate a marketing effort. When an administrator selects a gift record source and maps the appropriate fields, an activated marketing effort can determine all the gifts associated with an effort and calculate performance measures based on the gift amounts and other criteria.
- Before your organization creates and sends marketing efforts, set configuration options for *Marketing and Communications*. You can access these options from the Marketing and Communications page, under **Configuration**.
- Use the Vendors, Creatives, and Packages features to establish records for the businesses you purchase items from, the items you use in your direct and public marketing efforts (anything from graphics to small gifts such as pens you may include), and the actual pieces that make up your marketing efforts.
- Add acquisition lists to the program. These hold general information about the list and group related list segments that make up the list. Use list segments to import the data in the list into the program for use in your marketing efforts.
- Use finder files to keep rented and exchanged names and addresses separate from your house file. The records included in these files cannot be stored permanently in the database until those recipients give a gift.
- Use the Segmentation feature area to create the segments that will enable you to target specific direct marketing efforts and pieces of mail to different groups of donors.

- Use the Public Media feature area to create public media segments such as media outlets, time slots, and marketing locations to target your public marketing efforts.
- The *Planner* feature enables a Marketing Executive or Director to plan out the fiscal year (or other fixed time period) for your organization. This person in your organization knows the strategy and budget and captures this information in the Planner.
- Create source code parts and layouts that you can apply to your marketing efforts to establish the specific combination of list, package, segment, etc. that results in a particular gift.
- Use the Marketing Efforts feature to create the marketing effort itself, including the segmentation or public media. You can then create an export for the marketing effort to send to a mailing house or call center, for example, or import into another program.
- Perform analysis by running performance reports on all facets of your marketing efforts.

Common Tasks for Marketing Efforts

This section addresses tasks typically performed for all marketing efforts. For more information about tasks not addressed here, see the section for that marketing effort:

- Direct Marketing Efforts on page 131
- Public Media Efforts on page 150
- Marketing Acknowledgements on page 161
- Membership Renewal Efforts on page 193
- Sponsorship Efforts on page 219

Manage Segments on Marketing Efforts

Segments group donors based on a variety of criteria so you can target prospects with customized content based on their characteristics. For example, you can base segments for direct marketing efforts on previous efforts; statistical scoring such as recency, frequency, monetary values; or biographical traits such as age or gender. The segments you add to marketing efforts are configured in the Segments area of *Marketing and Communications*. For more information, see Segments on page 245.

From the Segments tab of an effort, you can view and manage all segments in the effort. You can add, edit, and delete individual segments, segment groups, and test segments. For more information about other segment management tasks, see Manage Segments on page 247.

For more information about the types of segments you can add for each marketing effort as well as any special considerations, see:

- Manage Segments on page 247
- Segments for Public Media Marketing Efforts on page 155
- Segments for Membership Efforts on page 217
- Segments for Sponsorship Efforts on page 244

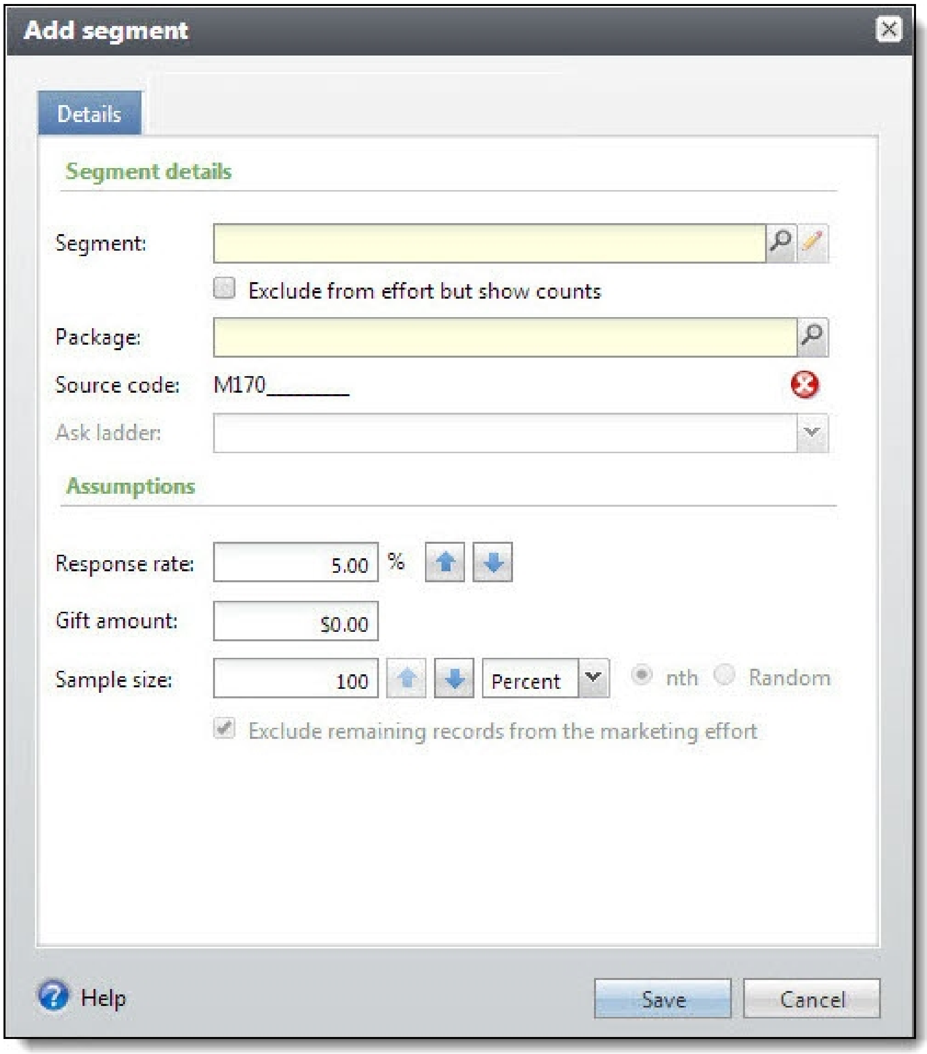
Note: Unlike other types of marketing efforts, you cannot add segments directly to a marketing acknowledgement effort. Instead, you assign revenue segments to marketing acknowledgement rules where you also set the package details and assumptions. For more information about managing segments on marketing acknowledgements, see Marketing Acknowledgement Segments on page 191.

Add Segments to Marketing Efforts

You can create segments of constituents in your database for direct, membership renewal, and sponsorship efforts.

Add a segment to a marketing effort

1. From a direct marketing, membership renewal, or sponsorship effort record, select the Segments tab.
2. Click **Add**, **Constituent segment/Membership segment/Sponsorship segment**. The Add segment screen appears,
3. On the Details tab, enter details and assumptions about the segment.



4. In the **Segment** field, select the segment to add to the marketing effort.

   If you select a segment with a source code part value assigned, that value defaults into the appropriate position in the source code field below.

Note: To edit the selected segment, click the **Edit** button to open the Edit segment screen. When you edit a segment from a marketing effort, you cannot change the segment's code. Also, if you edit the underlying segment after the segment is saved to the marketing effort, all existing calculations are cleared from the Segments tab.

5. To use this segment as an exclusion, select **Exclude from effort but show counts**. 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. Segment exclusions also allow you to group remainders from a segment so they are not included in other segments. For more information, see Segment Exclusions on page 82. When you select this option, all other options are disabled.
6. In the **Package** field, select the package to associate with this segment. You can select only packages with the same channel as the marketing effort. If you select a package with a source

code part value assigned, that value defaults into the appropriate position in the source code field below.

7. The **Source Code** field displays the full source code. If code parts are missing values, select the Source Code tab to complete the source code. You must enter code part values that meet the formatting requirements of the layout. A red X or green checkmark indicates whether the full code is valid.
8. In the **Ask ladder** field, select the ask ladder to associate with this segment. If you include ask ladders on a marketing effort, the **Ask Ladder** field is required for all segments you add to that marketing effort.

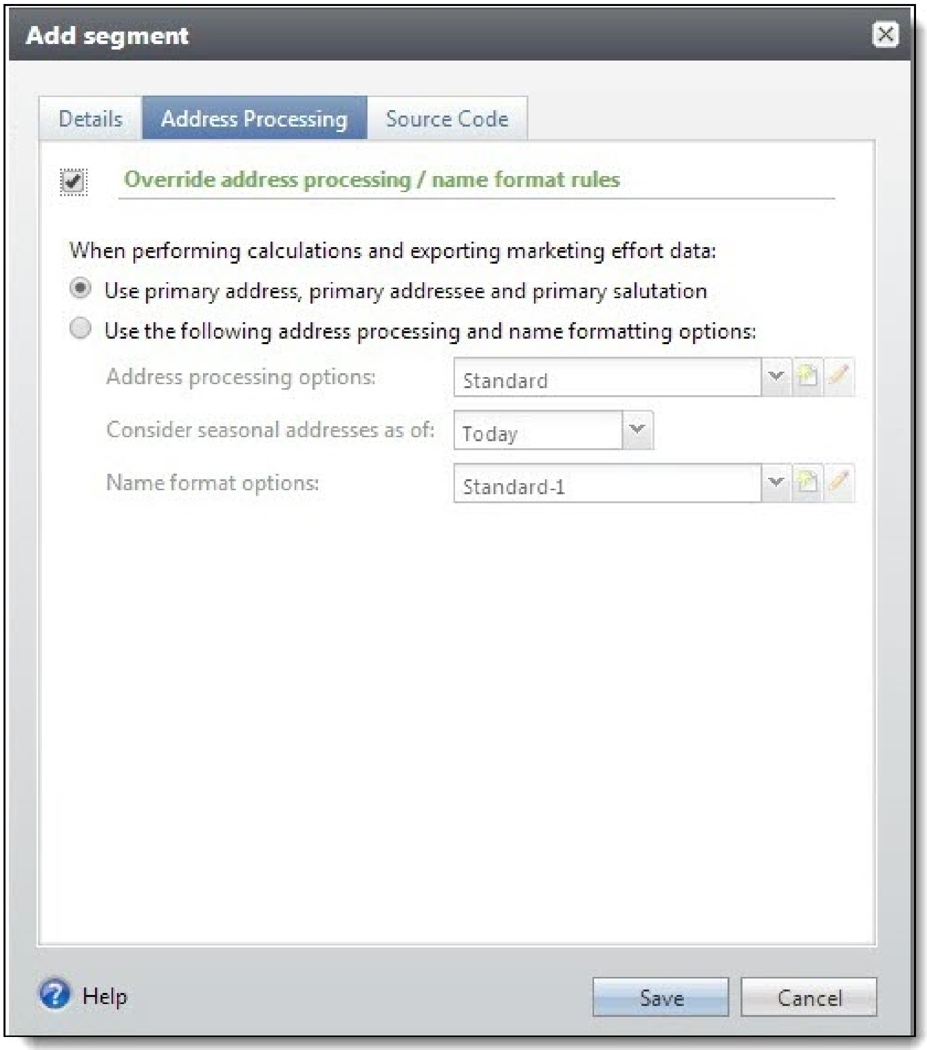
Note: You can add ask ladder overrides to the marketing effort to apply different ask ladders to selections than the one specified for their segment.

9. In the **Response rate** and **Gift amount** fields, enter the expected response rate for the segment and the expected gift amount from respondents. You can compare the expected response rate to the actual when you analyze the marketing effort.
10. In most cases, you will include in the marketing effort all records the segment contains. However, it is sometimes useful to include only a portion of a segment to hold down costs, ensure all segments are equally sized, or account for limits on marketing effort materials. To include only a sampling of the segment, in the **Sample size** field, enter the sample size as a percentage or total number of records. Then select whether to add records at random or every nth value. For example, if you enter "50" and select "Percent" and **Random**, the segment includes a random sampling of records equal to 50 percent of the records in the segment. If you enter "50" and select "Records" and **Random**, the segment includes 50 randomly sampled records.

    Some marketers think every "nth" record more thoroughly represents a set of records than a random selection. The nth value depends on your other selections in the **Sample size** field and the total number of records in the segment. For example, if you enter "50" and select "Percent" and **nth**, and the total number of records in the segment is 100, then 100 divided by 50 equals two, so every second record from the original 100 records is selected until 50 records are collected for the segment.
11. If you enter a sample size, you can select **Exclude remaining records from the marketing effort** to exclude any records that are not included in the sample from other segments below the current segment in the **Segments** grid. (Segments are processed for a marketing effort in order from top to bottom.)

    If you clear **Exclude remaining records from the marketing effort**, any records that are not in the sample are available to other segments below the current segment (if the records exist in the segments below; otherwise, they are not included in the marketing effort at all). If a record meets the criteria for multiple segments, it is included in the segment closest to the top.
12. Select the Address Processing tab. On this tab, you can specify the address and name format to use.

Note: The Address Processing tab appears only when you select **Allow individual segments to override the address processing/name formats of the effort**on the Address processing tab of the template.



13. To use different address processing and name format options than those set on the marketing effort, select **Override address processing/name formats**.
14. Select which name format and address processing options to use:
    - **Use primary address, primary addressee, and primary salutation**—Select this option to use the primary address, addressee, and salutation selected for records included in the marketing effort. If a constituent has no primary address, primary addressee, or primary salutation, then the record is exported with a blank address, addressee, or salutation. To ensure that every constituent has a proper addressee and salutation, make sure to define at least one default name format with a specified primary addressee and primary salutation.
    - **Use the following address processing and name formatting options**—Select this option to choose custom address processing and name format options for the marketing effort. For example, you can use a unique address processing option set for your holiday appeal.

      Address processing options — Select a pre-defined set of address processing options or create a new set.

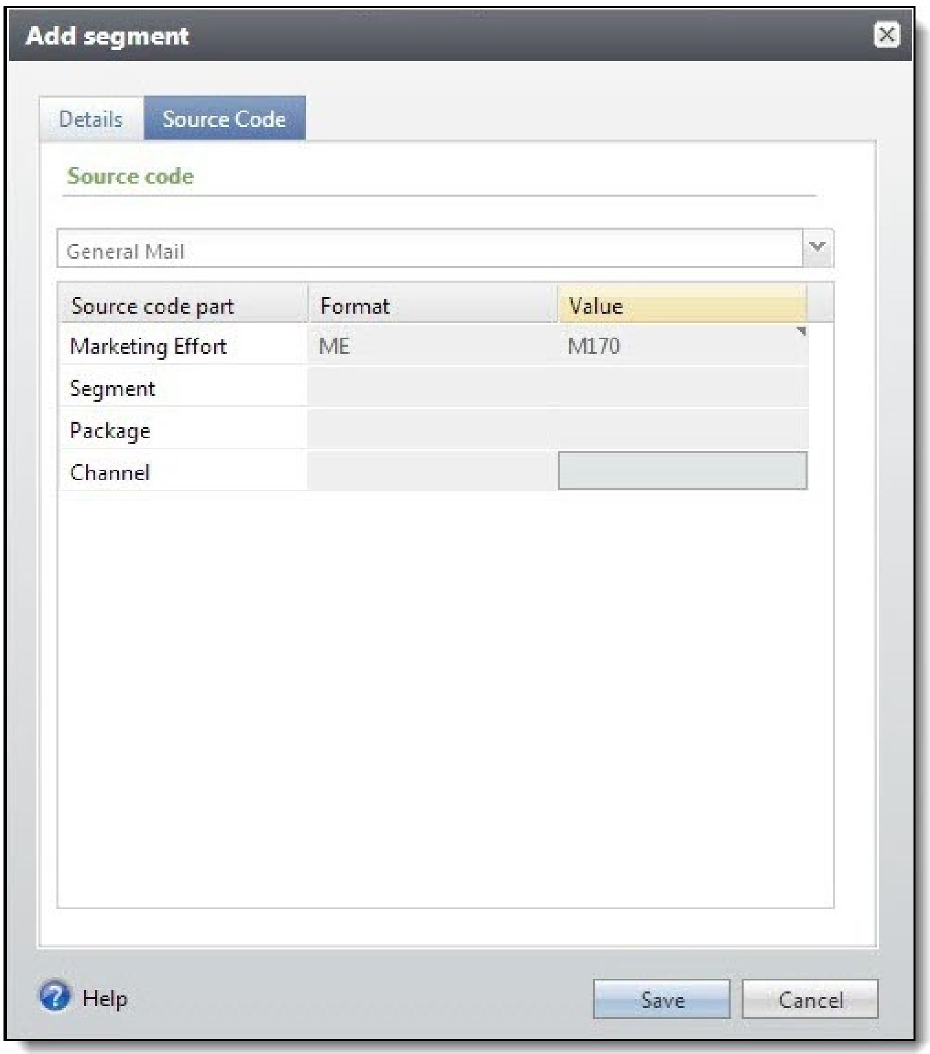
Consider seasonal addresses as of — Select a date to take seasonal addresses into consideration when a marketing effort is processed to ensure delivery to the correct location. For example, if a constituent stays at a vacation home in December, you can send your marketing effort there rather than the primary address.

Name format options — Select a pre-defined set of name format options or create a new set.

Note: You set name format and address processing options in *Marketing and Communications*, under **Configuration**. For more information, see Address Processing Options on page 16.

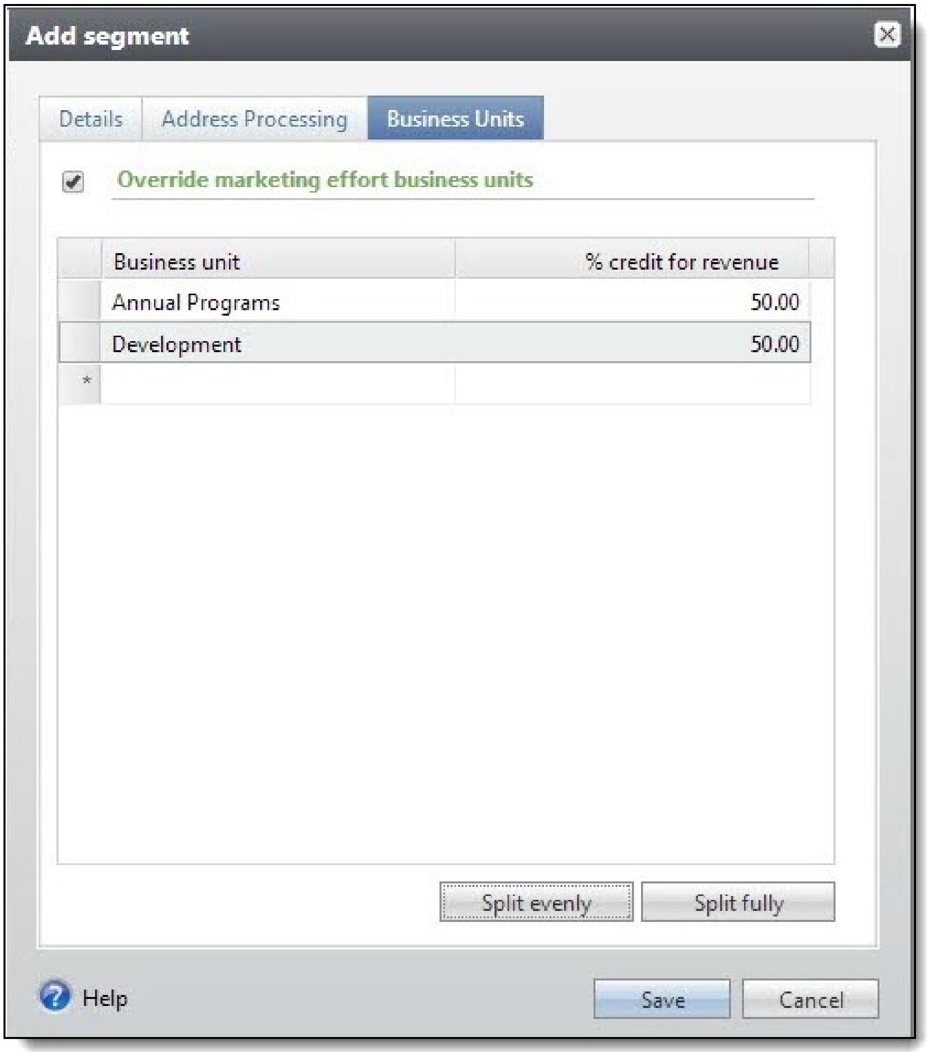
15. Select the Source Code tab. The **Source code** field displays the layout selected for the marketing effort. The fields under the layout display the code part values assigned to the layout. If any values are missing, you can enter them here.

Note: The Source Code tab appears only when the marketing effort has a source code that includes a segment part.



16. Select the Business units tab. This tab displays the business units selected for the marketing effort. To use other business units for the segment, select **Override marketing effort business units**.

Note: The Business units tab appears only when you select **Override appeal business units in the effort and/or in segments** on the Start setup form of the communication template and select **Allow individual segments to override the business units of the effort**on the Business Units tab of the template.



17. In the **Business unit** column, select which units to credit for the revenue.
18. In the **% Credit for revenue** column, enter the percentage of the revenue to credit to the selected business unit.
19. To divide the credit amount evenly among the selected business units, click **Split evenly**. To give each unit full credit for the revenue, click **Split fully**.
20. Click **Save**. You return to the Segments tab, where the new segment appears.

Segment Exclusions

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 exclusions)

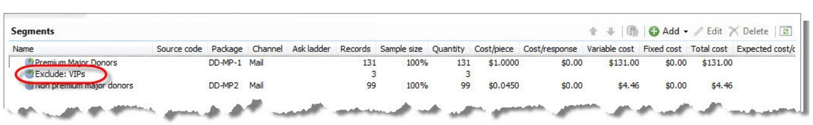
Segment 5: Non-premium major donors

Segment 6: Non-premium mid-level donors

Segment 7: Non-premium basic donors

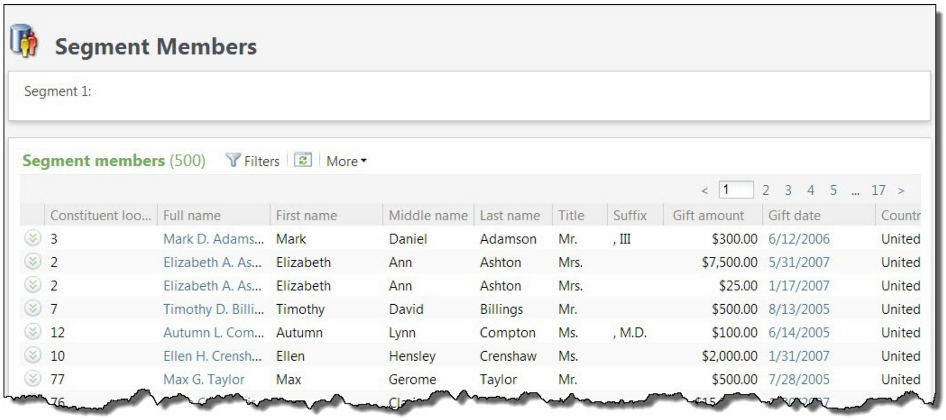
The **Calculate segment counts** and **Activate marketing effort** tasks calculate and refresh the record counts for segment exclusions, but do not assign the exclusions to a constituent appeal or apply source analysis rules.

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. For more information about how to export an exclusion segment, see Export a marketing effort on page 96.



View Members of a Segment

After you run the Calculate segment counts process, you can view a list of records included in a segment. From the Segments tab, select a segment and click **List members**. The Segment Members page appears with detailed information about each record included in the segment.



Add Test Segments to Marketing Efforts

Test segments allow you to test the assumptions of a segment. When you add test segments, many of the same settings are available as for a regular segment. Test segments take a sample portion of the parent segment's records. You can assign the same test segment to multiple segments in a marketing effort.

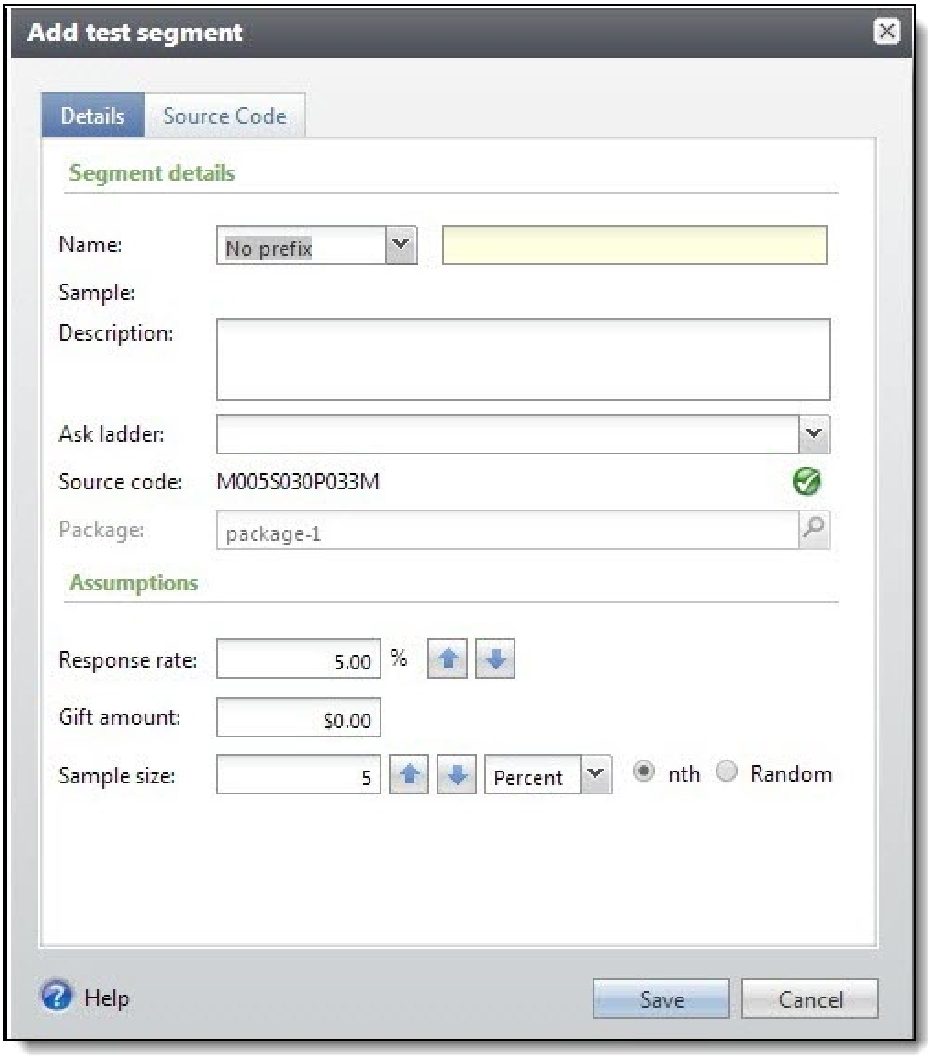
For a test segment, you may want to change the package, response rate, or gift amount from the parent segment so you can test which combination of assumptions achieves a better return on your investment. Any records included in a test segment are automatically excluded from the parent segment.

To support different methods of testing, you can create sample groups of records using percentages, fractions, or specified numbers of records. For example, to test how a new package performs with a segment that has a known response rate, you can send the package to a 5% sampling of the segment. Or when testing a new acquisition list, you can divide the list evenly into thirds and assign each group a different package.

Note: If you later mark the **Exclude from effort but show counts** option for the parent segment, the test segment is removed.

Add a test segment to a marketing effort

1. From a marketing effort record, select the Segments tab.
2. Select the segment or multiple segments to use in the test segment, and then click **Add**, **Test segment**. The Add test segment screen appears.



3. In the **Name** field, choose the format for the generated name. To add a prefix to the test segment name, select “Segment name” or “Segment code.” In the second field, enter the test segment’s name or test segment code. The **Sample** field displays a preview of the format you select.
4. In the **Description** field, enter a description for the test segment.
5. In the **Ask ladder** field, select the ask ladder to associate with this segment. If you include ask ladders on a marketing effort, the **Ask Ladder** field is required for all segments you add to that marketing effort.

Note: You can add ask ladder overrides to apply different ask ladders to selections than the one specified for their segment. For more information, see Ask Ladder Overrides Tab on page 123.

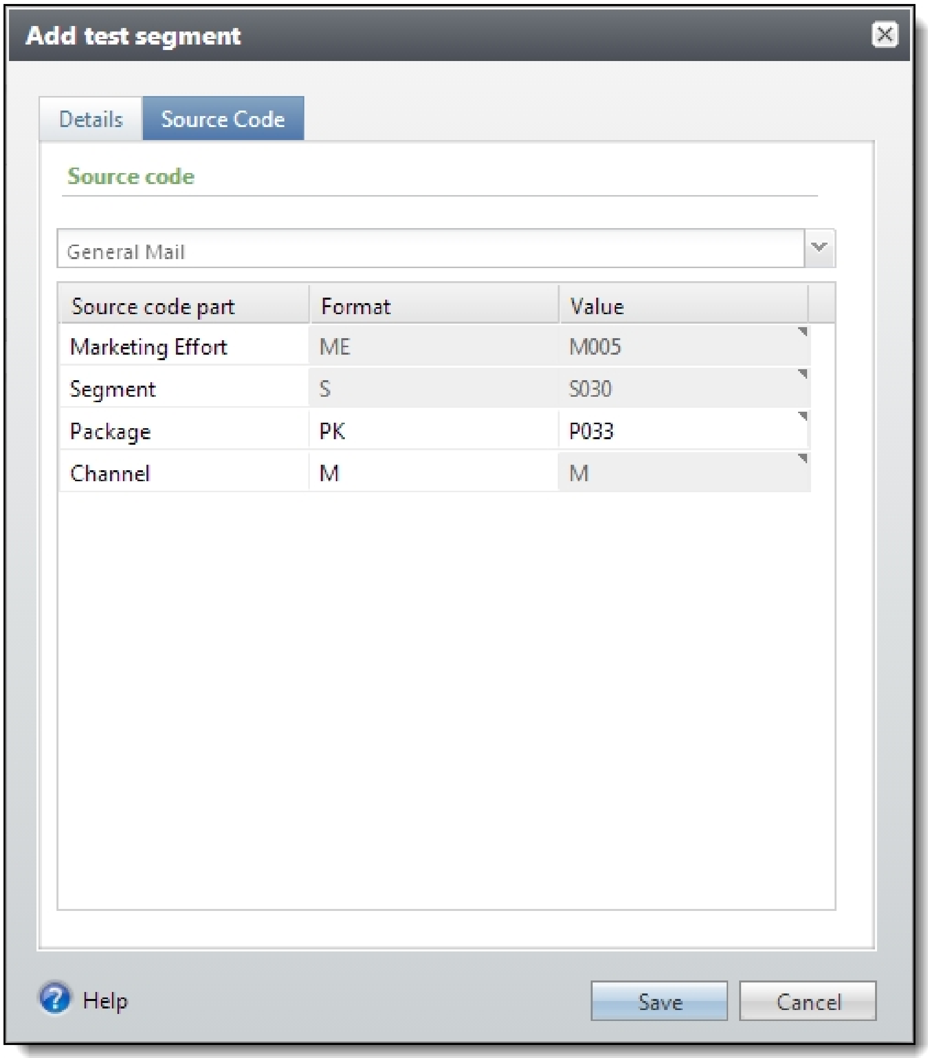
6. In the **Package** field, select the package to associate with this segment. You can select only packages with the same channel as the marketing effort. If you select a package with a source code part value assigned, this value defaults into the appropriate position in the **Source code** field.

7. The **Source Code** field displays the full source code. If code parts are missing values, select the Source Code tab to complete the source code. You must enter code part values that meet the formatting requirements of the layout. A red X or green checkmark indicates whether the full code is valid.
8. Under **Assumptions**, enter the expected **Response rate** for the segment and expected **Gift amount** respondents. This information enables you to compare the expected response rate to the actual when you analyze the marketing effort.
9. In the **Sample size** field, enter a sample size and select “Percent,” “Records,” or “Fraction.” Then select whether to add records at random or every nth value. For example, if you enter “50 Percent/Random,” the segment includes a random sampling of records equal to 50 percent of the records in the segment. If you enter “50 Records/Random,” the segment includes 50 randomly sampled records. If you enter "1/3 Fraction/Random,” the segment includes a random sample of one-third of the total records.
   - 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 even.
   - Some marketers think every “nth” record more thoroughly represents a set of records than a random selection. The nth value depends on your other selections in the **Sample size** field and the total number of records in the segment. For example, if you enter “50 Percent/nth” and the total number of records in the segment is 100, then 100 divided by 50 equals two, so every second record from the original 100 records is selected until 50 records are collected for the segment.

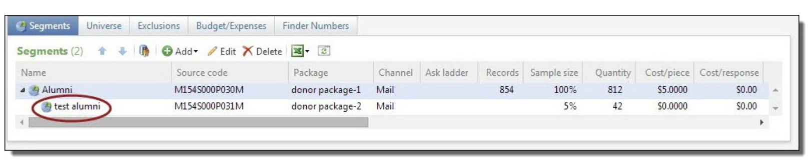
Note: The sample size is typically 100 percent. However, you can adjust the sample size to ensure segments are equally sized, hold down costs, or account for limits on marketing effort materials.

10. Select the Source code tab. The **Source code** field displays the layout selected for the marketing effort. The fields under the layout display the code part values assigned to the layout. If any values are missing, you can enter them here.

Note: The Source Code tab appears only when the marketing effort has a source code that includes a segment part.



11. Click **Save**. The test segment is generated. You return to the Segments tab, where the test segment appears under its parent segment.



Warning: The order of segments in the grid is important because you can only include records in one segment. When you activate a marketing effort, segments are processed from top to bottom. If a record meets the criteria for multiple segments, only the first of those segments includes the record.

Copy Segments from an Another Marketing Effort

Segments that perform well are often used for multiple marketing efforts over time. To quickly reuse segments, you can copy them from an existing marketing effort.

- The copy process includes all segments from the selected effort, including test segments.
- You can only copy segments with the same base currency.
- You can only copy segments from marketing efforts of the same type. (i.e., you cannot copy segments from a direct marketing effort to a membership renewal.)
- You cannot copy segment/package combinations that already exist on the marketing effort you are copying to.

Copy segments from another marketing effort

1. From Segments tab of an unactivated direct marketing, membership renewal, or sponsorship effort, click **Copy from another effort**. The Copy segments from another marketing effort screen appears.
2. Search for the marketing effort whose segments you want to copy and click **Select**.
3. You return to the Segments tab and all copied segments appear in the list below any segments you already added.

Note: If segment/package combinations from the effort you are copying already exist on the new effort, you receive a warning that tells you which segments/packages are duplicates. You can copy all other segments that are not duplicates, or you can cancel.

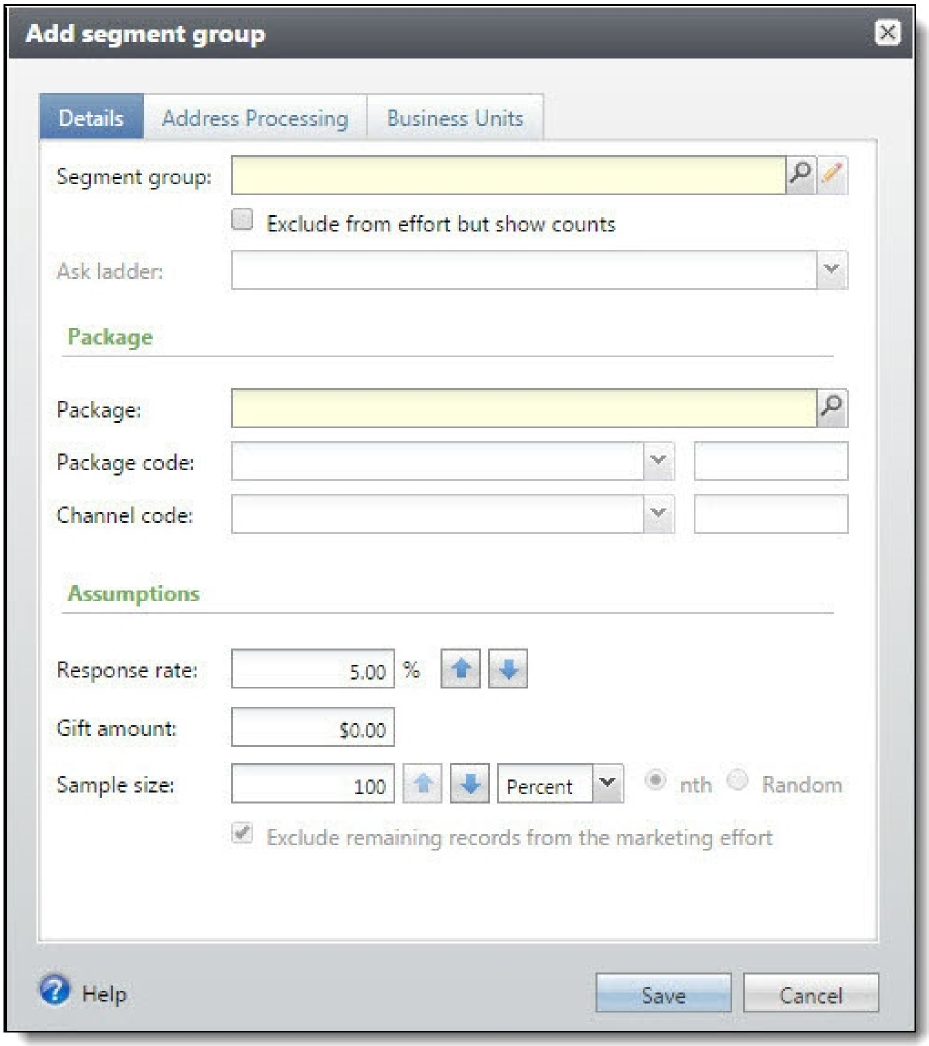
Add Segment Groups to Marketing Efforts

On the Segments tab of a marketing effort, you can add the segments you want to receive the marketing effort. Segment groups allow you to quickly add multiple segments to a marketing effort at one time. For more information about how to create segment groups, see Segment Groups on page 273.

Note: Because records can be included in only in one segment, it is important to consider the order of segments in groups. When you activate a marketing effort, segments are processed from top to bottom. If a record meets the criteria for multiple segments, it is included in the segment that appears first in the list.

Add a segment group to a marketing effort

1. From a direct marketing, membership renewal, or sponsorship effort record, select the Segments tab.
2. Click **Add**, **Segment group**. The Add segment group screen appears.



3. In the **Segment group** field, select a segment group or add a new one. For more information about how to create a segment group, see Segment Groups on page 273.
4. To exclude the segments from the marketing effort, select **Exclude from effort but show counts**. 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. For more information, see Segment Exclusions on page 82. When you select this option, all other options are disabled. If the selected segment group includes any list segments, the **Exclude from effort but show counts** option is disabled.
5. In the **Ask ladder** field, select the ask ladder to associate with this segment. If you include ask ladders on a marketing effort, the **Ask Ladder** field is required for all segments you add to that marketing effort.

Note: You can add ask ladder overrides to apply different ask ladders to selections than the one specified for their segment.

6. In the **Package** field, select the package to associate with the segment group. You can select only packages with the same channel as the marketing effort. If you select a package with a

source code part value assigned, this value defaults into the source code field below. Otherwise, select a package code value.

7. In the **Response rate** and **Gift amount** fields, enter an expected response rate for the segment and the expected gift amount from respondents. This information enables you to compare the expected response rate to the actual when you analyze the marketing effort.
8. In most cases, you will include in the marketing effort all records the segment contains. However, it is sometimes useful to include only a portion of a segment to hold down costs, ensure all segments are equally sized, or account for limits on marketing effort materials. To include only a sampling of the segments included in the group, in the **Sample size** field, enter the sample size as a percentage or total number of records. Then select whether to add records at random or every nth value. For example, if you enter “50” and select “Percent” and **Random**, the segment includes a random sampling of records equal to 50 percent of the records in the segment. If you enter “50” and select “Records” and **Random**, the segment includes 50 randomly sampled records.

   Some marketers think every “nth” record more thoroughly represents a set of records than a random selection. The nth value depends on your other selections in the **Sample size** field and the total number of records in the segment. For example, if you enter “50” and select “Percent” and **nth**, and the total number of records in the segment is 100, then 100 divided by 50 equals two, so every second record from the original 100 records is selected until 50 records are collected for the segment.

Note: **Note**: If the segment group includes constituent segments and list segments, the settings in the **Sample size** field applies only to the constituent segments. If list segments are managed by the vendor, no records are available to use for a sample.

9. If you enter a sample size, you can select **Exclude remaining records from the marketing effort** to exclude any records that are not included in the sample from other segments below the current segment in the **Segments** grid. (Segments are processed for a marketing effort in order from top to bottom.)

   If you clear **Exclude remaining records from the marketing effort**, any records that are not in the sample are available to other segments below the current segment (if the records exist in the segments below; otherwise, they are not included in the marketing effort at all). If a record meets the criteria for multiple segments, it is included in the segment closest to the top.

Note: The Address processing tab appears only when you select **Allow individual segments to override the address processing/name formats of the effort**on the Address processing tab of the template.

10. Select the Address processing tab. On this tab, you can specify the address and name format to use. To use different address processing and name format options than those set on the marketing effort, select **Override address processing/name formats**.
11. Select which name format and address processing options to use:
   - **Use primary address, primary addressee, and primary salutation**—Select this option to use the primary address, addressee, and salutation selected for records included in the marketing effort. If a constituent has no primary address, primary addressee, or primary salutation, then the record is exported with a blank address, addressee, or salutation. To ensure that every

constituent has a proper addressee and salutation, make sure to define at least one default name format with a specified primary addressee and primary salutation.

- **Use the following address processing and name formatting options**—Select this option to choose custom address processing and name format options for the marketing effort. For example, you can use a unique address processing option set for your holiday appeal.

  Address processing options — Select a pre-defined set of address processing options or create a new set.

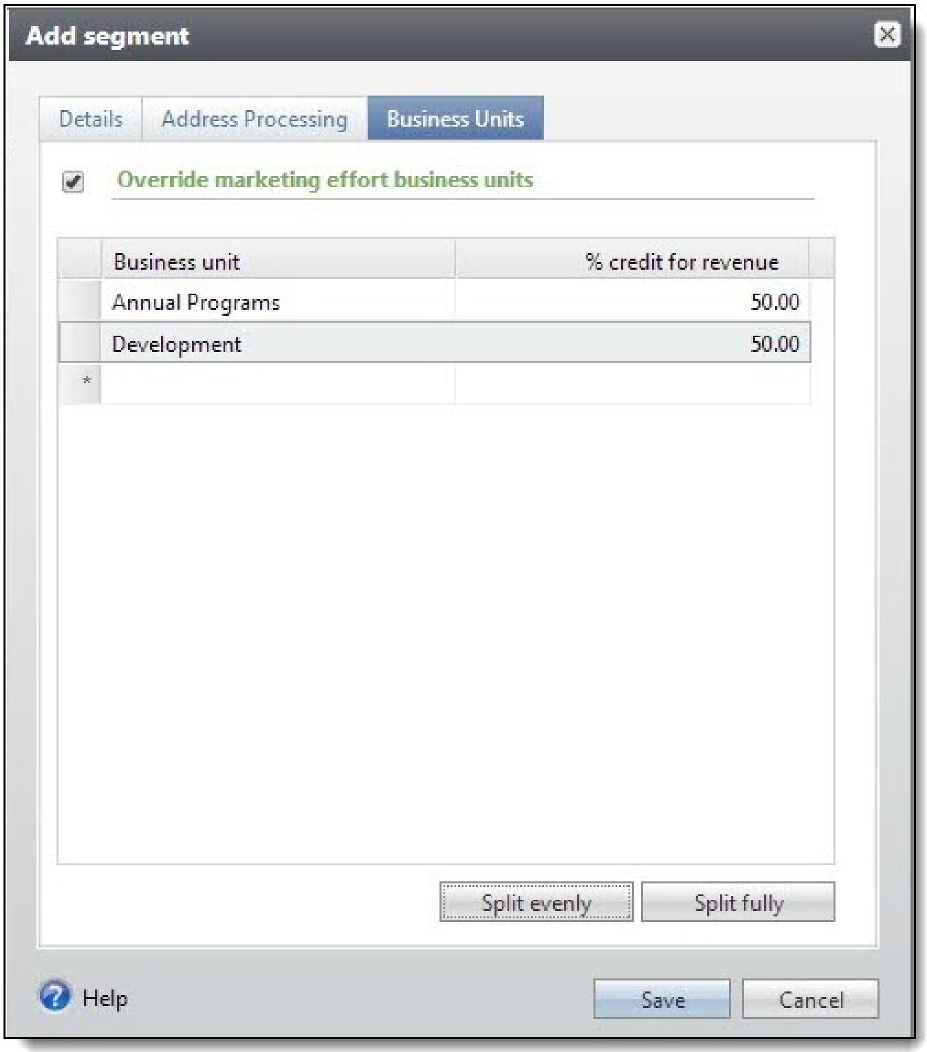
  Consider seasonal addresses as of — Select a date to take seasonal addresses into consideration when a marketing effort is processed to ensure delivery to the correct location. For example, if a constituent stays at a vacation home in December, you can send your marketing effort there rather than the primary address.

  Name format options — Select a pre-defined set of name format options or create a new set.

Note: You set name format and address processing options in *Marketing and Communications*, under **Configuration**. For more information, seeAddress Processing Options on page 16.

Note: The Business units tab appears only when you select **Override appeal business units in the effort and/or in segments** on the Start setup form of the communication template and select **Allow individual segments to override the business units of the effort**on the Business Units tab of the template.

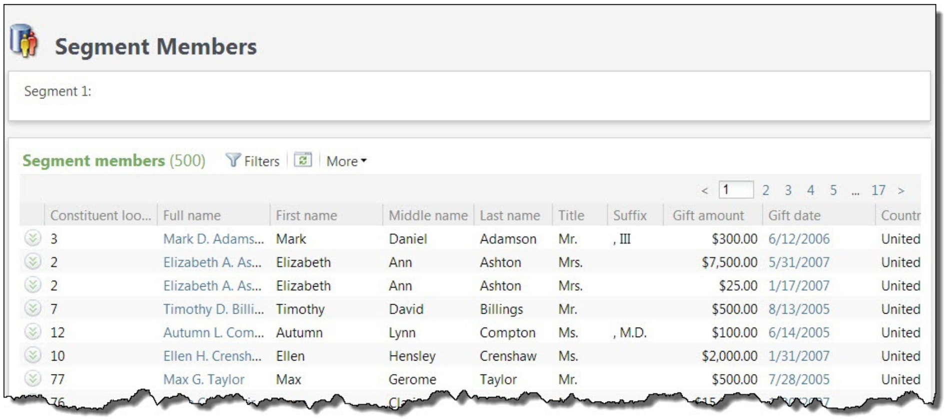
12. Select the Business units tab. This tab displays the business units selected for the marketing effort. To use other business units for the segment, select **Override marketing effort business units**.
13. In the **Business unit** column, select which units to credit for the revenue.
14. In the **% Credit for revenue** column, enter the percentage of the revenue to credit to the selected business unit.
15. To divide the credit amount evenly among the selected business units, click **Split evenly**. To give each unit full credit for the revenue, click **Split fully**.



16. Click **Save**. You return to the Segments tab, where you can view and edit the segments as necessary.

View Members of a Segment

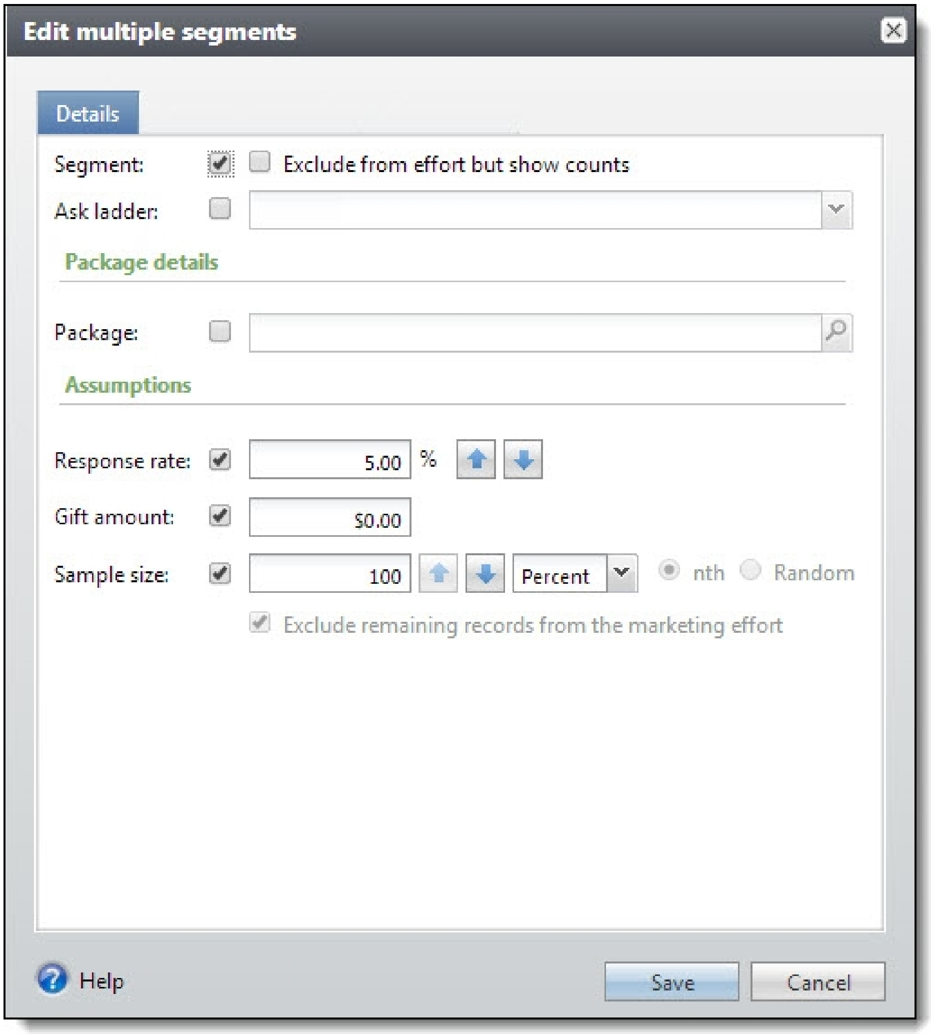
After you calculate segment counts, you can view a list of all records included in a segment. From the Segments tab of a marketing effort, click **List members**. The Segment Members page appears with detailed information for each record included in the segment. To open a segment member's constituent record from this page, click their full name. For revenue, membership, or sponsorship segments, you can click the transaction date to open the member's associated revenue, membership, or sponsorship record.



Edit Segments on a Marketing Effort

From the Segments tab of a marketing effort, you can edit individual segments, test segments, or segment groups. On unactivated marketing efforts, you can edit segments to specify different packages, assumptions, and more. On activated marketing efforts, you can edit only the descriptions; all other fields and options are locked.

To edit an individual segment, select the segment and click **Edit**. To apply the same changes to multiple segments or test segments at one time, select the segments in the grid (**CTRL** or **SHIFT** + Select), and click **Edit**. The Edit multiple segments screen appears.



Checkboxes appear next to each field and option. If a checkbox is selected, its value applies to all segments in the group. If a checkbox is not selected, that means the segments have different values for that field or option, or do not have a value defined. To apply the same value to the selected segments, select the checkbox and enter a value.

Note: For revenue segments on marketing acknowledgement efforts, you cannot change the segment or package, even before the marketing effort is activated.

Calculate Segment Counts

The Calculate segment counts process updates the various counts for a marketing effort and its segments, such as the total number of records, total expenses, and expected revenue. This process also assigns finder numbers to each record included in the marketing effort. When you run Calculate segment counts, you can choose to refresh all the selections associated with the marketing effort and to update the source analysis rule data.

For direct marketing efforts, the Calculate segment counts process includes the tasks selected on the Activation tab of the marketing effort or communications template. If a task is locked on the template, it is hidden on this screen but still runs when you click **Start**. For all other types of marketing efforts, you must select the tasks to include in the calculate segment counts process.

After you run Calculate segment counts, you can export an unactivated effort. For more information about how to export, see Export Marketing Efforts on page 95.

Calculate segment counts

1. Under **Tasks** on a marketing effort record, click **Calculate segment counts**. The Calculate segment counts screen appears.
2. To refresh all selections associated with the marketing effort, including those associated with the universe, exclusions, and segments, select **Refresh all selections used in the communication**.
3. To snapshot donor attributes as defined by your source analysis rules, select **Capture source analysis rule (SAR) data for all recipients**. For more information about source analysis rules, see the *Administration Guide*.

Note: We recommend that you snapshot source analysis rules data when the marketing effort file is first exported for quality checks, and not when the effort is activated. If you wait until the effort is activated, the source analysis rules data will likely be out of date.

4. To capture data for the marketing before you activate the effort, select **Generate data for marketing exclusions report**. Running this report can hinder performance so you may want to turn if off for certain efforts, such as weekly acknowledgement mailings.
5. After the process is complete and you return to the marketing effort record, the Segments tab displays updated counts.

View Calculation Status

After segment counts are calculated for a marketing effort, you can view details about the process status. To access the Marketing Effort Segment Record Count Calculation Status page, on the marketing effort profile page, under **History**, click the date next to **Counts generated**.

After segment counts are calculated for a marketing effort, you can view details about the process status. From the marketing effort profile page, under **History**, you can view the date the calculate counts process last ran and its current status. Icons represent the current status:

	Process is running
	Process is complete
	Process is complete with exceptions
	Process did not complete

To view more details about the calculation process, click the date next to **Counts generated**. The Marketing Effort Segment Record Count Calculation Status page. On this page, you can manage the marketing effort calculation processes for your marketing efforts.

On the Recent Status tab, you can view the details of the most recent operation of the Calculate segments counts process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many records processed successfully and how many were exceptions.

Each time you run the Calculate segments counts process, the program generates a status record of the instance. On the History tab, you can view historical status record information about each instance of the process. The information in the grid includes the status of the instance; the start time, end time, and duration of the instance; the person who started the instance; the total number of records processed during the instance; and the server used to run the process for the instance.

Export Marketing Efforts

You can create several types of exports for a direct marketing effort. A standard export creates a comma separated value file you can send to a marketing effort house or import into another program. Postal exports are for use with the *Postal Discounts* preprocessing service, which enables your organization to receive the lowest possible discounts by printing the required postal reports, bar-coded marketing effort labels, and sack and tray tags.

You can run the export process using the Export effort task. You can also automate the export process so it runs automatically when you activate the marketing effort. If the effort is not activated, you must run the Calculate Segment Counts process before you can export it. For more information, see Calculate Segment Counts on page 93.

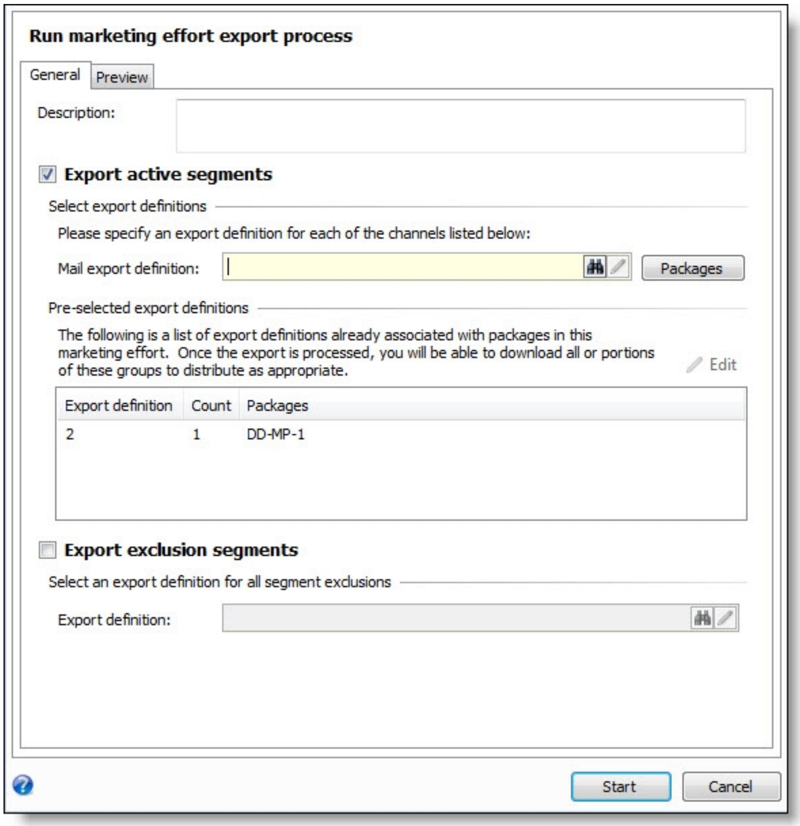
For more information about how to set a marketing effort to export automatically, see Activation Tab on page 121.

Standard/Postal Export

Standard exports create a .CSV file according to an export definition. Postal exports are available when you have the *Postal Discounts* preprocessing service. Postal exports are based on a postal template that performs all the presort calculations and exports the chosen postal fields in a selected export definition. When you create an export, it is saved as a process that you can run whenever necessary. From the Export Status page, you can download the .CSV file generated by the export process. For more information, see Download Export Output Files on page 99.

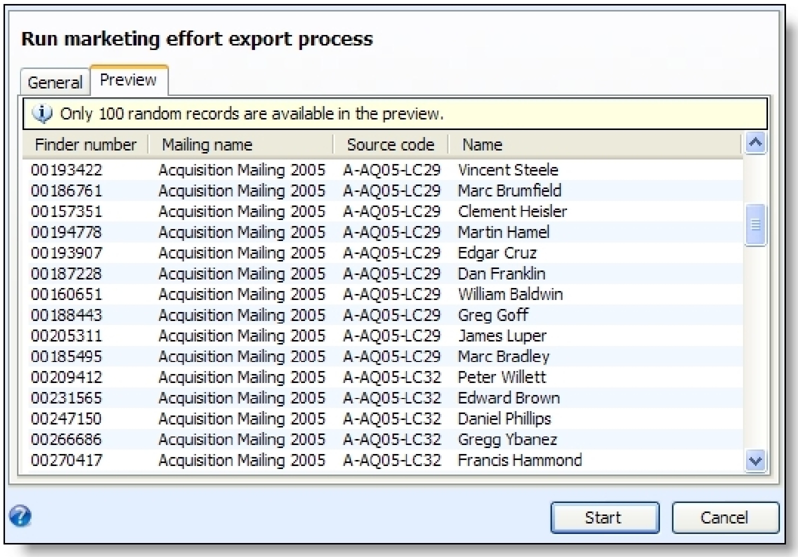
Export a marketing effort

1. From a marketing effort's profile page, under **Tasks**, select **Export effort**. The Run marketing effort export process screen appears.



2. In the **Description** field, enter a description for the export process.
3. if you use the *Postal Discounts* preprocessing service, you can select whether to create a **Standard** or **Postal** export. If you do not use *Postal Discounts*, this option does not appear and all exports will be **Standard**.
4. If mail or email packages assigned to the marketing effort do not have export definitions defined, select **Export active segments** and select a definition in the **Mail export definition** or **Email export definition** fields. You must select an export definition for those packages before you can start the export process.
5. If you already selected export definitions for any of the packages in the marketing effort (on the associated segments or on the Activations tab of the marketing effort), these appear in the **Pre-selected export definitions** box.

6. If your marketing effort includes segment exclusions, you can select **Export exclusion segments** to export the exclusions to a separate export file. Select the export definition to use for the exclusions.
7. Select the Preview tab. The Preview tab displays 100 random records included in the export. This enables you to spot check the records included in the export.



8. Click **Start** to begin the export.

View Marketing Effort Export Status

After a marketing effort is exported, you can view details about the process status. From the marketing effort profile page, under **History**, you can view the date the export process last ran and its current status. Icons represent the current status:

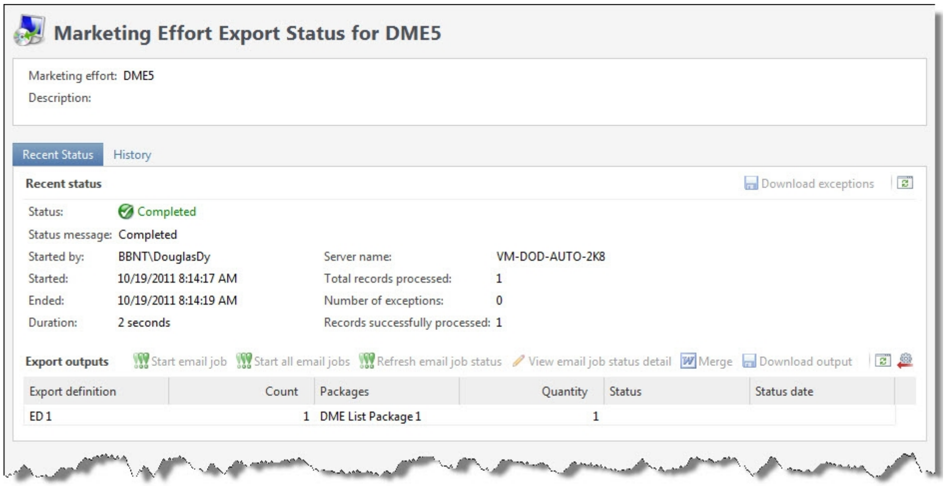
	Process is running
	Process is complete
	Process is complete with exceptions
	Process did not complete

To view more details about the export process, click the date next to **File exported**. The Marketing Effort Export Status page appears. On this page, you can manage the marketing effort export processes for your marketing efforts. For more information, see Manage Marketing Effort Export Processes on page 98.

Manage Marketing Effort Export Processes

Depending on your security rights, you can perform various tasks to manage export processes in the database.

When you select a process and open it, the status page for that process appears.



On the Recent status tab, you view the details of the most recent operation of the process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many of those records processed successfully and how many were exceptions. If your marketing effort includes segment exclusions and you exported them, an additional row of information appears.

After you run an export process, you can download output files from the database for use in another application or to send to a marketing effort processing house. When you download output files from the export process record, the program downloads the files to a location you specify. For more information, seeDownload Export Output Files on page 99.

If you calculate segment counts, merge records, and then export the effort, any records that were deleted by the merge process or now cause duplicates within the marketing effort since you last calculated segment counts are flagged as exceptions and included in an exception file. From the export's Recent status tab, you can view the number of exceptions or click **Download exceptions** to download the exceptions file. For more information about how to download exceptions, see Download Exceptions on page 105.

Note: If ***Blackbaud Direct Marketing*** is integrated with ***Blackbaud Internet Solutions***, additional options appear on the Export Status page so you manage Blackbaud Internet Solutions email jobs. For more information about these options, see the *Blackbaud Internet Solutions Integration Guide*.

Each time you run an export process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the export process. The information in the grid includes the status of the instance; the start time, end time, and duration of the instance; the person who started the instance; the total number of records processed during the instance; and the server used to run the process for the instance.

Download Export Output Files

After you run an export process, you can download output files from the database for use in another application or to send to a marketing effort processing house.

You have four options for downloading output files:

- CSV: downloads a single output file containing all data in comma-separated value format.
- XLSX: downloads a single output file containing all data in Microsoft ***Excel*** format.
- Multiple files: splits downloaded output into multiple files based on the unique values of a selected field. For example, if you split by "Package code," a separate output file is created for each package code included in the export.
- Grouped files: creates output files with data grouped by field values as specified. For example, you can create a set of files broken out by region. To do this, include the **State** field in your export definition and then select to group by **State** for the output download. Create a group for each region and add the appropriate states to each group — for example, include FL, GA, SC, and NC in the Southeast region group and CT, MA, NH, and VT in the Northeast region group. This setup produces a file for each region and each file includes data for only the states included in its region.

Download output to a CSV file

1. On the export process status page, select the Recent status tab. When the **Status** of the export process is Completed, the **Download output** button is enabled.
2. Select an export definition and click **Download output**, **Single file**. The Save As screen appears.
3. Name the output file and map to the directory to save the downloaded output file.
4. Click **Save** to start the download. When the download finishes, a message appears to inform you that it is complete and asks whether to open the output file.
5. To open the output file in the default application set to open a .csv file, such as Microsoft *Excel*, click **Yes**. To return to the export process status page, click **No**.

Download output to an XLSX file

1. On the export process status page, select the Recent status tab. When the **Status** of the export process is Completed, the **Download output** button is enabled.
2. Select an export definition and click **Download output** and select **Download to XLSX**. The Save As screen appears.

Note: On the Save As screen, the **Save as type** field automatically displays "Excel workbook (*.xlsx)". You cannot select to download another type of output file. In an ***Excel*** workbook (*.xlsx) file, data is stored in a variant of the Office Open XML format. You can open XLSX files with Microsoft ***Excel 2007*** or more recent versions. Other spreadsheet programs may support this format. For some older versions of ***Excel***, to open XLSX files, there is a compatibility pack available at Microsoft's Office website: http://office.microsoft.com.

3. Enter a name for the output file and map to the location to save the downloaded output file.

4. Click **Save**. The program downloads and saves the output file at the designated location. When the download finishes, a message appears to ask whether to open the output file.
5. To open the output file in the default application set to open a *.xlsx file such as Microsoft *Excel*, click **Yes**. To return to the export process status page, click **No**.

Download multiple output files

1. On the export process status page, select the Recent status tab. When the **Status** of the export process is Completed, the **Download output** button is enabled.
2. Select an export definition and click **Download output**, **Multiple files**. The Download output files screen appears.
3. In the **Output path** field, map to the location to save the output files.
4. In the **Create one file per** field, select a column header from the export file. This field determines how data from the export file is split into multiple output files. For example, if you select “Package code” in this field, a separate output file is created for each package code included in the export.
5. In the **File prefix** field, you can enter a prefix to prepend to the output file names.
6. Click **Download**. When the download finishes, a message appears to inform you that it is complete and asks whether to open the output path.
7. Click **Yes**. A window opens to the folder you selected for the output path. The folder contains the downloaded output files.

Download grouped files

1. On the export process status page, select the Recent status tab. When the **Status** of the export process is Completed, the **Download output** button is enabled.
2. Select an export definition and click **Download output**, **Grouped files**. The Download grouped files screen appears.
3. In the **Output path** field, map to the location to save the grouped files.
4. In the **Group by** field, select the export field to group the files by, for example, “Packages” or “Segment code.” *Note:* You cannot select an export field that has more than 500 distinct values.
5. Values for the selected **Group by** field appear in the left box of Group options. Select the checkbox for each value to include in the first group and then click right arrow to move those values to the right box. The Group file name screen appears.
6. In the **Name** field, enter a name for the grouped file and click **OK**. You return to the Download grouped files screen and the group appears in the box on the right.
7. Continue adding groups until all values on the left are included in a group on the right. To view the items included in a group, click the plus sign to expand the group.
8. Click **Download**. When the download finishes, a message appears to inform you that it is complete and asks whether to open the output path.

9. Click **Yes**. A window opens to the folder you selected for the output path. The folder contains the downloaded grouped files.

Activate Marketing Efforts

After you set up and test a marketing effort, you must activate it before sending it to the processing house. Activation “locks in” which records are included in the marketing effort and associates the gifts you receive as a result of the effort with an appeal. After activation, details including the appeal name, marketing effort name, date sent, segment name, test segment name, package name, source code, and finder number appear on constituent records that received the marketing effort.

For direct marketing efforts, the activation process includes the tasks selected on the Activation tab of the marketing effort or communication template. If a task is locked on the template, it is hidden on this screen but still runs when you click **Start**. For all other types of marketing efforts, you must select the tasks to include in the activation process.

After you activate the marketing effort, you can use analysis tools such as the Marketing Revenue report to determine the effectiveness of segments in the marketing effort.

Note: You cannot unactivate a marketing effort. As a workaround, you can copy the activated marketing effort and then delete it. The copy provides an unactivated version.

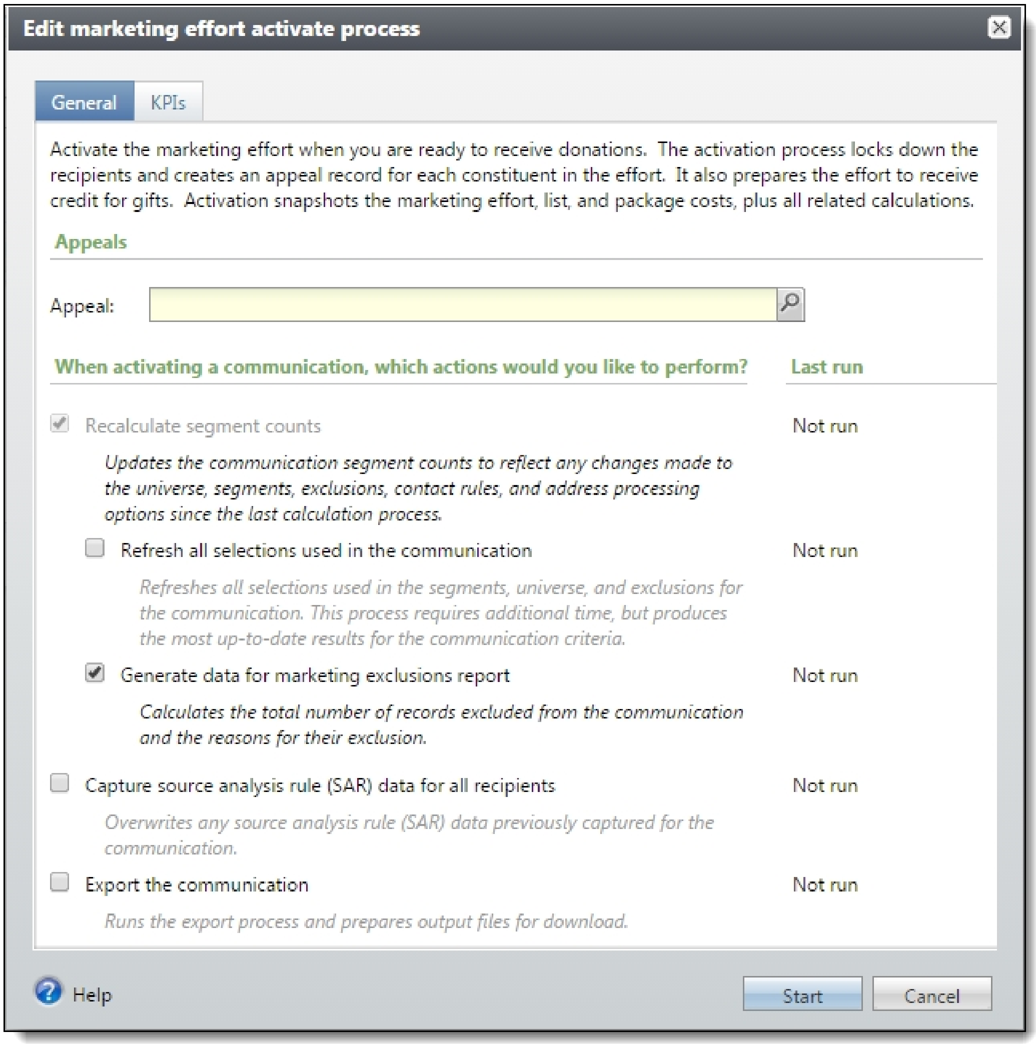
Tip: If the **Activate marketing effort** task is disabled, you probably did not add segments to the effort yet. If the marketing effort includes segments, check the record source to make sure the gift fields are mapped correctly.

Tip: If you run the duplicate constituents merge process, you should recalculate segment counts before activating the marketing effort. If you do not, you may receive exceptions for constituents that were deleted by the merge process or are now considered duplicates within the marketing effort. From the marketing effort's Activation Status page, you can view the number of exceptions or click **Download exceptions** to download the exceptions file.

Note: Public media efforts are activated automatically when you create the effort.

FDPActivate a marketing effort

1. From the marketing effort’s profile page, select **Activate marketing effort** under **Tasks**. The Edit marketing effort activate process screen appears.



Note: For direct marketing efforts, options on this screen are hidden if they were locked on the communication template. This procedure assumes all options on the Activation tab are unlocked.

2. Select the appeal to associate with donations received from the marketing effort. If you already selected an appeal for the marketing effort, it appears in this field.
3. Under **When activating a communication, which actions would you like to perform?**, select which tasks should occur as part of the activation process.

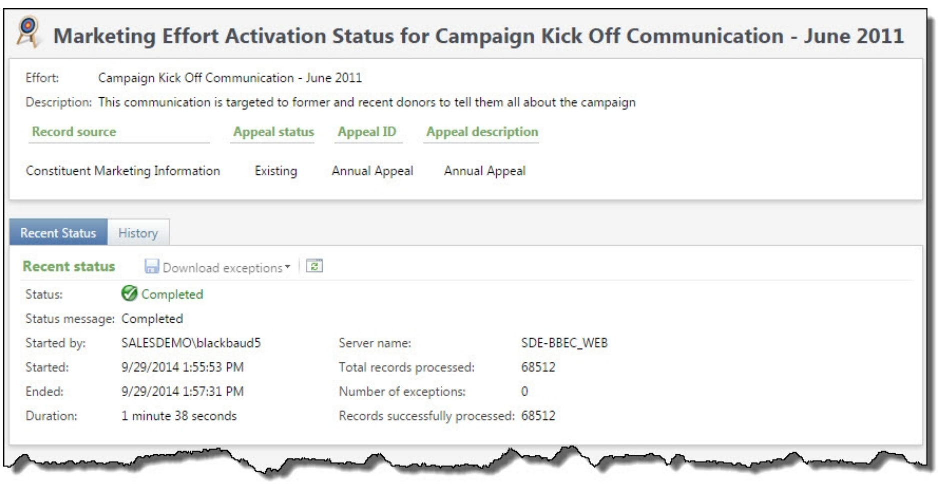
   To run the Calculate segment counts process when you activate the effort, select **Recalculate segment counts**. This process calculates various counts for the marketing effort and its segments, such as the total number of records, total expenses, and expected revenue.
4. To refresh all selections associated with the marketing effort, including those associated with the universe, exclusions, and segments, select **Refresh all selections used in the communication**.
5. To capture data for the marketing before you activate the effort, select **Generate data for marketing exclusions report**. Running this report can hinder performance so you may want to turn if off for certain efforts, such as weekly acknowledgement mailings.

Note: If you use advanced name format options, you must generate data for the marketing exclusions report.

6. To snapshot donor attributes as defined by your source analysis rules, select **Capture source analysis rule (SAR) data for all recipients**. For more information about source analysis rules, see the *Administration Guide*.

Note: If you did not run Calculate segment counts at any point prior to activation, this option is selected by default. If you ran the counts process earlier and do not want to update the segment counts or source analysis rule data, clear those options. 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, we recommend that you snapshot source analysis rules data when the marketing effort file is first exported for quality checks, and not when the effort is activated. If you wait until the effort is activated, the source analysis rules data will likely be out of date.

7. To export the marketing effort automatically when activated, select **Export the communication**.
8. Click **Start**. The Marketing Effort Activation Status page appears while the activation processes. Activation may take a while depending on the properties of the marketing effort.



9. To return to the marketing effort, click **Go to [marketing effort]**. The marketing effort profile page appears. Under **History**, you can monitor the activation process as it runs. For more information, see View Activation Status on page 104.

Edit Marketing Effort Activation Criteria

After you activate, under **Tasks**, you can click **Edit activation criteria** to edit the appeal associated with the marketing effort. All other activation criteria is locked. Click **Start** to run the activation process again.

View Activation Status

After a marketing effort is activated, you can view details about the process status. From the marketing effort profile page, under **History**, you can view the date the activation process last ran and its current status. Icons represent the current status:

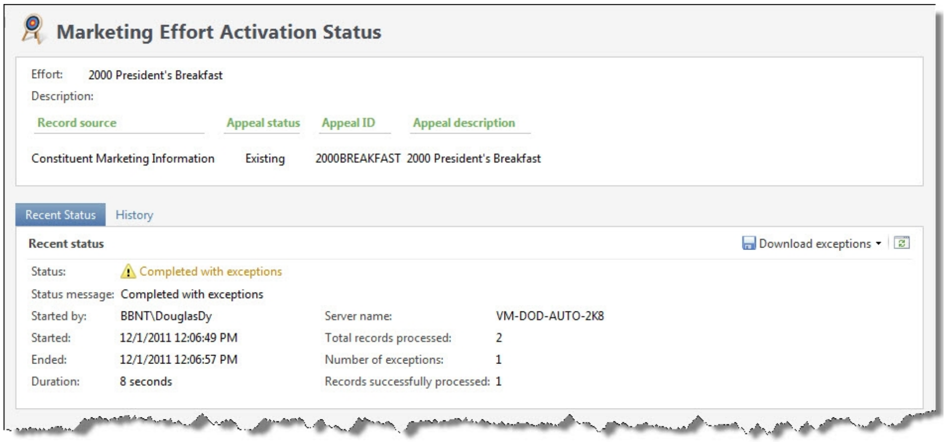
	Process is running
	Process is complete
	Process is complete with exceptions
	Process did not complete

To view more details about the activation process, click the date next to **Activated**. The Marketing Effort Activation Status page appears. On this page, you can manage the marketing effort activation processes for your marketing efforts.

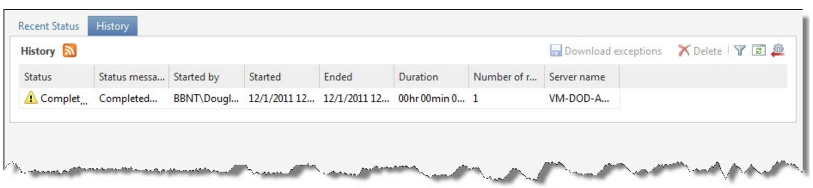
Manage Activation Processes

On the Marketing Effort Activation Status page, you manage the marketing effort activation processes for your marketing efforts.

On the Recent Status tab, you can view the details of the most recent operation of the activate marketing effort process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many records processed successfully and how many were exceptions. You can download the exceptions to an output file. For example, you can use the exceptions file in the **Remove members** process to remove any duplicates that were created during a merge. For more information, see Remove Members From Marketing Efforts on page 110.



Each time you run the marketing effort activation process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the marketing effort activation process. The information in the grid includes the status of the instance; the start time, end time, and duration of the instance; the person who started the instance; the total number of records processed during the instance; and the server used to run the process for the instance. You can delete activation process history as needed.



- **View RSS feed** - To subscribe to a Really Simple Syndication (RSS) feed, click **View RSS feed**. Use this to receive a notification when a process completes.
- **Filter** - You can filter the history list by status: Completed, Running, or Did not finish.
- **Refresh List** - To make sure you have the latest process information, click **Refresh List**.

Download Exceptions

After you run the activation or export process, you can download an output file that includes exceptions generated from the activation or export process. For example, if you calculate segment counts, merge, and then activate or export the effort without updating the segment counts, any records that were deleted by the merge process or now cause duplicates within the marketing effort since you last calculated segment counts are flagged as exceptions and included in an exception file. From the marketing effort's Activation Status or Export Status pages, you can view the number of exceptions or click **Download exceptions** to download the exceptions file.

You have four options for downloading output files:

- CSV: downloads a single output file containing all data in comma-separated value format.
- XLSX: downloads a single output file containing all data in Microsoft ***Excel*** format.
- Multiple files: splits downloaded output into multiple files based on the unique values of a selected field. For example, if you split by "Package name," a separate output file is created for each package name included in the export.

- Grouped files: creates output files with data grouped by field values as specified. For example, you can create a set of files broken out by segment name. To do this, select to group by **Segment** for the output download.

Download exceptions to a CSV file

1. On the activation status or export status page, select the Recent status tab. When the **Status** is Completed with exceptions, the **Download exceptions** button is enabled.
2. Click **Download exceptions**, **Download to CSV**. The Save As screen appears.
3. Name the output file and map to the directory to save the downloaded output file.
4. Click **Save** to start the download. When the download finishes, a message appears to inform you that it is complete and asks whether to open the output file.
5. To open the output file in the default application set to open a .csv file, such as Microsoft *Excel*, click **Yes**. To return to the activation or export status page, click **No**.

Download exceptions to an XLSX file

1. On the activation status page or export status page, select the Recent status tab. When the **Status** is Completed with exceptions, the **Download exceptions** button is enabled.
2. Click **Download exceptions**, **Download to XLSX**. The Save As screen appears.

Note: On the Save As screen, the **Save as type** field automatically displays "Excel workbook (*.xlsx)". You cannot select to download another type of output file. In an ***Excel*** workbook (*.xlsx) file, data is stored in a variant of the Office Open XML format. You can open XLSX files with Microsoft ***Excel 2007*** or more recent versions. Other spreadsheet programs may support this format. For some older versions of ***Excel***, to open XLSX files, there is a compatibility pack available at Microsoft's Office website: http://office.microsoft.com.

3. Enter a name for the output file and map to the location to save the downloaded output file.
4. Click **Save**. The program downloads and saves the output file at the designated location. When the download finishes, a message appears to ask whether to open the output file.
5. To open the exceptions file in the default application set to open a *.xlsx file such as Microsoft *Excel*, click **Yes**. To return to the activation or export status page, click **No**.

Download multiple output files

1. On the activation status or export status page, select the Recent status tab. When the **Status** is Completed with exceptions, the **Download exceptions** button is enabled.
2. Click **Download exceptions**, **Multiple files**. The Download output files screen appears.
3. In the **Output path** field, map to the location to save the output files.
4. In the **Create one file per** field, select a column header from the export file. This field determines how data from the export file is split into multiple output files. For example, if you select "Package code" in this field, a separate output file is created for each package code included in the export.
5. In the **File prefix** field, you can enter a prefix to prepend to the output file names.

6. Click **Download**. When the download finishes, a message appears to inform you that it is complete and asks whether to open the output path.
7. Click **Yes**. A window opens to the folder you selected for the output path. The folder contains the downloaded exception files.

Download grouped files

1. On the activation status or export status page, select the Recent status tab. When the **Status** is Completed with exceptions, the **Download exceptions** button is enabled.
2. Click **Download exceptions**,**Grouped files**. The Download grouped files screen appears.
3. In the **Output path** field, map to the location to save the grouped files.
4. In the **Group by** field, select the export field to group the files by, for example, “Packages” or “Segment code.” *Note:* You cannot select an export field that has more than 500 distinct values.
5. Values for the selected **Group by** field appear in the left box of Group options. Select the checkbox for each value to include in the first group and then click right arrow to move those values to the right box. The Group file name screen appears.
6. In the **Name** field, enter a name for the grouped file and click **OK**. You return to the Download grouped files screen and the group appears in the box on the right.
7. Continue adding groups until all values on the left are included in a group on the right. To view the items included in a group, click the plus sign to expand the group.
8. Click **Download**. When the download finishes, a message appears to inform you that it is complete and asks whether to open the output path.
9. Click **Yes**. A window opens to the folder you selected for the output path. The folder contains the downloaded grouped exception files.

Refresh Marketing Efforts

The refresh process updates the gift totals for an activated marketing effort with any new gifts received since the last refresh.

When you refresh the marketing effort, a “matchback” process runs automatically. The matchback attempts to match the appeal ID, marketing effort ID, source code, and/or finder number entered on gift records to those values on each segment in your marketing effort.

You may receive gifts from donors who were not included in segments for the marketing effort, but somehow their gifts are still associated with the marketing effort or appeal. These gifts are called Indirect and Unresolved Responses and they appear at the bottom of the marketing effort's Segments tab.

These tables explain how the program determines whether to match a gift to a segment, or consider the gift an Indirect or Unresolved Response for a marketing effort.

A gift is matched to a segment when:	Appeal ID	Marketing Effort ID	Source Code	Finder Number
A constituent included in the marketing effort gives a gift where the following match:	**X**	**X***		**X*** *Need either Marketing Effort ID or Finder Number
A constituent included in the marketing effort gives a gift where the following match:	**X*** *If the appeal is associated with only one marketing effort			
A new constituent (via an imported list) gives a gift where the following match:	**X**			**X**
A new constituent (via a vendor managed list or public media effort) gives a gift where the following match:	**X**	**X**	**X**	

Note: We do not recommend that you use **Source Code** only when entering data. If you only use **Source Code** when you add revenue, the constituent will be associated with the Marketing Effort and Segment as a Direct response regardless of whether they are included in the Marketing Effort.

A gift is an Indirect Response when:	Appeal ID	Marketing Effort ID	Source Code	Finder Number
A constituent who is NOT included in the marketing effort gives a gift where the following match:	**X**	**X**		

A gift is an Unresolved Response when:	Appeal ID	Marketing Effort ID	Source Code	Finder Number
A constituent who is NOT included in the marketing effort gives a gift where the following match:	**X**			

A gift is an Unresolved Response when:	Appeal ID	Marketing Effort ID	Source Code	Finder Number
A constituent included in the marketing effort gives a gift where the following match:	**X*** *If the appeal is associated with more than one marketing effort			

Refresh a marketing effort

Tip: The marketing export refresh process can be scheduled by administrators in *Administration*, **Manage Queues**.

1. From a marketing effort record, click **Refresh marketing effort** under **Tasks**. You can also click **Start process** from the Refresh status page.
2. A message appears when the process completes. Any records that the matchback process was able to match with a segment are moved out of the indirect responses section of the grid and included as a response to the appropriate segment.

View Refresh Status for a Marketing Effort

After a marketing effort is refreshed, you can view details about the refresh process status. From the marketing effort profile page, under **History**, you can view the date the refresh process last ran and its current status. Icons represent the current status:

	Process is running
	Process is complete
	Process is complete with exceptions
	Process did not complete

To view more details about the refresh process, click the date next to **Refreshed** The Marketing Effort Refresh Status page appears. On this page, you can manage the marketing effort refresh processes for your marketing efforts.

On the Recent Status tab, you can view the details of the most recent operation of the marketing effort refresh process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many records processed successfully and how many were exceptions.

Each time you run the marketing effort refresh process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the refresh process. The information in the grid includes the status of the instance; the start time, end time, and duration of the instance; the person who started the instance; the total number of records processed during the instance; and the server used to run the process for the instance.

Delete refresh history for a marketing effort

1. On the Refresh Status page for a marketing effort, select the History tab.
2. Select an item in the grid and click **Delete**. A confirmation message appears.
3. Click **Yes**.

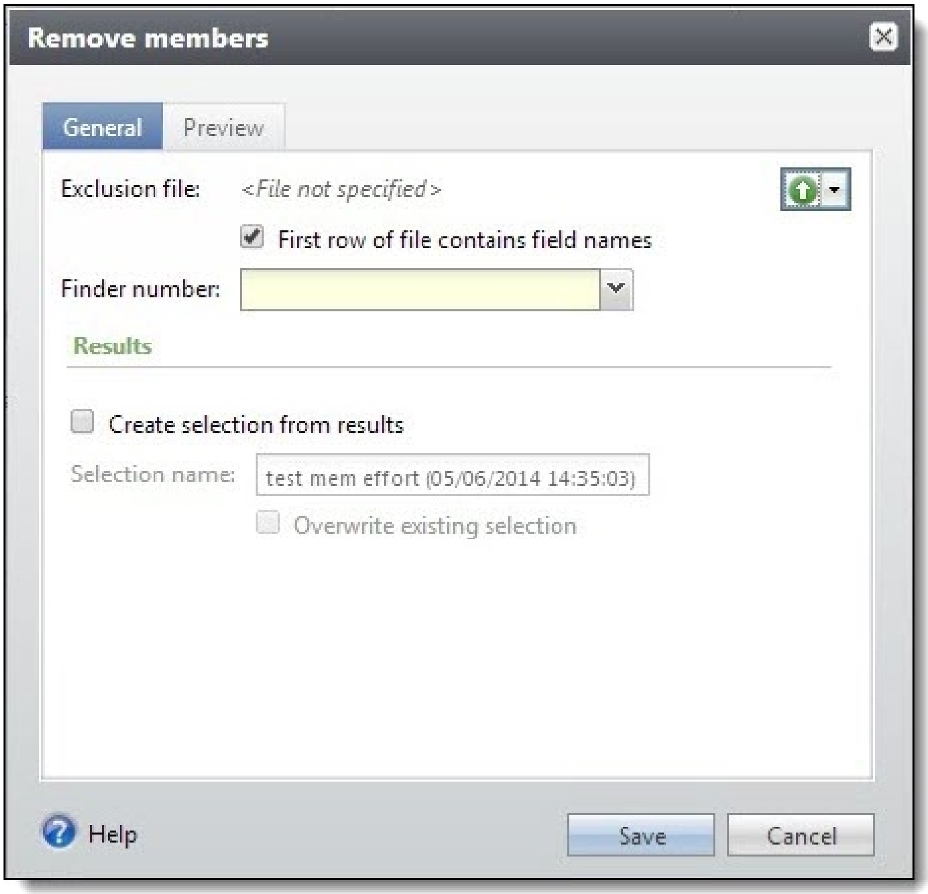
Remove Members From Marketing Efforts

With the **Remove members** task from an activated marketing effort, you can use the UMC (Updated Mail Count) file provided by a vendor to update the quantity of records included in marketing effort segments so they match the vendor's numbers. For example, a vendor may remove duplicate records or those with invalid or incomplete addresses. After processing, you can view the remove members status and the Removed member counts report. For more information, see Manage Remove Members Status on page 111.

Remove members from a marketing effort

1. From an activated marketing effort, click the **Remove members** task. The Remove members screen appears.
2. In the **Exclusion file** field, select the UMC (Updated Mail Count) file.

   The UMC file must be in .csv format and must contain a column for finder numbers.
3. If the UMC file contains field names in the first row, select **First row of the file contains field names**.
4. In the **Finder number** field, select the field name for the **Finder number** column in the UMC file. Records with invalid finder numbers are saved to an exception file.
5. To create a constituent selection that includes the records removed from the marketing effort segments, select **Create selection from results**. The **Selection name** field displays the default name for the selection. If a selection with the same name already exists, you can select **Overwrite existing selection** to overwrite the records in the existing selection.

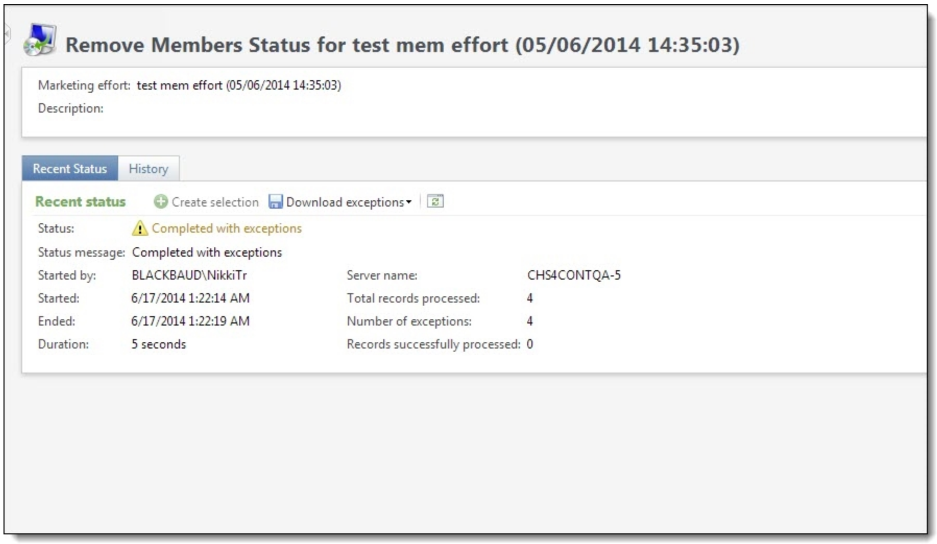


6. You can select the Preview tab to view a sample of the data included in the UMC file.
7. Click **Save**. The Remove member screen closes and the Remove Members Status page appears on the Recent Status tab. For more information, see Add Direct Marketing Efforts on page 133.

Manage Remove Members Status

After starting the Remove Members task, you can view the status of the process on the Recent Status tab of the Remove Members Status page. When the process completes, you can view details such as the total records processed, number of exceptions, and the records processed successfully.

Each time you run the process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the remove members process. The information in the grid includes the status of the instance; the start time, end time, and duration of the instance; the person who started the instance; the total number of records processed during the instance; and the server used to run the process for the instance.



Other options available on the History tab include:

- **Removed member counts** - To view a report that lists information about records removed from a marketing effort during the Remove Members process, click **Removed member count report** under Reports.
- **Create selection** - To create a constituent selection that includes the records removed from the marketing effort segments, click **Create selection**.
- **Download exceptions** - To save a file containing the records that were processed but not removed, click **Download exceptions**.
- **Delete** - To delete the remove members process and associated history entries for the process, click **Delete**. Deleting a process also restores all members removed from the marketing effort. Deleted entries will not be available in the **Process date** field when running the Removed members count report.
- **Filter** - As the history list grows over time, it may be difficult to find a particular status record. To narrow the list, click **Filter**. A **Status** field appears for you to narrow the list by Completed, Running, or Did not finish. Select the status you need and click **Apply**. To remove the **Status** field, click **Filter** again.
- **Refresh List** - To make sure you have the latest process information, click **Refresh List**.

Test Marketing Efforts

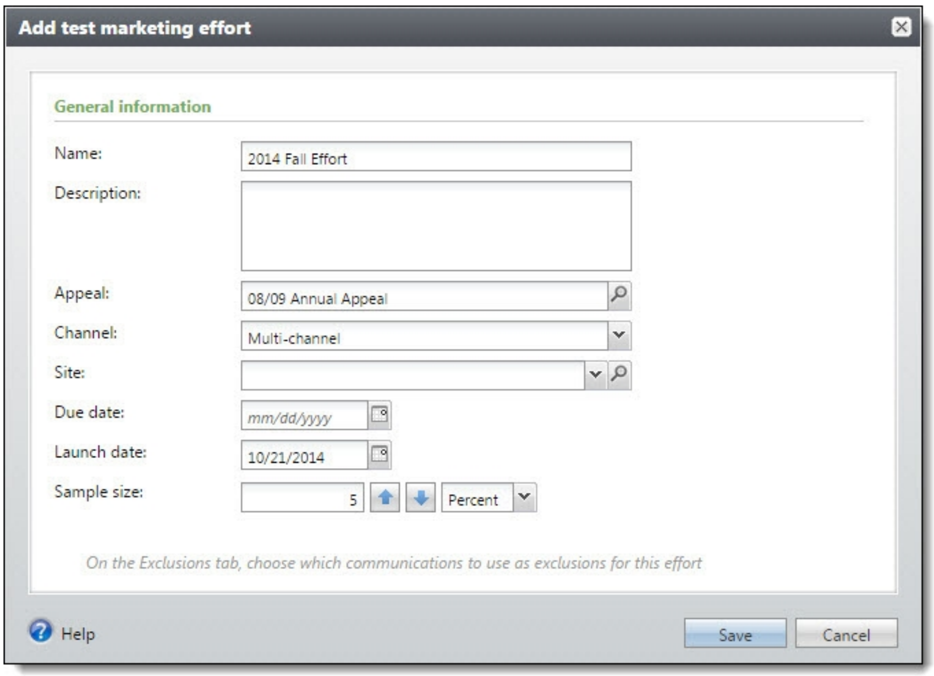
Test marketing efforts enable you to test various aspects of a marketing effort on a subset of recipients before you send out the final effort. For example, you can create test marketing efforts for different combinations of packages, segments, and other components. Based on the responses you receive to the test efforts, you can make adjustments to packages and fine-tune the segments before sending out the final version of the marketing effort.

Add Test Marketing Efforts

Creating a test marketing effort is similar to creating a marketing effort. However, you cannot include and exclude records on a test effort because those are defined by the selections in the parent marketing effort. You specify the number or percentage of records in the parent marketing effort to include in the test.

Add a test marketing effort

1. From a marketing effort, click **Test efforts** under **Testing**. The Test Marketing Efforts page appears.
2. Click **Add**. The Add test marketing effort screen appears.



3. The **Template** field displays the name of the template selected for the parent marketing effort.

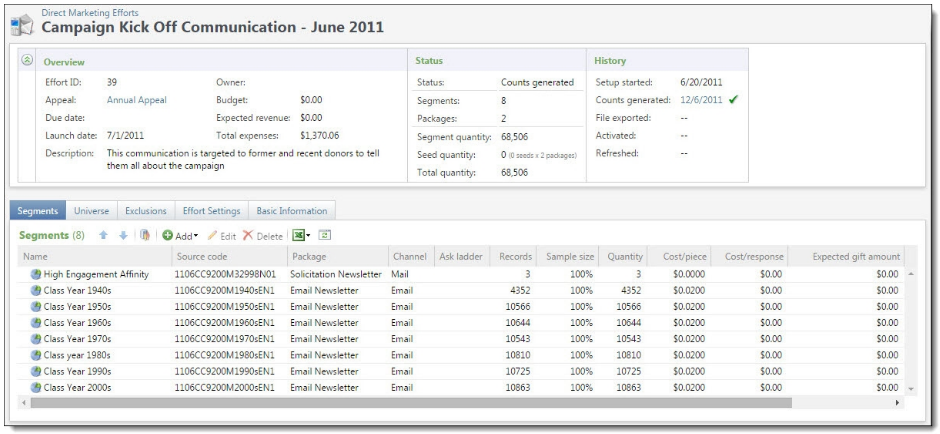
Note: Fields and options that were locked on the General tab of the associated template are hidden on this form. This procedure assumes all available fields and options are unlocked on the template.

4. In the **Name** field, enter a name for the test marketing effort. If the parent marketing effort uses a name pattern from the communication template, the generated name appears and may have additional fields you need to complete. If you included a counter in the name pattern, the program increments the counter until it creates a unique name. If the name pattern does not include counter, the program appends a number to the end of the name to make it unique.
5. To add a description that identifies the test effort, enter it in the **Description** field.

6. In the **Appeal** field, select the appeal to associate with the test effort.
7. In the **Channel** field, select the means of distribution for the test effort—mail, email, phone, or multi-channel. If you select mail, email, or phone, you cannot edit the channel after you add segments to the effort. If it is set to multi-channel, you cannot change the channel to a different type if the test effort includes segments with packages of a different type. For example, you can change the channel from multi-channel to mail if the effort includes only mail packages. However, if the test effort includes packages for the mail and email channels, you cannot change the channel from multi-channel to mail.
8. For internal tracking purposes, you can enter a **Due date** and **Launch date** for the test effort. For example, **Due date** is typically the date by which the test effort must be completed with segment counts for the vendor/printing house. **Launch date** is usually the date the test effort is sent to the post office.
9. In the **Sample size** field, enter the number or percentage of records from the parent marketing effort to include in the test marketing effort.
10. If your organization uses finder numbers, you can select **Reserve a specified range of finder numbers** to reserve a range of finder numbers for the test effort. Finder numbers are assigned to each potential donor included in the test effort when you run the Calculate segment counts process. If you do not select this option, the Finders Numbers tab is hidden on the effort.
11. To use the budgeting tools for the test effort, select **Specify effort budget, expenses, and goals**. When you select this option, you can enter the amount budgeted for the effort and quickly view whether the effort exceeds the budget. If you do not select this option, the Budgets/Expenses tab is hidden on the test effort.
12. To allow exclusions based on prior test efforts, select **Allow the exclusion of constituents who received previous communications**. When you select this option, you can select an existing activated marketing effort to use as exclusion criteria for the test effort. If you do not select this option, the **Previous marketing effort exclusions** grid is hidden on the test effort's Exclusions tab.
13. Click **Save**. The Add test marketing effort screen closes and the profile page for the new test effort appears. For more information about tabs on the profile page, see Direct Marketing Effort Record on page 137.

Marketing Effort Records

On the profile page, you can manage all aspects of a marketing effort record. You access the profile page when you add a new effort or open a saved effort.



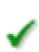
Note: Direct marketing efforts are built from communication templates which can lock and hide tabs and options on the marketing. For more information, see Direct Marketing Efforts on page 131.

The **Overview** section displays basic information about the marketing effort such as the appeal, owner, and launch and due dates. It also includes the budgeted amount, expected revenue, and total expenses to date.

The **Status** section displays the current state of the effort, the total number of segments and packages, and the total quantity of records in the marketing effort, broken out by segments and seeds. The **Status** field includes these states:

- Setup started – The effort is started but segment counts are not yet calculated.
- Counts generated – Segment counts were calculated.
- File exported – The effort was exported before activation.
- Activated – The effort was activated and the current date is before the effort's launch date.
- Past launch date – The effort was activated and the current date is later than the effort's launch date.

The **History** section displays the **Setup started** date for the marketing effort and the date and status for the segment counts calculation, file export, activation, and refresh processes. To view the status page for a process, click the date next to the process name. Icons represent the current status:

	Process is running
	Process is complete
	Process is complete with exceptions
	Process did not complete

On the Explorer bar, under **Tasks**, links appear for processes you still need to run for the marketing effort. For example, if the effort is activated, the **Edit activation criteria**, **Export effort**, and **Refresh effort** tasks appear.

Settings for the marketing effort, such as segments, exclusions, and source codes, are grouped on tabs at the bottom of the profile page. Each tab displays settings defined on the direct marketing communication template or on the acknowledgement, membership renewal, or sponsorship effort template.

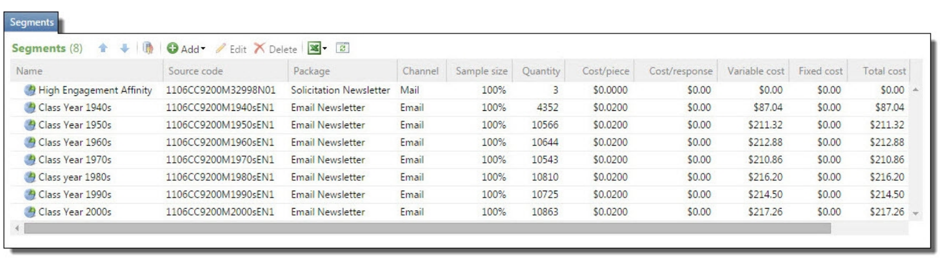
Note: After activation, you can only edit budget information and package costs.

Segments Tab

On the Segments tab, you manage segments for a marketing effort. You can add and edit the segments assigned to the marketing effort. You can also copy segments from an existing marketing effort. For more information about segment tasks, see Manage Segments on Marketing Efforts on page 75.

Note: Unlike other types of marketing efforts, you cannot add segments directly to a marketing acknowledgement effort. Instead, you assign revenue segments to marketing acknowledgement rules where you also set the package details and assumptions. For more information about managing segments on marketing acknowledgements, see Marketing Acknowledgement Segments on page 191.

For direct marketing efforts linked to a marketing plan, this tab automatically includes all the segment summaries defined in the plan.


Segments
Segments (8) Add Edit Delete

Name	Source code	Package	Channel	Sample size	Quantity	Cost/piece	Cost/response	Variable cost	Fixed cost	Total cost
High Engagement Affinity	1106CC9200M32998N01	Solicitation Newsletter	Mail	100%	3	$0.0000	$0.00	$0.00	$0.00	$0.00
Class Year 1940s	1106CC9200M1940sEN1	Email Newsletter	Email	100%	4352	$0.0200	$0.00	$87.04	$0.00	$87.04
Class Year 1950s	1106CC9200M1950sEN1	Email Newsletter	Email	100%	10566	$0.0200	$0.00	$211.32	$0.00	$211.32
Class Year 1960s	1106CC9200M1960sEN1	Email Newsletter	Email	100%	10644	$0.0200	$0.00	$212.88	$0.00	$212.88
Class Year 1970s	1106CC9200M1970sEN1	Email Newsletter	Email	100%	10543	$0.0200	$0.00	$210.86	$0.00	$210.86
Class year 1980s	1106CC9200M1980sEN1	Email Newsletter	Email	100%	10810	$0.0200	$0.00	$216.20	$0.00	$216.20
Class Year 1990s	1106CC9200M1990sEN1	Email Newsletter	Email	100%	10725	$0.0200	$0.00	$214.50	$0.00	$214.50
Class Year 2000s	1106CC9200M2000sEN1	Email Newsletter	Email	100%	10863	$0.0200	$0.00	$217.26	$0.00	$217.26

After you activate a direct marketing effort, you can open individual segments, but you cannot edit their fields. You can edit segments and segment groups for public media efforts at any time.

After activation, the **Segments** grid displays gift counts, response counts, response rates, and more for each segment and segment group. The grid also includes record counts for segment exclusions. Additionally, the **Indirect and unresolved responses** grid appears on the Segments tab.

- Indirect responses are those from donors who did not receive an offer and gave a gift to this marketing effort. The donors were not part of the marketing effort but they gave a gift and it somehow got associated with the appeal and marketing effort ID. Essentially, the gift has the appeal and marketing effort ID even though the donor was not directly contacted through the marketing effort.
- Unresolved responses are those from donors who did not receive an offer and gave a gift to the appeal, but the gift cannot be resolved or credited to a specific marketing effort. The donors were not part of the marketing effort, but gave a gift that was somehow associated with the appeal, although it has no marketing effort ID. The gift has only the appeal.

When you refresh a marketing effort, a “matchback” process takes place. This process tries to place gifts into specific segments and remove them from the indirect or unresolved pool based on the source code on the gift record. For more information, see Refresh Marketing Efforts on page 107.

Use the arrows to move selected segments up or down in the grid. The order of segments in the grid is important because you can only include records in one segment. When you activate a marketing effort, segments are processed from top to bottom. If a record meets the criteria for multiple segments, only the first of those segments will include the record

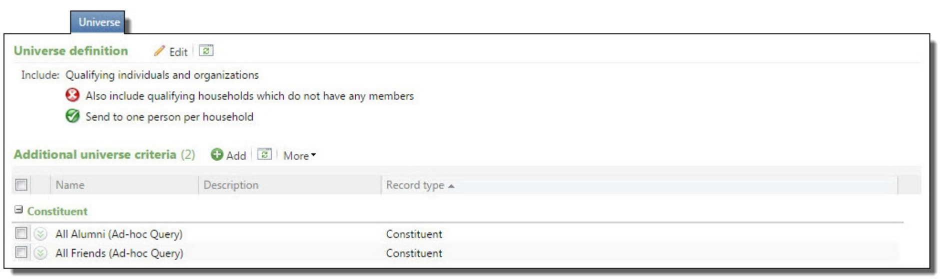
If you move segments, click **Calculate segment counts** to view the updated counts. For more information about updating segment counts, see Calculate Segment Counts on page 93.

Note: You cannot change the order of segments on acknowledgement marketing efforts. You must change their order on the process template and then run the process again.

The Unresolved Responses report shows all the unresolved donors and all the possible marketing efforts that have been activated against the same appeal. After you generate this report, you can go back to your source system and correct the source code on the gifts that appear in the report.

Universe Tab

A marketing effort's "universe" defines the pool of records to include in the marketing effort. The Universe tab displays the universe selections defined on the Universe tab of the direct marketing communication template or on the acknowledgement, membership renewal, or sponsorship effort template.



Note: For direct marketing efforts, the options you can view and edit depend on what is locked on the communication template. If all options are locked, the Universe tab is completely hidden. To display the Universe tab and view the options defined on the template, click **Show locked fields**. The information below assumes all fields and options on the Universe tab are unlocked on the communication template. For detailed information about the template's Universe tab, see Universe Tab on page 38.

Under **Universe definition**, you can edit the universe definition selected on the template. The universe definition specifies which types of constituents to include in the universe: "All qualifying constituents," "Qualifying individuals and organizations," or "Qualifying households."

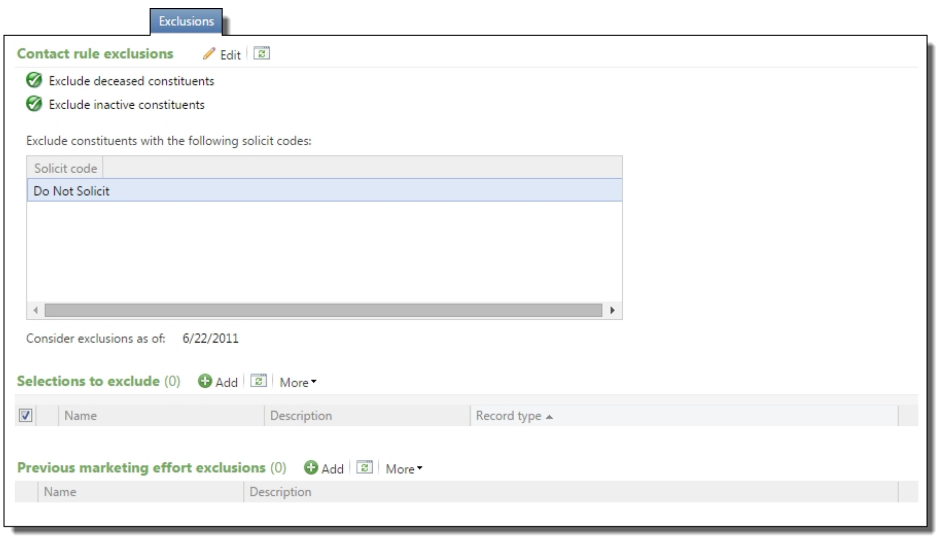
In the **Additional universe criteria** grid, you can edit the universe selections defined on the template. Selections included in this grid reduce the universe to only records that meet the criteria for the chosen selections. When you later create segments for the marketing effort, those segments will include only records that meet the defined universe criteria. If you add no selections under **Additional universe criteria**, the universe includes all records specified by the **Universe definition**.

Note: If a direct marketing effort is linked to a marketing plan, the Universe tab contains a list of all the specifications from the marketing plan with a section type of “Universe” or “Include.” You can use universe specifications as a reference for how to build the universe.

Note: For marketing acknowledgements, the Universe tab displays the Universe defined on the template. To change the universe, you must edit the template rules and run the marketing acknowledgement process again.

Exclusions Tab

Exclusions determine which records to exclude from the marketing effort. The Exclusions tab displays the exclusion selections defined on the Exclusions tab of the direct marketing communication template or on the acknowledgement, membership renewal, or sponsorship effort template.



Note: For direct marketing efforts, the options you can view and edit depend on what is locked on the template. If all options are locked, the Exclusions tab is completely hidden. To display the Exclusions tab and view the options defined on the template, click **Show locked fields**. The information below assumes all fields and options on the Exclusions tab are unlocked on the communication template. For detailed information about the template's Exclusions tab, see Exclusions Tab on page 40.

In the **Selections to exclude** grid, you can edit the exclusion selections defined on the template.

Under **Contact rule exclusions**, you can edit the contact rule exclusions selected on the template. In the **Exclude constituents with the following solicit codes** grid, you can edit the solicit code exclusions selected on the template.

The **Previous marketing effort exclusions** grid appears if **Allow the exclusion of constituents who received previous communications** is selected on the Exclusions tabs of the template or Create effort form of the Add marketing effort screen. In this grid, click **Add** to select an activated marketing effort to use as exclusion criteria for the marketing effort.

Note: When you specify exclusion selections, all record sources are still available when you later create segments for the marketing effort (unlike when you define the marketing effort’s universe).

Excluded constituents are excluded from every segment in the marketing effort. If you do not specify any exclusion selections, all constituents in the defined universe are available for the marketing effort.

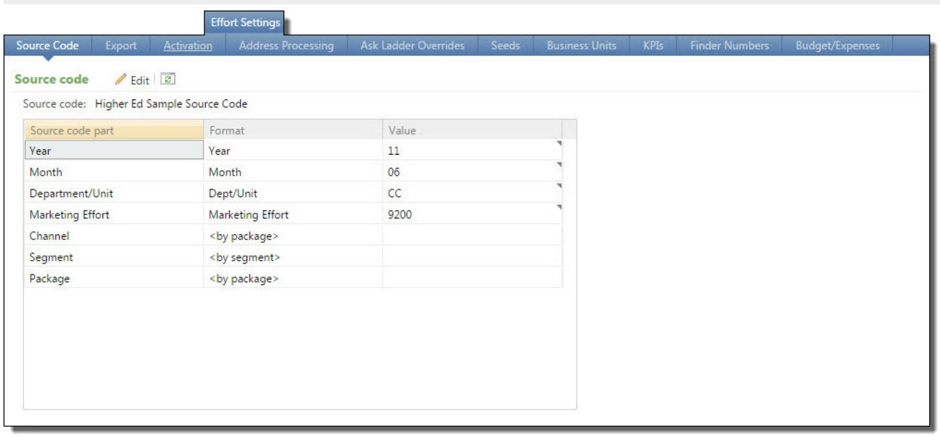
Note: If a direct marketing effort is linked to a marketing plan, the Exclusions tab contains a list of all specifications from the marketing plan with a section type of “Exclude.” You can use exclusion specifications as a reference for how to build your exclusions.

Note: For marketing acknowledgements, the Exclusions tab displays the exclusions defined on the template. To change these exclusions, you must edit the template rules and run the marketing acknowledgement process again.

Effort Settings Tab

The Effort Settings tab displays the Source Code, Export, Activation, Address processing, and KPIs tabs. If the **Reserve a specified range of finder numbers** or **Specify effort budget, expenses, and goals** options were selected on the communication template or Create effort form of the Add marketing effort screen for a direct marketing effort, the Finder Numbers and Budget/Expenses tabs also appear. If **Override segment ask ladders**, **Override appeal business units in the effort and/or in segments**, or **Include seeds in communication** were selected on the communication template, the Ask Ladder Overrides, Business Units, and Seeds tabs also appear. For marketing acknowledgement, membership renewal, and sponsorship efforts, the Finder Numbers, Budget/Expenses, Ask Ladder Overrides, and Seeds tabs always appear.

Note: For direct marketing efforts, the options you can view and edit depend on what is locked on the communication template. If all fields and options for a tab are locked on the template, that tab will not appear on the Effort Settings Tab. To display all hidden tabs and view the options defined on the template, click **Show locked fields**.

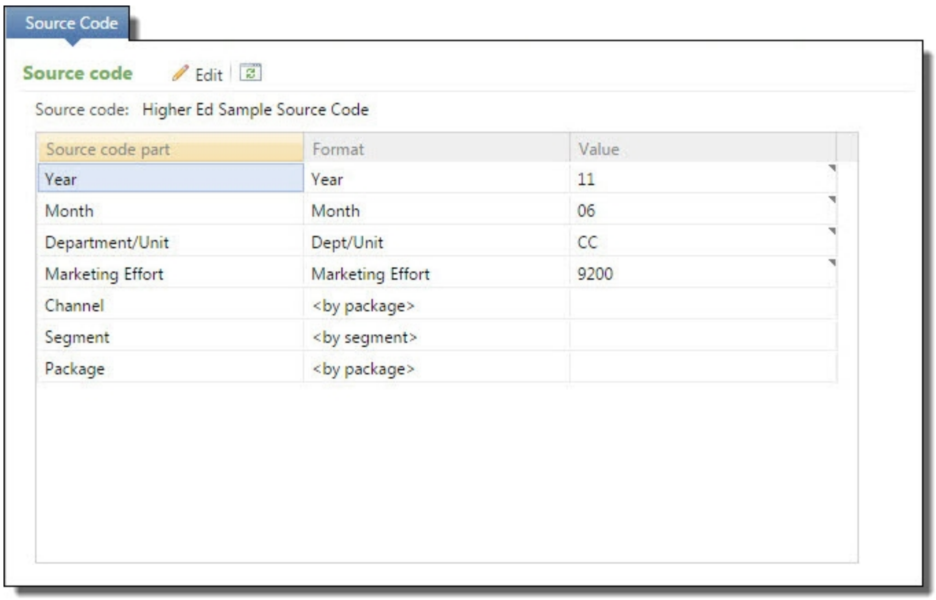


Source Code Tab

Source codes are a series of letters or numbers printed on marketing materials that identify key aspects of the marketing effort, such as the list, package, and segment. You can use source code parts and layouts to build source codes based on your organization’s structure and then apply these to your marketing efforts. Later, you can use source codes in reports to analyze the success of marketing efforts. For more information about how to configure source codes, see Source Codes on page 308.

The Source Code tab displays the source code layout selected on the Source Code of the direct marketing communication template or on the acknowledgement, membership renewal, or sponsorship effort template.

Note: For direct marketing efforts, the options you can view and edit depend on what is locked on the template. If all options are locked, the Source Code tab is completely hidden. To display the Source Code tab and view the options defined on the template, click **Show locked fields**. The information below assumes all fields and options on the Source Code tab are unlocked on the template. For detailed information about the template's Source Code tab, see Source Code Tab on page 32.



Under **Source code**, you can view or edit the source code layout selected on the template. The grid displays the source code parts defined for the selected layout.

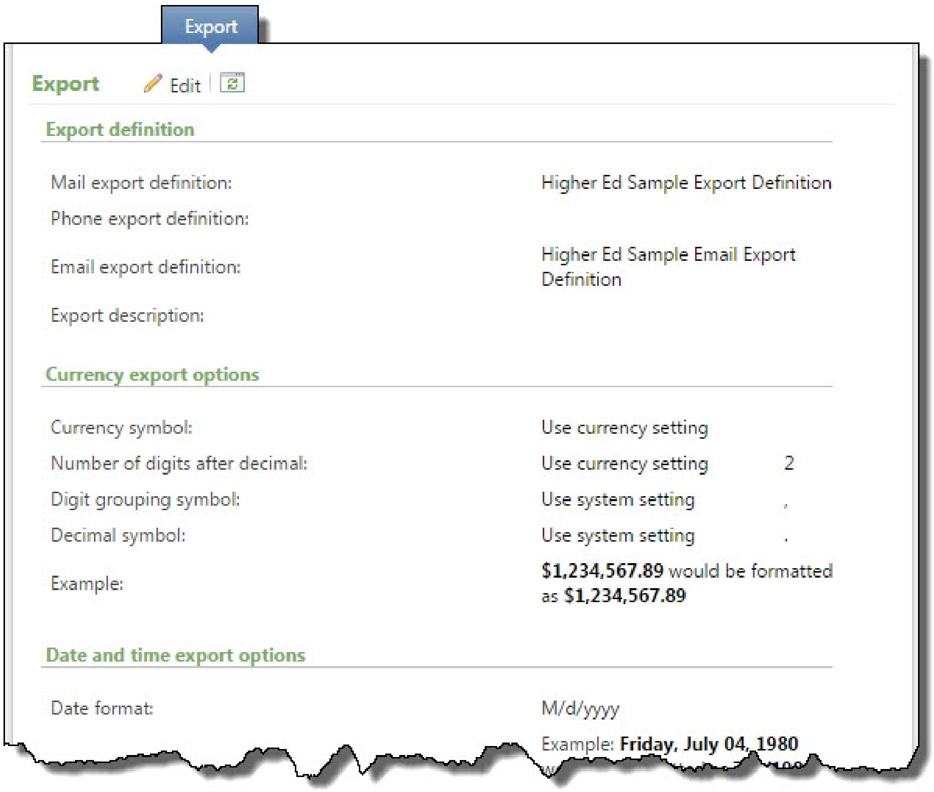
Note: If the source code layout selected on the template includes user-defined source code parts, you can enter or select values for those parts on the marketing effort even if the layout is locked on the template. If your organization automates the source code by selecting **Automatically increment source code values during data entry** on the source code parts for the template, do not edit the generated part values in the grid.

Note: For a direct marketing effort created from a marketing plan that includes a source code layout, the plan's layout is used for the marketing effort unless the source code on the template is locked.

Export Tab

The Export tab displays the parameters defined on the Export format tab of the direct marketing communication template or on the acknowledgement, membership renewal, or sponsorship effort template.

Note: For direct marketing efforts, the options you can view and edit depend on what is locked on the template. If all options are locked, the Export tab is completely hidden. To display the Export tab and view the options defined on the template, click **Show locked fields**. The information below assumes all fields and options on the
Export format tab are unlocked on the template. For detailed information about the template's Export format tab, see Export Format Tab on page 33.



Under **Export definition**, you can edit the export description and the export definitions selected for the mail, phone, and/or email channels. These definitions are used for any packages assigned to the marketing effort that do not have an export definition defined already.

Under **Currency export options**, you can edit the format for currency in the export.

Under **Date and time export options**, you can edit the format for dates and times in the export.

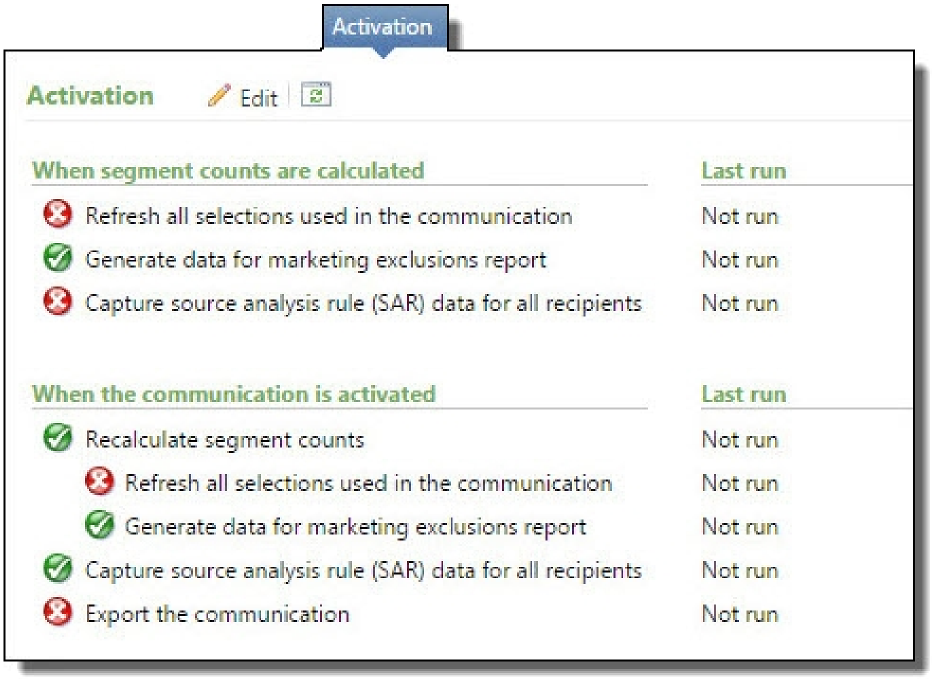
Under **Line break character options**, select the line break character(s) to use in export files for letter merges and communications exported to CSV.

Activation Tab

The Activation tab displays the activation tasks selected on the Activation tab of the direct marketing communication template or on the acknowledgement, membership renewal, or sponsorship effort template.

Note: For direct marketing efforts, the options you can view and edit depend on what is locked on the template. If all options are locked, the Activation tab is completely hidden. To display the

Activation tab and view the options defined on the template, click **Show locked fields**. The information below assumes all options on the Activation tab are unlocked on the template. For detailed information about the template's Activation tab, see Activation Tab on page 35.



Note: For more information about how to activate marketing efforts, see Activate Marketing Efforts on page 101.

Under **When segment counts are calculated**, you can edit which tasks to include when segment counts are calculated:

- Refresh all selections used in the communication
- Generate data for marketing exclusions report
- Capture source analysis rule (SAR) data for all recipients

Under **When the communication is activated**, you can edit which tasks to include when the marketing effort is activated. These tasks include:

- Recalculate segment counts
- Refresh all selections used in the communication
- Generate data for marketing exclusions report
- Capture source analysis rule (SAR) data for all recipients
- Export the communication

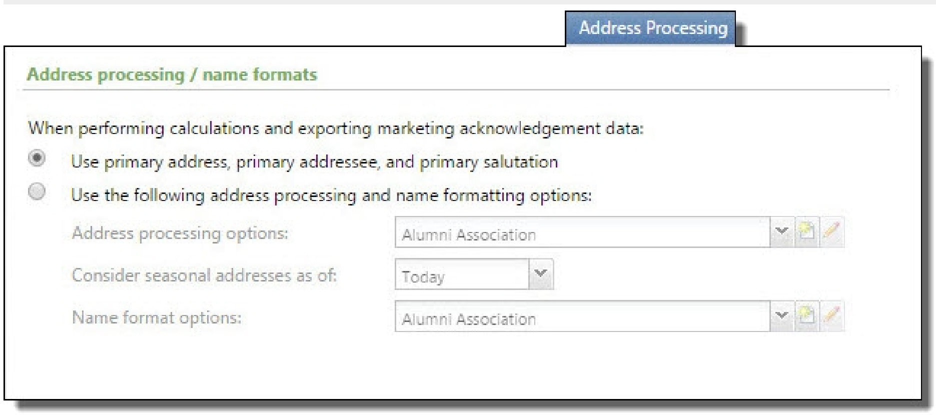
Note: A green checkmark appears next to each task selected to run as part of the process. A red X appears next to those that will not run. The **Last run** column displays the last date and time the process ran. If you run a task and then turn it off, that task displays a red X but the **Last run** column still displays the date the process ran.

Address Processing Tab

Address processing options determine the address types used for constituents included in a marketing effort. For example, you can use the mail preferences from constituent records and select backup addresses to use when mail preferences are not set up. Name formats determine how to format names on the marketing effort. For example, for marketing efforts like event invitations and appeals, you may use a more formal format that includes titles and suffixes (Mr. William H. Smith Jr.). For marketing efforts like alumni letters, you may use a less formal format such as the nickname and last name (Willie Smith).

The Address Processing tab displays the address processing options and name formats defined on the Address processing tab of the direct marketing communication template or on the acknowledgement, membership renewal, or sponsorship effort template.

Note: For direct marketing efforts, the options you can view and edit depend on what is locked on the template. If all options are locked, the Address Processing tab is completely hidden. To display the Address Processing tab and view the options defined on the template, click **Show locked fields**. The information below assumes all fields and options on the Address processing tab are unlocked on the template. For detailed information about how to configure the Address processing tab, see Address Processing Tab on page 36.



Under **Address processing/name formats**, you can edit the selected name format and address processing options:

- **Use primary address, primary addressee, and primary salutation**
- **Use the following address processing and name formatting options**: If you select this option, choose the address processing options, seasonal addresses cut-off date, and name formats to use.

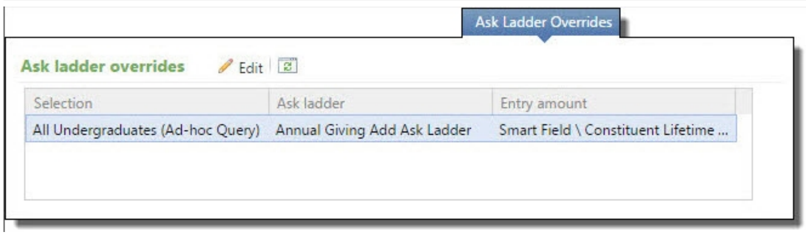
Ask Ladder Overrides Tab

Note: For direct marketing efforts, the Ask Ladder Overrides tab is not available if **Override segment ask ladders** was not selected on the communication template.

Assign ask ladders to segments to ensure each recipient receives the appropriate ask amount on their marketing effort. On the Ask Ladder Overrides tab, you can choose alternate ask ladders for selections that override the one specified for a segment. For example, you can create an override for high-value constituents to ensure they receive the same ask ladder regardless of which segment they may fall into. For more information about how to configure ask ladders, see Ask Ladders on page 22.

For direct marketing efforts, the Ask Ladder Overrides tab displays the ask ladder overrides selected on the Ask ladder tab of the communication template. For marketing acknowledgement, membership renewal, and sponsorship efforts, you can choose which overrides to apply to ask ladders selected on the template rules.

Note: For direct marketing efforts, the options you can view and edit depend on what is locked on the template. If all options are locked, the Ask Ladder Overrides tab is completely hidden. To display the Ask Ladder Overrides tab and view the options defined on the template, click **Show locked fields**. The information below assumes all fields and options on the Ask Ladder tab are unlocked on the communication template. For detailed information about the template's Ask Ladder tab, see Exclusions Tab on page 40.



Seeds Tab

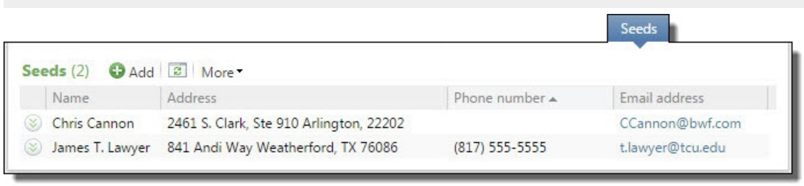
Note: For direct marketing efforts, the Seeds tab is not available if **Include seeds in communication** was not selected on the communication template.

On the Seeds tab, you can assign seeds to marketing efforts created from the communication template. Seeds are usually people at your organization you include in marketing efforts to verify that the vendor or printing house sends out marketing effort pieces correctly.

Note: To configure seeds, select **Seeds** under **Seeds and Vendors** on the Marketing and Communications page. For more information, see Manage Seeds on page 321.

For direct marketing efforts, the Seeds tab displays the seeds selected on the Seeds tab of the communication template. For marketing acknowledgement, membership renewal, and sponsorship efforts, you can view the seeds selected on the template or add new ones.

Note: For direct marketing efforts, the options you can view and edit depend on what is locked on the communication template. If all options are locked, the Seeds tab is completely hidden. To display the Seeds tab and view the options defined on the template, click **Show locked fields**. For detailed information about the template's Seeds tab, see Exclusions Tab on page 40.

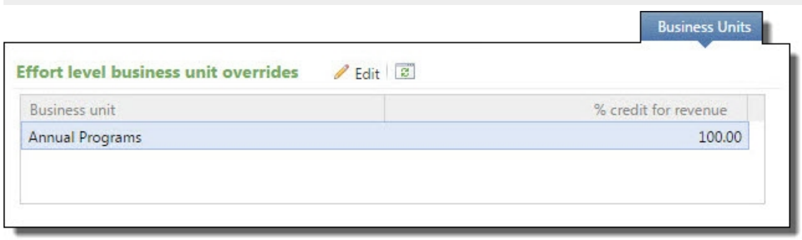


Business Units Tab

Note: The Business Units tab is not available if **Override appeal business units in the effort and/or segments** was not selected on the direct marketing communication template. The Business Units tab does not appear for other types of marketing efforts.

Business units are the methods your organization uses to deliver an appeal to potential donors, such as Annual Programs, Direct Marketing, and e-Marketing. On the appeal, you can choose which business units to credit for revenue received in response to the appeal. When you associate an appeal with a template, all gifts received in response to marketing efforts created from that template are credited to the business units selected for the appeal. However, you can create business unit overrides on the template to credit other business units than those selected on the appeal. For example, if the appeal credits 100% to the Direct Marketing business unit, but the marketing effort is multi-channel and also includes email, on the Business Units tab, you can change the distribution to 50% Direct Marketing and 50% e-Marketing.

Note: The options you can view and edit depend on what is locked on the communication template. If all options are locked, the Business Units tab is completely hidden. To display the Business Units tab and view the options defined on the template, click **Show locked fields**. For detailed information about the template's Business Units tab, see Business Units Tab on page 43.



KPIs Tab

Use Key Performance Indicators (KPIs) to monitor your progress toward goals set for the marketing effort, such as the average gift amount, response rate, and return on investment (ROI).

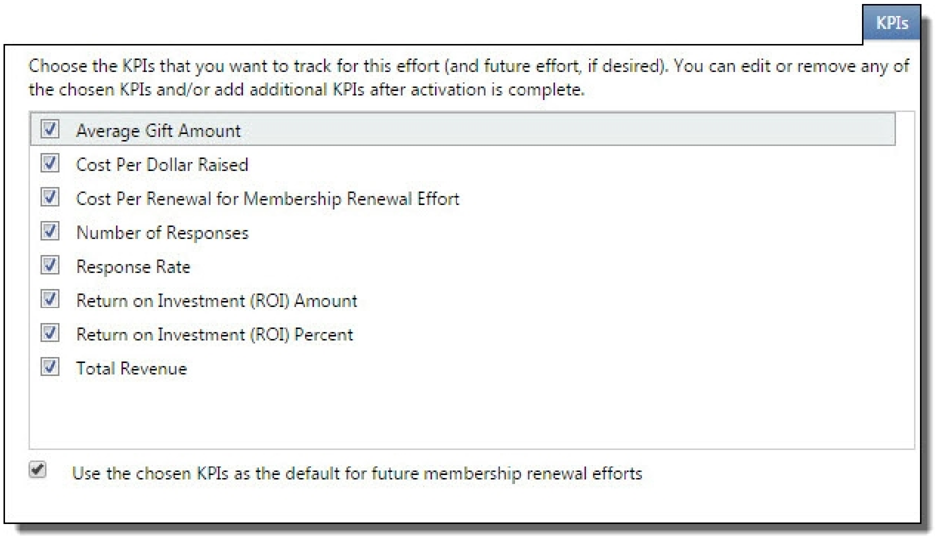
The KPIs tab displays the KPIs selected on the KPIs tab of the direct marketing communication template or on the acknowledgement, membership renewal, or sponsorship effort template.

Note: For direct marketing efforts, the options you can view and edit depend on what is locked on the template. If all options are locked, the KPIs tab is completely hidden. To display the KPIS tab and view the options defined on the template, click **Show locked fields**. The information below assumes all fields and options on the KPIs tab are unlocked on the communication template. For detailed information about the template's KPIs tab, see KPIs Tab on page 38.

When you create a marketing effort, the program automatically creates an instance of each selected KPI. Each time you refresh the marketing effort, the program automatically updates the associated KPI values.

When you click the down arrows next to a KPI, the drop-down display includes a color-coded thermometer and line chart that compare the KPI's actual and goal values. Click the name of a KPI to open it in the *Information Library* where you can update the KPI's goals, view its status history, and enable alerts.

For more information about how to configure marketing Key Performance Indicators, see the *Reports and KPIs Guide*.



Finder Numbers Tab

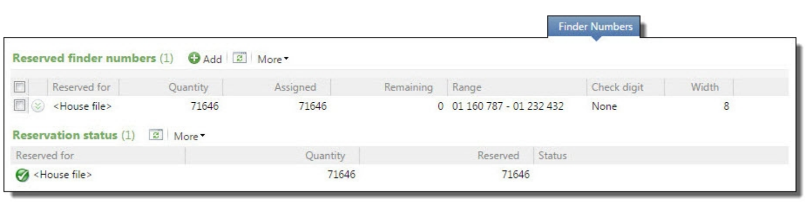
Note: For direct marketing efforts, the Finder Numbers tab is not available if **Reserve a specified range of finder numbers** was not selected on the communication template.

Finder numbers provide an identifier for each list name in the finder file or acquisition list, as well as each constituent in a house mailing. The finder number identifies the marketing effort and the donor. Additionally, if a direct marketing effort contains any potential donors from acquisition lists, the program uses finder numbers for the list matchback process.

On the Finder Numbers tab, you can view the range of finder numbers reserved for each source in the marketing effort, or add a new range. After the effort is activated, the tab displays the number of finder numbers assigned to records in the effort.

Under **Reservation status**, you can view the current status for reserved finder numbers. If there is an issue with a reserved range, the **Status** column displays an error message.

For activated marketing efforts that include vendor-managed list segments, under **Finder files**, you can import finder files. If finder numbers in the finder file do not match the range reserved for the vendor, you receive an exception. For more information about finder files, see Finder Files on page 301.



Reserve Finder Numbers

The program automatically assigns a finder number to every record in a marketing effort using the next available number in the sequence. On the Finder Numbers tab, you can reserve a range of finder numbers for a vendor or for internal use with imported lists.

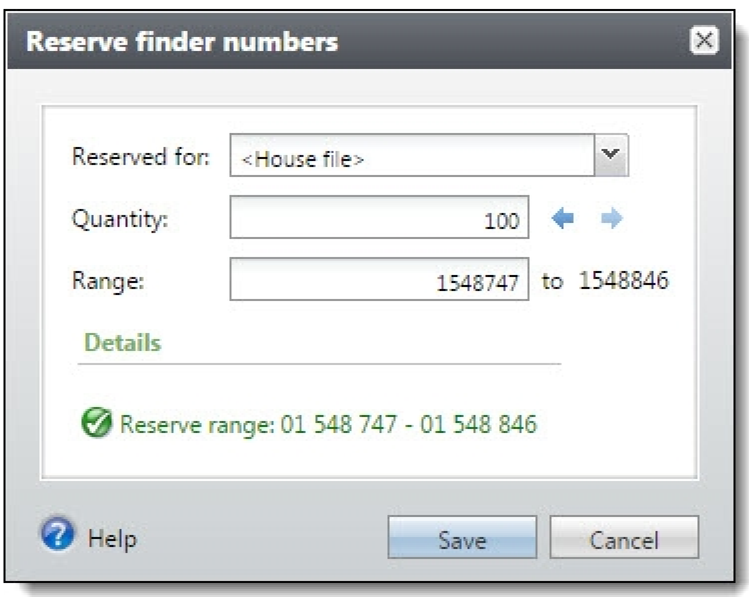
The program assigns finder numbers to records in the marketing effort when you run the calculate segment counts process. If new records are added when you recalculate segment counts, the program automatically adds finder numbers to the existing range. If the extended range reaches the point of overlapping 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 if the effort is not yet activated.

Note: The starting finder number and available number of characters are defined in *Configuration*. For more information, see Finder Number Settings on page 48.

Reserve finder numbers

Note: For direct marketing efforts, the Finders Numbers tab is hidden if the **Reserve a specified range of finder numbers** option was not selected on the General tab of the communication template or the **Create effort** screen of the effort.

1. From the Finder Numbers tab of not yet activated marketing effort, click **Add**. The Reserve finder numbers screen appears.



2. In the **Reserved for** field, select "<House file>," an imported list, or a vendor who provides list services. The options available depend on the type of segments added to the marketing effort.
3. In the **Quantity** field, enter the range of finder numbers to reserve. The value must be less than or equal to the maximum finder number allowed by the finder number settings.

You can use the arrows to find the next available range that accommodates the specified **Quantity**. This helps fill gaps between your ranges.

4. The **Range** field displays the starting number and a computed ending number for this set of reserved finder numbers. The default starting number is the highest assigned or reserved finder number. You can enter a different starting number that is less than or equal to the maximum finder number allowed by the finder number settings. The ending number equals the starting number plus the specified **Quantity**. If the **Quantity** changes, the starting and ending numbers for the range update automatically. After finder numbers are assigned, you can only increase the amount in the **Quantity** field up to the point that the range overlaps with another range.

   For imported finder files, enter the range of finder numbers provided by the vendor.

5. The Details section displays the range of reserved numbers. If there are issues with the defined range, such as a starting number that results in overlapping finder numbers, an error appears in the Details section.
6. Click **Save**. You return to the Finder Numbers tab.

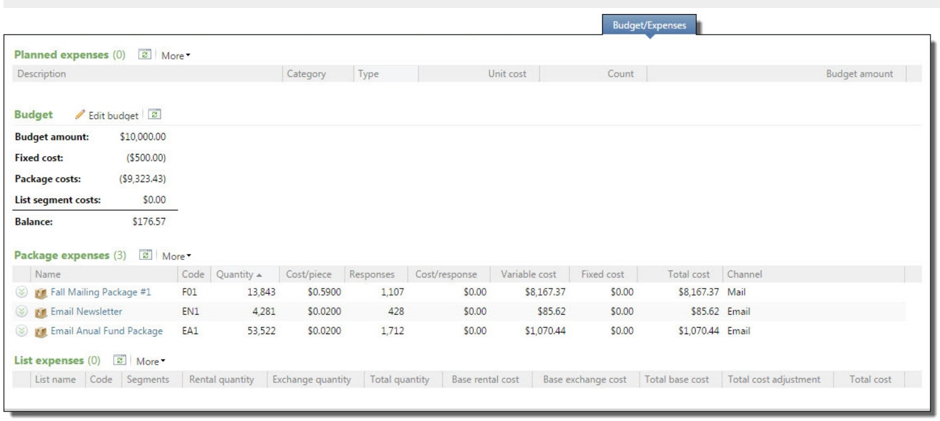
Budget/Expenses Tab

Note: For direct marketing efforts, the Budget/Expenses tab is not available if **Specify effort budget, expenses, and goals** was not selected on the communication template.

On the Budget/Expenses tab, you can enter the amount budgeted for the effort and quickly view whether the effort exceeds the budget. You can enter the marketing effort's budget, and projected expenses for packages and lists. While the marketing effort is in development, you can monitor whether the marketing effort's expenses are on track or exceed the planned budget.

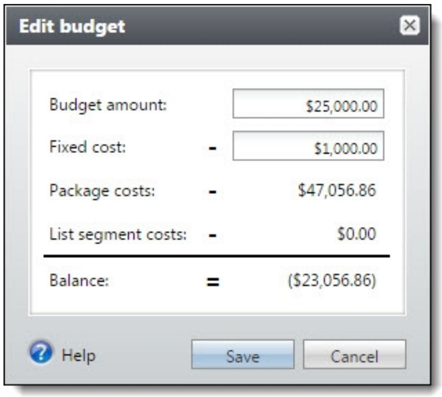
Under **Package expenses**, you can view the associated costs for each package included in the marketing effort. If the marketing effort uses acquisition lists, under **List expenses**, you can view the costs for each list. You can edit the costs for packages and lists directly from this tab, but be aware that those changes are made to the package and list records and will impact other marketing efforts that use them.

Note: If a direct marketing effort was created from a marketing plan, the **Planned expenses** section displays expenses entered on the plan.



Edit the budget for a marketing effort

1. From a marketing effort profile page, select the Budget/Expenses tab under Effort Settings.
2. Under Budget, click **Edit budget**. The Edit budget screen appears.



3. Enter the budget amount allocated for the marketing effort.
4. If the marketing effort has a fixed cost you know in advance, such as the total amount to use a processing house, enter the amount in the **Fixed cost** field.

   The **Package costs** field automatically displays the total cost for packages currently in use with the effort.

   For a direct marketing effort, the **List segment costs** field displays the total of all costs assigned to list segments for the marketing effort.

   The **Balance** field displays the current total cost for the marketing effort and its packages.
5. Click **Save**. You return to the Budget/Expenses tab.

Troubleshoot Budget/Expenses for Marketing Efforts

On the Budget/Expenses tab, you can monitor whether a marketing effort exceeds its budget. If you did not budget enough money to reach all members of a marketing effort, you can address this in several ways:

- Increase the budget amount, if possible.
- Adjust your exclusions on the Exclusions tab. For example, you can add an exclusion for constituents who received an earlier marketing effort.
- Use less expensive packages for certain segments.
- Decrease the sample size on the segment. When you reduce the sample size, you reduce the total quantity which decreases the overall variable cost for the segment.
- Remove segments so you can use them in a later marketing effort.

Basic Information Tab

For direct marketing efforts, the Basic Information tab displays general information, such as the name, appeal, and channel, defined on the General tab of the communication template. The options you can view and edit depend on what is locked on the template. To display hidden fields, click **Show locked fields**. Click **Edit** to make changes to any unlocked options. For detailed information about the available fields and options, see Add a direct marketing effort on page 134.

For all other types of marketing efforts, the Basic Information tab displays the name and description defined on the template. The **Channel** defaults to "multi-channel " and the **Launch date** is the date the template was processed. To edit this information, click **Edit**.

After a marketing effort is activated, you cannot edit the channel or appeal.

Direct Marketing Efforts

Use direct marketing efforts to target segmented donors with mail and email packages based on criteria such as recent giving history and wealth.

Direct Marketing Effort Workflow

Unlike other types of marketing efforts, direct marketing efforts are built from communication templates which standardize and streamline the setup process . Templates define default settings and simplify setup by including only the options you need to create a communication.

Setting up direct marketing efforts requires several steps.

- System administrators configure communication templates and name patterns.
- Campaign analysts build marketing efforts based on templates. They add segments to the marketing effort and configure any settings not defined and locked by the template.
- Campaign analysts execute the marketing effort and monitor its status.

For more information about how to configure communication templates and name patterns, see Communication Templates on page 27 and Communication Name Patterns on page 46.

From *Marketing and Communications*, you can create a direct marketing effort based on an approved marketing plan, which enables information from the plan to default into the marketing effort, or you can create a “one-off” marketing effort. When you create the marketing effort, you can specify records that should be included or excluded from it, or you can do this later.

Also, export definitions enable you to specify several different templates you can use to export an active marketing effort.

After you create the marketing effort, you then add direct marketing segments to target specific sets of users with certain packages or public media segments to target a demographic of people such as those who travel by a specific location, visitors of a specific website or business, or the audience of a specific television or radio program.

For the marketing effort and its various components, you can specify source codes. These source codes are included on the response devices used in the marketing effort and can be entered on gift records that come in from the marketing effort. When you record the code on a gift record, you establish the specific combination of list, package, segment, etc. that resulted in the gift for analysis purposes.

Because the same appeal can be associated with multiple marketing efforts, the program assigns and stores a “finder number” for each potential donor in a direct marketing effort. The finder number identifies the effort and the donor. For each effort, the program stores a marketing effort ID, source code, and finder numbers. The program uses these numbers to determine which segment the gift belongs in, or whether it is an indirect response or unresolved response. Additionally, if a direct marketing effort contains any potential donors from lists, the program uses the numbers for the list matchback process.

You can then test various aspects of an effort, such as different combinations of packages and segments, on a subset of recipients before you send out the actual marketing effort.

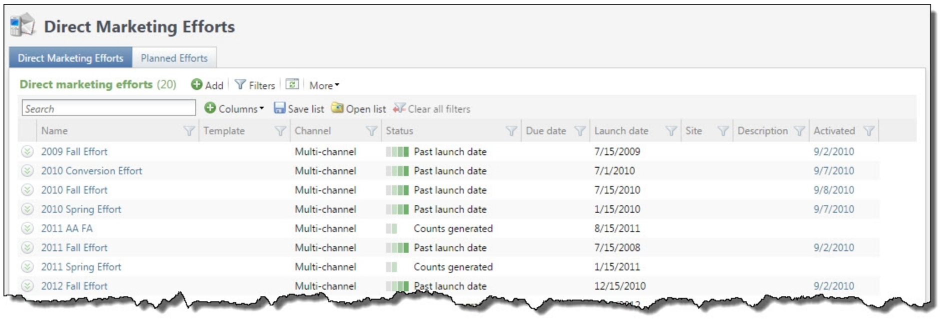
After you create and test your direct marketing effort, you can activate it. When you activate the direct marketing effort, you specify the appeal to be associated with gifts that come in as a result of the effort. Public media efforts are activated automatically when you create the effort. During the creation process, you also select the appeal to associate with the effort.

Finally, you can create an export file of the marketing effort for use by a processing house or to import into another program.

A variety of features in the program help you analyze the success of individual segments, including the Average Gift Comparison and Retention and Attrition reports.

Manage Direct Marketing Efforts

On the Direct Marketing Efforts page, you can view information about all direct marketing efforts saved in the database. To access the Direct Marketing Efforts page, from *Marketing and Communications*, click **Direct Marketing Efforts**.



The Direct Marketing efforts tab provides a list of direct marketing efforts. When you expand a marketing effort in the list, a drop-down record displays information such as the associated appeal, owner, and number of segments and packages. You can quickly monitor the progress of marketing effort setup tasks. The record displays the **Setup started** date for the marketing effort and the current status and date for the segment counts calculation, file export, activation, and refresh processes. To view the status page for a process, click the date next to the process name. Icons represent the current status:

	Process is running
	Process is complete
	Process is complete with exceptions
	Process did not complete

Task buttons appear for processes you still need to run. For example, if the effort is activated, the **Edit activation criteria**, **Export effort**, and **Refresh effort** buttons appear.

You can also customize the list of marketing efforts. You can add and remove columns and choose how they filter and sort. For example, for the **Status** column, you can set the filters to display only activated marketing efforts. You can also save list parameters to quickly display different views of the list. For example, you may want activated marketing efforts to display fewer columns or in a different order. To save list parameters, click **Save list**. You can also search the list by keyword.

Show Me: Watch this video to learn more about list features.

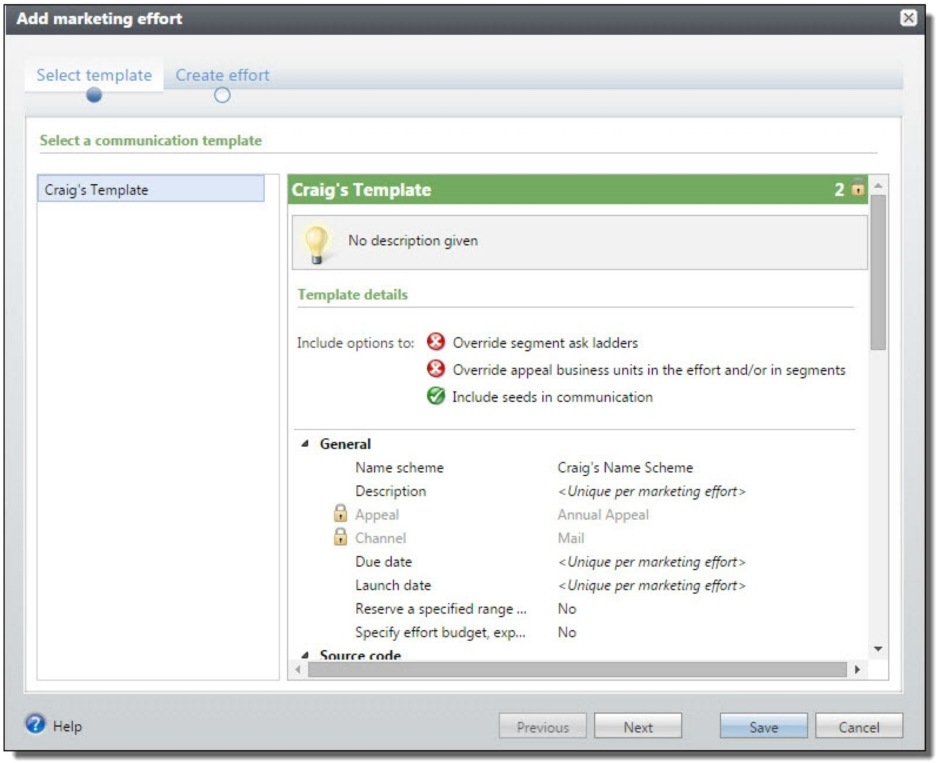
The Planned Efforts tab lists all planned marketing efforts from approved marketing plans. For more information about planned efforts, see Create Efforts from a Marketing Plan on page 136.

Add Direct Marketing Efforts

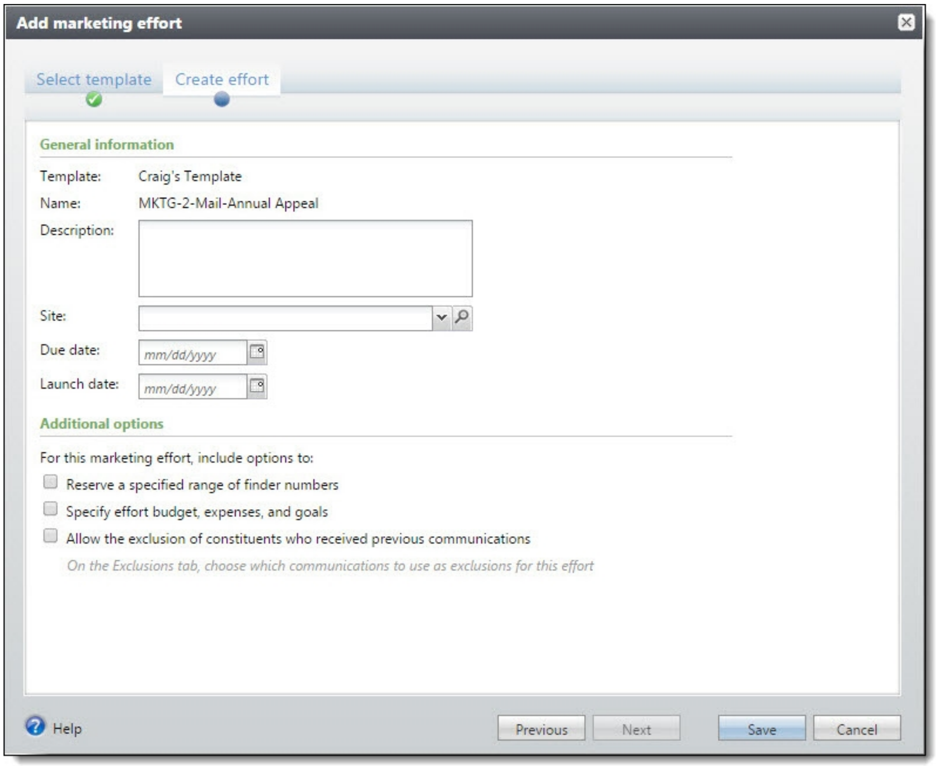
DIrect marketing efforts are built from communication templates. To configure communication templates, from *Marketing and Communications*, under **Configuration**, select **Communication templates**. For more information, see Communication Templates on page 27.

Add a direct marketing effort

1. From *Marketing and Communications*, click **Direct marketing efforts**. The Direct marketing efforts page appears.
2. Click **Add**. The Add marketing effort screen opens to the Select Template form.



3. On the left is a list of all communication templates available for building marketing efforts. To help you choose the correct one, you can select a template to preview its settings on the right.
4. Select the template to use and click **Next** to move to the **Create effort** form.



5. The **Template** field displays the name of the selected template.

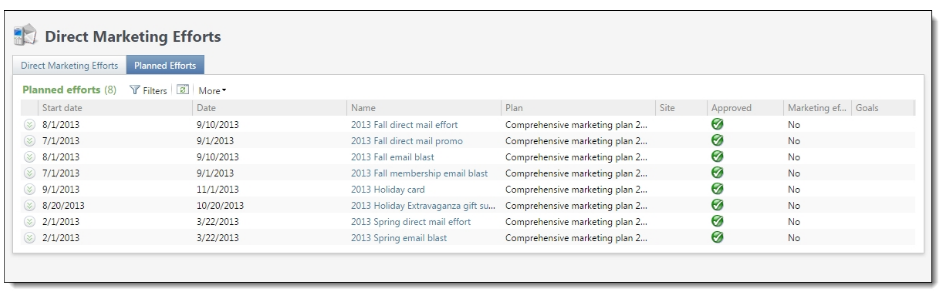
Note: Any fields and options that are locked on the General tab of the selected template are hidden on this form. This procedure assumes all available fields and options are unlocked on the template.

6. In the **Name** field, enter a name for the marketing effort. If the communication template uses a name pattern, the generated name appears and may have additional fields you need to complete. If the name pattern includes dynamic parts, such as the Appeal, Channel, or Due date, those fields are required on the Create effort form, if they were blank and unlocked on the template. If you included a counter in the name pattern, the program increments the counter until it creates a unique name. If the name pattern does not include counter, the program appends a number to the end of the name to make it unique. For efforts created from a marketing plan, the **Name** field displays the name of the planned effort, if the template does not include a name pattern.
7. To add a description that identifies the marketing effort, enter it in the **Description** field.
8. In the **Appeal** field, select the appeal to associate with the marketing effort.
9. In the **Channel** field, select the means of distribution for the marketing effort—mail, email, phone, or multi-channel. If you select mail, email, or phone, you cannot edit the channel after you add segments to the marketing effort. If it is set to multi-channel, you cannot change the channel to a different type if the marketing effort includes segments with packages of a different type. For example, you can change the channel from multi-channel to mail if the effort includes only mail packages. However, if the marketing effort includes packages for the mail and email channels, you cannot change the channel from multi-channel to mail.

10. For internal tracking purposes, you can enter a **Due date** and **Launch date** for the marketing effort. For example, **Due date** is typically the date by which the marketing effort must be completed with segment counts for the vendor/printing house. **Launch date** is usually the date the marketing effort is sent to the post office. For marketing efforts created from a marketing plan, the **Launch date** displays the date specified on the marketing plan.
11. If the marketing effort was created from a marketing plan, the **Plan** field displays the name of the marketing plan.
12. If your organization uses finder numbers, you can select **Reserve a specified range of finder numbers** to reserve a range of finder numbers for the marketing effort. Finder numbers are assigned to each potential donor included in the marketing effort when you run the Calculate segment counts process. If you do not select this option, the Finders Numbers tab is hidden on the marketing effort.
13. To use the budgeting tools for the marketing effort, select **Specify effort budget, expenses, and goals**. When you select this option, you can enter the amount budgeted for the effort and quickly view whether the effort exceeds the budget. If you do not select this option, the Budgets/Expenses tab is hidden on the marketing effort.
14. To allow exclusions based on prior marketing efforts, select **Allow the exclusion of constituents who received previous communications**. When you select this option, you can select an existing activated marketing effort to use as exclusion criteria for the marketing effort. If you do not select this option, the **Previous marketing effort exclusions** grid is hidden on the marketing effort's Exclusions tab.
15. Click **Save**. The Add marketing effort screen closes and the new marketing effort record appears. For more information about tabs on the profile page, see Direct Marketing Effort Record on page 137.

Create Efforts from a Marketing Plan

You can use marketing plans to map out the marketing efforts that will occur during a given time period. Once a plan is approved, all planned marketing efforts appear on the Planned Efforts tab.



To create a marketing effort from a plan, expand the planned effort and click **Create effort from plan**. The Add direct marketing effort screen appears. For more information about how to create a direct marketing effort, see Add a direct marketing effort on page 134.

Copy a Direct Marketing Effort

To create a new direct marketing effort with many of the same settings as an existing effort, you can create a copy. To copy an effort, from the Direct Marketing efforts page, expand the marketing effort and click the **Copy** task button. A new marketing effort named "[Marketing Effort] (1)" appears in the list.

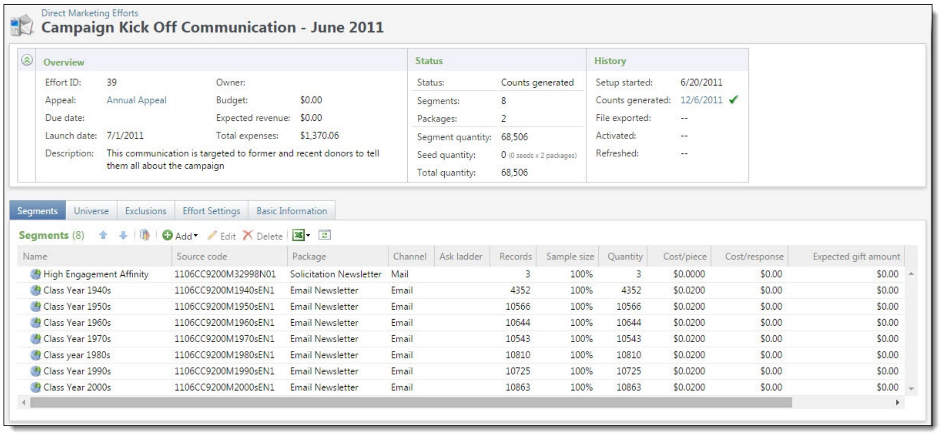
These are a few notes about what copies from the existing effort:

- The template used to create the original marketing effort copies to the new marketing effort. However, if the template was edited after the original effort was created, you receive a warning. In this case, you will need to determine which version is the right one to use for the new marketing effort. It may be better to create a new effort based on the newer version of the template, rather than make a copy.
- When you copy non-activated marketing efforts, the program copies over all source code values for lists, record sources, segments, and packages. However, if code values have changed on the record outside of the marketing effort, the program copies over the current value. For example, you may create an effort, set a segment code to XYZ, activate the effort, and then later change the segment code on the segment record to ABC. When you copy the effort, the segment code for the new effort is ABC from the segment record, not the former code of XYZ from the original effort.
- If a source code part assigned to the original marketing effort 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.
- KPIs associated with the original effort copy to the new effort. If necessary, you can create different KPIs when you activate the effort. When you activate the effort, the original and copies track the same targets and milestones.
- White mail segments assigned to the original marketing effort do not carry over to the copied version.
- When you copy an activated effort, the new effort is not activated.

Tip: When you copy a direct marketing effort, we recommend that you review the universe and exclusions, particularly if you excluded previous efforts. The new effort will have the same exclusions as the copied effort. For example, if you have an effort called SPRING 2014 with an exclusion of WINTER 2013, when you copy the SPRING 2014 effort to create the 2015 effort, the new effort retains the WINTER 2013 exclusion. The exception is test efforts that were based on SPRING 2014. When you activate TEST1 SPRING 2014, it is added as an exclusion to SPRING 2014. During the copy process, the program creates a “TEST1 SPRING 2014 (1)” effort in a non-activated state and removes the original TEST1 SPRING 2014 from its exclusions.

Direct Marketing Effort Record

On the profile page, you can manage all aspects of a direct marketing effort record. You access the record when you add a new effort or open a saved effort from the Direct Marketing Efforts page.



In the top area of the profile, the **Overview** section displays basic information about the marketing effort such as the template, appeal, owner, and launch and due dates. It also includes the budgeted amount, expected revenue, and total expenses to date.

By default, all tabs and fields that are locked on the template are hidden on the marketing effort. To display hidden fields and tabs, click **Show locked fields**. When this option is toggled on, a lock appears next to each locked field and tab to indicate they were hidden. If a tab includes both locked and unlocked fields, the tab appears on the marketing effort but the locked fields are hidden. When you click **Show locked fields**, a lock appears on this tab to indicate that it includes locked fields.

The **Status** section displays the current state of the effort, the total number of segments and packages, and the total quantity of records in the marketing effort, broken out by segments and seeds. The **Status** field includes these states:

- Setup started – The effort is started but segment counts are not yet calculated.
- Counts generated – Segment counts were calculated. This status also appears if segment counts are run again during activation.
- File exported – The effort was exported before activation.
- Activated – The effort was activated and the current date is before the effort's launch date.
- Past launch date – The effort was activated and the current date is later than the effort's launch date.

The **History** section displays the **Setup started** date for the marketing effort and the date and status for the segment counts calculation, file export, activation, and refresh processes. To view the status page for a process, click the date next to the process name. Icons represent the current status:

	Process is running
	Process is complete
	Process is complete with exceptions
	Process did not complete

On the Explorer bar, under **Tasks**, links appear for processes you still need to run for the marketing effort. For example, if the effort is activated, the **Edit activation criteria**, **Export effort**, and **Refresh effort** tasks appear.

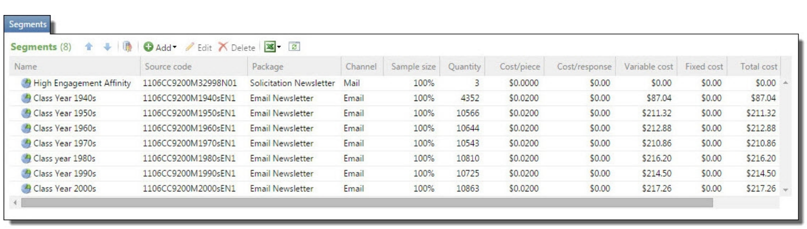
Settings for the marketing effort, such as segments, exclusions, and source codes, are grouped on tabs at the bottom of the profile page.

Segments for Direct Marketing Efforts

Segments group donors based on a variety of criteria so you can target prospects with customized content based on their characteristics. For example, you can base segments for direct marketing efforts on previous efforts; statistical scoring such as recency, frequency, monetary values; or biographical traits such as age or gender. A variety of features in the program help you analyze the success of individual segments, including the Average Gift Comparison and Retention and Attrition reports. For more information about segment tasks, see Manage Segments on Marketing Efforts on page 75.

To view the segments used with a marketing effort, select the Segments tab of the record of the effort. Under **Segments**, you can view and manage all segments in the effort. You can add individual segments or groups of segments and edit, delete, and move them. You can drag and drop one or multiple segments at a time. For efforts linked to a marketing plan, the tab automatically includes all the segment summaries defined in the plan. These segment summaries allow you to group segments and see values “roll up” for the included segments.

For direct marketing efforts linked to a marketing plan, the Segments tab automatically includes all the segment summaries defined in the plan.



Name	Source code	Package	Channel	Sample size	Quantity	Cost/piece	Cost/response	Variable cost	Fixed cost	Total cost
High Engagement Affinity	1106CC9200M32998N01	Solicitation Newsletter	Mail	100%	3	$0.0000	$0.00	$0.00	$0.00	$0.00
Class Year 1940s	1106CC9200M1940sEN1	Email Newsletter	Email	100%	4352	$0.0200	$0.00	$87.04	$0.00	$87.04
Class Year 1950s	1106CC9200M1950sEN1	Email Newsletter	Email	100%	10566	$0.0200	$0.00	$211.32	$0.00	$211.32
Class Year 1960s	1106CC9200M1960sEN1	Email Newsletter	Email	100%	10644	$0.0200	$0.00	$212.88	$0.00	$212.88
Class Year 1970s	1106CC9200M1970sEN1	Email Newsletter	Email	100%	10543	$0.0200	$0.00	$210.86	$0.00	$210.86
Class year 1980s	1106CC9200M1980sEN1	Email Newsletter	Email	100%	10810	$0.0200	$0.00	$216.20	$0.00	$216.20
Class Year 1990s	1106CC9200M1990sEN1	Email Newsletter	Email	100%	10725	$0.0200	$0.00	$214.50	$0.00	$214.50
Class Year 2000s	1106CC9200M2000sEN1	Email Newsletter	Email	100%	10863	$0.0200	$0.00	$217.26	$0.00	$217.26

From the grid, you can generate segments for the marketing effort.

- For direct marketing efforts, you can generate segments based on a Segment Builder set and add constituent, list, membership, and test segments.

After activation, the **Segments** grid displays gift counts, response counts, response rates, and more for each segment and segment group. The grid also includes record counts for segment exclusions. Additionally, the **Indirect and unresolved responses** grid appears on the Segments tab.

- Indirect responses are those from donors who did not receive an offer and gave a gift to this marketing effort. The donors were not part of the marketing effort but they gave a gift and it somehow got associated with the appeal and marketing effort ID. Essentially, the gift has the appeal and marketing effort ID even though the donor was not directly contacted through the marketing effort.
- Unresolved responses are those from donors who did not receive an offer and gave a gift to the appeal, but the gift cannot be resolved or credited to a specific marketing effort. The donors were not part of the marketing effort, but gave a gift that was somehow associated with the appeal, although it has no marketing effort ID. The gift has only the appeal.

When you refresh a marketing effort, a “matchback” process takes place. This process tries to place gifts into specific segments and remove them from the indirect or unresolved pool based on the source code on the gift record. For more information, see Refresh Marketing Efforts on page 107.

The Unresolved Responses report shows all the unresolved donors and all the possible marketing efforts that have been activated against the same appeal. After you generate this report, you can go back to your source system and correct the source code on the gifts that appear in the report.

Use the arrows to move selected segments up or down in the grid. The order of segments in the grid is important because you can only include records in one segment. When you activate a marketing effort, segments are processed from top to bottom. If a record meets the criteria for multiple segments, only the first of those segments will include the record.

If you move segments, click **Calculate segment counts** to view the updated counts. For more information about how to calculate segment counts, see Calculate Segment Counts on page 93.

Add List Segments to a Direct Marketing Effort

You can assign list segments to marketing efforts and specify how to use them — whether the segments are a test, retest, continuation, or reuse. When you assign a list segment to a marketing effort, the base list cost, and any additional costs for the segment, and the assigned record count default to the marketing effort. If these costs change, such as when you receive discounts from your vendor, you can override the quantity of records and additional costs for segments.

You can move a list segment and treat it as you would any other segment. A list segment can also have test segments. When you refresh the marketing effort, you process matchbacks for the list segments as well. The matchback process attempts to match the source codes entered on gift records to the source codes on each segment in your marketing effort.

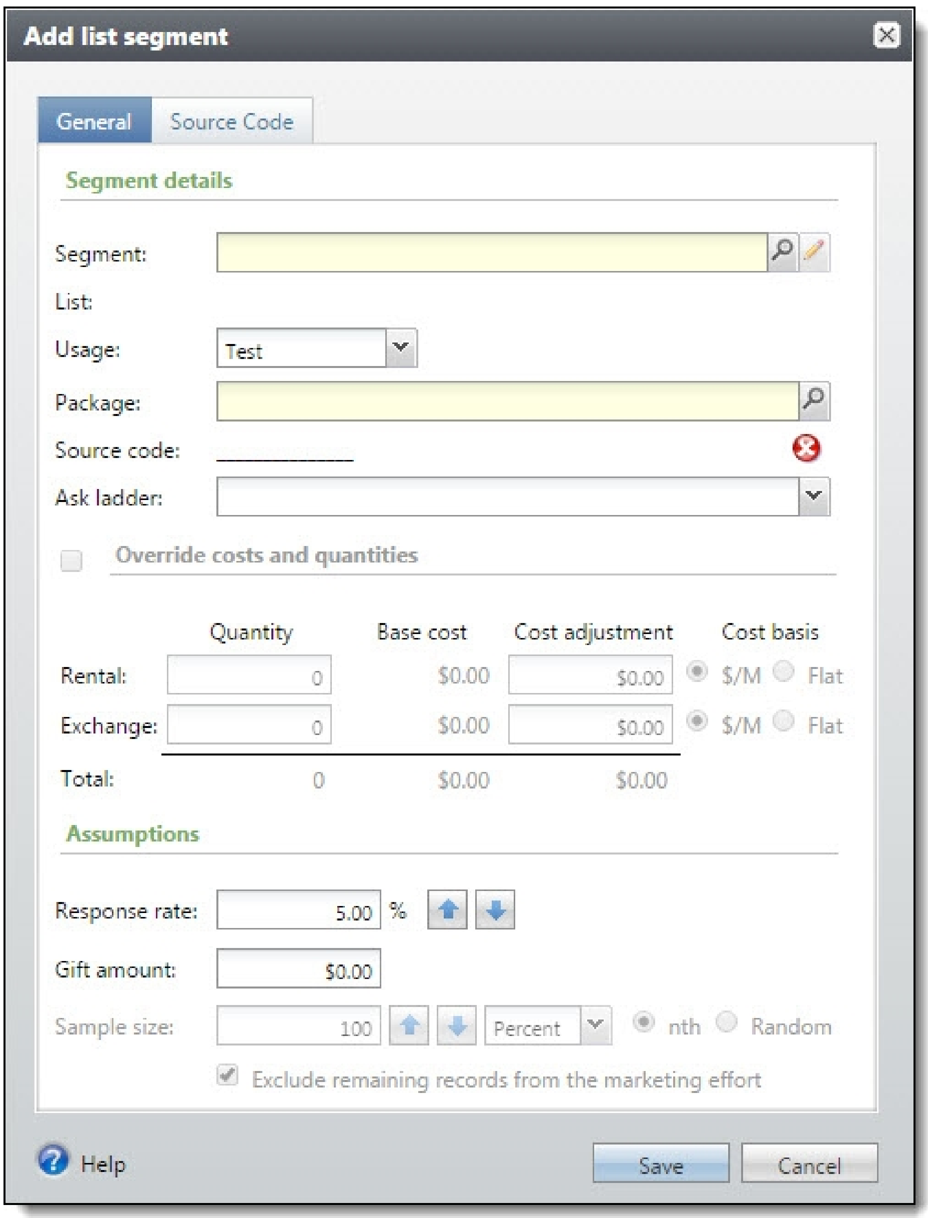
If you add a source code, the matchback will match accordingly to the segment even if the constituent is in a different segment initially. If you only populate the Appeal on a constituent, the effort data also populates but only if the Appeal is linked to that single marketing effort. If the Appeal is linked to more than one effort, the Effort field does not automatically populate. You can leave it blank or choose a linked effort. For more information about matchbacks, see Refresh Marketing Efforts on page 107.

For more information about how costs are calculated for list segments and lists, see Calculate Costs for List Segments and Lists on page 145.

Note: The address processing and name format options selected for the marketing effort do not apply to list segments. The program uses the format from the import file.

Add a list segment to a direct marketing effort

1. From a direct marketing effort record, select the Segments tab.
2. Click **Add**, **List segment**. The Add list segment screen appears.



3. In the **Segment** field, select the list segment to add to the marketing effort.

If you select a segment with a source code part value assigned, that value defaults into the appropriate position in the source code field below.

Note: To edit the selected segment, click the **Edit** button to open the Edit segment screen. When you edit a segment from a marketing effort, you cannot change the segment’s code. Also, if you edit the underlying segment after the segment is saved to the marketing effort, all existing calculations are cleared from the Segments tab.

4. The **List** field displays the list associated with the segment.
5. In the **Usage** field, select how to use the segment in the marketing effort:
   - Test: Test a sample of a rented or exchanged list
   - Retest: Retest the sample of the list or to test a different sample of the same list.
   - Continuation: When a sample list tests well, you can create a continuation to use the entire list with a marketing effort.
   - Reuse: When a list performs well, you can reuse it with other marketing efforts.
6. In the **Package** field, select the package to associate with this segment. You can select only packages with the same channel as the marketing effort. If you select a package with a source code part value assigned, this value defaults into the source code field below.
7. The Source code field displays the full source code. If code parts are missing values, select the Source Code tab to complete the source code. You must enter code part values that meet the formatting requirements of the layout. A red X or green checkmark indicates whether the full code is valid.
8. In the Ask ladder field, select the ask ladder to associate with this segment. If you include ask ladders on a marketing effort, the **Ask Ladder** field is required for all segments you add to that marketing effort.

Note: You can add ask ladder overrides to apply different ask ladders to selections than the one specified for their segment.

9. The list's rental and exchange costs and quantities appear in the grid. To update these amounts, for example, if you received discounts from the vendor, select **Override costs and quantities** and enter the amounts to use for this marketing effort.
10. Click **Save**. You return to the Segments tab, where the new segment appears.

Add List Segment Screen

General tab

Screen Item	Description
Segment	Click the binoculars to search for a segment to use in the marketing effort. If you select a segment with a source code part value assigned, this value defaults into the appropriate position in the source code field below. **Note**: When you add or edit a marketing effort segment, you can click the Edit button to open the Edit segment screen. When you edit a segment from a marketing effort, you cannot change the segment's code. Also, when you edit an existing marketing effort segment, if you edit the underlying segment the marketing effort segment is based on, all existing calculations are cleared from the Segments tab.
List	This field displays the list associated with the segment.
Usage	Select how to use the segment in the marketing effort.
Package	Click the binoculars to search for the package to associate with this segment. Packages are the different pieces available for a marketing effort. You can select only packages with the same channel as the marketing effort. If you select a package with a source code part value assigned, this value defaults into the appropriate position in the source code field below.
Source code	Displays the full source code. If code parts are missing values, select the Source code tab to complete the source code. You must enter code part values that meet the formatting requirements of the layout. A red X or green checkmark indicates whether the full code is valid.
Ask ladder	Select the ask ladder to associate with this segment. If you include ask ladders on a marketing effort, the **Ask Ladder** field is required for all segments you add to that marketing effort. **Note:** You can add ask ladder overrides to apply different ask ladders to selections than the one specified for their segment.
Override costs and quantities	If you receive discounts from the vendor, select **Override costs and quantities** to override the segment costs to rent or exchange the list and the segment's quantities. This option enables the columns and fields below.
Quantity	**Rental** — If you selected an import file, the **Quantity** column displays the number of records in the list. **Exchange** — If some of records in the list are an exchange, enter the amount.
Base cost	**Rental** — Enter the cost to rent the list. **Exchange** — Enter the cost to exchange the list.
Cost adjustment	Enter any additional costs to create the lists.
Cost basis	Select whether the costs are per thousand records or a flat fee.

Screen Item	Description
Total	This column displays the sum of the **Rental** and **Exchange** columns. If you selected an import file, the total must equal the quantity from the import file.
Response rate and **Gift amount**	Enter an expected response rate for the segment and the expected gift amount from respondents. This information enables you to compare the expected response rate to the actual when you analyze the marketing effort.
Sample size	Enter a sample size and select “Percent” or “Records.” Then select whether to add records at random or every nth value. For example, if you enter “50” and select “Percent” and **Random**, the segment includes a random sampling of records equal to 50 percent of the records in the segment. If you enter “50” and select “Records” and **Random**, the segment includes 50 randomly sampled records. Some marketers think every “nth” record more thoroughly represents a set of records than a random selection. The nth value depends on your other selections in the **Sample size** field and the total number of records in the segment. For example, if you enter “50” and select “Percent” and **nth**, and the total number of records in the segment is 100, then 100 divided by 50 equals two, so every second record from the original 100 records is selected until 50 records are collected for the segment. The sample size is typically 100 percent. However, you can adjust the sample size to ensure segments are equally sized, hold down costs, or account for limits on marketing effort materials.
Exclude remaining records from the marketing effort	If you enter a sample size less than 100 percent or select “Records” in the **Sample size** field, you can select **Exclude remaining records from the marketing effort** to exclude any records that are not included in the sample from other segments below the current segment in the **Segments** grid. (Segments are processed for a marketing effort in order from top to bottom.) If you clear **Exclude remaining records from the marketing effort**, any records that are not in the sample are available to other segments below the current segment (if the records exist in the segments below; otherwise, they are not included in the marketing effort at all). If a record meets the criteria for multiple segments, it is included in the segment closest to the top.

Source code tab

Screen Item	Description
Source code	This field displays the layout selected for the marketing effort. The fields below display the code part values that were assigned to the layout. If any values are missing, you can enter them here.

Business units tab

Note: The Business units tab appears only when you select **Override appeal business units in the effort and/or in segments** on the Start setup form of the communication template and select **Allow individual segments to override the business units of the effort**on the Business Units tab of the template.

Screen Item	Description
Override marketing effort business units	This tab displays the business units selected for the marketing effort. To use other business units for the segment, select **Override marketing effort business units**. In the **Business unit** column, select which units to credit for the revenue. In the **% Credit for revenue** column, enter the percentage of the revenue to credit to the selected business unit. To divide the credit amount evenly among the selected business units, click **Split evenly**. To give each unit full credit for the revenue, click **Split fully**.

Calculate Costs for List Segments and Lists

To calculate the variable costs for list segments in a marketing effort, the program adds the total segment costs to the total list costs.

For example, you have an effort based on a list that includes two segments — subscribers for a 3-month period and a 6-month period. The segments both contain rental and exchange records. The tables below demonstrate how segment costs are calculated.

The program first calculates the costs for each segment by multiplying the quantity of records by the cost/m (cost per thousand).

3-month segment	**Quantity**	**Cost/M**	**Total**
Rental	10,000	$12.00	$120.00
Exchange	5,000	$1.00	$5.00
			$125.00

6-month segment	**Quantity**	**Cost/M**	**Total**
Rental	20,000	$15.00	$300.00
Exchange	5,000	$1.00	$5.00
			$305.00

Then the program calculates the “per piece” cost by dividing the total list cost by the total number of records in the list. For this example, $2,410 / 40,000 = $0.06025. This distributes the base list cost across the two segments in the marketing effort.

Note: The marketing effort may not use all the records in segments for the list. For this example, if another effort included segments from the same list, those records would be included in the quantity and would affect the “per piece” amount.

List cost for marketing effort	Quantity	Cost/M	Total	"Per Piece" List Cost
				(Total cost / Total quantity
Total Rental	30,000	$80.00	$2,400.00	
Total Exchange	10,000	$1.00	$10.00	
	40,000		$2,410.00	**$0.06025**

Finally, the program calculates the list cost for each segment by multiplying the "per piece" cost by the quantity for each segment. To calculate the total variable cost for each segment, the program adds the total segment costs and total list costs.

3-month segment	Quantity	Cost/M	Segment Cost	List Cost	Total Variable Cost
Rental	10,000	12.00	$120.00	$602.50	
Exchange	5,000	1.00	$5.00	$301.25	
			$125.00	$903.75	**$1,028.75**

6-month segment	Quantity	Cost/M	Segment Cost	List Cost	Total Variable Cost
Rental	20,000	$15.00	$300.00	$1,205.00	
Exchange	5,000	$1.00	$5.00	$301.25	
			$305.00	$1,506.25	**$1,811.25**

The Variable Cost for each segment appears on the Segments tab of the marketing effort.

Import Direct Marketing Efforts

If you use strategy vendors to segment an exported file of your constituents, the vendors 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.

Note: This section addresses how to import a Direct Marketing Effort Batch. For detailed information about import processes and configuration, see the *Batch and Import Guide*.

To import marketing efforts, on the Add import process screen, select "Direct Marketing Effort Batch" in the **Batch template** field.

Marketing Import Process Rules

During a marketing effort import, the program uses these rules to determine whether to link to an existing segment, list, or package record, or create a new one.

You mapped only the source code field for the segment, list, or package:

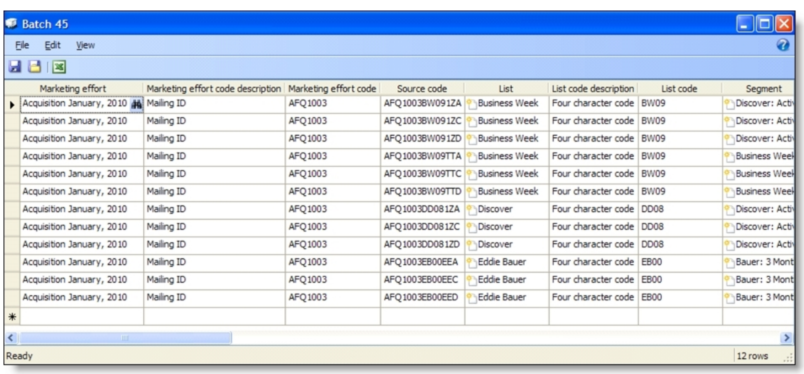
- If the code for a segment, list, or package in the import file matches a unique existing code, the import links to the matching record. If no match exists, the program creates a new segment, list, or package record and uses the code value in the **Segment/List/Package code** and **Segment/List/Package name** fields.
- Segments can have duplicate codes. If the import file contains a segment with the same code as more than one existing segment, you receive an exception. To correct this problem, you need to manually add the segment to the marketing effort. You will receive a warning that you are creating a duplicate segment, but you can click **Ignore** to create the segment anyway.
- If the import file contains a segment, list, or package with the same name as an existing record but not the same code, you receive an exception. You must change the name or code of the imported segment, list, or package.

You mapped both the source code and name for the segment, list, and package fields:

- The program first searches for an existing segment, list, or package with the same code. If it finds one, then the program verifies that the **Segment/List/Package name** field is an exact match. If it does not match, you receive an exception. You must change the name of the existing segment, list, or package or the name of the record in the import file.
- If a segment in the file has a code that matches an existing segment but they have different names, you receive an exception. You can either do nothing and allow the program to create a segment, or you can change the segment name in the import file to match the one in the database.

Resolve Errors in a Direct Marketing Effort Batch

After you import a Direct Marketing Effort Batch file, imported 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 *Batch entry*, see the *Batch and Import Guide*.



Keep these tips in mind as you resolve errors in the batch:

- You must map the **Segment/List/Package code** or **Segment/List/Package name** fields for all segments, lists, or packages in the batch. If the full source code includes the segment, list, or package code parts, the **Segment/List/Package code** fields for those parts are mapped automatically. To avoid issues, we recommend that you map the **Segment/List/Package code** and **Segment/List/Package name** fields for all records.

- If you include test segments, the parent segment row must come before the test segment row in the batch. The test segment row must include a **Test segment quantity** column and a test segment name. The name in the **Segment name** and code columns must match the parent segment's name exactly.
- If you use the same marketing effort, list, segment, test segment, or package record for multiple segments, when you edit any of the fields for those records, the program automatically updates that value for all rows in that column. For example, if you update the package description, the program updates the description automatically for all segments that use that package.
- The icons that appear next to the list, segment, test segment, and package columns indicate whether that record is linked to an existing record or a new record will be created when the batch is committed.
- Code part values must meet the requirements defined by the source code layout. For example, if the code part requires fixed values (e.g. the Department code is M for Membership or D for Direct Marketing), then the Department code must be M or D or the row is marked as an exception in the batch. If you need a new code value for Department other than M or D, you must add it to the source code layout before you commit the batch.
- If a code value in the batch contains a mix of fixed and wildcard values, the program validates the value based on the most restrictive to least restrictive code part definitions. For example, the source code layout defines the list code part as one of these two formats:
- L** - L followed by any two characters
- *** - Any three characters

  If the batch includes a list code of L11, then the program would match it to the L** format before the *** format.

Historical Direct Marketing Efforts

Marketing efforts converted from another application are called "historical." Historical marketing efforts and their related pieces (source codes, segments, and lists) are used primarily for recordkeeping and reporting purposes.

Marketing Efforts

You can access historical marketing efforts from the Marketing Efforts page. All converted marketing efforts have a type of "Direct marketing effort (Historical)." When you open a historical marketing effort, you can view its segments and edit limited information:

- You can edit the name and date on a historical marketing effort, but you cannot edit its source code or appeal.
- For historical marketing efforts that are still receiving revenue, you will need to schedule marketing effort refreshes to update response counts and revenue received.
- These reports do not include historical marketing efforts: Ask ladder response, Export definition file layout, Finder file counts, Marketing exclusions, Marketing record counts, Remove member counts, Segmented house file counts, Average gift comparison, Retention and attrition, Source analysis response (unless SAR data is converted), and Source code performance (unless converted marketing efforts use a rigid source code structure)

- You can use filters to exclude historical marketing efforts from the marketing efforts list on the Marketing Efforts page.

Segments

You can access historical segments from the Segments page. Converted segments have "(Historical)" appended to the segment type. When you open a historical segment, you can edit limited information:

- You can edit the name, description, and category on historical segments and historical list segments. On historical list segments, you can also edit the order date, expires on date, and number of contacts .
- You cannot add segments to historical marketing efforts, but you can edit the assumptions on existing segments for non-activated marketing efforts.
- Historical segments are excluded from segment refresh processes.
- You can use filters to exclude historical segments from the list on the Segments page.

Lists

Converted lists can be associated with historical list segments and new list segments, however, you cannot edit the source code field on historical list segments. You can edit base cost fields on converted lists, but you cannot edit that information on an associated historical list segment.

Source Codes

You can edit the name and description on a historical source code layout. If the historical source code layout is free-form text, it cannot be used when creating a new marketing effort.

Public Media Efforts

With public media efforts, you can communicate to a mass audience through content targeted at groups rather than a specific recipient. Examples of public media efforts include content broadcast on television or radio, or displayed in print publications, online through website banner ads or interactive media, or on billboards or signs.

Public Media Effort Workflow

Setting up a public media effort requires several steps.

- Define source codes to track the effectiveness of your public media efforts. When you record the source code on a gift record received in response to an effort, you establish the specific combination of package, segment, and channel that resulted in the gift. You can analyze this data to determine which combination yields the best results.
- Set up public media segments such as media outlets, time slots, and marketing locations similar to how you segment your direct marketing efforts. Rather than target a specific constituent or prospect, you instead target a demographic of people such as those who travel by a specific location, visitors of a specific website or business, or the audience of a specific television or radio program. From *Marketing and Communications*, you can add the media outlets, time slots, and marketing locations your organization uses for public media efforts. You can also create segment groups for related segments, such as the affiliate stations of a television network. For information about these segments, see Public Media Segments on page 255.
- Add a public media effort. Configure its source code and select the key performance indicators (KPIs) to use to track the effectiveness of the effort. For information about how to add an effort, see Add Public Media Efforts on page 151.
- Add segments and segment groups to the effort. For information about how to add segments to an effort, see Segments for Public Media Marketing Efforts on page 155.

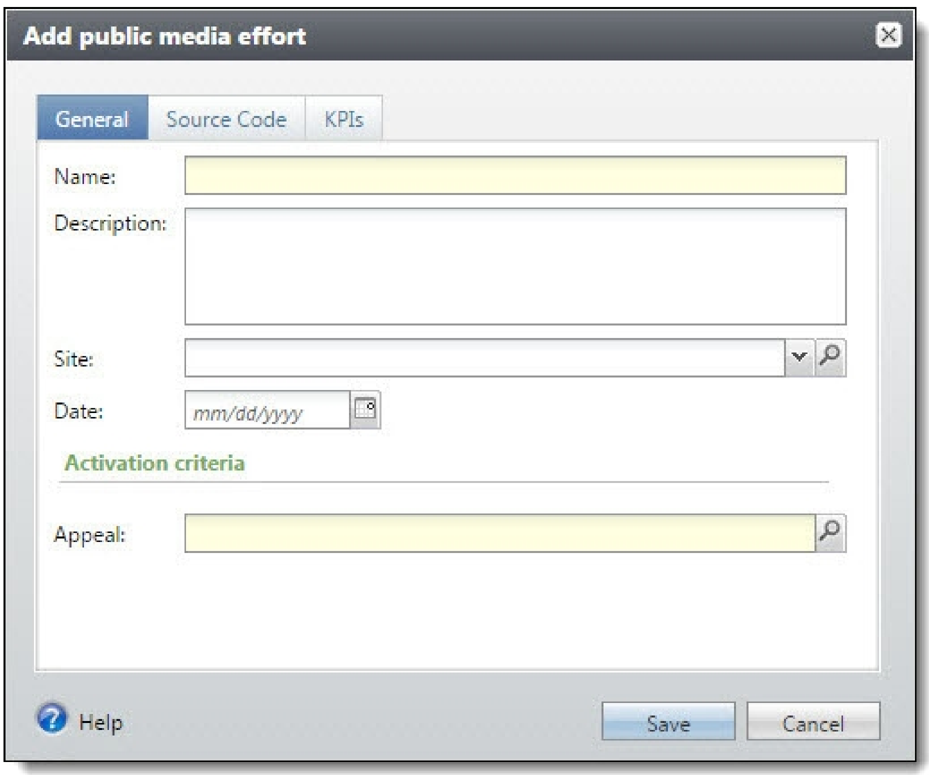
- Set a budget for the public media effort and its packages. For information about how to manage the effort budget, see Troubleshoot Budget/Expenses for Marketing Efforts on page 129.
- Public media efforts are activated automatically when you save the effort. You can analyze the effort's response rate and use the selected KPIs to track its effectiveness.

Add Public Media Efforts

Use public media efforts to communicate to a mass audience through content not targeted toward a specific recipient. After you create the marketing effort, you can assign segments to the effort. For public media efforts, you can use segment prospects based on media outlets, time slots, and marketing locations.

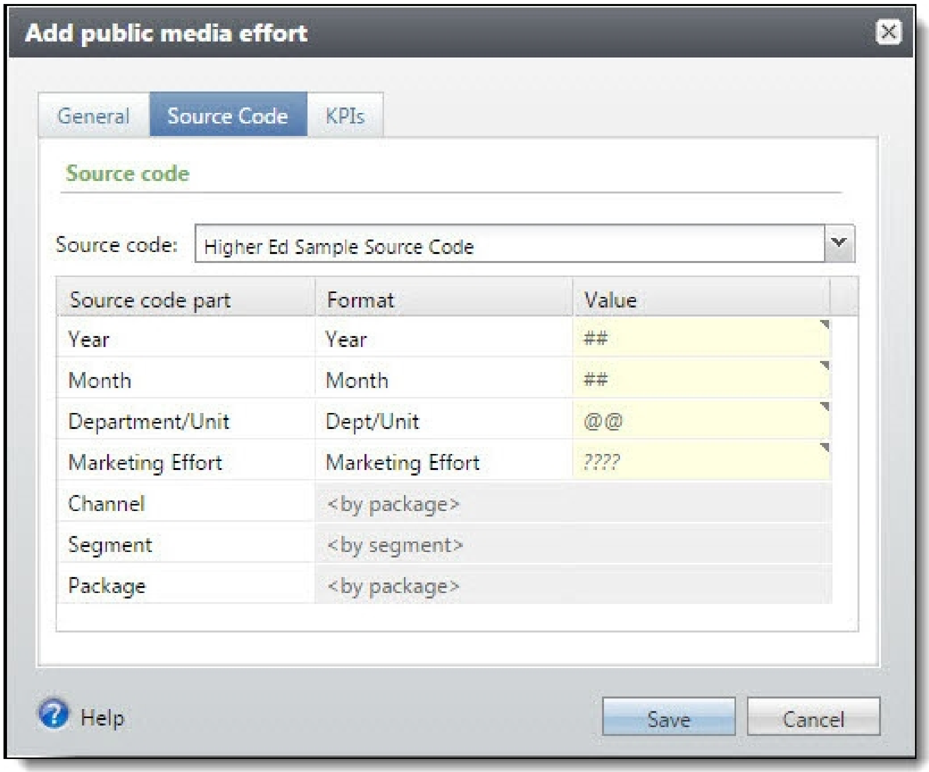
Add a public media effort

1. From *Marketing and Communications*, under **Marketing efforts**, click **Public media efforts**. The Public media efforts page appears.
2. Click **Add a public media effort**. The Add public media effort screen appears. For information about the items on this screen, see Add Public Media Effort Screen on page 153.

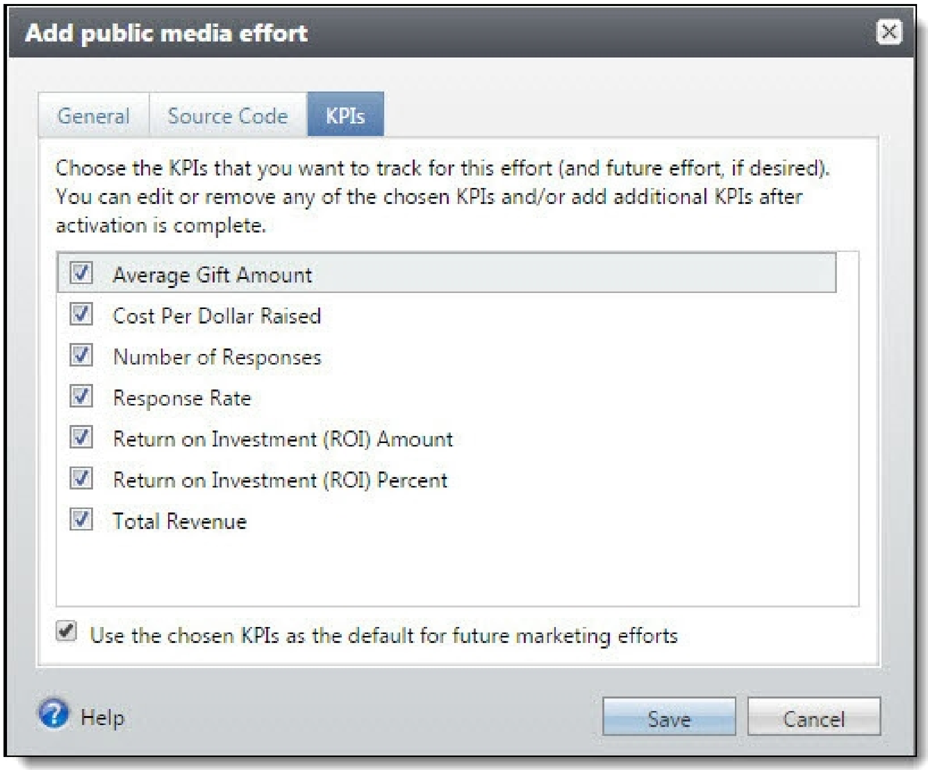


3. On the General tab, enter a unique name and description to help identify the effort.
4. To restrict use of the effort to only a specific site at your organization, in the **Site** field, select the site to use the effort.

5. In the **Date** field, select the date when you begin the effort. This date may be different from the activation date.
6. In the **Appeal** field, select an appeal to identify gifts received as a result of the marketing effort.
7. To help track the effectiveness of the marketing effort, on the Source code tab, select the layout to use to generate source codes for the effort. The source code helps identify the components used with the effort such as segments.



8. To generate key performance indicators (KPIs) when you activate the effort to track its effectiveness, select the KPIs tab.



Select the marketing KPIs to generate for the effort. To use the same KPIs as the default when you add future marketing efforts, select **Use the chosen KPIs as the default for future marketing efforts**.

Note: You do not have to activate public media efforts. They are activated automatically when you save the effort.

9. Click **Save**. The new public media record appears. For information about tabs on marketing efforts, see Marketing Effort Records on page 114.

Add Public Media Effort Screen

The tables below explains the items on the Add public media effort screen. For information about how to access this screen, see Add Public Media Efforts on page 151.

General tab

Screen Item	Description
Name	Enter a unique name to help identify the public media effort.

Screen Item	Description
Description	Enter additional information to further identify the effort, such as an explanation of its content or intended recipients.
Site	To restrict use of the effort to only users at a specific site at your organization, select the site to use the effort.
Date	Select the date of when to start the effort.
Appeal	Select an appeal to identify gifts received as a result of the marketing effort. You can associate the same appeal with multiple marketing efforts.

Source code tab

Screen Item	Description
Source code	In the **Source code** field, select a code layout. Layouts are created on the Source Codes page. After you select a source code layout, each source code part for the layout appears below. Enter a value for each code part that requires one. The values allowed depend on how the source code part is defined in the layout. Gray fields indicate fixed codes you cannot edit. For example, you defined fixed values for the “Department” source code part — “Membership” or “Development.” After you select “Membership” or “Development,” the ‘M’ or ‘D’ code value appears in the field to the right and is disabled. Yellow fields display the format for the code you can enter. For example, you have a source code part for “Month” and you specified that the only valid format for “Month” is a two digit code (# = 0 though 9). The field displays ## to indicate that you need to enter two digits. The fields for Channel, Package, Segment and Test Segment display “<by channel>,” “<by package>,” etc. These codes are set on the marketing effort segment.

KPIs tab

Screen Item	Description
KPIs	Select the checkbox for each KPI to track for the marketing effort. These appear on the KPIs tab of the marketing effort. When you activate the marketing effort, the program automatically creates an instance of each marketing effort KPI you selected and associates it with the activated marketing effort. The KPIs you select also appear on a KPI dashboard.

Segments for Public Media Marketing Efforts

Segments group donors based on a variety of criteria so you can target prospects with customized content based on their characteristics. For example, you can base public media efforts on media outlets and time slots, such as for broadcast or online efforts, or marketing locations, such as for billboards, promotional literature, or other out-of-home efforts. Through these segments, you can communicate your message to a specific demographic, such as prospects who live in a specific area, visit a specific website, or prefer a specific television or radio program.

To view the segments used with a public media effort, select the Segments tab of the record of the effort. Under **Segments**, you can view and manage all segments in the effort. For information about the Segments tab, see Segments Tab on page 116.

For public media efforts, you can add media outlet, time slot, and marketing location segments. When you add segments to a marketing effort, each segment must use a different package. From the grid, you can add and manage segments and segment groups to the marketing effort.

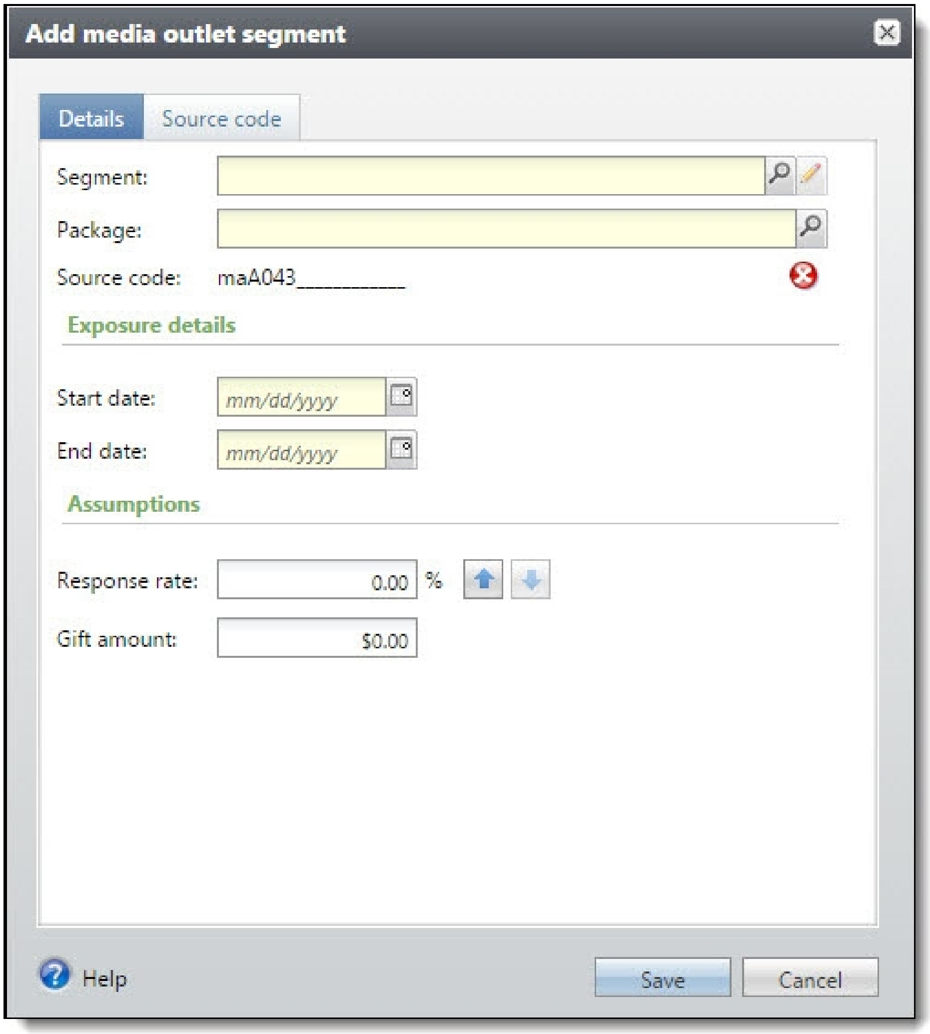
Add Public Media Segments to a Marketing Effort

To use a public media segment with a marketing effort, you must add it to the effort to track the response from prospects who receive the content through the segment. You can add media outlet, time slot, and marketing location segments to a public media effort.

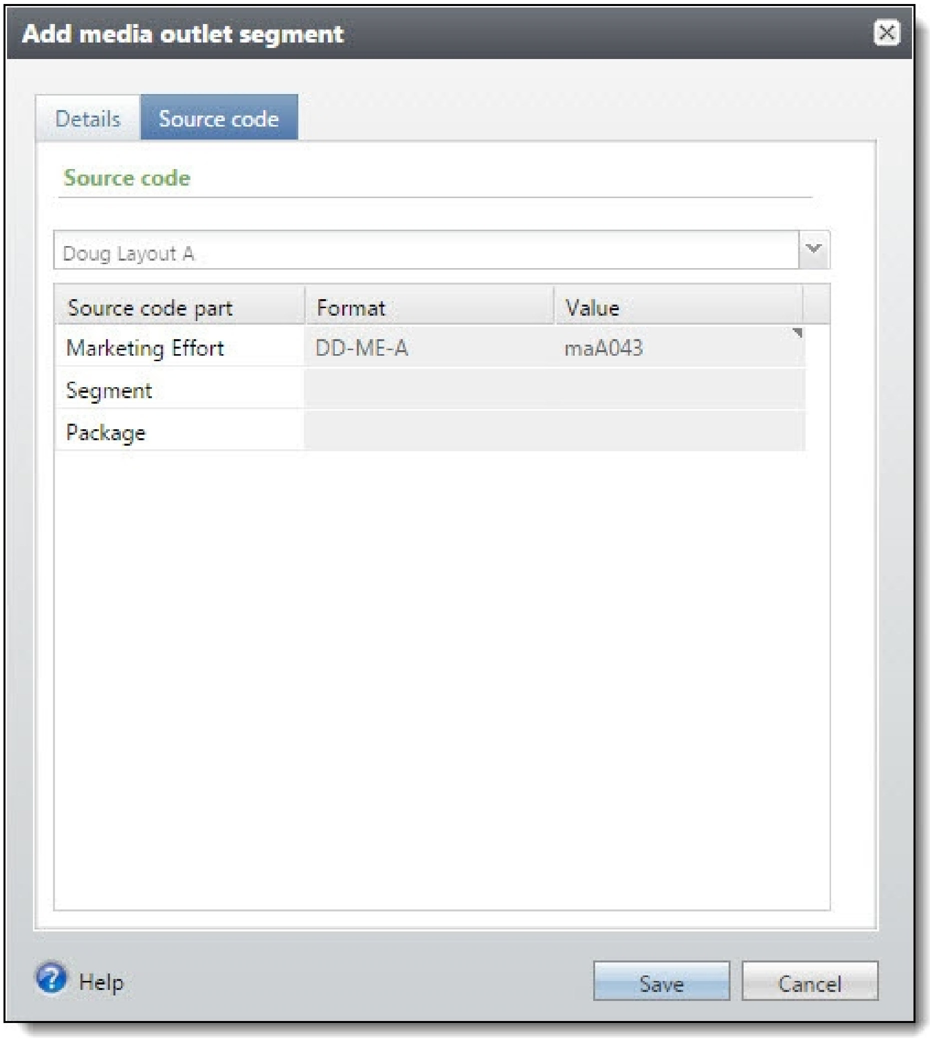
- Media outlets are where your content appears for a public media effort. Examples of media outlets include television networks or radio stations for a broadcast effort, websites or social networking sites for an Internet effort, or magazines or newspapers for a print effort.
- For broadcast marketing efforts, time slots are when your content appears. Examples of time slots include the program or time period during which the content runs or a specific day and time.
- For out-of-home marketing efforts such as billboards or pamphlets, marketing locations are where your content appears. Examples of marketing locations include the physical location of a billboard advertisement or a business location that displays literature such as pamphlets or a poster.

Add a public media segment to an effort

1. From a public media effort, select the Segments tab.
2. Click **Add** and select the type of public media segment to add to the effort, such as **Media outlet** or **Marketing location**. The Add screen appears. For information about the items on this screen, seeAdd Public Media Segment Screen on page 157.



3. On the Details tab, in the **Segment** field, search for and select the public media segment to use with the effort.
4. In the **Package** field, search for and select the package that contains the content to use with the segment. The **Source code** field displays the source code for the segment based on the selected segment and package.
5. Under **Exposure details**, select the start and end dates for the use of the segment with the effort. For example, for a media outlet, select the dates between which the outlet runs the content for the effort.
6. Under **Assumptions**, enter the anticipated response rate for the segment and the expected average gift amount from its respondents.
7. Select the Source code tab.



8. Under **Source code**, the source code layout used with the marketing effort and the code for each selected component, such as channel and package, appears. Edit the parts of the source code as necessary to identify the content run through the segment.
9. Click **Save**. You return to the marketing effort record. On the Segments tab, the segment appears.

Add Public Media Segment Screen

The table below explains the items on the Add screen for a segment on a public media effort. For information about how to access this screen, see Add Public Media Segments to a Marketing Effort on page 155.

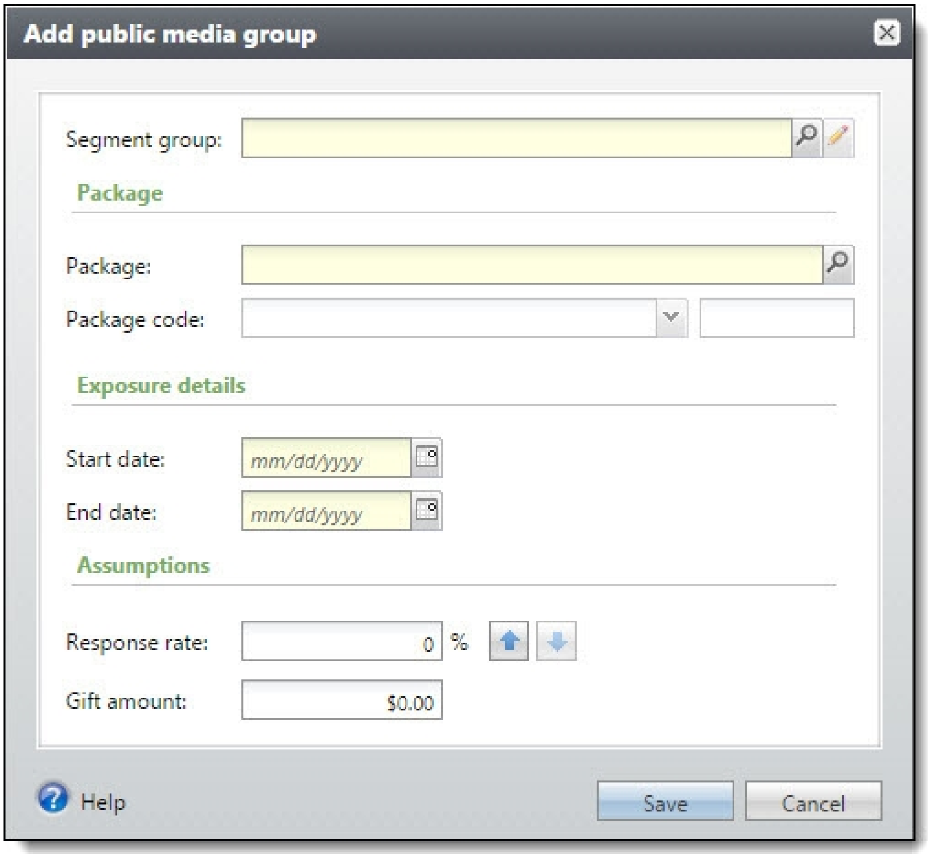
Screen Item	Description
Segment	Click the binoculars to search for a segment to use in the marketing effort. If you select a segment with a source code part value assigned, this value defaults into the appropriate position in the source code field below. **Note**: When you add or edit a marketing effort segment, you can click the **Edit** button to open the Edit segment screen. When you edit a segment from a marketing effort, you cannot change the segment's code. Also, when you edit an existing marketing effort segment, if you edit the underlying segment the marketing effort segment is based on, all existing calculations are cleared from the Segments tab.
Package	Click the binoculars to search for the package to associate with the segment group. Packages are the different pieces available for a marketing effort. If you select a package with a source code part value assigned, this value defaults into the source code field below. Otherwise select a package code value.
Source code	Displays the full source code. If code parts are missing values, select the Source code tab to complete the source code. You must enter code part values that meet the formatting requirements of the layout. A red X or green checkmark indicates whether the full code is valid.
Exposure details	Select the start and end dates of when to use the segment with the effort. For example, select the dates between which the content through the segment.
Response rate	Enter the anticipated response rate from prospects who receive the content through the segment.
Gift amount	Enter the average gift amount expected from prospects who receive the content through the segment.
Channel	On the Source code tab, this field displays the source code used to identify the channel associated with the selected package. Edit this source code as necessary to identify the segment when used with the effort.

Add Segment Groups to a Public Media Effort

You may create segment groups for related public media segments. For example, you may create a segment group for a television network to include its affiliate stations. To use a public media group with an effort, you must add it as a segment group to track the response from prospects who receive the content through the group.

Add a public media group to an effort

1. Access the public media effort to add the segment group to.
2. Select the Segments tab.
3. Click **Add** and select **Public media group**. The Add public media group screen appears. For information about the items on this screen, see Add Public Media Group Screen on page 159.



4. In the **Segment group** field, search for and select the public media group to use with the effort.
5. Under **Package**, search for and select the package that contains the content to use with the group.
6. Edit the source code as necessary to identify the package when used with the effort and group.
7. Under **Exposure details**, select the start and end dates for the use of the group with the effort.
8. Under **Assumptions**, enter the anticipated response rate for the group and the expected average gift amount from its respondents.
9. Click **Save**. You return to the marketing effort record. On the Segments tab, the group appears.

Add Public Media Group Screen

The table below explains the items on the Add public media group screen. For information about how to access this screen, see Add Segment Groups to a Public Media Effort on page 158.

Screen Item	Description
Segment group	Select a segment set. This is a collection of segments you create with Segment Builder. You can also create a set here if necessary. For more information about how to create a segment set, seeSegment Groups on page 273.
Package	Click the binoculars to search for the package to associate with the segment group. Packages are the different pieces available for a marketing effort. If you select a package with a source code part value assigned, this value defaults into the source code field below. Otherwise select a package code value.
Exposure details	Select the start and end dates of when to use the group with the effort.
Response rate	Enter the anticipated response rate from prospects who receive the content through the group.
Gift amount	Enter the average gift amount expected from prospects who receive the content through the group.

Marketing Acknowledgements

To thank donors for gifts donated to your organization, you can use**Marketing Acknowledgements**. **Marketing Acknowledgements** is an optional feature that your system administrator configures. If you need to use marketing acknowledgement efforts, and the **Marketing Acknowledgements** task does not appear, consult your system administrator. The marketing acknowledgements workflow is per revenue or gift; you cannot acknowledge multiple gifts for a single constituent in one action, but must send an acknowledgement for each gift, and you can acknowledge a single gift only once.

When Should I Use Marketing Acknowledgements?

There are multiple options for managing revenue communications in the program, including marketing acknowledgement efforts, standard acknowledgements, and receipts. When their features overlap, we recommend that you use marketing acknowledgements to combine receipts and thank you letters in one letter.

With marketing acknowledgements, you can:

- Send different types of acknowledgement letters in a single process (as opposed to a unique process per letter for standard acknowledgements).
- Include receipt information in the acknowledgement letter
- Include an ask for an additional gift in the acknowledgement letter with a finder number, source code, and ask ladder
- Send multiple letters for the same revenue record
- Use name format options and address processing options
- Limit the number of acknowledgements processed at one time
- Send acknowledgement letters for pledges

With marketing acknowledgements, you cannot:

- Re-acknowledge revenue (for revenue letters marked "out of date"). However, it is possible to clear the process results or delete the acknowledged date on the revenue to reprocess the revenue.
- Consolidate revenue and send one acknowledgement. Marketing acknowledgements will always generate at least one acknowledgement per revenue record.

Marketing Acknowledgements Workflow

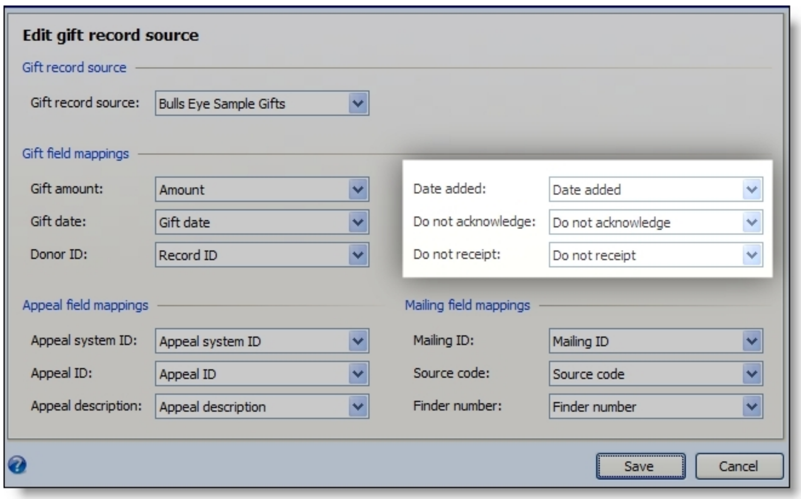
Setting up marketing acknowledgements requires several steps.

- Edit acknowledgement and receipt gift field mappings for each of your record sources. In *Configuration*, an administrator must determine the record sources to include in an effort. When setting up a record source, the **Gift Record Source** is required to process an acknowledgement effort. When an administrator selects a gift record source and maps the appropriate fields, an activated acknowledgement effort can determine all the gifts associated and calculate performance measure based on the gift amounts and other criteria. For more information, see Gift Field Mappings for Acknowledgements and Receipts on page 164.
- Create acknowledgement form templates in Microsoft *Word*. This is an optional task; however, if you want to export acknowledgement data fields to merge with a letter, we recommend you create an acknowledgement form template in *Word*. For more information, see Microsoft Word for Marketing Acknowledgements on page 164.
- Create export definitions to use with your marketing acknowledgement process. Export definitions enable you to specify several different templates to use when exporting an active acknowledgement effort. For more information, see Acknowledgement Export Definitions on page 165.
- Add letters and assign them to packages. Before you can generate letters from an acknowledgement process, you must create and assign letters. You do not have to associate a letter with a *Word* template. However, you must select a letter on any packages to use for marketing acknowledgements. For more information, see Letter and Package Tasks for Marketing Acknowledgements on page 165.
- Add marketing acknowledgement templates.You can create templates for each type of marketing acknowledgement process you need to create. When you add marketing acknowledgement templates, you define a source code and define the universe and exclusions for the acknowledgement effort. For more information, see Acknowledgement Template and Process Tasks on page 168.
- Define acknowledgement rules. For each marketing acknowledgement template you create, you can specify one or multiple acknowledgement rules. Acknowledgement rules determine when and how the program processes acknowledgements. With acknowledgement rules, you can also tie the marketing acknowledgement process to a segment to target specific sets of donors with certain packages. For more information, see Add Marketing Acknowledgement Rules on page 178.
- Run a marketing acknowledgement process. This process generates acknowledgement data and creates the acknowledgement effort. For more information, see Run Marketing Acknowledgement Process on page 183.
- Activate marketing acknowledgements. Activation specifies which appeal to associate with any gifts that come in as a result of the acknowledgement effort. You can activate the effort automatically when you run the marketing acknowledgement process or do it as a separate task. For more information, see Activation Tab on page 176.
- Create a marketing acknowledgement export process. Using the export definitions your system administrator defined for marketing acknowledgements, you can add a process to export data fields for your acknowledgement efforts. You can export the effort automatically when you run the marketing acknowledgement process or do it as a separate task. For more information, see Exports Tab on page 167.
- Export data to merge with acknowledgement letters and complete the acknowledgement process. You can create an export file of the marketing acknowledgement for use by a processing house or to merge with a letter template in Microsoft *Word* or other program.For assistance with *Word*

merge help, see the Microsoft *Word* help file. Also, visit www.blackbaud.com for Knowledgebase articles about the merge process with Blackbaud programs.

Gift Field Mappings for Acknowledgements and Receipts

Before you can process marketing acknowledgements, you must first specify gift field mappings for acknowledgements and receipts for each record source your organization uses. Select a gift record source and map the appropriate fields, then when you run a marketing acknowledgement process, the marketing acknowledgement can locate associated gifts and calculate performance measures based on the gift amounts.



For more information about how to edit gift field mappings, see the Record Sources chapter of the *Administration Guide*.

Microsoft Word for Marketing Acknowledgements

Before you run acknowledgements, we recommend you create an acknowledgement form template in *Word*. The *Word* form template is the form you merge acknowledgement data with to create the acknowledgements you send to constituents. For example, the letter can read, “Thank you for your gift of [gift amount merge field] to restore the Adamson Science Center.”

When you create the *Word* form template the first time, generate a header file from the program to use in the form template for merged fields. The header file exports in *.csv format.

After you create the *Word* form template, you must add a letter to the program. You assign letters to packages. When you select a package for an acknowledgement process, the program automatically uses the letter you assigned to the package. By creating the *Word* form template and adding letter information first, you can generate merged acknowledgements easily after you run the acknowledgement process.

Note: After you merge the acknowledgement *Word* form template with acknowledgement data, you can print the acknowledgements to send to constituents. You can send acknowledgements via email by including the merged file as an attachment to the email.

For assistance with *Word* merge help, see the Microsoft *Word* help file. Also, visit www.blackbaud.com for Knowledgebase articles about the merge process with Blackbaud programs.

Acknowledgement Export Definitions

In *Marketing and Communications*, you can create export definitions to use specifically for marketing acknowledgements. When you create an acknowledgement export definition, the available export fields are based on the gift query view.

From the Export Definitions page, you can add, edit, or delete acknowledgement export definitions. You can also generate a header file to merge acknowledgement data fields with a *Word* template.

When you create an export definition to use for acknowledgements, you can select from several **Acknowledgement** fields. **Acknowledgement** fields include **Letter**, **Receipt date**, and **Receipt number**. For more information about how to create export definitions, see Export Definitions on page 370.

Letter and Package Tasks for Marketing Acknowledgements

Before you can generate letters from an acknowledgement process, you must create and assign acknowledgement letters. After this is done, it is likely you will not change letter information.

Add or edit packages and assign letters to your packages. To add letters, from *Marketing and Communications*, click **Letters and Documents**. On the Letters and documents page, click **Add a marketing acknowledgement letter**. To add packages, from *Marketing and Communications*, click **Packages**. On the Packages page, click **Add a mail package**. On the Add mail package screen, you can select the select the acknowledgement letter you want to assign to the package.

For more information about how to create letters and packages, see Add Letters for Packages on page 354.

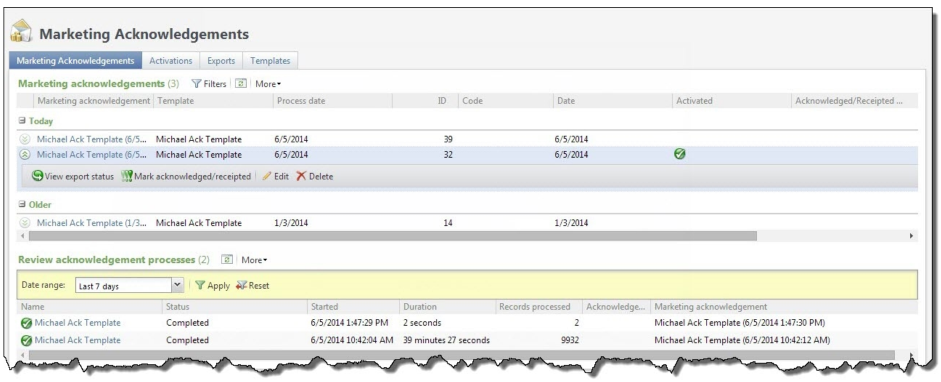
Warning: Because acknowledgement packages must have a letter assigned to them, you cannot use email packages with marketing acknowledgements. To create a package to use with marketing acknowledgements, you must create a mail package.

Marketing Acknowledgements Page

Use **Marketing Acknowledgements** to manage the marketing acknowledgements in your database. To access **Marketing Acknowledgements**, click **Marketing Acknowledgements** on the Marketing and Communications page. The Marketing Acknowledgements page appears.

Marketing Acknowledgements Tab

On the Marketing Acknowledgements tab, view details about marketing acknowledgements processes. The Marketing acknowledgements grid lists information about saved marketing acknowledgements such as the **Template** and **Process date**. The Review acknowledgement processes section displays details for each run of your acknowledgement processes, including the status and number of records processed.

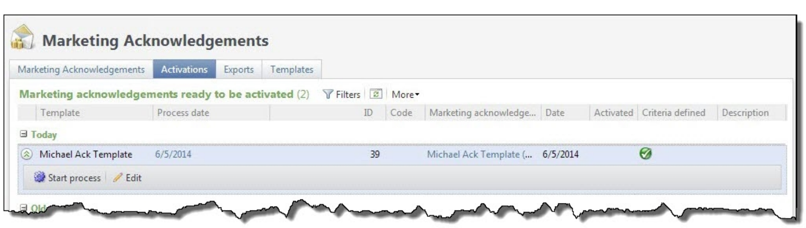


On the Marketing Acknowledgements tab, you can go to a detailed view of a selected acknowledgement effort, edit an effort, delete an effort, and mark it acknowledged/receipted. You can also view the export status and acknowledgement process status page.

Tip: To acknowledge gifts without creating a marketing acknowledgement, you can delete the effort on the Marketing Acknowledgements tab without clearing the results of the marketing acknowledgement process.

Activations Tab

On the Activations tab, the **Marketing acknowledgements ready to be activated** grid lists any marketing acknowledgements ready to run and displays the **Template**, **Process date**, **Marketing acknowledgement**, **Criteria defined**, and **Description** of each marketing acknowledgement.



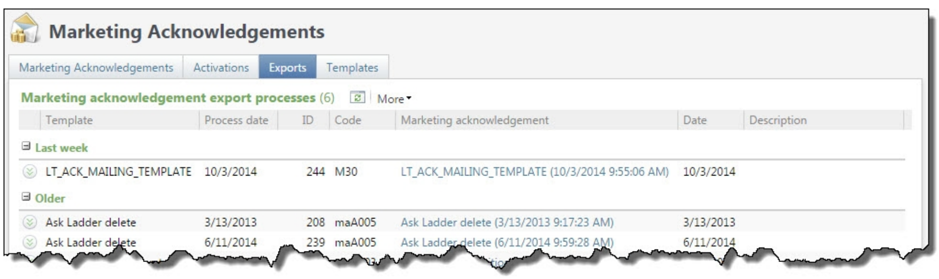
On this tab, you can go to a detailed view of the acknowledgement effort or marketing acknowledgement process, run the process, and edit the effort.

To start the effort activation process, click the double arrows beside the marketing acknowledgement in the grid and click **Start process**. While the activation processes, the Effort Activation Status page for the selected effort appears. The activation process may take some time depending on the properties of the effort.

When a marketing acknowledgement process completes successfully (with at least one record processed), the program automatically creates an effort from the process. To go to the effort page, click the link in the **Marketing acknowledgement** column. After you activate an effort, you can make changes to the effort activation process as necessary.To access the Marketing Effort Activation Status page and view information about the activation process for a marketing acknowledgement, click the process date of the effort in the **Marketing acknowledgements ready to be activated** grid.

Exports Tab

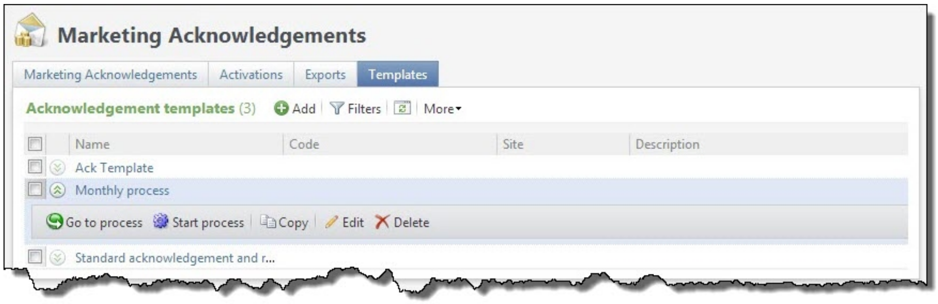
On the Exports tab, the **Marketing acknowledgement export processes** grid lists the marketing acknowledgement export processes in the database and displays the **Template**, **Process date**, **ID**, **Code Marketing Acknowledegment**, **Date**, and **Description** of each marketing acknowledgement.



On this tab, you can go to a detailed view of a marketing acknowledgement and a marketing acknowledgement process; run a process; and add, edit, or delete a marketing acknowledgement export process.

Templates Tab

On the Templates tab, the **Acknowledgement templates** grid lists the acknowledgement processes in the database and displays the **Name**, **Code**, **Site**, and **Description** for each process. You enter this information when you create the acknowledgement process and add it to the database. Depending on your security rights and system role, you can perform functions to manage acknowledgement process in the database from the action bar.



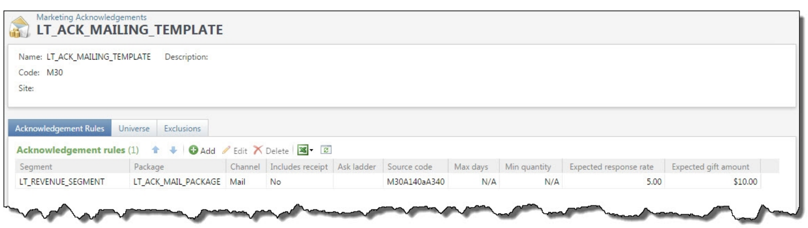
Acknowledgement Template and Process Tasks

From the Templates tab of a marketing acknowledgement, you can manage templates and their associated processes.

Use the template record for a marketing acknowledgement process to manage the acknowledgement rules, universe, and exclusions for that process. To open a template, on the Templates tab, select a marketing acknowledgement process in the grid. The template record for the selected process appears.

Acknowledgement Rules Tab

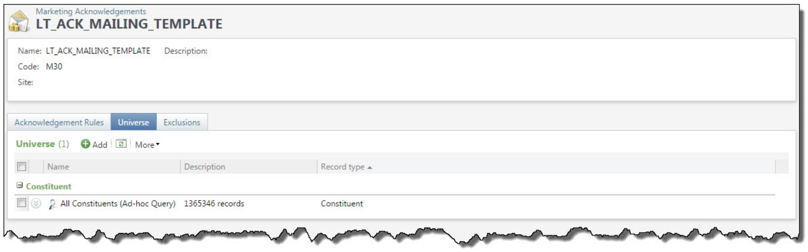
On the Acknowledgement Rules tab, view any acknowledgement rules for the selected process. The tab lists information about the acknowledgement rules including**Segment**, **Package**, and **Channel** for the acknowledgement rule.



For more information about acknowledgement rules, see Add Marketing Acknowledgement Rules on page 178.

Universe Tab

On the Universe tab, the **Universe** grid lists any inclusions selected for the marketing acknowledgement process and displays the **Name**, **Description**, and **Record type** of each selection.



On this tab, you can search for a specific universe selection and add, edit, or delete the inclusions defined for the effort. For more information about these tasks, see Universe Tab on page 117.

Exclusions Tab

On the Exclusions tab, the **Exclusion selections** grid lists any exclusions selected for the marketing acknowledgement process and displays the **Name**, **Description**, and **Record type** of each exclusion selection.

On this tab, you can search for a specific exclusion selection, and add, edit, or delete exclusions. For more information about these tasks, see Exclusions Tab on page 118.

Add Templates for Marketing Acknowledgement Processes

Marketing acknowledgement templates allow you to configure different types of acknowledgement processes. For example, you can create a template for monthly acknowledgements for gifts. On the template, you define process settings for the generated marketing efforts, such as source code and address processing options. You then add acknowledgement rules that specify segments to include in the process, such as a selection of donors who gave this month. You can use this template to schedule an acknowledgement process to run each month using the same settings.

From the Marketing Acknowledgements page, select the Templates tab. Click **Add**. The Add marketing acknowledgement process screen appears. On this screen is a series of tabs that walk you through the template setup process. After you save a template, the template record opens to the Acknowledgement Rules tab so you add, edit, and delete acknowledgement rules. For more information, see Add Marketing Acknowledgement Rules on page 178.

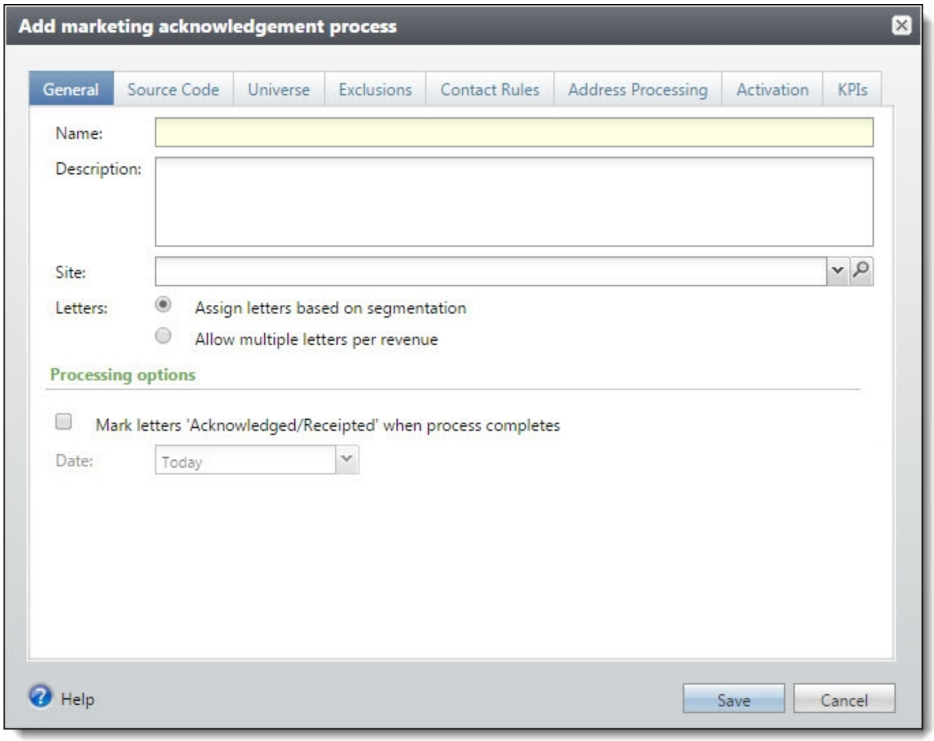
Note: This process is typically completed by the systems administrator at your organization.

General Tab

On the General tab, define basic information for the marketing acknowledgement process.

Define general information on the General tab

1. From the Add marketing acknowledgement process screen, select the General tab.



2. In the **Name** field, enter a name for the marketing acknowledgement template. To add a default description that identifies marketing acknowledgement efforts created from the template, enter it in the **Description** field.
3. If your organization uses site security, in the **Site** field, select the site to associate with this process. Only users associated with the selected site can access this process.
4. To send one letter per gift received, select **Assign letters based on segmentation**. This option prevents a donor from receiving more than one acknowledgement letter for a single gift. To allow more than one letter per gift received, select **Allow multiple letters per revenue**.
5. To change the status on the revenue record to "Acknowledged," select **Mark letters 'Acknowledged/Receipted' when process completes**. If you select **Letter includes receipt** on the acknowledgement letter record, the Receipt status changes to "Receipted." If you do not select this option, you can mark letters as acknowledged at a later time on the Recent Status tab or History tab. You can also mark letters acknowledged on the Review Acknowledgements tab.

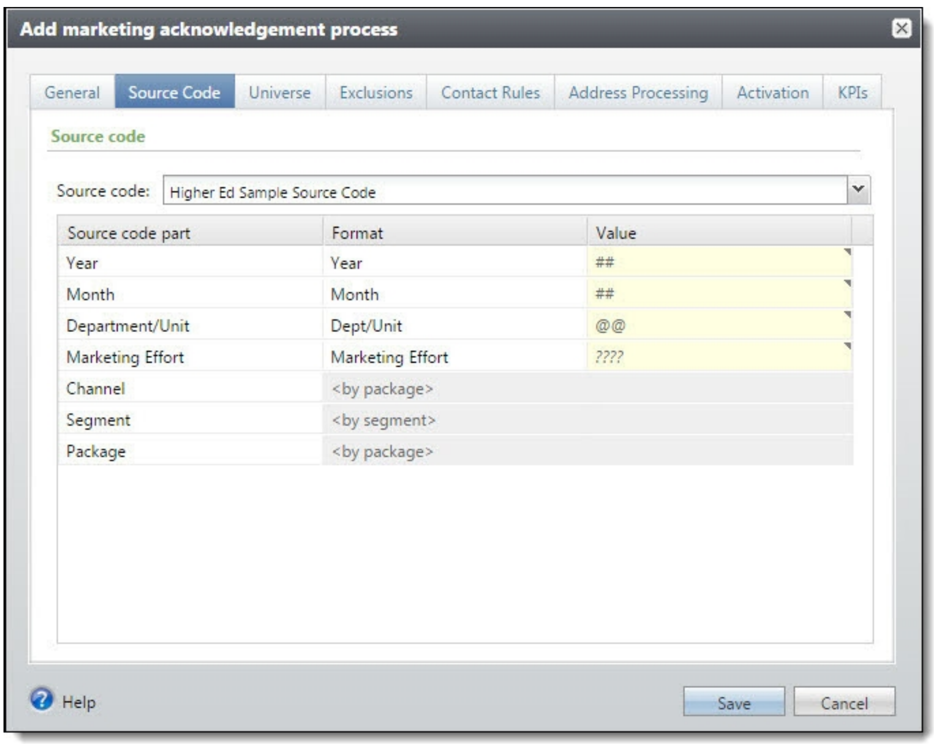
6. If you select **Mark letters 'Acknowledged/Receipted' when process completes**, select the date to record as the date when the revenue was acknowledged/receipted.
7. Select another tab or click **Save** to save and close the process.

Source Code Tab

On the Source code tab, select the source code layout to apply to marketing acknowledgement efforts you create from the template.

Define source code information on the Source code tab

1. From the Add marketing acknowledgement process screen, select the Source code tab.



2. In the **Source code** field, select a source code layout. The grid displays the source code parts defined for the selected layout.

   Source code layouts are configured from the Source Codes page in *Marketing and Communications*. For more information, see Manage Source Codes on page 309.
3. Enter a value for each code part that requires one. The values that you can enter depend on how the source code part is defined in the layout.
   - Gray fields indicate fixed codes you cannot edit. For example, if you define fixed values for the "Department" source code part as "Membership" or "Development," after you select "Membership" or "Development," the "M" or "D" code value appears in the field to the right and is disabled.

- Yellow fields display the format for the code you can enter. For example, if you have a source code part for “Month,” and you specify that the only valid format for “Month” is a two digit code (# = 0 through 9), the field displays ## to indicate that you need to enter two digits.
- The fields for Channel, Package, Segment, and Test Segment display “<by channel>,” “<by package>,” "<by segment>," and "<by test segment>." These codes are set on the marketing effort segment.

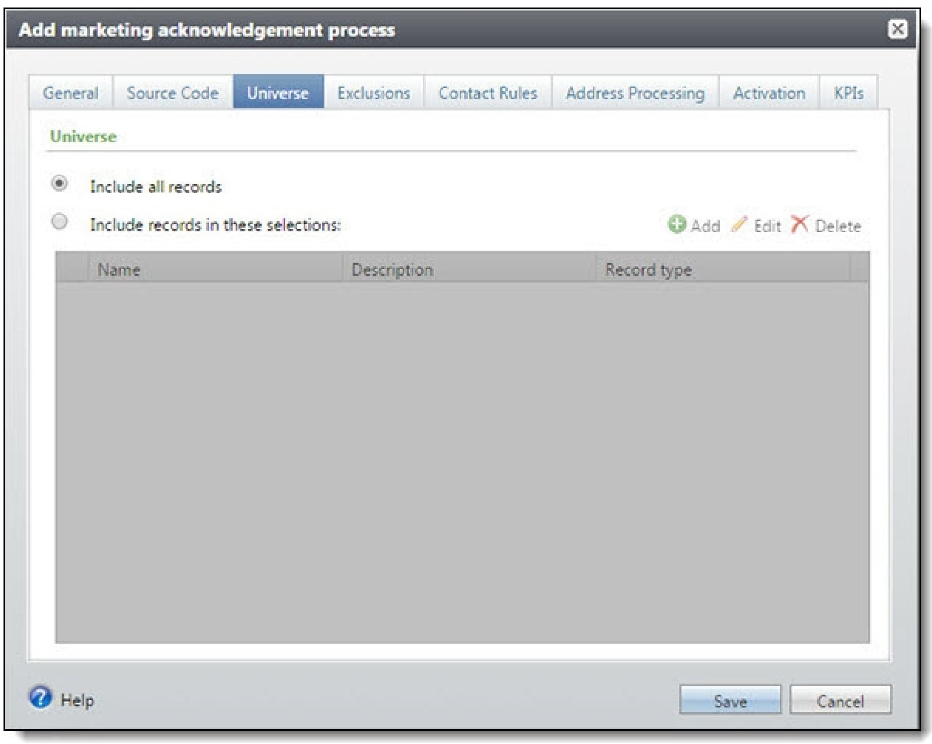
4. Select another tab or click **Save** to save and close the process.

Universe Tab

On the Universe tab, define the pool of potential records to explicitly include in marketing acknowledgement efforts created from the template.

Define the universe on the Universe tab

1. From the Add marketing acknowledgement process screen, select the Universe tab.



2. Under **Universe**, select one of these options:

- To send the acknowledgement to all records that meet the segmentation criteria, select **Include all records**. This option includes records from all lists and record sources if you have more than one. You can later specify to exclude specific sets of donors on the Exclusions tab.
- To include specified selections of records that meet the segmentation criteria, select **Include records in these selections** and choose the selections.

By specifying groups of records for inclusion, when you later create segments for the marketing acknowledgement process, the potential pool of records for those segments is limited to only those records that meet the criteria of the universe selections you specify here. No matter which selections you choose for each segment, they will not include any records that do not exist in the universe selections you specify.

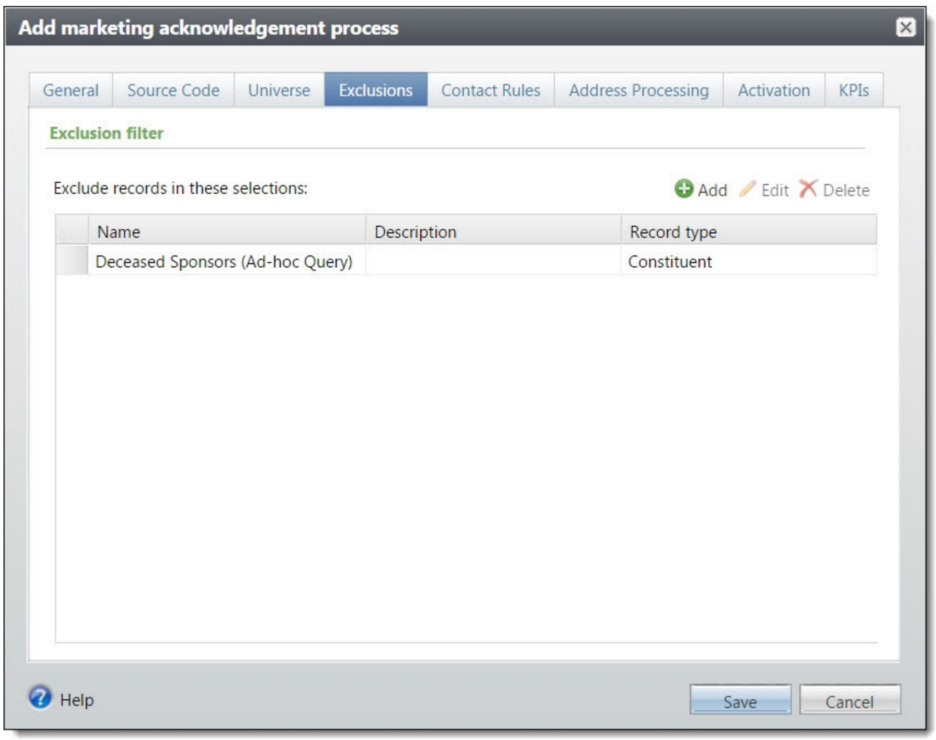
3. Select another tab or click **Save** to save and close the process.

Exclusions Tab

On the Exclusions tab, specify the records to explicitly exclude from marketing acknowledgement efforts created from the template.

Define exclusions on the Exclusions tab

1. From the Add marketing acknowledgement process screen, select the Exclusions tab.



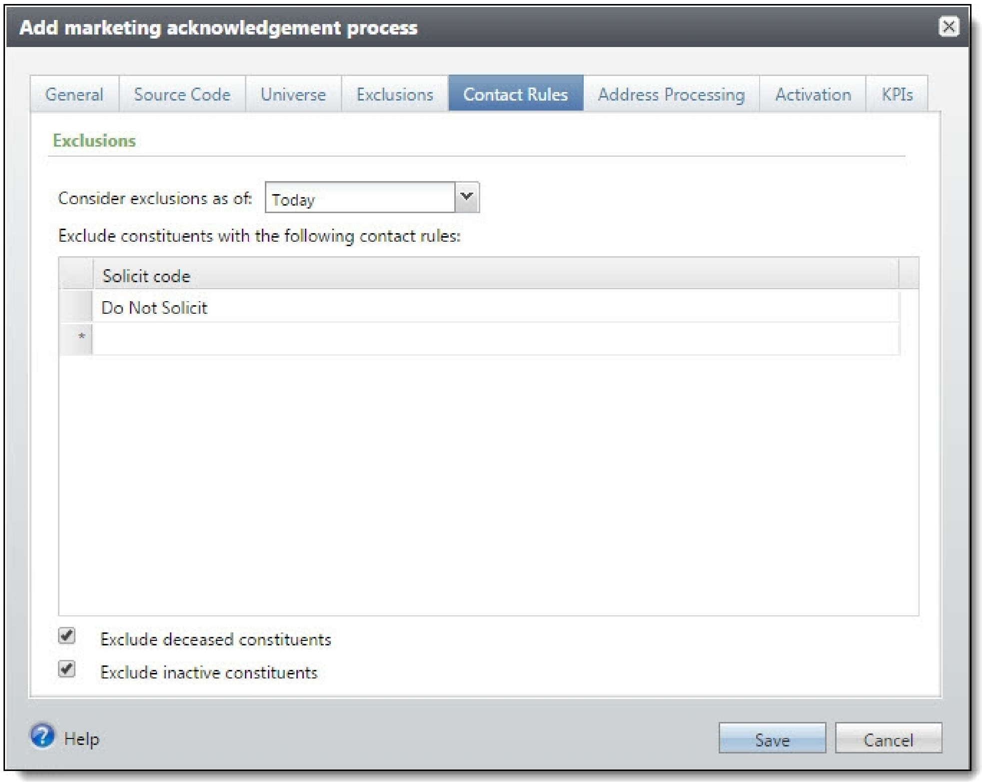
2. Under **Exclusion filter**, choose the selections of donors to exclude from the marketing acknowledgement process. When you specify exclusion selections, all record sources are still available when you later create segments for the marketing acknowledgement process (unlike when you define the acknowledgement's universe). The filter excludes donors from every segment in the acknowledgement.
3. Select another tab or click **Save** to save and close the process.

Contact Rules Tab

On the Contact Rules tab, define contact rules to determine which records to exclude from marketing acknowledgement efforts created from the template.

Define contact rules on the Contact Rules tab

1. From the Add marketing acknowledgement process screen, select the Contact Rules tab.



2. In the **Consider exclusions as of** field, select whether to determine exclusion status based on solicit code as of today or a specific date in the future.
3. Use the **Exclude constituents with the following contact rules** grid to exclude constituents from a marketing effort based on the contact preferences stored on their constituent records. In the **Solicit codes** column, select the solicit codes to exclude from the marketing effort.

   For example, one way to remove constituents with invalid or missing addresses is to add "Do not mail" as the solicit code on their constituent records. Then select the "Do not mail" solicit code in this grid to exclude those constituents from the marketing effort.

   A solicit code can be marked optional, default, or required. If the solicit code is optional, you can add it to the exclusions of the marketing effort as applicable. If the solicit code is a default, it will automatically appear as an exclusion for a marketing effort, but you can remove it. If a solicit code is required, it will automatically appear as an exclusion for the marketing effort and cannot be removed.
4. To exclude deceased constituents from the marketing effort, select **Exclude deceased constituents**. When an individual is marked deceased, a status of "Deceased" appears in the profile summary frame of the constituent page.

Note: This option appears only for system administrators and other users with the **Show Exclude Deceased Constituent Checkbox** system permission found under Configuration, Exclusions in *System Roles*.

5. To exclude inactive constituents from the marketing effort, select **Exclude inactive constituents**. When an individual or organization is marked inactive, a status of "Inactive" appears in the profile summary frame of the constituent page.

Note: This option appears only for system administrators and other users with the **Show Exclude Inactive Constituent Checkbox** system permission found under Configuration, Exclusions in *System Roles*.

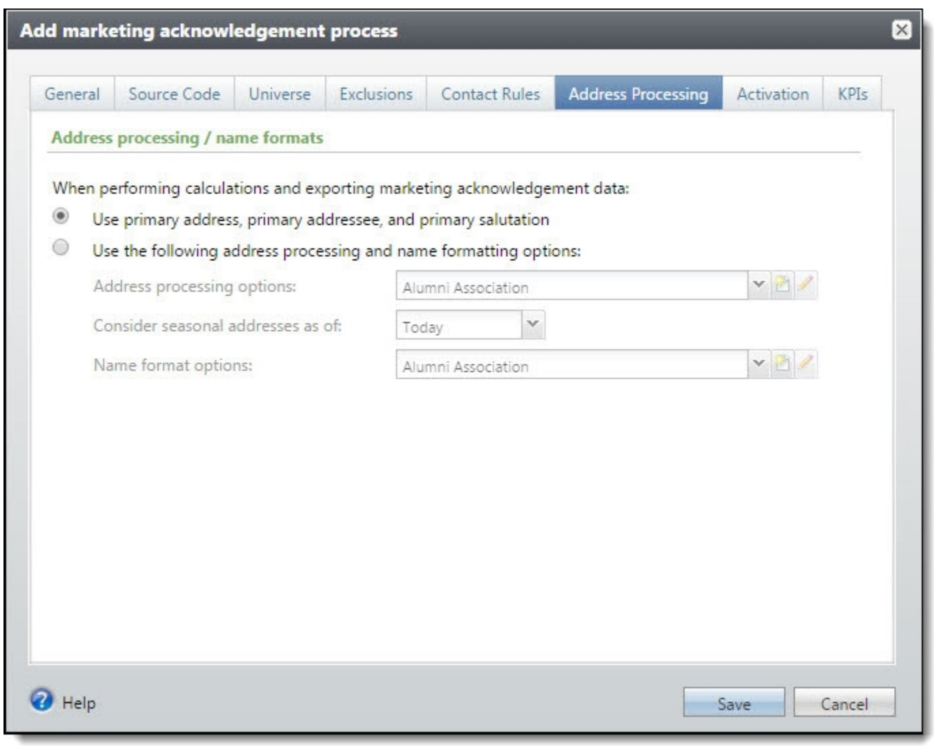
6. Select another tab or click **Save** to save and close the process.

Address Processing Tab

On the Address processing tab, select the address processing and name format options to use for marketing acknowledgement efforts created from the template.

Define address processing and name format options on the Address processing tab

1. From the Add marketing acknowledgement process screen, select the Address processing tab.



2. Under **Address processing/name formats** select which name format and address processing options to use:

   - Select **Use primary address, primary addressee, and primary salutation** to use the primary address, addressee, and salutation selected for records included in the marketing effort. If a constituent has no primary address, primary addressee, or primary salutation, then the record is exported with a blank address, addressee, or salutation. To ensure that every constituent has a proper addressee and salutation, define at least one default name format with a specified primary addressee and primary salutation.

- Select **Use the following address processing and name formatting options**to choose custom address processing and name format options for the marketing effort. For example, you can use a unique address processing option set for your holiday appeal.

  Address processing options—Select a pre-defined set of address processing options or create a new set.

  Consider seasonal addresses as of—Select a date to take seasonal addresses into consideration when a marketing effort is processed to ensure delivery to the correct location. For example, if a constituent stays at a vacation home in December, you can send your marketing effort there rather than the primary address.

  Name format options—Select a pre-defined set of name format options or create a new set.

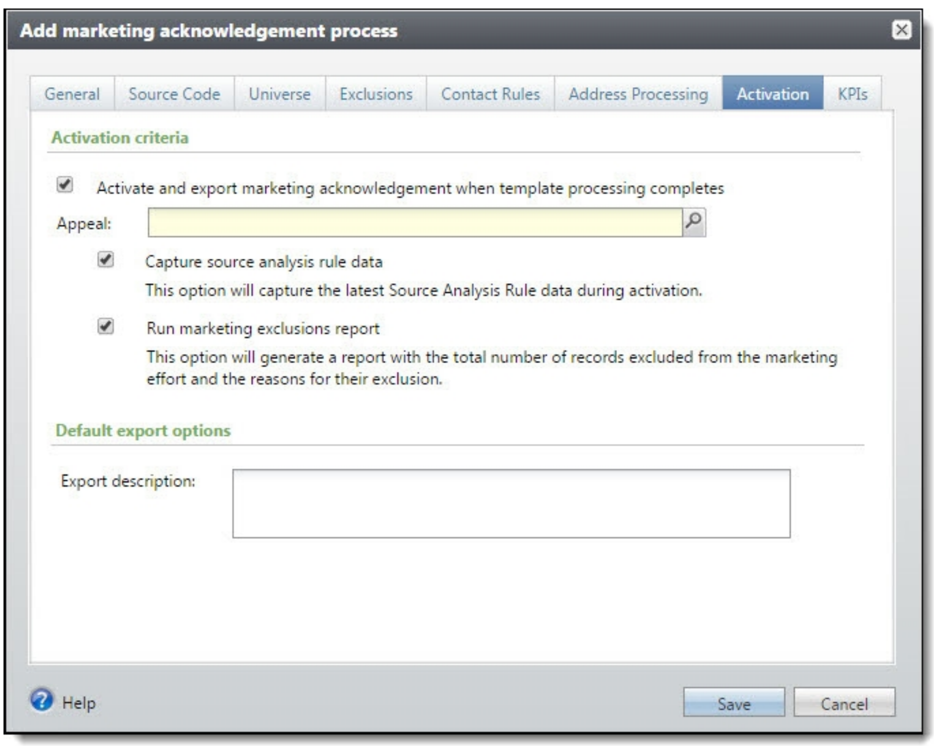
3. Select another tab or click **Save** to save and close the process.

Activation Tab

On the Activation tab, select the tasks that occur when a user activates a marketing acknowledgement efforts created from the template.

Define activation tasks on the Activation tab

1. From the Add marketing acknowledgement process screen, select the Activation tab.



2. To automatically activate the effort and create the export file after the template is processed, select **Activate and export marketing acknowledgement when template processing**

completes. If you do not select this option, any values you enter in the fields on this tab are used as defaults on the Run Effort Export Process screen.

3. In the Appeal field, select the appeal to associate with this acknowledgement.
4. To snapshot donor attributes as defined by your source analysis rules (SAR), select **Capture source analysis rule data**. For more information about source analysis rules, see the *Administration Guide*.
5. To capture data for the marketing exclusions report before you activate the effort, select **Run marketing exclusions report**. Running this report can hinder performance so you may want to turn if off for certain efforts, such as weekly acknowledgement mailings.
6. Under **Default export options**, enter a description for the export process.
7. Select another tab or click **Save** to save and close the process.

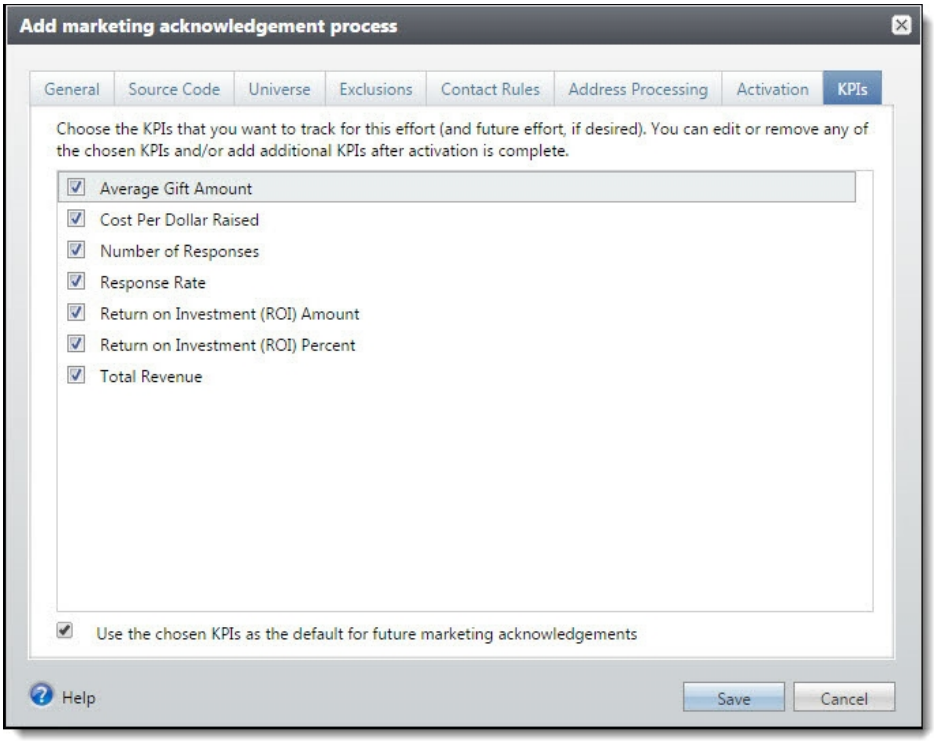
KPIs Tab

On the KPIs tab, select the KPIs (Key Performance Indicators) to include on marketing acknowledgement efforts created from the template. Use KPIs to monitor your progress toward goals set for the effort, such as the average gift amount, response rate, and return on investment (ROI). When a user creates a marketing effort, the program automatically creates an instance of each selected KPI.

For more information about how to configure marketing Key Performance Indicators, see the *Reports and KPIs Guide*.

Select key performance indicators on the KPIs tab

1. From the Add marketing acknowledgement process screen, select the KPIs tab.



2. Use the **Key performance indicators** grid to select which KPIs to track for marketing efforts created from the template. In the **KPI** column, select a KPI.
3. Select another tab or click **Save** to save and close the process.

Template Page for Marketing Acknowledgements

When you save a marketing acknowledgement process, its template page appears so you can define the acknowledgement rules, universe, and exclusions for that process.

On the Acknowledgement rules tab, view any acknowledgement rules for the selected process. The tab lists information about the acknowledgement rules such as the **Segment, Package,** and **Channel** for the acknowledgement rule. On this tab, you can add, edit, and delete acknowledgement rules.

On the Universe tab, the **Universe** grid lists any inclusions selected for the marketing acknowledgement process and displays the **Name** and **Description** of each selection. On this tab, you can search for a specific universe selection and add, edit, or delete the inclusions defined for the effort.

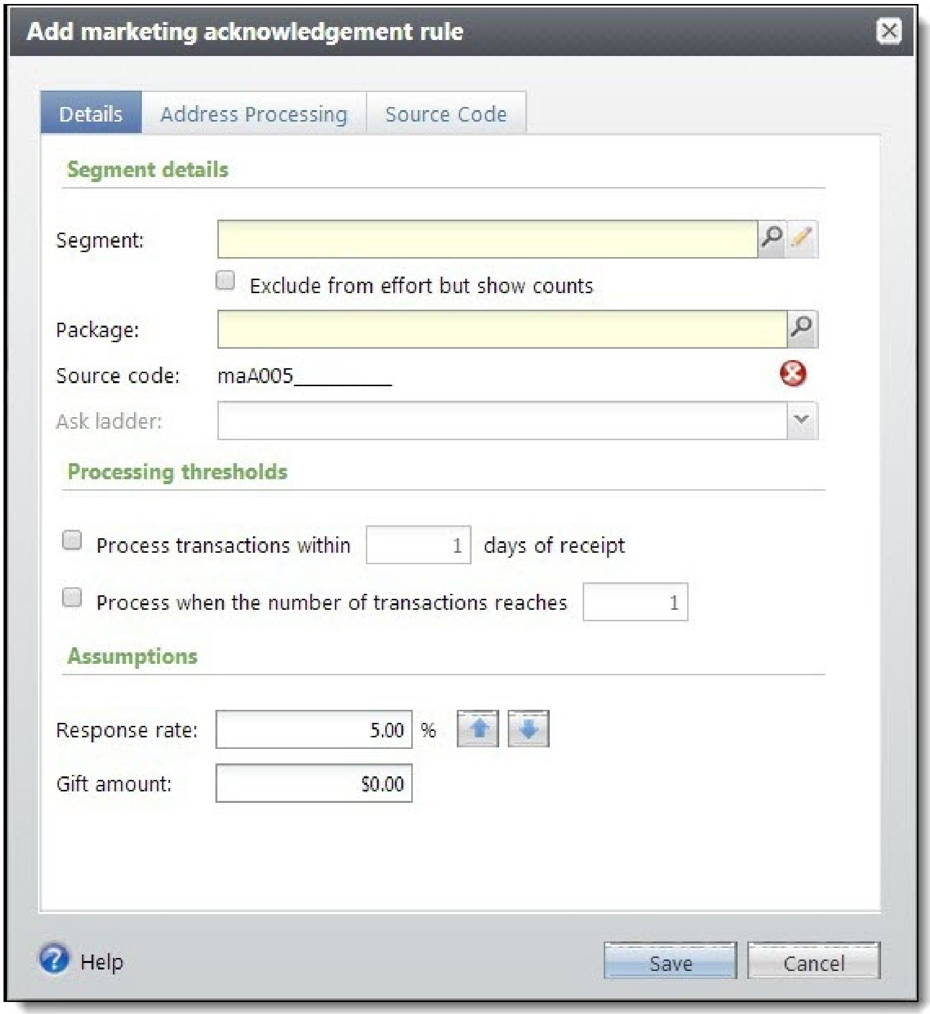
On the Exclusions tab, the **Exclusion selections** grid lists any exclusions selected for the marketing acknowledgement process and displays the **Name** and **Description** of each exclusion selection. On this tab, you can search for a specific exclusion selection and add, edit, or delete exclusions.

Add Marketing Acknowledgement Rules

Marketing acknowledgement rules are criteria you define to determine when and how marketing acknowledgement processes are run and which segments to include in the effort. You can add one or multiple marketing acknowledgement rules to each marketing acknowledgement process. Each marketing acknowledgement rule you add maps one-to-one with a segment in the marketing acknowledgement.

Add an acknowledgement rule

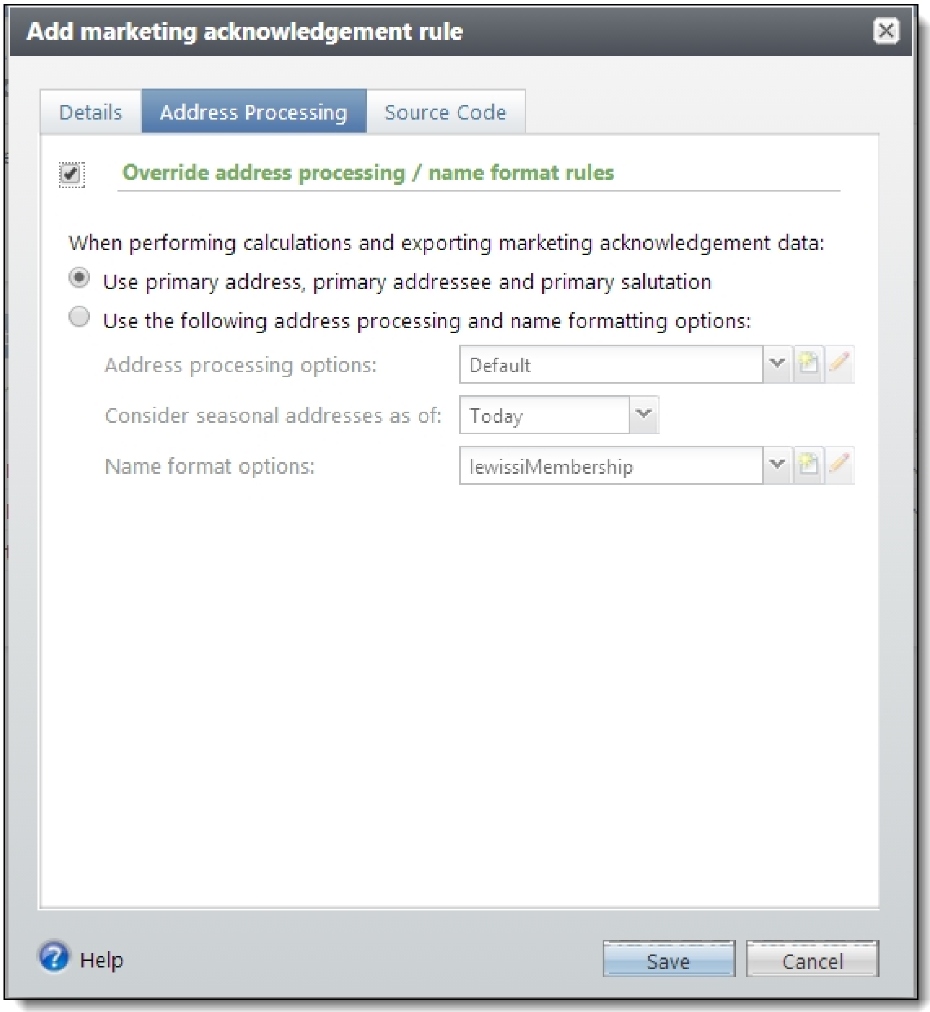
1. From the marketing acknowledgement template page, select the Acknowledgement Rules tab.
2. Click **Add**. The Add marketing acknowledgement rule screen appears on the Details tab.



3. Under **Segment details**, in the **Segment** field, select a revenue segment to use in the marketing acknowledgement. For more information about marketing acknowledgement segments, see Marketing Acknowledgement Segments on page 191.
4. To exclude the segment from the marketing acknowledgement, select **Exclude from effort but show counts**. 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. Segment exclusions also allow you to group remainders

from a segment so they are not included in other segments. For more information, see Segment Exclusions on page 82. When you select this option, all other options are disabled.

5. In the **Package** field, select the package to associate with this segment. Packages are the different pieces available for a marketing effort. If you select a package with a source code part value assigned, this value displays below. For more information about packages for marketing acknowledgements, see Letter and Package Tasks for Marketing Acknowledgements on page 165
6. The **Source code** field displays the source code based on part values from the template, segment, and package. If the segment or package do not have part values assigned, select the Source code tab to enter those values.
7. To include an ask ladder on the marketing acknowledgement, in the **Ask ladder** field, select the ask ladder to use.
8. Under **Processing thresholds**, to ensure acknowledgements are processed within a certain number of days after your organization receives the revenue, select **Process transactions within [#] days of receipt** and enter the number of days.
9. To process acknowledgements only when you reach a certain number of gifts, select **Process when the number of transactions reaches** and enter the number of gifts to receive before processing the acknowledgements.
10. Under **Assumptions**, you can enter an expected **Response rate** and **Gift amount** from respondents. Entering this information enables you to compare the expected versus actual response rate and gift amount when you analyze the marketing acknowledgement later.
11. Select the Address Processing tab.



Note: Configure name format and address processing options in *Marketing and Communications*, under **Configuration**. For more information, see Name Format Options on page 54 and Address Processing Options on page 16

12. To use different address processing and name format options than those set on the effort, select **Override address processing/name formats**.

13. Select which name format and address processing options to use:

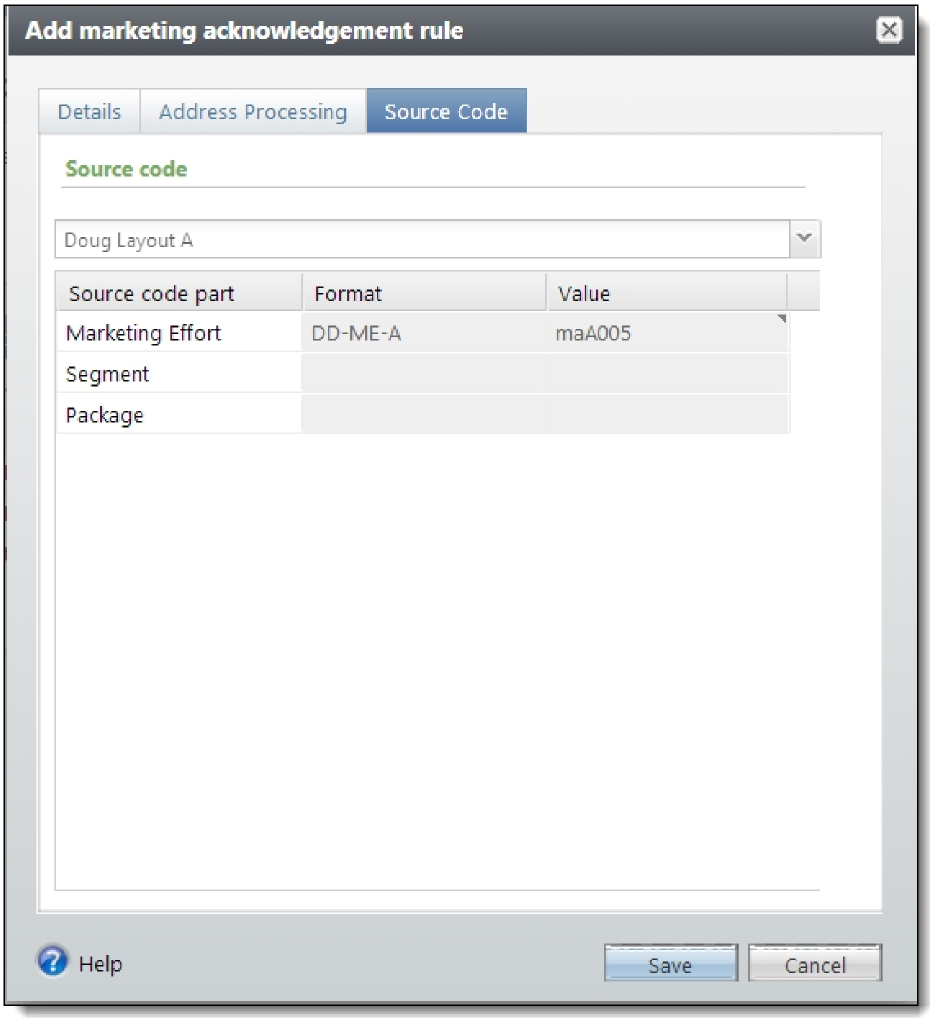
- Select **Use primary address, primary addressee, and primary salutation** to use the primary address, addressee, and salutation selected for records included in the marketing effort. If a constituent has no primary address, primary addressee, or primary salutation, then the record is exported with a blank address, addressee, or salutation. To ensure that every constituent has a proper addressee and salutation, make sure to define at least one default name format with a specified primary addressee and primary salutation.
- Select **Use the following address processing and name formatting options** to choose custom address processing and name format options for the marketing effort. For example, you can use a unique address processing option set for your holiday appeal.

Address processing options—Select a pre-defined set of address processing options or create a new set.

Consider seasonal addresses as of—Select a date to take seasonal addresses into consideration when a marketing effort is processed to ensure delivery to the correct location. For example, if a constituent stays at a vacation home in December, you can send your marketing effort there rather than the primary address.

Name format options—Select a pre-defined set of name format options or create a new set.

14. Select the Source Code tab.



15. In the **Source code** field, select a source code layout. The grid displays the source code parts defined for the selected layout.

Note: Source code layouts are configured from the Source Codes page in *Marketing and Communications*. For more information, see Manage Source Codes on page 309.

16. Click **Save**. You return to the Acknowledgement rules tab and the new rule appears in the grid.

Move Acknowledgement Rules

The order of acknowledgement rules in the grid is important because rules are processed in order from top to bottom. To change the order, use the arrows to move rules up or down in the grid.

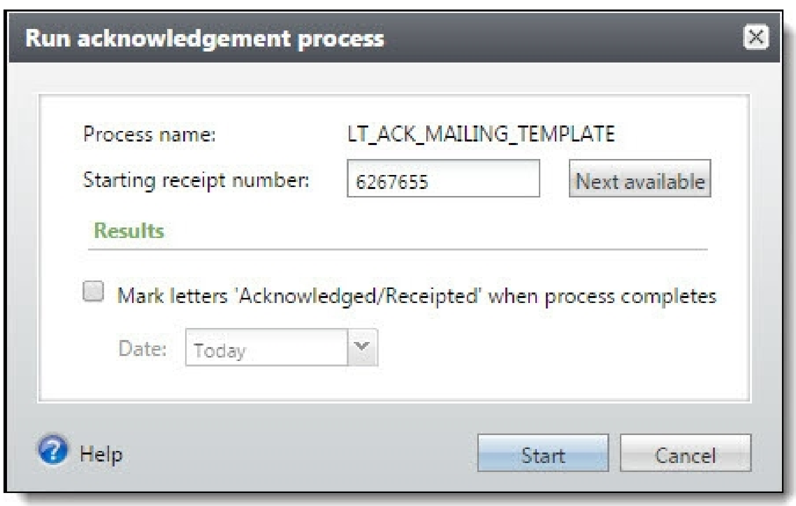
A revenue record (from the segment selected on the rule) can be included in multiple acknowledgement rules as long as you assign each of those acknowledgement rules a different letter. If a revenue record and letter are included in more than one acknowledgement rule, the record is included in the rule that appears first in the grid and excluded from all other rules.

Run Marketing Acknowledgement Process

Once you add or edit the marketing acknowledgement process, you run the process to generate acknowledgements for donors. When you run a marketing acknowledgement process, the process sets the included gifts aside so that they cannot be affected by any other processes.

Run a marketing acknowledgement process

1. To run acknowledgements, select the acknowledgement process and click **Start process**. The Run marketing acknowledgement process screen appears.



2. For information about the items on this screen, seeRun Marketing Acknowledgement Process Screen on page 183.
3. To start the marketing acknowledgement process, click **Start**. The process begins. After the process completes, the process status page appears.

Run Marketing Acknowledgement Process Screen

The table below explains the items on this screen.

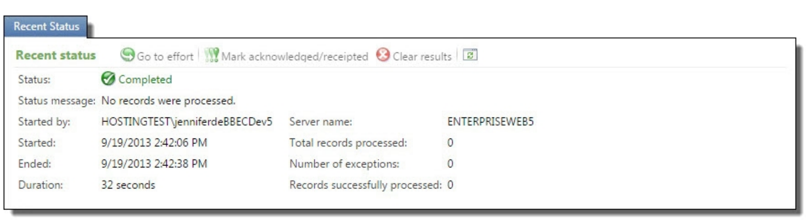
Screen Item	Description
Process name	The process name defaults from the **Name** field on the Add or Edit marketing acknowledgement process screen. This field is disabled. To change the process name, access the Edit marketing acknowledgement process screen.
Starting receipt number	In this field, the next available number of the default stack appears. However, you can change the starting receipt number. When you select the starting receipt number, the program automatically assigns numbers to the records included in the process.
Next available	To choose the next available receipt number as the starting receipt number for the process, click this link.
Mark letters 'Acknowledged/Receipted' when process completes	To change the Acknowledge status from Not acknowledged to Acknowledged, select this checkbox. If, on the acknowledgement letter record, you selected **Letter includes receipt**, the program also changes the Receipt status from Not receipted to Receipted. You can mark letters acknowledged at a later time on the Recent Status tab or History tab. You can also mark letters acknowledged on the Review Acknowledgements tab.
Date	When you select the **Mark letters 'Acknowledged/Receipted' when process completes** checkbox, this field enables. To select a date other than today's date, click the drop down arrow and select <Specific date>. An additional field appears on the right for you to enter a date. To use a calendar to select the date, click the drop down arrow in this field.

Tabs of a Process Status Page

Each business process in the database has a status page. The process status page contains information specific to the process. You enter this information when you add the process to the database. Each process status page also includes information about the most recent instance and historical data about the process. On some process status pages, you can manage the job schedules of the process. To help manage this information, each process status page contains multiple tabs.

Recent Status Tab

On the Recent status tab, you view the details of the most recent instance of the process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many of those records processed successfully and how many were exceptions.

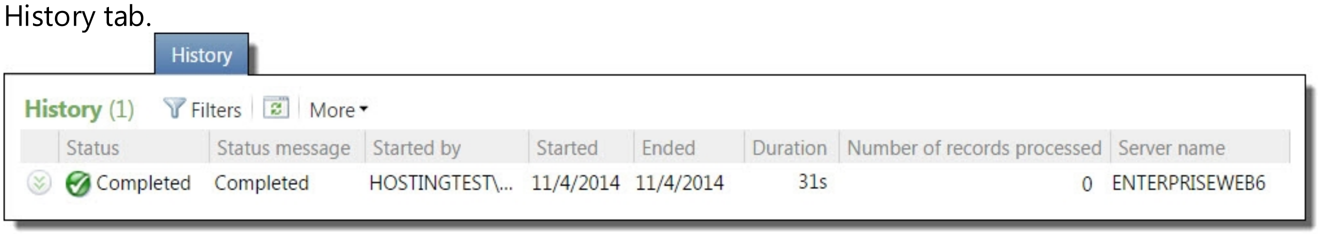


History Tab

Each time you run a business process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the process. The information in the grid includes the status and date of the instance.

On the History tab, you can limit the status records that appear in the grid. You can filter by the process status. If you filter the records that appear in the grid, it can reduce the amount of time it takes to find a process instance. For example, if you search for an instance that did not finish its operation, you can select to view only status records with a **Status** of Did not finish. To filter the records that appear in the grid, click the funnel in the action bar. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid. To update the information that appears, click **Refresh List** on the action bar.

Depending on your security rights and system role, you can delete a status record from the grid on the History tab.



Delete a Status Record from the History Tab of a Process Status Page

On the History tab of a process status page, you can delete a specific status record of the process. When you delete a status record, you delete the specific instance and all of its history.

Delete a status record from the History tab

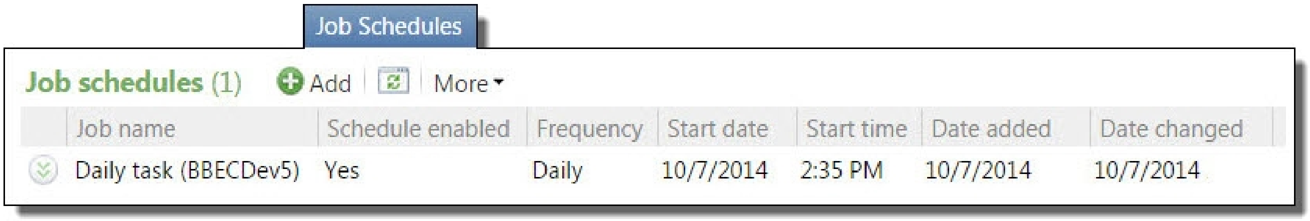
1. On the History tab of the process status page, select a status record and click **Delete**. A confirmation message appears.

> ***Note:*** You can filter the records in the grid by the status of the process to reduce the amount of time it takes to find an instance of the process. For example, to search for a completed instance, click the funnel icon, select "Completed" in the **Status** field, and click **Apply**. Only completed instances appear in the grid.

2. Click **Yes**. You return to the History tab. The selected status record no longer appears.

Job Schedules Tab (Not Available on All Process Pages)

On the Job schedules tab, you can view the job schedules of the process in the database. The details in this grid include the name, whether a job schedule is enabled, the frequency of the job schedule, the start date and time and end date and time, and the date the job schedule was added and last changed in the database. You enter this information when you set the job schedule of the process.



Depending on your security rights and system role, you can add, edit, and delete job schedules that appear on the Job schedules tab. To update the information that appears, click **Refresh List**.

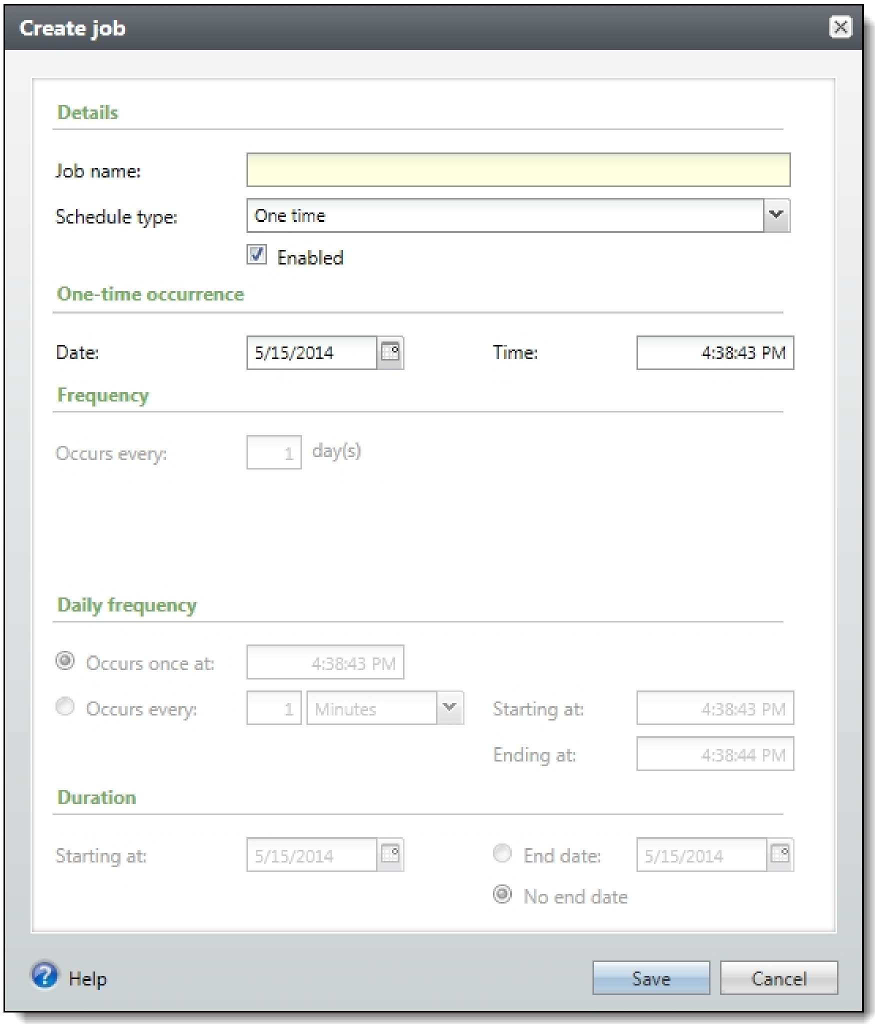
Schedule Process Jobs

You can create a job schedule to automatically run a business process. When you create a schedule for a process, the program exports and runs the process at the scheduled instance or interval. For example, you can schedule a process to run at a time convenient for your organization, such as overnight. To create a job schedule, click **Add** on the Job schedules tab of the process status page. The Create job screen appears.

Note: To create a job schedule from any tab of the process status page, click **Create job schedule** under **Tasks**.

Create a job schedule

1. On the Job schedules tab of the process, click **Add**. The Create job screen appears.



2. In the **Job name** field, enter a name for the scheduled process.
3. By default, the schedule is active. To suspend it, clear the **Enabled** checkbox.
4. In the **Schedule type** field, select how often to run the process. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*. Your selection determines which other fields are enabled.
   a. For a process that runs once, select the date and time to run it.
   b. For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it. For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single

time or at regular intervals on the days when it runs.

c. For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.

5. To return to the Job schedules tab, click **Save**.

Edit Job Schedules

After you create a job schedule for a process, you can update it. For example, you can adjust its frequency. You cannot edit the package selected to create the job schedule.

Edit a job schedule

1. On the Job schedules tab, select a job and click **Edit**. The Edit job screen appears. The options on this screen are the same as the Create job screen. For information about these options, see Create Job Screen on page 241.
2. Make changes as necessary. For example, in the **Schedule type** you can change how often to run the process.
3. Click **Save**. You return to the Job schedules tab.

Create Job Screen

Screen Item	Description
Job name	Enter a name for the job schedule.
Schedule type	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*.
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs just once, select the date and time to run it.
Frequency	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.

Screen Item	Description
Daily frequency	For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select **Occurs once at** and enter the start time. To run a process at intervals, select **Occurs every** and enter the time between instances, as well as a start time and end time.
Start date	For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.

Delete Job Schedules

On the Job schedules tab of the status page, you can delete a job schedule of the process. This deletes the scheduled job as well as any changes made to it outside the program.

Delete a job schedule

1. On the Job schedules tab, select the job and click **Delete**. A confirmation screen appears.
2. Click **Yes**. You return to the Job schedules tab.

Start Process

This task allows you to start the selected business process from the process page.

Edit Process

This task allows you to edit the selected business process form the process page.

Create Job Schedule

This task allows you to create a job schedule that tells the application when to automatically run the selected business process.

Delete Process

This task allows you to delete the selected business process from the process page. Before you delete a process, we strongly recommend you back up your data. Unless you previously save the transmission file or prenotification authorization file, once you delete the process, you can no longer use its output file that contains the data extracted from your database.

Exception Report

When you run a process, the process status page appears and displays the number of records that did and did not process. Records that fail to process are called exceptions. When there are exceptions, you can view the Exception Report for the generated process. This report lists the expectations generated and explains why each did not process properly. You can view the most recent Exception Report from the Recent status tab of the process page. If you want to view an older report, you can do so from the History tab of the process page.

To print a report, click the **Print** button on the toolbar of the report. You can also set up the page format for the print job to determine how the printed report looks. You can also use the report information in another software application or save the report in another file format, such as to share the data with someone who cannot access the program. When you click the **Export** button on the toolbar, you can export the information into a shared application, such as Microsoft *Excel*, or save the report into an easily shared format, such as Adobe *Acrobat* (*.pdf) or a Web archive (*.mhtml).

Process Status Report

When you execute a process in *Sponsorships*, the process generates a status report which is housed on the Recent Status tab of the process page. For example, if you execute a sponsorship transfer the Transfer Report appears on the Recent Status tab. The report lists details about the transfer, such as all sponsors included in the transfer, the original sponsorships and the new sponsorships. A link to this report also appears on the History tab of the process page. From this tab you can view any archived status reports.

To print a report, click the **Print** button on the toolbar of the report. You can also set up the page format for the print job to determine how the printed report looks. You can also use the report information in another software application or save the report in another file format, such as to share the data with someone who cannot access the program. When you click the **Export** button on the toolbar, you can export the information into a shared application, such as Microsoft *Excel*, or save the report into an easily shared format, such as Adobe *Acrobat* (*.pdf) or a Web archive (*.mhtml).

Generate Windows Scripting File

A Windows Scripting File (*.wsf) is an executable script file format for Windows that can incorporate VBScript (*.vbs) routines and include XML elements.

Generate a Windows Scripting File

1. On the process that requires a Windows Scripting File, click **Generate WSF** under **Tasks**.
2. Your browser prompts you to open or save the file. To save the file, choose the file location.

Note: The download process varies according to the browser you use.

Marketing Acknowledgement Segments

Revenue segments group donors for acknowledgement efforts. Unlike other marketing effort types, you cannot add revenue segments directly to a marketing acknowledgement effort. Instead, you assign segments to marketing acknowledgement rules where you also set the package details and assumptions. Then you add one or more acknowledgement rules to the marketing acknowledgement template that allows you to acknowledge donors with different letter packages within one process. For example, you can include different rules for new donors and existing donors.

If you select **Allow multiple letters per revenue** on the Add marketing acknowledgement process screen, you can send a letter for each segment the revenue qualifies for. For example, a donor meets the criteria for the "New Donors" segment that receives a welcome kit. Additionally, the donor's gift of $500 qualifies them for the hand-written note segment as well. When you add acknowledgement rules for both of those segments to the template and select **Allow multiple letters per revenue**, the donor receives the welcome kit and the hand-written note for the same gift.

After you run the marketing acknowledgement process, you can view associated revenue segments on the Segments tab of the marketing effort. If the segment associated with the acknowledgement rule does not include any revenue to acknowledge (no records meet the defined criteria), that segment does not appear on the marketing effort.

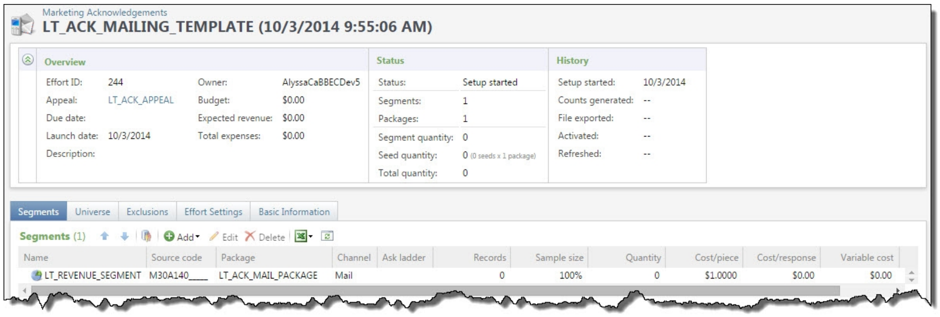
Note: For more information about how to create a revenue segment, see Revenue Segments on page 249.

The tasks you can perform on the Segments tab for marketing acknowledgements differ from direct marketing efforts in several ways:

- Edit segment - When you edit a segment for a marketing acknowledgement, you cannot change the segment or the package, regardless of whether the marketing acknowledgement has been activated.
- Move segment - You cannot move segments up or down for marketing acknowledgements.
- Test segment - You can create a test segment for a marketing acknowledgement, but you cannot edit the package. Use a test segment to test the ask ladders and assumptions for the marketing acknowledgement.
- Delete segment - You cannot delete segments that were created as part of the marketing acknowledgement process. You can delete test segments from a marketing acknowledgement.
- List members - You cannot remove members for a marketing acknowledgement. On a marketing acknowledgement, the list member information includes information about acknowledged gifts, including gift amount and gift date.
- Universe and exclusions - The Universe tab and Exclusions tab display the Universe and Exclusions defined on the template. You cannot edit the tabs.

Marketing Acknowledgement Records

When a marketing acknowledgement process runs successfully, the program automatically creates an acknowledgement effort. The effort record page for marketing acknowledgements is similar to the effort page for a direct marketing effort. For more information about marketing effort records, see Marketing Effort Records on page 114.



Membership Renewal Efforts

Use **Membership Efforts** to contact selections of constituents based on their membership. For example, you can send a mailing to members whose memberships are expiring soon, asking them to for a renewal.

Membership Efforts is an optional feature that your system administrator configures. If you need to use membership efforts and the **Membership Efforts** task does not appear, consult your system administrator.

Membership Renewal Efforts Workflow

Setting up membership renewal efforts requires several steps.

- Create export definitions to use with your membership renewal effort process. Export definitions enable you to specify several different templates that you can use when exporting an active membership renewal effort. For more information, see Membership Export Definitions on page 194.
- Add membership renewal effort processes. Create processes to select memberships based on criteria, such as memberships due to expire. When you add membership renewal effort processes, you define a source code and define the universe and exclusions for the membership renewal effort. For more information, see Membership Renewal Efforts Page on page 195.
- Define membership renewal effort rules. For each membership renewal effort process (template) you create, you can specify one or multiple membership rules. Membership rules determine when and how the program processes memberships. When you specify rules, you can also tie the membership renewal process to a segment to target specific sets of members with certain packages. For more information, see Add Membership Renewal Effort Rules on page 207.
- Run a membership renewal effort process. Once you add or edit the membership renewal effort process, you run the process to create the membership renewal effort. You can also opt to activate and export the effort automatically when the membership renewal effort process is complete.For more information, see Run Membership Renewal Effort Process on page 210.
- Activate membership renewal efforts. By activating the membership renewal effort, you are specifying the appeal to be associated with any memberships that come in as a result of the membership renewal effort. You can activate the effort automatically when you run the membership renewal effort process or do it as a separate task. For more information, see Activations Tab on page 195.
- Create a membership renewal effort export process. Using the export definitions your system administrator defined for membership renewal efforts, you can add a process to export data fields for your membership renewal efforts. You can export the effort automatically when you run the membership effort process or do it as a separate task. For more information, see Exports Tab on page 196.
- Export data to complete the membership process. You can create an export file of the membership effort for use by a processing house or to import into another program.

Membership Export Definitions

In *Marketing and Communications*, you can create export definitions to use specifically for membership renewal efforts. You can create export definitions for mail or email channels. When you create a membership export definition, the available export fields are based on the membership query view.

From the Export Definitions page, you can add, edit, or delete membership export definitions. You can also generate a header file to merge membership data fields with a *Word* template.

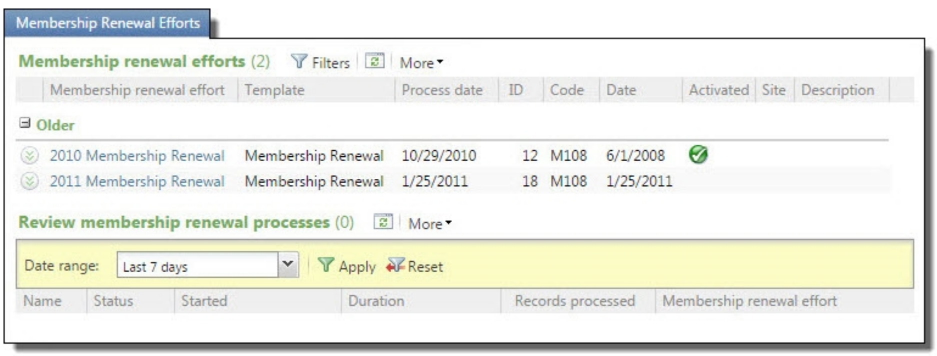
When you create an export definition to use for memberships, you can select from several **Membership** fields. **Membership** fields include **Expiration date**, **Join date**, and **Status**. For more information about how to create export definitions, see Export Definitions on page 370.

Membership Renewal Efforts Page

Use **Membership Renewal Efforts** to manage the membership efforts in your database. To access **Membership Renewal Efforts**, click **Membership renewal efforts** on the Marketing and Communications page. The Membership Renewal Efforts page appears.

Membership Renewal Efforts Tab

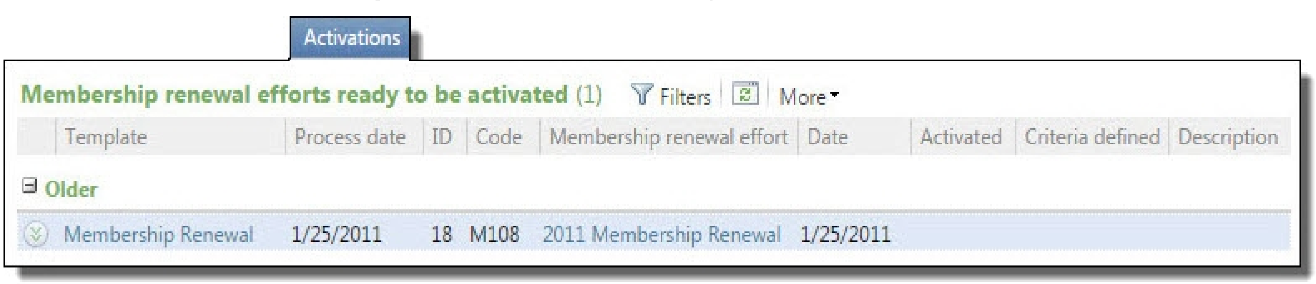
On the Membership Renewal Efforts tab, view details about each of your membership renewal efforts that have been processed. The Membership renewal efforts section lists information about the effort such as the **Template** and **Mail Date**. The Review membership renewal processes section displays details for each run of your processes, including the status and number of records processed.



On the Membership Renewal Efforts tab, you can go to a detailed view of a selected membership renewal effort, edit an effort, or delete an effort.

Activations Tab

On the Activations tab, the **Membership renewal efforts ready to be processed** grid lists any membership efforts ready to run and displays the **Template, Process date**, **ID**, **Code**, **Effort**, **Date**, **Criteria defined**, and **Description** of each membership effort.



On this tab, you can go to a detailed view of the membership renewal effort, run the process, and edit an effort.

To start the effort activation process, click the double arrows beside the membership renewal effort in the grid and click **Start process**. While the activation processes, the Effort Activation Status page for the selected effort appears. The activation process may take some time depending on the properties of the effort.

When a membership renewal process completes successfully (with at least one record processed), the program automatically creates an effort from the process. To go to the effort page, click the link in the **Membership renewal effort** column. After you activate an effort, you can make changes to the effort activation process as necessary. To access the Membership Renewal Effort Activation Status page and view information about the activation process for a membership renewal, click the process date of the effort in the **Membership renewal efforts ready to be activated** grid.

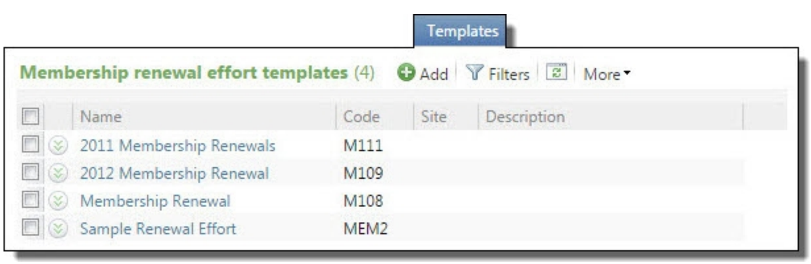
Exports Tab

On the Exports tab, the **Membership renewal effort export processes** grid lists the membership effort export processes in the database and displays the **Template**, **Process date**, **ID**, **Code**, **Membership effort**, **Date**, and **Description** of each membership effort.

On this tab, you can go to a detailed view of a membership effort process, run a process, and add, edit, or delete a membership effort export process.

Templates Tab

On the Templates tab, the **Membership renewal effort templates** grid lists the membership effort processes in the database and displays the **Name**, **Code**, **Description**, and **Site** for each process. You enter this information when you create the membership process and add it to the database. Depending on your security rights and system role, you can perform functions to manage membership process in the database from the action bar.



Membership Renewal Template and Process Tasks

From the Templates tab of a membership effort, you can manage templates and their associated processes.

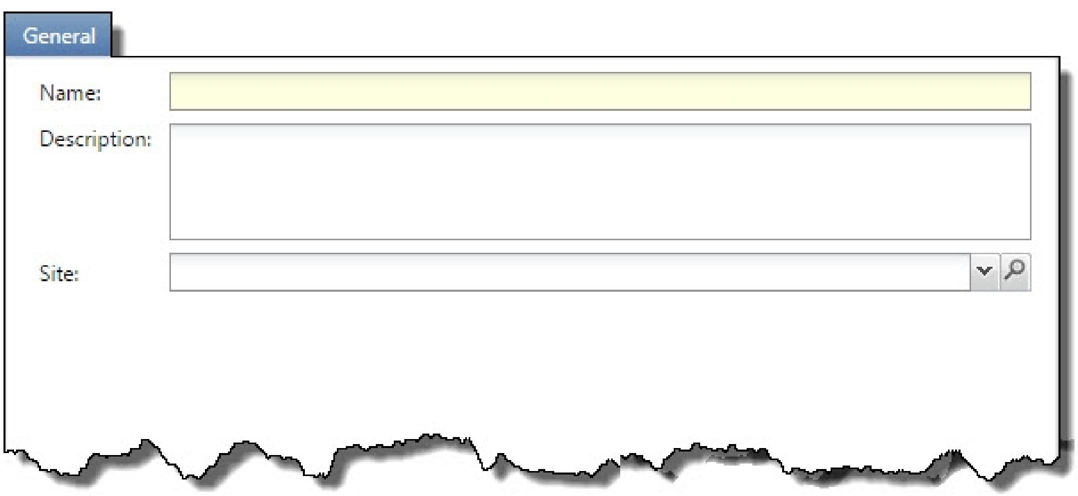
Add Templates for Membership Renewal Effort Processes

You create templates for membership effort processes to generate different types of membership efforts. For example, you can create a membership effort process for membership renewal notices. Each month, you run the process to generate renewal notices for anyone whose membership expires soon.

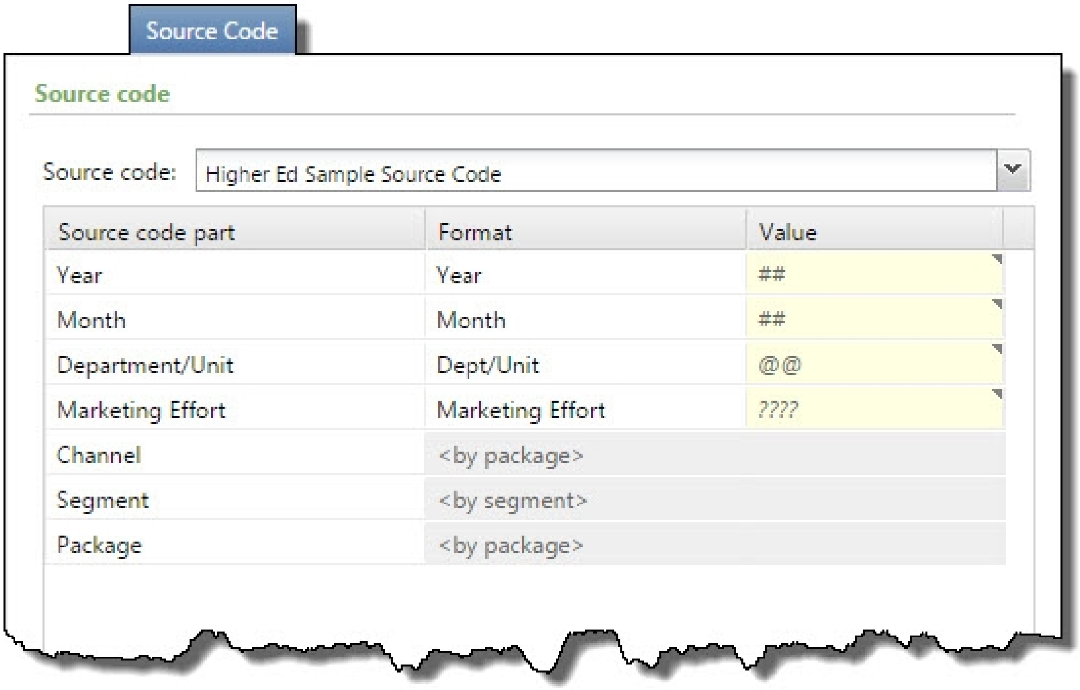
Note: This process is typically completed by the IT Administrator at your organization.

Add a membership renewal effort process template

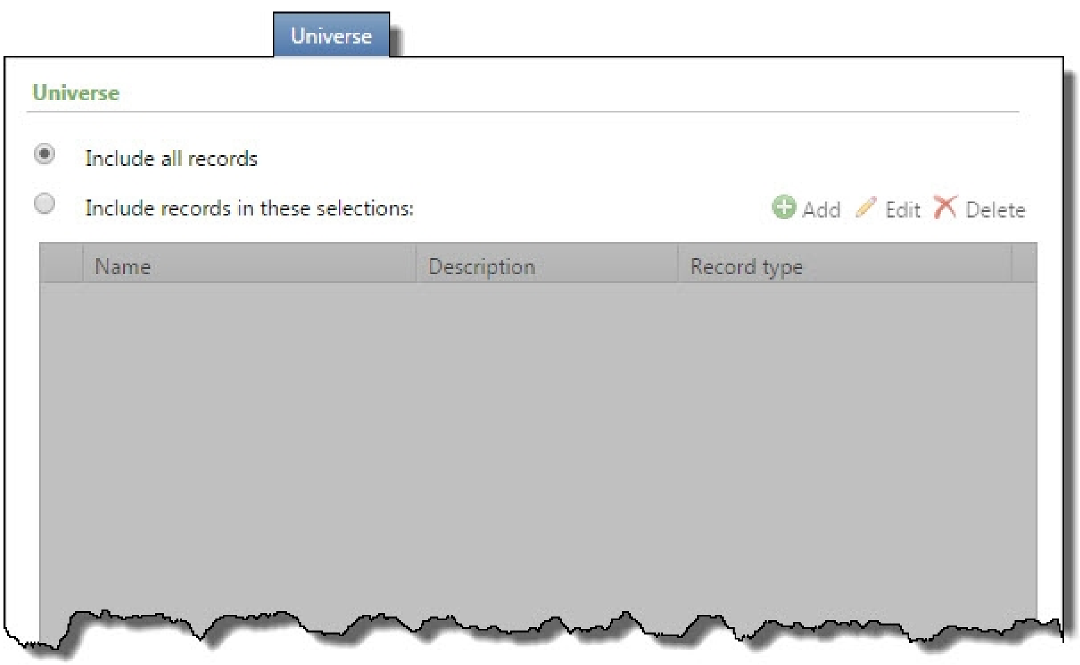
1. From *Marketing and Communications*, click **Membership renewal efforts**. The Membership renewal efforts page appears.
2. Under **Tasks**, click **Add a template**. The Add membership renewal effort process screen appears. For information about the items on this screen, see Add Membership Renewal Effort Process Screen on page 201.



3. On the General tab, enter a unique name and description to help identify the template.
4. To restrict use of the template to a specific site at your organization, in the **Site** field, select the site to use the template.
5. On the Source code tab, select a source code layout and the specific components of the source code such as Effort, Effort year, Campaign, and Segment.

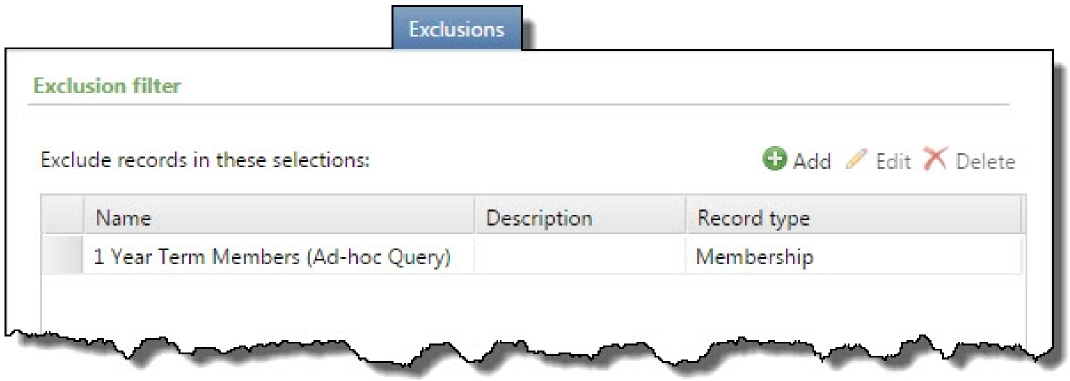


6. On the Universe tab, select whether to include all records in the membership effort, or only records in specific selections.

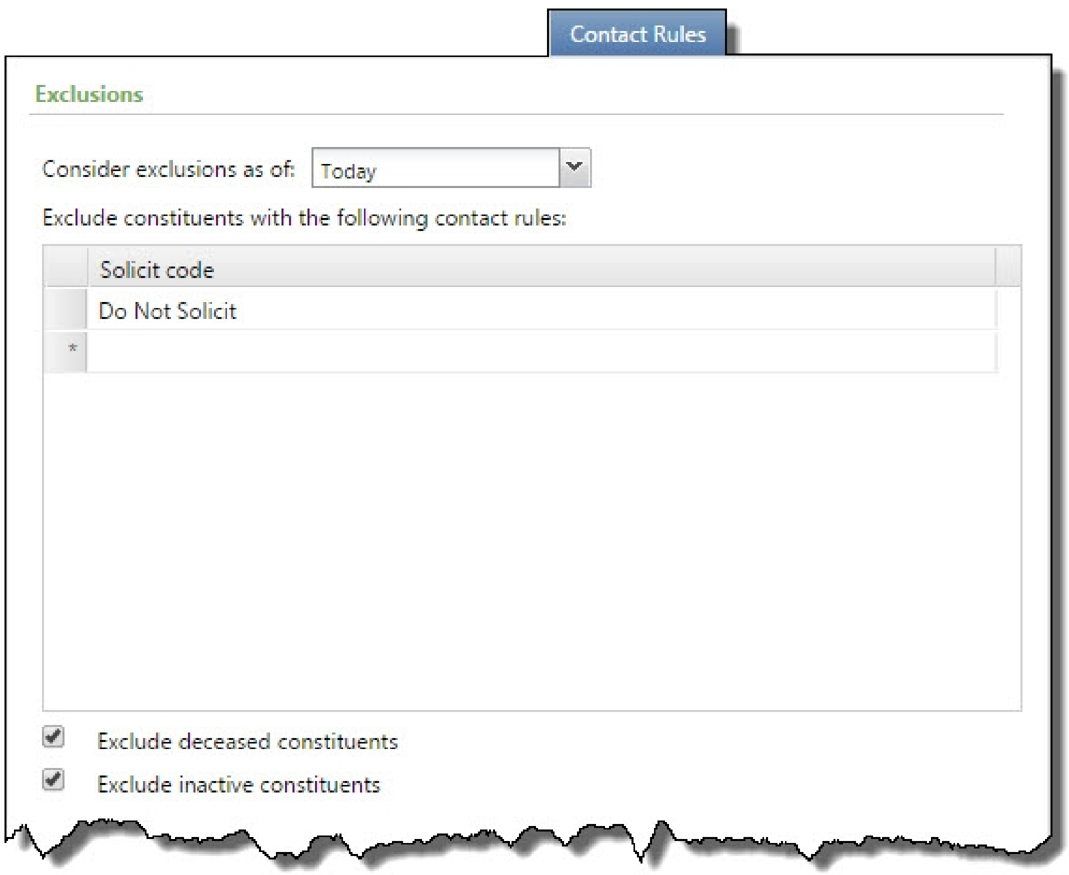


If you select **Include records in these selections**, search for or add the query selections to include in the effort. When you select to include only specific selections, you reduce the "universe" of potential records to include the membership effort to only those that meet the criteria of the selections selected as universe filters.

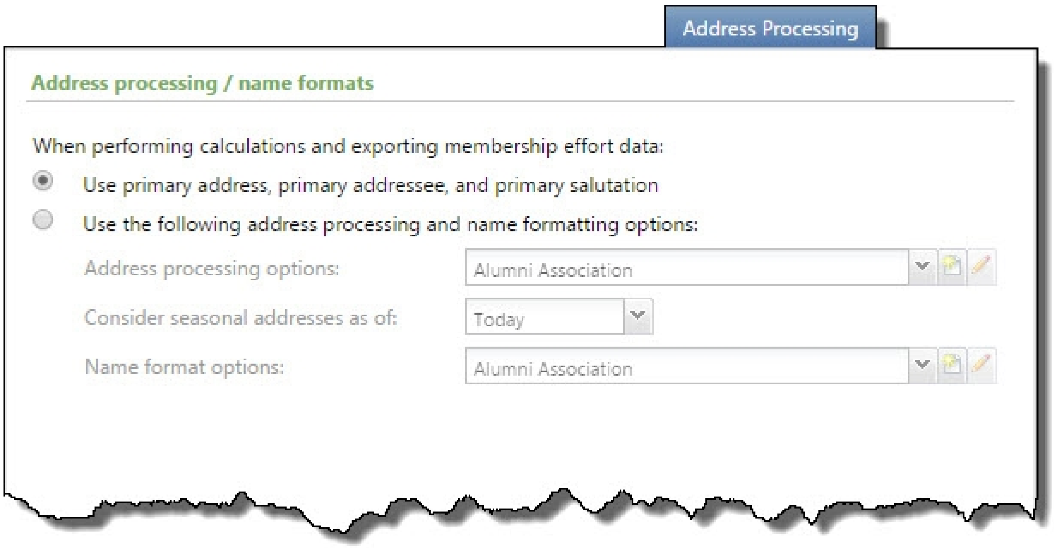
7. On the Exclusions tab, search for or add the query selections to exclude in the effort.



8. On the Contact rules tab, select the criteria of constituents to exclude from the effort, such as by solicit code or active status.

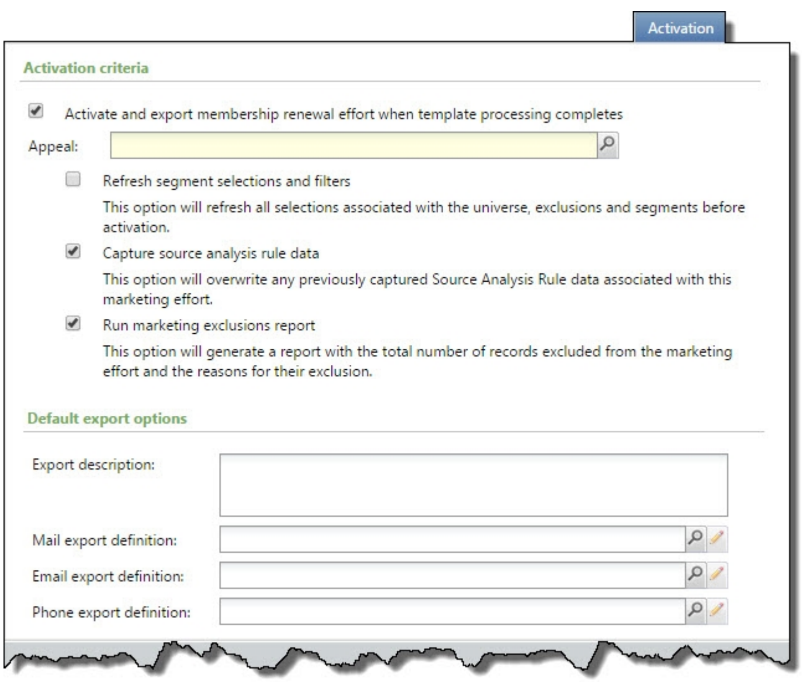


9. On the Address processing tab, select whether to include the primary address, addressee, and salutation for each recipient or specific address processing and name formatting options for the effort.



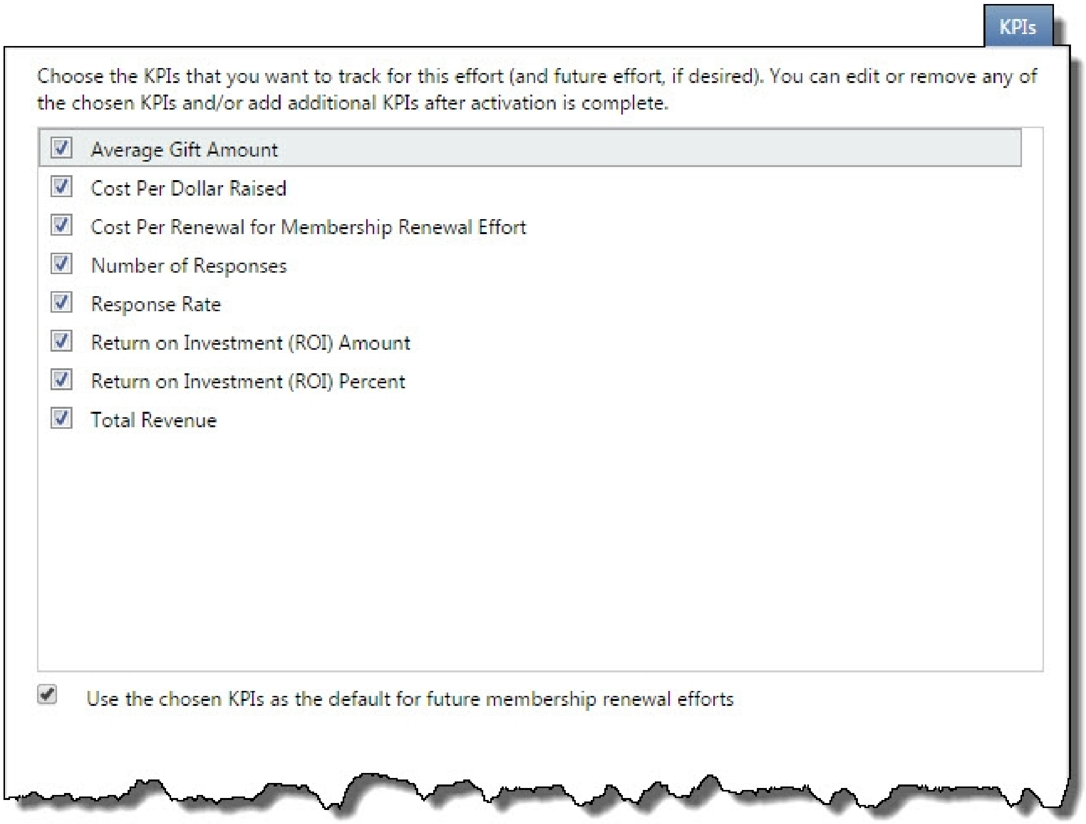
If you select **Use the following address processing and name formatting options**, select the options to use. In the **Consider seasonal addresses as of** field, enter the date, such as the mail date, to use to determine whether to use a seasonal address.

10. On the Activation tab, select whether to activate and export the effort when the template processing completes, and search for and select the appeal that the effort supports.



If you select **Activate and export membership renewal effort when template processing completes**, select whether to refresh all selections and filters associated with the effort's segments and whether to capture any source analysis rule data associated with the effort.

11. Under **Default export options**, enter a description to help identify the default export definitions, and select the export definitions to use for packages that do not already have an export definition defined.
12. On the KPIs tab, select the key performance indicators (KPIs) to use to track the effectiveness of the effort, and select whether to use the selected KPIs as the default for future efforts.



13. Click **Save**. You return to the Templates tab.

Add Membership Renewal Effort Process Screen

The tables below explain the items on the Add membership renewal effort process screen.

General Tab

Screen Item	Description
Name	This is a required field with 100 character length field name. Enter a name for the process that is easily recognizable when you use the process again.

Screen Item	Description
Description	This field has a 255 character length field name. Enter description information that further identifies the process. For example, you can enter "Only use for Annual Fund donors".
Site	System administrators can establish security access to memberships based on site. When you select a site in the **Site** field, only users associated with the selected site can access the membership process.

Source code tab

Screen Item	Description
Source code	In the **Source code** field, select a code layout. Layouts are created on the Source Codes page. After you select a source code layout, each source code part for the layout appears below. Enter a value for each code part that requires one. The values allowed depend on how the source code part is defined in the layout. Gray fields indicate fixed codes you cannot edit. For example, you defined fixed values for the "Department" source code part — "Membership" or "Development." After you select "Membership" or "Development," the 'M' or 'D' code value appears in the field to the right and is disabled. Yellow fields display the format for the code you can enter. For example, you have a source code part for "Month" and you specified that the only valid format for "Month" is a two digit code (# = 0 though 9). The field displays ## to indicate that you need to enter two digits. The fields for Channel, Package, Segment and Test Segment display "<by channel>," "<by package>," etc. These codes are set on the marketing effort segment.

Universe Tab

Screen Item	Description
Include all records	When you mark **Include all records**, the membership effort process can potentially include all records from all sources (if you have more than one) and lists. In this case, all your records are available for inclusion. You can later specify to exclude specific sets of donors on the Exclusions tab.

Screen Item	Description
Include records in these selections	When you mark **Include records in these selections**, you are specifying that only a subset of your records will be available for inclusion in the membership effort process. By specifying groups of records for inclusion, when you later create segments for the membership effort process, the potential pool of records for those segments is limited to only those records that meet the criteria of the universe selections you specify here. No matter what selections you choose for each segment, they will not include any records that do not exist in the universe selections you specify. It is important to note that by specifying universe selections, you are reducing the "universe" of potential records to include in the membership effort process to only those that meet the criteria of the selections you specify as universe filters. Click **Search** to locate a selection or **Add** to create a new one.

Exclusions Tab

Screen Item	Description
Exclude records in these selections	In the **Exclusion filter** frame when you specify selections, you define a set of donors you do not want to include in the membership effort process. When you specify exclusion selections, all record sources are still available when you later create segments for the membership effort process (unlike when you define the membership's universe). The set of excluded donors is excluded from every segment in the membership. Click **Search** to locate a selection or **Add** to create a new one. If you do not specify any exclusion selections, all constituents are available for the membership effort process (depending on the defined universe).

Contact rules tab

Screen Item	Description
Consider exclusions as of	Select whether to include exclusions as of today or a specific date.

Screen Item	Description
Exclude constituents with the following contact rules	You can exclude constituents from a marketing effort based on the contact preferences stored on their constituent records. To exclude constituents based on contact preferences, in the **Solicit codes** grid, select any solicit codes to exclude from the marketing effort. To remove constituents with invalid or missing addresses, on their records set the Solicit Code to “Do not mail.” Then select “Do not mail” in the **Exclude constituents with the following contact rules** field. A solicit code can be optional, default, or required. If the solicit code is optional, you can add it to the exclusions of the marketing effort as applicable. If the solicit code is marked as a default, it will automatically appear as an exclusion for a marketing effort, but you can remove it. If a solicit code is required, it will automatically appear as an exclusion for the marketing effort and cannot be removed.
Exclude deceased constituents	To exclude deceased constituents from the marketing effort, select this checkbox. When an individual is marked deceased, a status of “Deceased” appears in the profile summary frame of the constituent page. This option appears only for system administrators and other users who were granted the **Show Exclude Deceased Constituent Checkbox** system permission found under Configuration, Exclusions in *System Roles*.
Exclude inactive constituents	To exclude inactive constituents from the marketing effort, select this checkbox. When an individual or organization is marked inactive, a status of “Inactive” appears in the profile summary frame of the constituent page. This option appears only for system administrators and other users who were granted the **Show Exclude Inactive Constituent Checkbox** system permission found under Configuration, Exclusions in *System Roles*.

Address processing tab

Screen Item	Description
Use primary address, primary addressee, and primary salutation	To use the primary address, primary addressee, and primary salutation for records included in the marketing effort, select this option. If a constituent has no Primary Address, Primary Addressee, or Primary Salutation, then the record is exported with a blank address, addressee, or salutation. To ensure that every constituent has a proper addressee and salutation, in *Marketing and Communications*, under **Configuration**, you can configure the program to automatically add a default addressee and salutation to each constituent record.

Screen Item	Description
Use the following address processing and name formatting options	To define custom address and name formatting options for the marketing effort, select this option. For example, you can add a unique address processing option set for your holiday appeal. You set name formatting and address processing options in *Marketing and Communications*, under **Configuration**. Address processing options — Select a pre-defined set or create one. Consider seasonal addresses as of — Select a date to take seasonal addresses into consideration when a marketing effort is processed to ensure delivery to the correct location. For example, if a constituent stays at a vacation home in December, you can send your marketing effort there rather than the primary address. Consider seasonal addresses as of — Select a date to take seasonal addresses into consideration when a marketing effort is processed to ensure delivery to the correct location. For example, if a constituent stays at a holiday home in December, you can send your marketing effort there rather than the primary address. Name format options — Select a pre-defined set or create one.

Activation Tab

Screen Item	Description
Activate and export effort when template processing completes	Select this option to automatically activate the effort and create the export file after the template is processed. If you do not select **Activate and export effort when template processing completes**, any values you enter in the fields on this tab are used as defaults on the Run Effort Export Process screen.
Appeal	Select the appeal to associate with this effort.
Refresh filters, selections, and segments	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 to snapshot all donor attributes defined by the source analysis rules.
Run marketing exclusions report	To run the Marketing Exclusions Report when you activate the membership renewal effort, select **Run marketing exclusions report**. Running this report can hinder performance so you may want to turn if off for certain efforts, such as weekly acknowledgement mailings.

Screen Item	Description
Export description	Enter a description for the export process.
Mail/Email export definition	Select an export definition for the mail channel and/or email channel. These definitions are used for any packages that do not have an export definition defined already. While these fields are not required, if you leave them blank and have packages without export definitions defined, the export will not process automatically when **Activate and export effort when template processing completes** is selected. For that reason, we recommend that you always add export definitions to use as a defaults when you export automatically.

KPIs tab

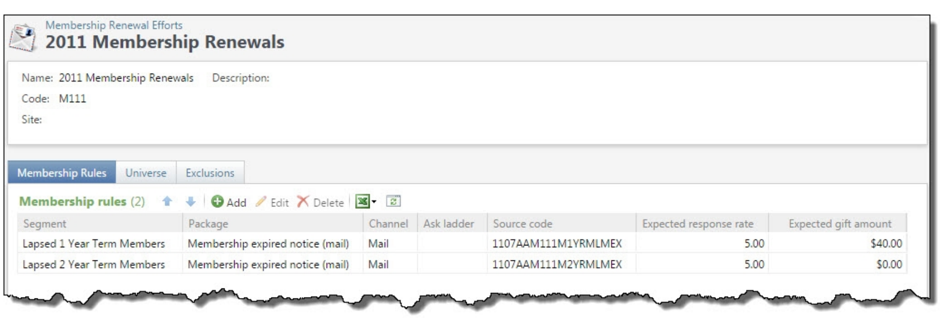
Screen Item	Description
KPIs	Select the checkbox for each KPI to track for the marketing effort. These appear on the KPIs tab of the marketing effort. When you activate the marketing effort, the program automatically creates an instance of each marketing effort KPI you selected and associates it with the activated marketing effort. The KPIs you select also appear on a KPI dashboard.

Manage Templates for Membership Renewal Efforts

Use the template page for an individual membership renewal effort process to manage the membership rules, universe, and exclusions for that process. To access a membership renewal effort process's template page, on the Templates tab, select a membership renewal effort process. The template page for the selected process appears.

Membership Rules Tab

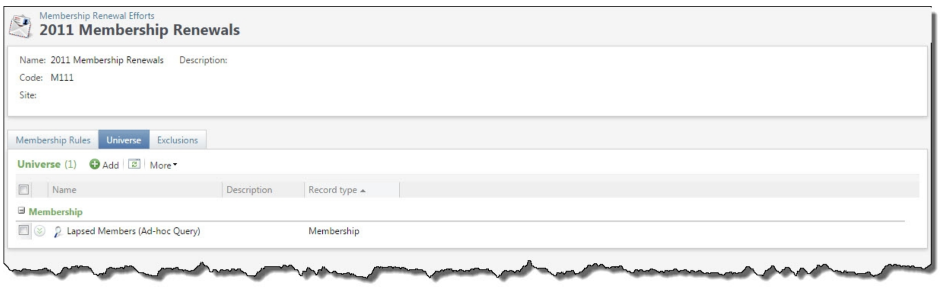
On the Membership rules tab, view any membership rules for the selected process. The tab lists information about the membership rules such as the required segment, package, and assumptions.



On this tab, you can add, edit, and delete membership rules. For more information about these tasks, see Add Membership Renewal Effort Rules on page 207

Universe Tab

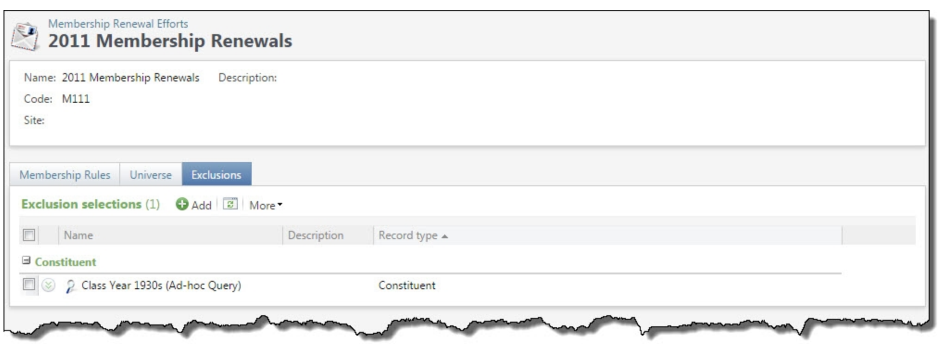
On the Universe tab, the **Universe** grid lists any inclusions selected for the membership effort process and displays the name and description of each selection.



On this tab, you can search for a specific universe selection, and add, edit, or delete the inclusions defined for the effort. For more information about these tasks, see Universe Tab on page 117.

Exclusions Tab

On the Exclusions tab, the **Exclusion selections** grid lists any exclusions selected for the membership effort process and displays the **Name** and **Description** of each exclusion selection.



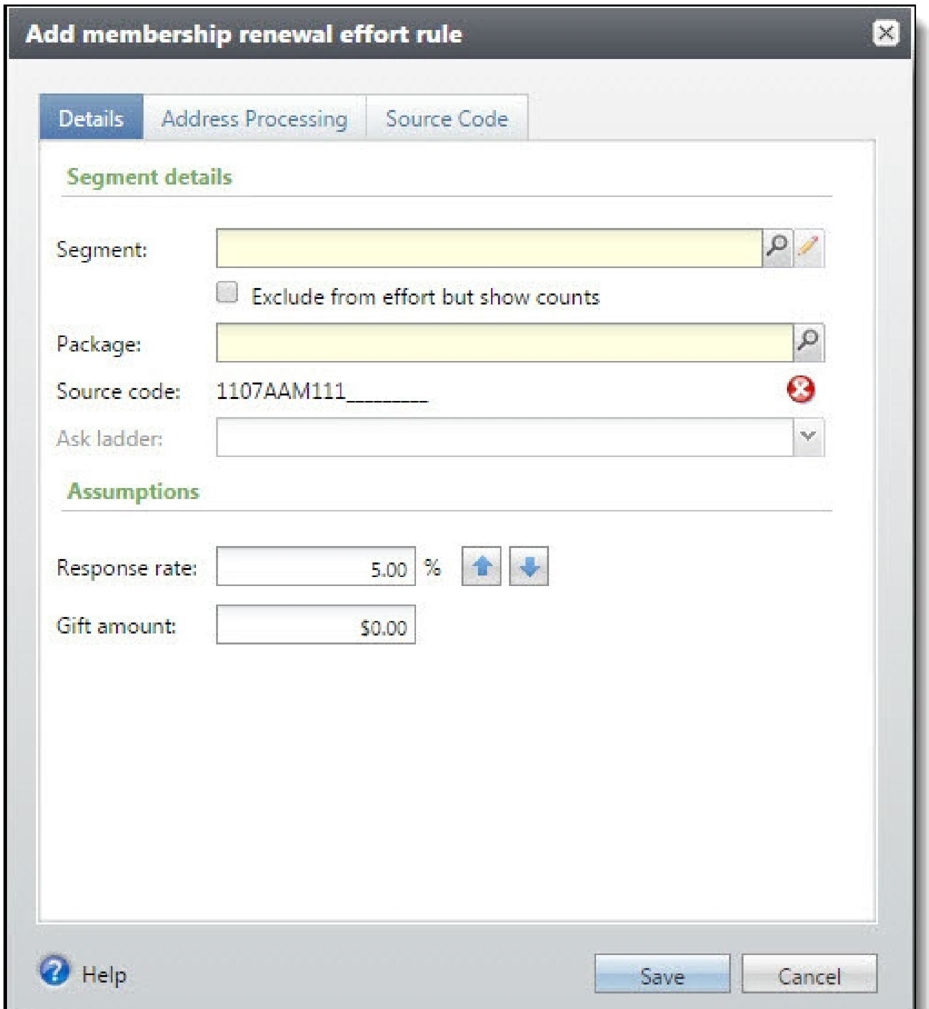
On this tab, you can search for a specific exclusion selection, and add, edit, or delete exclusions. For more information about these tasks, see Exclusions Tab on page 118.

Add Membership Renewal Effort Rules

Membership renewal effort rules are criteria you define to determine when and how membership renewal effort processes are run, and the segments included in the effort. You can add one or multiple membership renewal effort rules to each membership renewal effort process. Each membership renewal effort rule you add maps one-to-one with a segment in the membership effort.

Add a membership renewal effort rule

1. From the Membership Renewal Efforts page, select the Templates tab. Open a membership renewal template and select the Membership rules tab.
2. On the action bar, click **Add**. The Add membership renewal effort rule screen appears.



3. On this screen, you can enter **Segment details**, **Package details**, and define **Assumptions**.

   For information about the items on this screen, see Add Membership Renewal Effort Rule Screen on page 208.
4. Click **Save**. You return to the Membership rules tab. The data you entered appears in the **Membership rules** grid.

Add Membership Renewal Effort Rule Screen

Details tab

Screen Item	Description
Segment	Use the binoculars to search for a specific segment to use for the membership renewal effort. You must select a membership segment. If you select a segment with a source code part value assigned, this value defaults into the source code field below.
Segment code	This field displays the default source code part value from the selected revenue segment or you can enter a value.
Exclude from effort but show counts	To exclude the segment from the membership renewal effort, select this option. 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. Segment exclusions also allow you to group remainders from a segment so they are not included in other segments. For more information, see Segment Exclusions on page 82. When you select this option, all other options are disabled.
Package	Click the binoculars to search for the package to associate with this segment. Packages are the different pieces available for a marketing effort. If you select a package with a source code part value assigned, this value defaults into the source code field below.
Package code	This field displays the default source code part value from the selected package or you can enter a value.
Ask ladder	If you include ask ladders on a membership renewal effort, select the ask ladder you want to associate with this membership process.
Cost	The **Cost** field displays the cost for the package you select. The cost defaults from the information entered for the package on the Packages page.
Response rate	You can enter a default expected **Response rate** to your membership renewal effort. Entering this information enables you to compare the expected versus actual response rate when you analyze the membership renewal effort later.
Gift amount	You can specify a default expected **Gift amount** from respondents. Entering this information enables you to compare the expected versus actual response rate when you analyze the membership renewal effort later.

Address processing tab

Screen Item	Description
Use primary address, primary addressee, and primary salutation	To use the primary address, primary addressee, and primary salutation for records included in the marketing effort, select this option. If a constituent has no Primary Address, Primary Addressee, or Primary Salutation, then the record is exported with a blank address, addressee, or salutation. To ensure that every constituent has a proper addressee and salutation, in *Marketing and Communications*, under **Configuration**, you can configure the program to automatically add a default addressee and salutation to each constituent record.
Use the following address processing and name formatting options	To define custom address and name formatting options for the marketing effort, select this option. For example, you can add a unique address processing option set for your holiday appeal. You set name formatting and address processing options in *Marketing and Communications*, under **Configuration**. Address processing options — Select a pre-defined set or create one. Consider seasonal addresses as of — Select a date to take seasonal addresses into consideration when a marketing effort is processed to ensure delivery to the correct location. For example, if a constituent stays at a vacation home in December, you can send your marketing effort there rather than the primary address. Consider seasonal addresses as of — Select a date to take seasonal addresses into consideration when a marketing effort is processed to ensure delivery to the correct location. For example, if a constituent stays at a holiday home in December, you can send your marketing effort there rather than the primary address. Name format options — Select a pre-defined set or create one.

Move Membership Renewal Effort Rules

Use the arrows to move selected rules up or down in the grid. The order of rules in the grid is important because rules are processed in order from top to bottom.

Run Membership Renewal Effort Process

Once you add or edit the membership effort process, you run the process to create membership efforts for members.

Run a membership renewal effort process

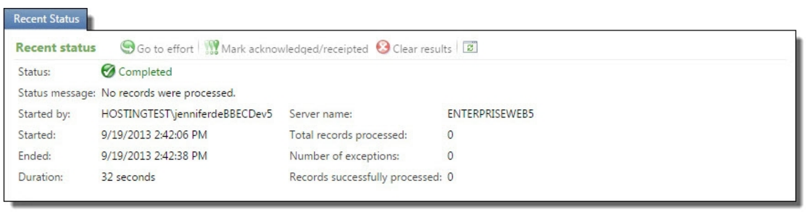
1. To run membership renewal efforts, select the membership renewal effort process.
2. Click **Start process**. The Process status page appears on the Recent status tab.

Tabs of a Process Status Page

Each business process in the database has a status page. The process status page contains information specific to the process. You enter this information when you add the process to the database. Each process status page also includes information about the most recent instance and historical data about the process. On some process status pages, you can manage the job schedules of the process. To help manage this information, each process status page contains multiple tabs.

Recent Status Tab

On the Recent status tab, you view the details of the most recent instance of the process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many of those records processed successfully and how many were exceptions.

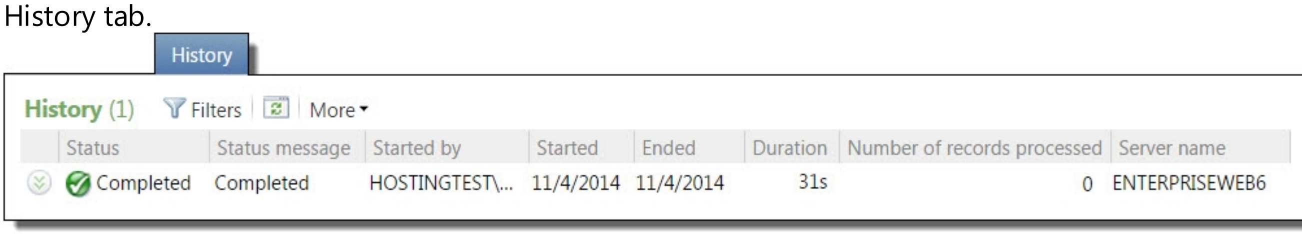


History Tab

Each time you run a business process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the process. The information in the grid includes the status and date of the instance.

On the History tab, you can limit the status records that appear in the grid. You can filter by the process status. If you filter the records that appear in the grid, it can reduce the amount of time it takes to find a process instance. For example, if you search for an instance that did not finish its operation, you can select to view only status records with a **Status** of Did not finish. To filter the records that appear in the grid, click the funnel in the action bar. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid. To update the information that appears, click **Refresh List** on the action bar.

Depending on your security rights and system role, you can delete a status record from the grid on the History tab.



Delete a Status Record from the History Tab of a Process Status Page

On the History tab of a process status page, you can delete a specific status record of the process. When you delete a status record, you delete the specific instance and all of its history.

Delete a status record from the History tab

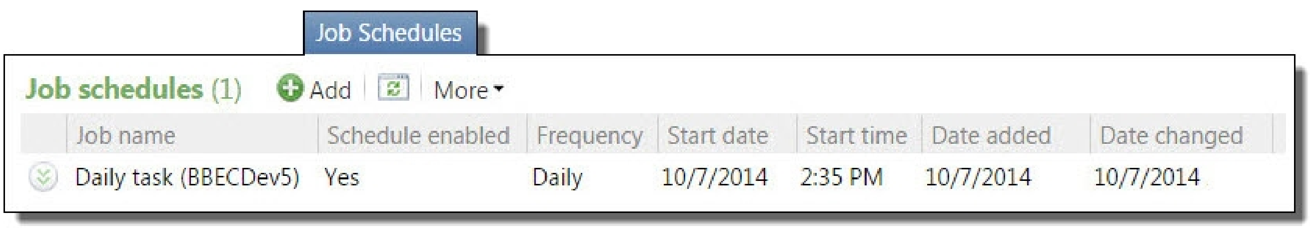
1. On the History tab of the process status page, select a status record and click **Delete**. A confirmation message appears.

> ***Note:*** You can filter the records in the grid by the status of the process to reduce the amount of time it takes to find an instance of the process. For example, to search for a completed instance, click the funnel icon, select "Completed" in the **Status** field, and click **Apply**. Only completed instances appear in the grid.

2. Click **Yes**. You return to the History tab. The selected status record no longer appears.

Job Schedules Tab (Not Available on All Process Pages)

On the Job schedules tab, you can view the job schedules of the process in the database. The details in this grid include the name, whether a job schedule is enabled, the frequency of the job schedule, the start date and time and end date and time, and the date the job schedule was added and last changed in the database. You enter this information when you set the job schedule of the process.



Depending on your security rights and system role, you can add, edit, and delete job schedules that appear on the Job schedules tab. To update the information that appears, click **Refresh List**.

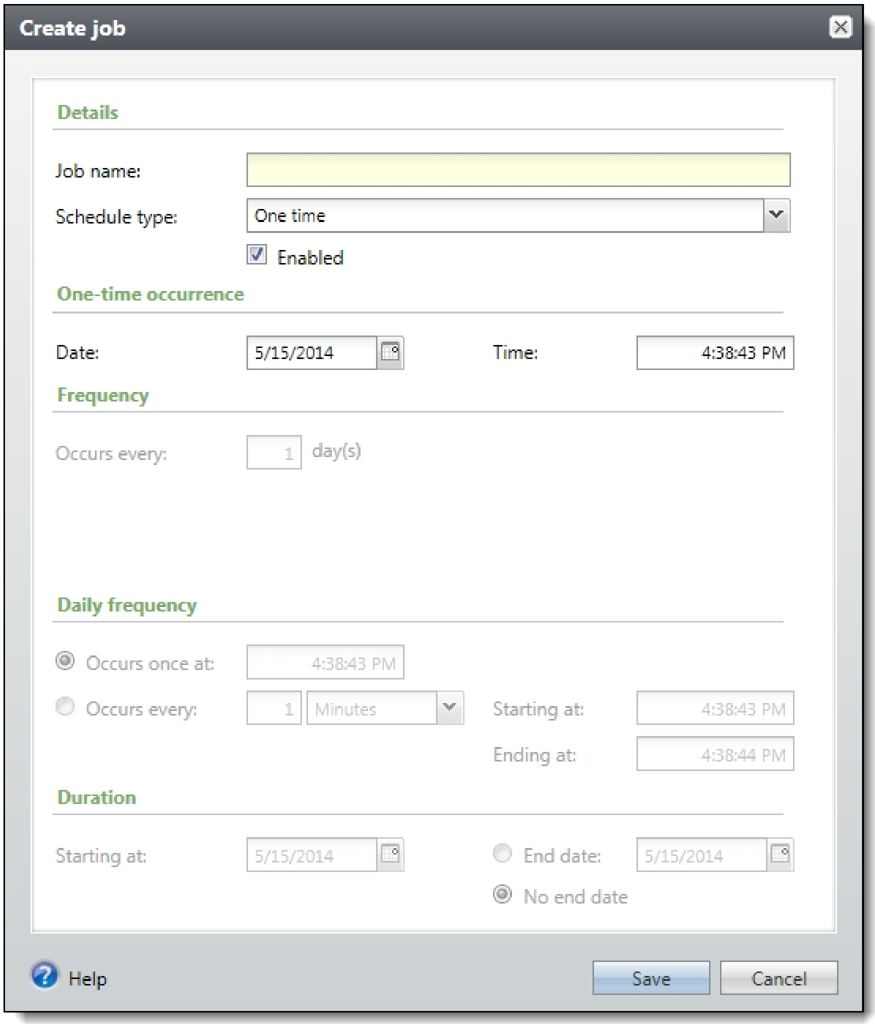
Schedule Process Jobs

You can create a job schedule to automatically run a business process. When you create a schedule for a process, the program exports and runs the process at the scheduled instance or interval. For example, you can schedule a process to run at a time convenient for your organization, such as overnight. To create a job schedule, click **Add** on the Job schedules tab of the process status page. The Create job screen appears.

> ***Note:*** To create a job schedule from any tab of the process status page, click **Create job schedule** under **Tasks**.

Create a job schedule

1. On the Job schedules tab of the process, click **Add**. The Create job screen appears.



2. In the **Job name** field, enter a name for the scheduled process.
3. By default, the schedule is active. To suspend it, clear the **Enabled** checkbox.
4. In the **Schedule type** field, select how often to run the process. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*. Your selection determines which other fields are enabled.
   a. For a process that runs once, select the date and time to run it.
   b. For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it. For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single

time or at regular intervals on the days when it runs.

c. For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.

5. To return to the Job schedules tab, click **Save**.

Edit Job Schedules

After you create a job schedule for a process, you can update it. For example, you can adjust its frequency. You cannot edit the package selected to create the job schedule.

Edit a job schedule

1. On the Job schedules tab, select a job and click **Edit**. The Edit job screen appears. The options on this screen are the same as the Create job screen. For information about these options, see Create Job Screen on page 241.
2. Make changes as necessary. For example, in the **Schedule type** you can change how often to run the process.
3. Click **Save**. You return to the Job schedules tab.

Create Job Screen

Screen Item	Description
Job name	Enter a name for the job schedule.
Schedule type	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*.
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs just once, select the date and time to run it.
Frequency	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.

Screen Item	Description
Daily frequency	For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select **Occurs once at** and enter the start time. To run a process at intervals, select **Occurs every** and enter the time between instances, as well as a start time and end time.
Start date	For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.

Delete Job Schedules

On the Job schedules tab of the status page, you can delete a job schedule of the process. This deletes the scheduled job as well as any changes made to it outside the program.

Delete a job schedule

1. On the Job schedules tab, select the job and click **Delete**. A confirmation screen appears.
2. Click **Yes**. You return to the Job schedules tab.

Start Process

This task allows you to start the selected business process from the process page.

Edit Process

This task allows you to edit the selected business process form the process page.

Create Job Schedule

This task allows you to create a job schedule that tells the application when to automatically run the selected business process.

Delete Process

This task allows you to delete the selected business process from the process page. Before you delete a process, we strongly recommend you back up your data. Unless you previously save the transmission file or prenotification authorization file, once you delete the process, you can no longer use its output file that contains the data extracted from your database.

Exception Report

When you run a process, the process status page appears and displays the number of records that did and did not process. Records that fail to process are called exceptions. When there are exceptions, you can view the Exception Report for the generated process. This report lists the expectations generated and explains why each did not process properly. You can view the most recent Exception Report from the Recent status tab of the process page. If you want to view an older report, you can do so from the History tab of the process page.

To print a report, click the **Print** button on the toolbar of the report. You can also set up the page format for the print job to determine how the printed report looks. You can also use the report information in another software application or save the report in another file format, such as to share the data with someone who cannot access the program. When you click the **Export** button on the toolbar, you can export the information into a shared application, such as Microsoft *Excel*, or save the report into an easily shared format, such as Adobe *Acrobat* (*.pdf) or a Web archive (*.mhtml).

Process Status Report

When you execute a process in *Sponsorships*, the process generates a status report which is housed on the Recent Status tab of the process page. For example, if you execute a sponsorship transfer the Transfer Report appears on the Recent Status tab. The report lists details about the transfer, such as all sponsors included in the transfer, the original sponsorships and the new sponsorships. A link to this report also appears on the History tab of the process page. From this tab you can view any archived status reports.

To print a report, click the **Print** button on the toolbar of the report. You can also set up the page format for the print job to determine how the printed report looks. You can also use the report information in another software application or save the report in another file format, such as to share the data with someone who cannot access the program. When you click the **Export** button on the toolbar, you can export the information into a shared application, such as Microsoft *Excel*, or save the report into an easily shared format, such as Adobe *Acrobat* (*.pdf) or a Web archive (*.mhtml).

Generate Windows Scripting File

A Windows Scripting File (*.wsf) is an executable script file format for Windows that can incorporate VBScript (*.vbs) routines and include XML elements.

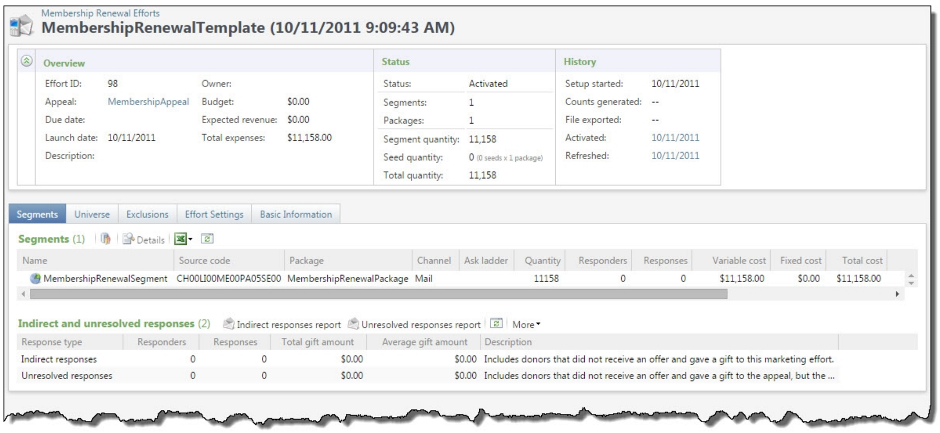
Generate a Windows Scripting File

1. On the process that requires a Windows Scripting File, click **Generate WSF** under **Tasks**.
2. Your browser prompts you to open or save the file. To save the file, choose the file location.

Note: The download process varies according to the browser you use.

Membership Renewal Effort Records

When a membership renewal effort process runs successfully, the program automatically creates a membership renewal effort record. It includes the same tabs and you can perform the same tasks as a direct marketing effort record. For more information about effort records, see Marketing Effort Records on page 114.



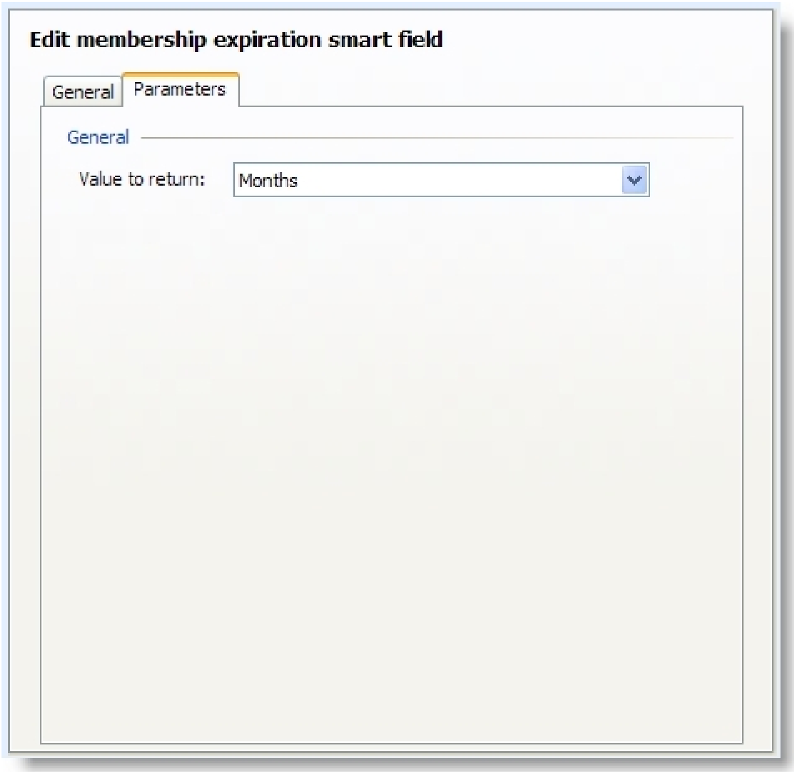
Segments for Membership Efforts

You can add membership segments and segment groups to membership renewal efforts. For example, if the effort is a renewal reminder, you can add segments that contain constituents whose memberships are set to expire in 20 weeks, grouped by membership level.

For more information about how to create a membership segment, see Membership Segments on page 251. For more information about segment tasks, see Manage Segments on Marketing Efforts on page 75.

Membership Expiration Smart Fields

The Membership expiration smart field calculates values for membership expiration dates based on criteria you set. Based on your selection in the **Value to return** field, the smart field returns the number of days, weeks, months, quarters, or years until the membership is set to expire.


Edit membership expiration smart field
General
Parameters
General
Value to return:
Months

Sponsorship Efforts

Use **Sponsorship Efforts** to create marketing efforts for segments of constituents based on sponsorships. For example, you can send welcome kits to new sponsors or reminders to existing sponsors whose sponsorships are expiring soon.

Sponsorship Efforts Workflow

Setting up sponsorship efforts requires several steps.

- Create export definitions to use with your sponsorship effort process. Export definitions enable you to specify several different templates that you can use when exporting an active sponsorship effort. For more information, see Manage Segments on page 247.
- Add sponsorship effort processes. Create processes to select sponsorships based on criteria, such as voluntarily or involuntarily upgrading sponsorships. When you add sponsorship effort processes,

you define a source code and define the universe and exclusions for the sponsorship effort. For more information, seeSponsorship Template and Process Tasks on page 223.

- Define sponsorship effort rules. For each sponsorship effort process (template) you create, you can specify one or multiple sponsorship rules. Sponsorship rules determine when and how the program processes sponsorship efforts. When you specify rules, you can also tie the sponsorship process to a segment to target specific sets of sponsors with certain packages, such as welcome kits or sponsorship upgrades. For more information, see Add Sponsorship Effort Rules on page 235.
- Run a sponsorship effort process. Once you add or edit the sponsorship effort process, you run the process to create the sponsorship effort. You can also opt to activate and export the effort automatically when the sponsorship effort process is complete. For more information, seeRun Sponsorship Effort Process on page 237.
- Activate sponsorship efforts. By activating the sponsorship effort, you are specifying the appeal to be associated with any sponsorships that come in as a result of the sponsorship effort. You can activate the effort automatically when you run the sponsorship effort process or do it as a separate task. For more information, see Activate Marketing Efforts on page 101.
- Create a sponsorship effort export process. Using the export definitions your system administrator defined for sponsorship efforts, you can add a process to export data fields for your sponsorship efforts. You can export the effort automatically when you run the sponsorship effort process or do it as a separate task.
- Export data to complete the sponsorship process. You can create an export file of the sponsorship effort for use by a processing house or to import into another program. For more information, see Export Marketing Efforts on page 95.

Sponsorship Export Definitions

In *Marketing and Communications*, you can create export definitions to use specifically for sponsorship efforts. When you create a sponsorship export definition, the available export fields are based on the sponsorship query view.

From the Export Definitions page, you can add, edit, or delete sponsorship export definitions. You can also generate a header file to merge sponsorship data fields with a *Word* template. For more information about how to create export definitions, see Export Definitions on page 370.

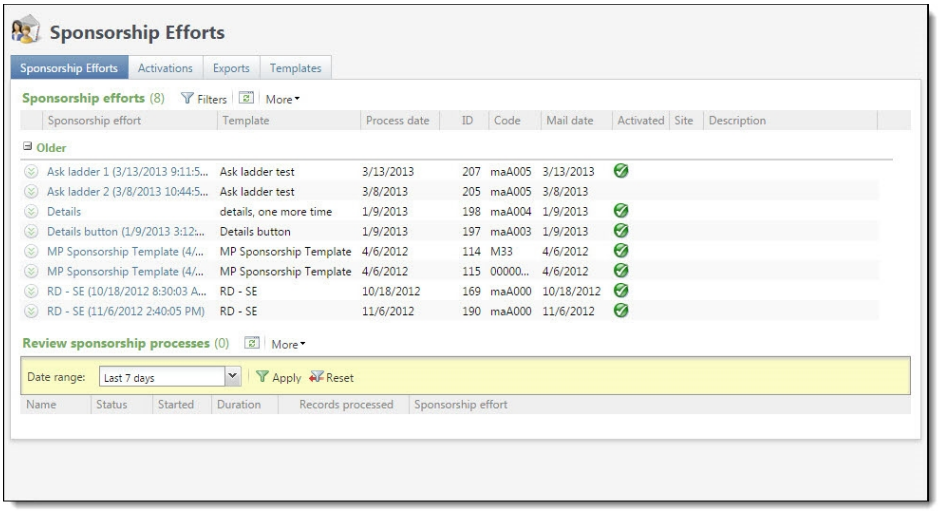
Sponsorship Efforts Page

Use **Sponsorship Efforts** to manage the sponsorship efforts in your database. To access **Sponsorship Efforts**, from the *Marketing and Communications*, click **Sponsorship efforts**. The Sponsorship Efforts page appears.

The Sponsorship Efforts page displays only sponsorship efforts. Sponsorship efforts do not appear on the Marketing Efforts tab of the Marketing Efforts page.

Sponsorship Efforts Tab

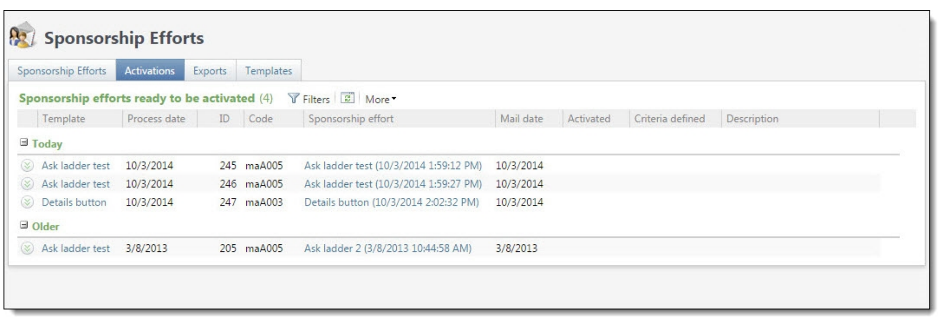
On the Sponsorship efforts tab, view details about each of your processed sponsorship efforts. The **Sponsorship efforts** section lists information about the **Template** and **Mail Date**. The **Review sponsorship processes** section displays details for each run of your processes, including the status and number of records processed.



On the Sponsorship Efforts tab, you can go to a detailed view of a selected sponsorship effort, edit an effort, or delete an effort.

Activations Tab

On the Activations tab, the **Sponsorship efforts ready to be activated** grid lists any sponsorship efforts ready to run and displays the **Template, Process date**, **ID**, **Code**, **Sponsorship effort**, **Mail date**, **Criteria defined**, and **Description** of each sponsorship effort.



On this tab, you can go to a detailed view of the sponsorship effort, run the process, and edit the effort.

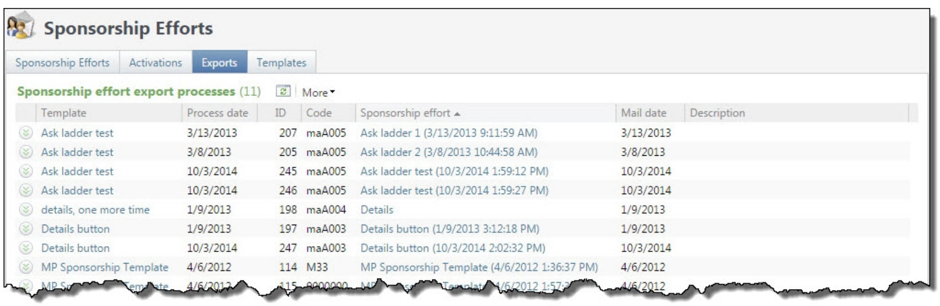
To start the effort activation process, click the double arrows beside the sponsorship effort in the grid and click **Start process**. While the activation processes, the Effort Activation Status page for the selected effort appears. The activation process may take some time depending on the properties of the effort.

When a sponsorship effort process completes successfully (with at least one record processed), the program automatically creates an effort from the process. To go to the effort page, click the link in the **Sponsorship effort** column. After you activate an effort, you can make changes to the effort activation process as necessary. To access the Sponsorship Effort Activation Status page and view information about the activation process for a sponsorship, click the process date of the effort in the **Sponsorship efforts ready to be activated** grid.

Exports Tab

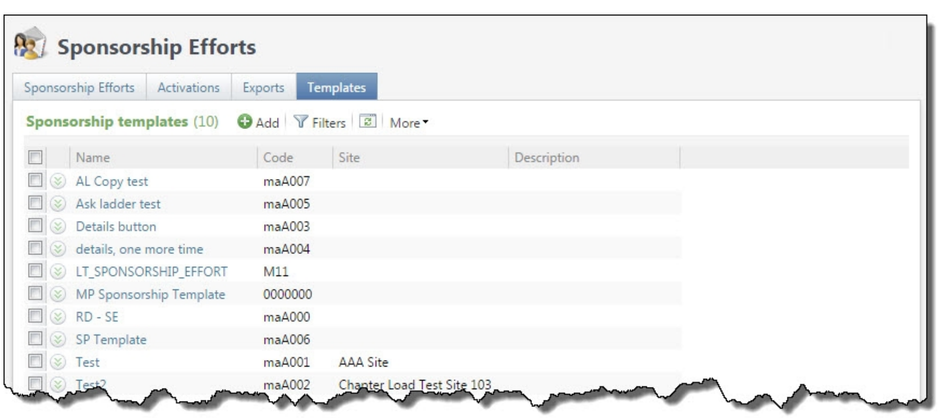
On the Exports tab, the **Sponsorship effort export processes** grid lists the sponsorship effort export processes in the database and displays details about each sponsorship effort.

On this tab, you can go to a detailed view of a sponsorship effort and process, run a process, and add, edit, or delete a sponsorship effort export process.



Templates Tab

On the Templates tab, the **Sponsorship templates** grid lists the sponsorship processes in the database and displays the **Name**, **Code**, **Description**, and **Site** for each process. You enter this information when you create the sponsorship process and add it to the database. Depending on your security rights and system role, you can perform functions to manage sponsorship process in the database from the action bar.



Sponsorship Template and Process Tasks

From the Templates tab of a sponsorship effort, you can manage templates and their associated processes.

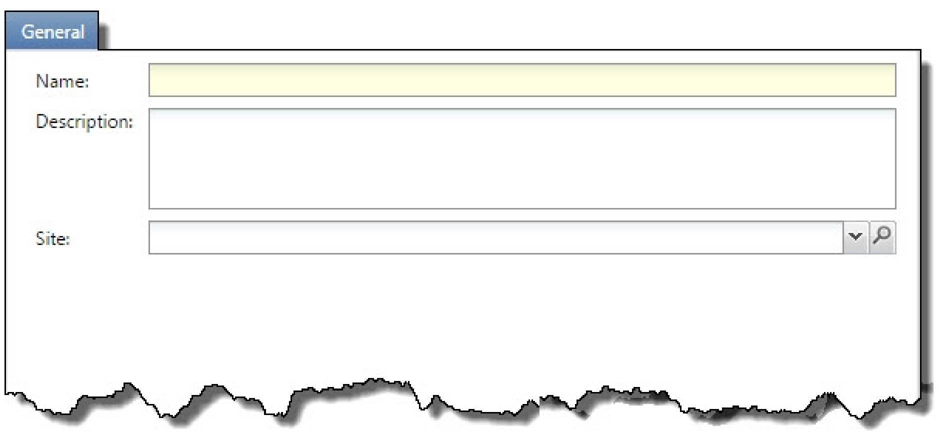
Add Sponsorship Effort Process

You create sponsorship effort processes (or templates) to generate different types of sponsorship efforts. For example, you can create a sponsorship effort process for sponsorship welcome kits. Each month, you run the process to generate welcome kit efforts for anyone new to sponsorship.

Note: This process is typically completed by the IT Administrator at your organization.

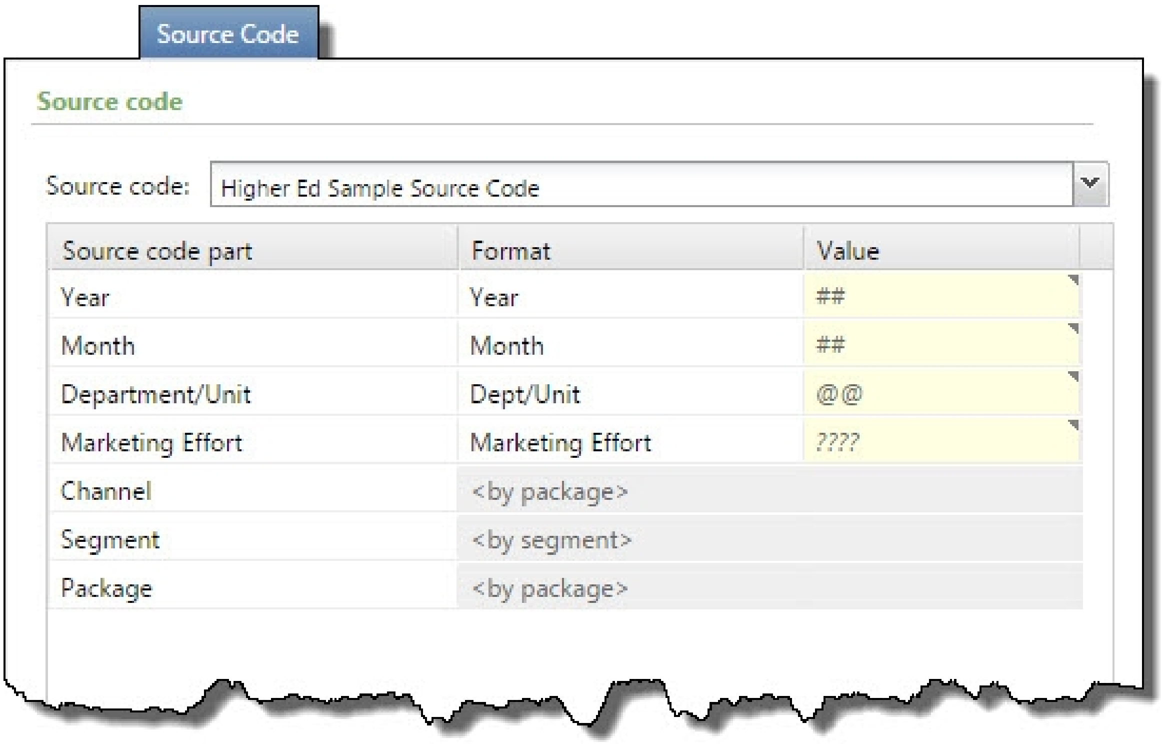
Add a sponsorship effort process

1. From the Sponsorship page, click **Sponsorship efforts**. The Sponsorship Efforts page appears.
2. In the **Tasks** pane, click **Add new template**. The Add sponsorship effort process screen appears and defaults to the General tab.

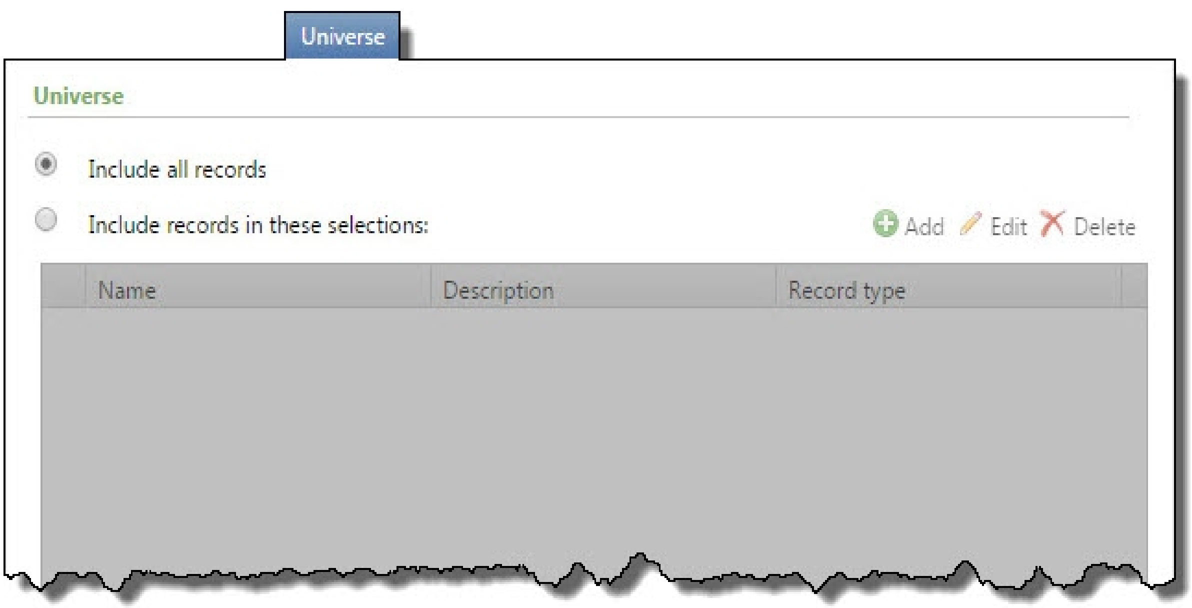


3. On the General tab, you can define basic information about the template.

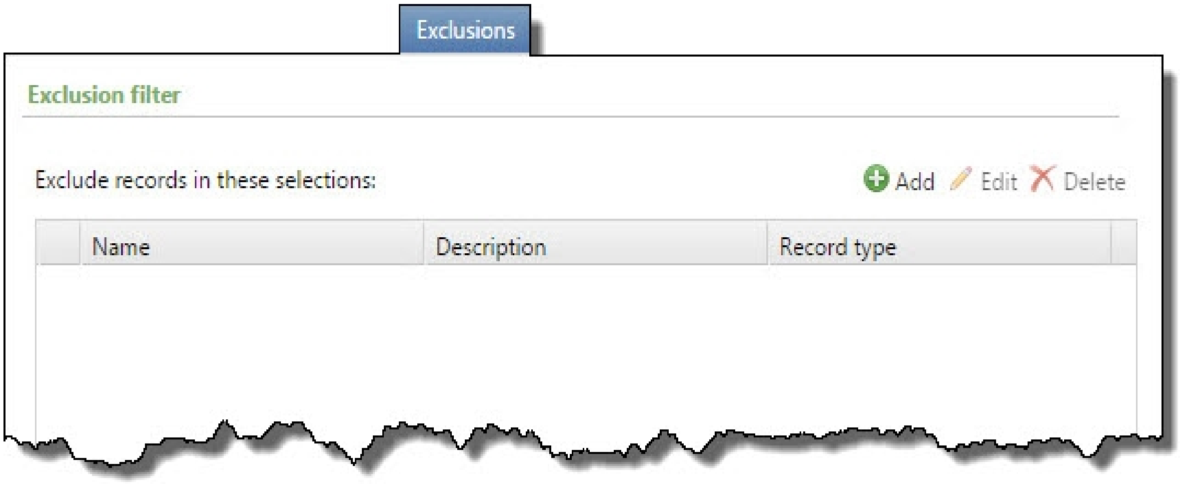
   For information about the items on this screen, seeAdd Sponsorship Effort Process Screen on page 228.
4. Select the Source code tab. On this tab, you specify a source code layout, and specific components of the source code, such as Effort, Effort year, Campaign, and Segment.



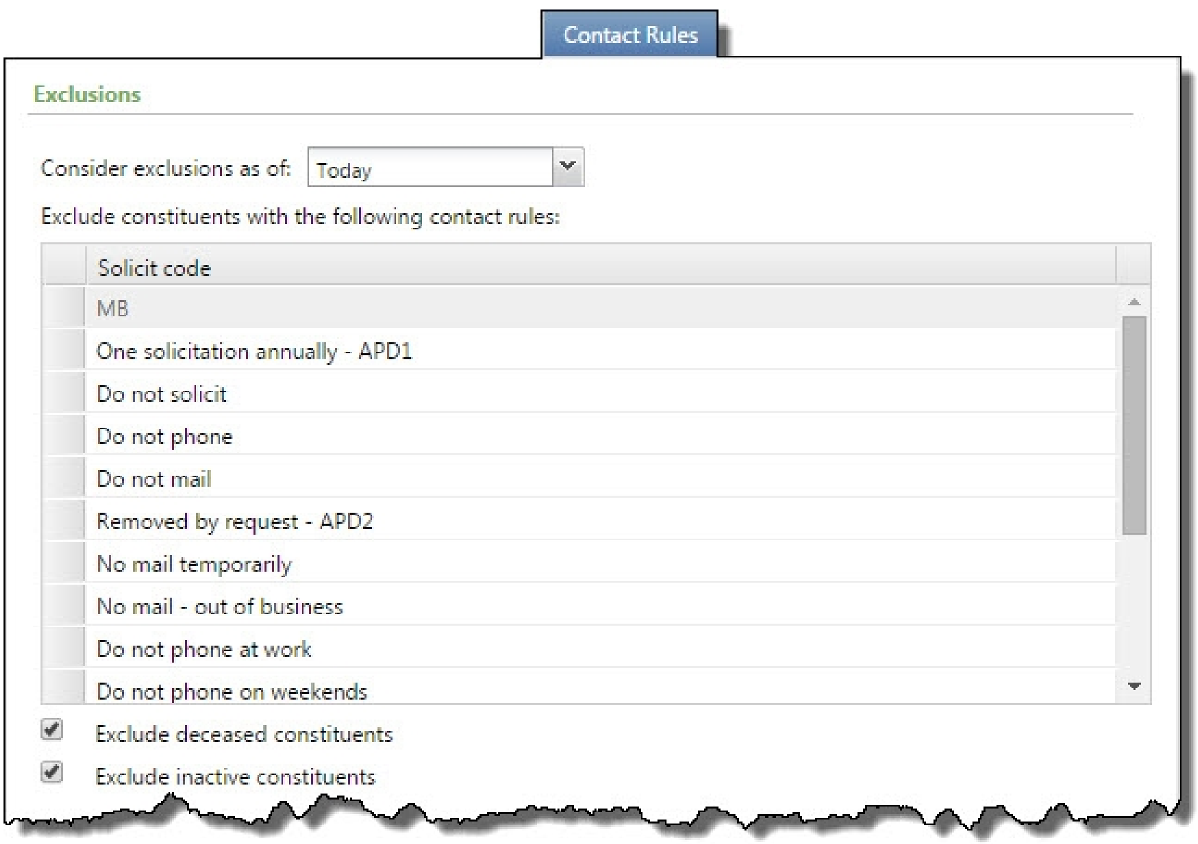
5. Select the Universe tab. On this tab, you determine the subset of records available for inclusion in the sponsorship effort process. By specifying groups of records for inclusion, you reduce the "universe" of potential records to include the sponsorship effort process to only those that meet the criteria of the selections you specify as universe filters.



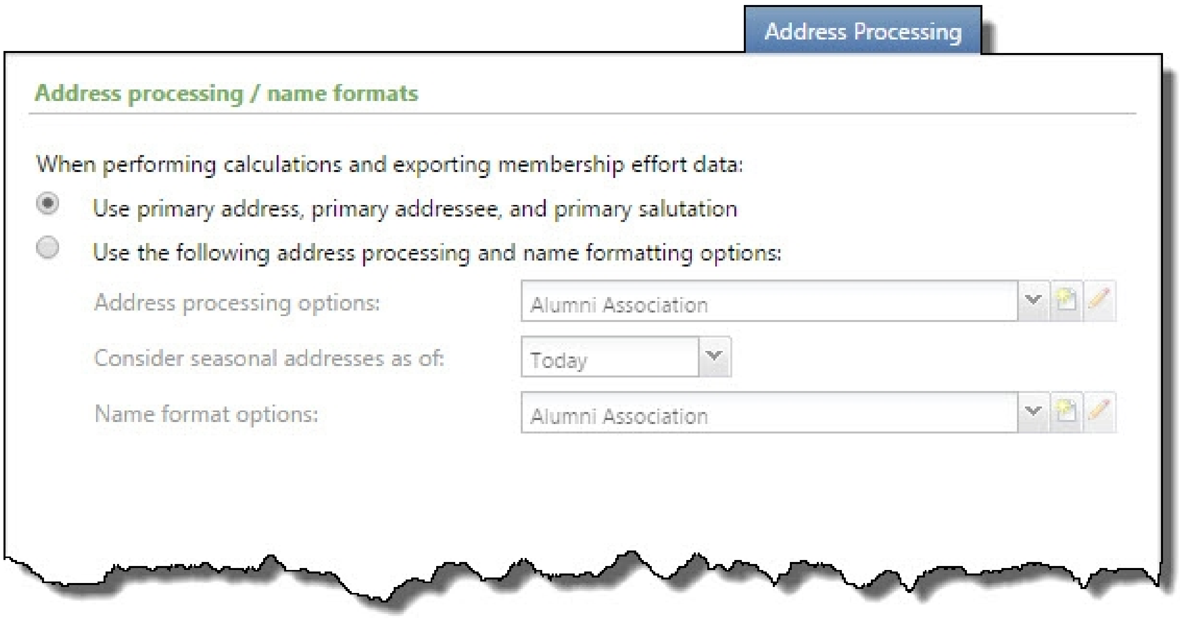
6. Select the Exclusions tab. On this screen, you determine which records to exclude from the sponsorship effort process. You can use an existing selection to exclude records from the sponsorship effort process, or create a new selection to use for exclusions.



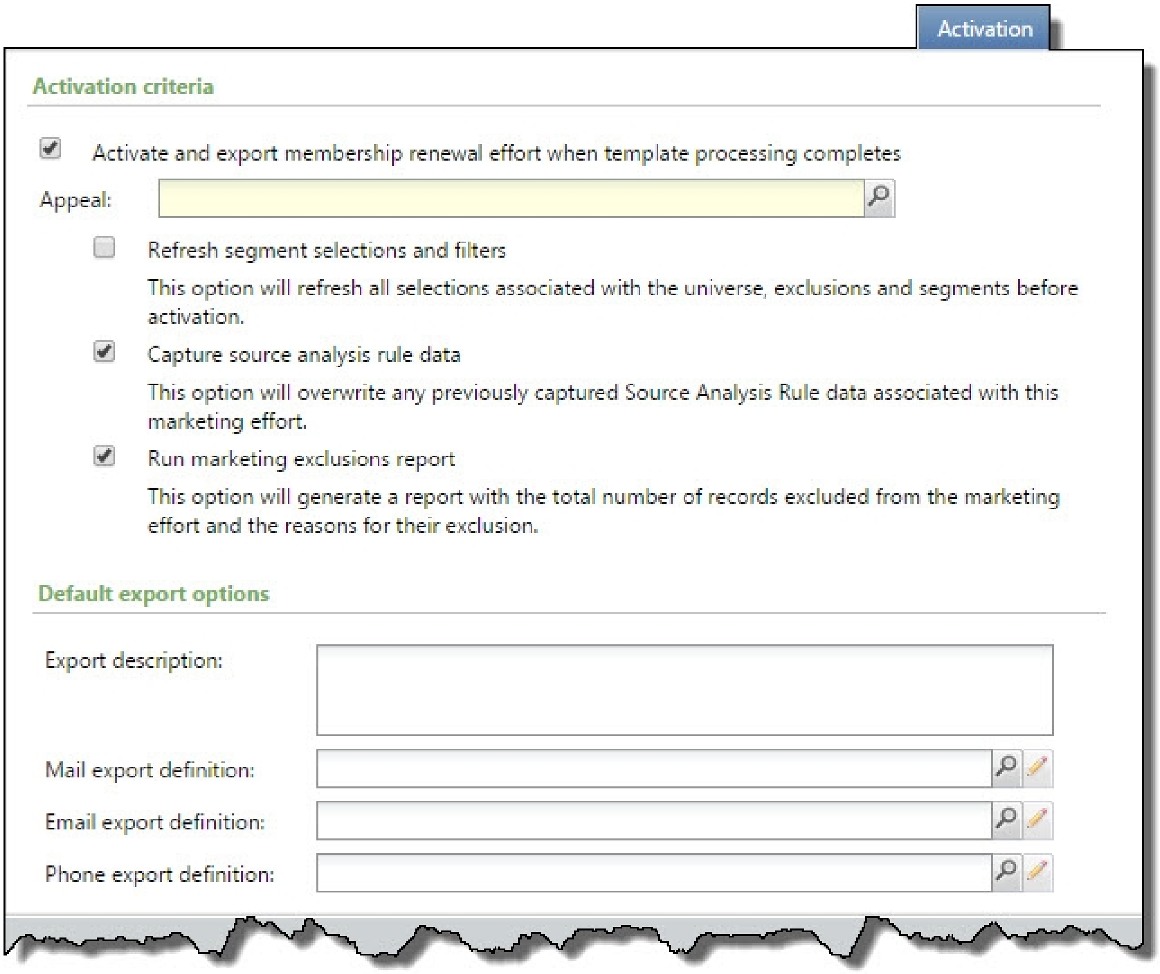
7. Select the Contact rules tab to enter information about any exclusions for this effort.



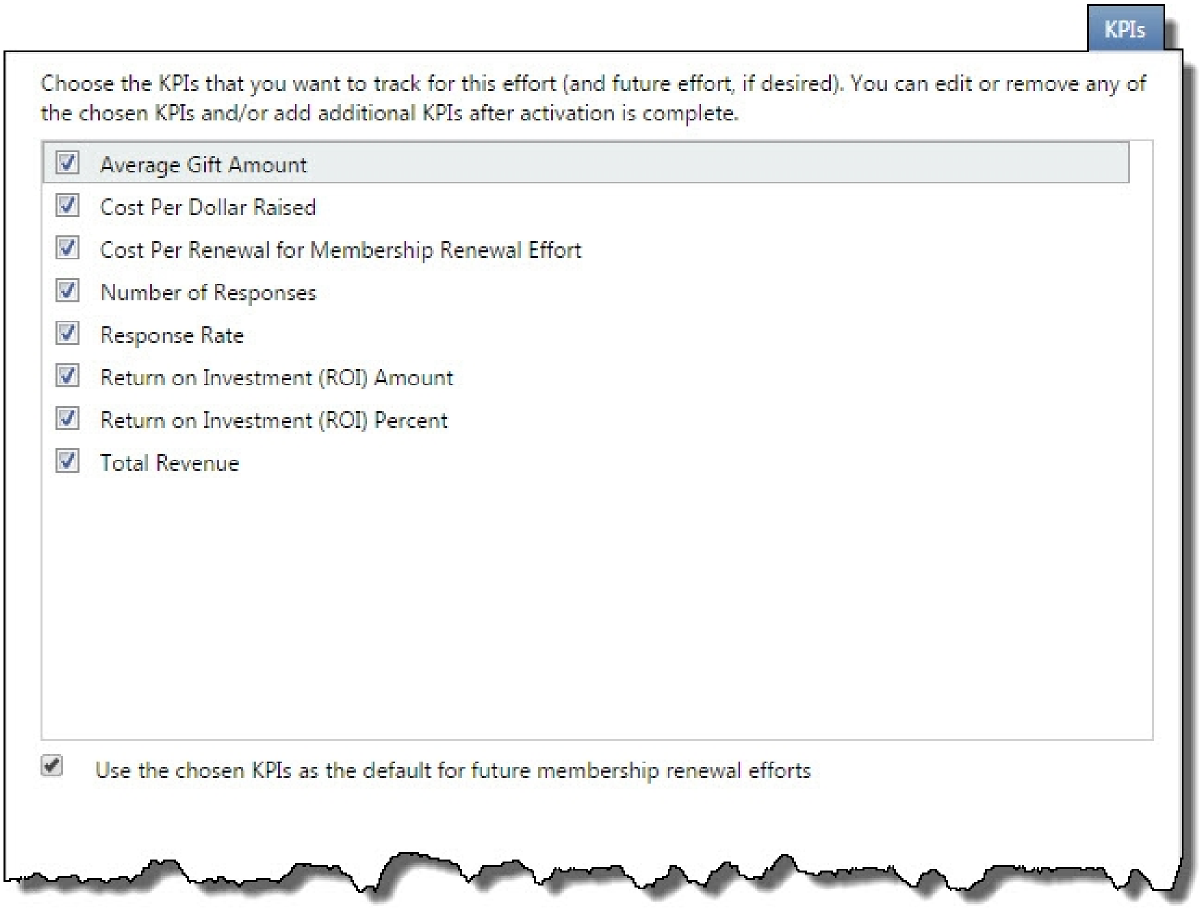
8. Select the Address processing tab to define the address and name formats to use for the effort. For example, you can add a unique address processing option set for your holiday cards.



9. Select the Activation tab to set the effort to activate and export automatically after template processing is complete. You can also assign an appeal and choose the default export definitions to use for any packages that do not have an export definition defined.



10. Select the KPIs tab to choose each KPI you want to track for the effort.



11. To close the screen and save the information you entered, click **Save**. The new template page appears. For information about this page, see Template Page for Sponsorship Efforts on page 233.

Add Sponsorship Effort Process Screen

The tables below explain the items on the Add sponsorship effort process screen.

General Tab

Screen Item	Description
Name	This is a required field with 100 character length field name. Enter a name for the process that is easily recognizable when you use the process again.

Screen Item	Description
Description	This field has a 255 character length field name. Enter description information that further identifies the process. For example, you can enter "Mailed to new sponsors within one month of the sponsorship start date" to explain the Welcome Kit template.
Site	System administrators can establish security access to sponsorships based on site. When you select a site in the **Site** field, only users associated with the selected site can access the sponsorship process.

Source code tab

Screen Item	Description
Source code	In the **Source code** field, select a code layout. Layouts are created on the Source Codes page. After you select a source code layout, each source code part for the layout appears below. Enter a value for each code part that requires one. The values allowed depend on how the source code part is defined in the layout. Gray fields indicate fixed codes you cannot edit. For example, you defined fixed values for the "Department" source code part — "Membership" or "Development." After you select "Membership" or "Development," the 'M' or 'D' code value appears in the field to the right and is disabled. Yellow fields display the format for the code you can enter. For example, you have a source code part for "Month" and you specified that the only valid format for "Month" is a two digit code (# = 0 though 9). The field displays ## to indicate that you need to enter two digits. The fields for Channel, Package, Segment and Test Segment display "<by channel>," "<by package>," etc. These codes are set on the marketing effort segment.

Universe Tab

Screen Item	Description
Include all records	When you mark **Include all records**, the sponsorship effort process can potentially include all records from all sources (if you have more than one) and lists. In this case, all your records are available for inclusion. You can later specify to exclude specific sets of donors on the Exclusions tab.

Screen Item	Description
Include records in these selections	When you mark **Include records in these selections**, you are specifying that only a subset of your records will be available for inclusion in the sponsorship effort process. By specifying groups of records for inclusion, when you later create segments for the sponsorship effort process, the potential pool of records for those segments is limited to only those records that meet the criteria of the universe selections you specify here. No matter what selections you choose for each segment, they will not include any records that do not exist in the universe selections you specify. It is important to note that by specifying universe selections, you are reducing the “universe” of potential records to include in the sponsorship effort process to only those that meet the criteria of the selections you specify as universe filters. Click **Search** to locate a selection or **Add** to create a new one.

Exclusions Tab

Screen Item	Description
Exclude records in these selections	In the **Exclusion filter** frame when you specify selections, you define a set of sponsors you do not want to include in the sponsorship effort process. When you specify exclusion selections, all record sources are still available when you later create segments for the sponsorship effort process (unlike when you define the sponsorship’s universe). The set of excluded donors is excluded from every segment in the sponsorship. Click **Search** to locate a selection or **Add** to create a new one. If you do not specify any exclusion selections, all sponsorships are available for the sponsorship effort process (depending on the defined universe).

Contact rules tab

Screen Item	Description
Consider exclusions as of	Select whether to include exclusions as of today or a specific date.

Screen Item	Description
Exclude constituents with the following contact rules	You can exclude constituents from a marketing effort based on the contact preferences stored on their constituent records. To exclude constituents based on contact preferences, in the **Solicit codes** grid, select any solicit codes to exclude from the marketing effort. To remove constituents with invalid or missing addresses, on their records set the Solicit Code to "Do not mail." Then select "Do not mail" in the **Exclude constituents with the following contact rules** field. A solicit code can be optional, default, or required. If the solicit code is optional, you can add it to the exclusions of the marketing effort as applicable. If the solicit code is marked as a default, it will automatically appear as an exclusion for a marketing effort, but you can remove it. If a solicit code is required, it will automatically appear as an exclusion for the marketing effort and cannot be removed.
Exclude deceased constituents	To exclude deceased constituents from the marketing effort, select this checkbox. When an individual is marked deceased, a status of "Deceased" appears in the profile summary frame of the constituent page. This option appears only for system administrators and other users who were granted the **Show Exclude Deceased Constituent Checkbox** system permission found under Configuration, Exclusions in *System Roles*.
Exclude inactive constituents	To exclude inactive constituents from the marketing effort, select this checkbox. When an individual or organization is marked inactive, a status of "Inactive" appears in the profile summary frame of the constituent page. This option appears only for system administrators and other users who were granted the **Show Exclude Inactive Constituent Checkbox** system permission found under Configuration, Exclusions in *System Roles*.

Address processing tab

Screen Item	Description
Use primary address, primary addressee, and primary salutation	To use the primary address, primary addressee, and primary salutation for records included in the marketing effort, select this option. If a constituent has no Primary Address, Primary Addressee, or Primary Salutation, then the record is exported with a blank address, addressee, or salutation. To ensure that every constituent has a proper addressee and salutation, in *Marketing and Communications*, under **Configuration**, you can configure the program to automatically add a default addressee and salutation to each constituent record.

Screen Item	Description
Use the following address processing and name formatting options	To define custom address and name formatting options for the marketing effort, select this option. For example, you can add a unique address processing option set for your holiday appeal. You set name formatting and address processing options in *Marketing and Communications*, under **Configuration**. Address processing options — Select a pre-defined set or create one. Consider seasonal addresses as of — Select a date to take seasonal addresses into consideration when a marketing effort is processed to ensure delivery to the correct location. For example, if a constituent stays at a vacation home in December, you can send your marketing effort there rather than the primary address. Consider seasonal addresses as of — Select a date to take seasonal addresses into consideration when a marketing effort is processed to ensure delivery to the correct location. For example, if a constituent stays at a holiday home in December, you can send your marketing effort there rather than the primary address. Name format options — Select a pre-defined set or create one.

Activation Tab

Screen Item	Description
Activate and export effort when template processing completes	Select this option to automatically activate the effort and create the export file after the template is processed. If you do not select **Activate and export effort when template processing completes**, any values you enter in the fields on this tab are used as defaults on the Run Effort Export Process screen.
Appeal	Select the appeal to associate with this effort.
Refresh filters, selections, and segments	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.
Run marketing exclusions report	To run the Marketing Exclusions Report when you activate the acknowledgement, select **Run marketing exclusions report**. Running this report can hinder performance so you may want to turn if off for certain efforts, such as weekly acknowledgement mailings.

Screen Item	Description
Export description	Enter a description for the export process.
Mail/Email/Phone export definition	Select an export definition for the mail channel, phone channel, and/or email channel. These definitions are used for any packages that do not have an export definition defined already. While these fields are not required, if you leave them blank and have packages without export definitions defined, the export will not process automatically when **Activate and export effort when template processing completes** is selected. For that reason, we recommend that you always add export definitions to use as a defaults when you export automatically. For more information about how to create export definitions or how to export efforts see Direct Marketing Efforts on page 131.

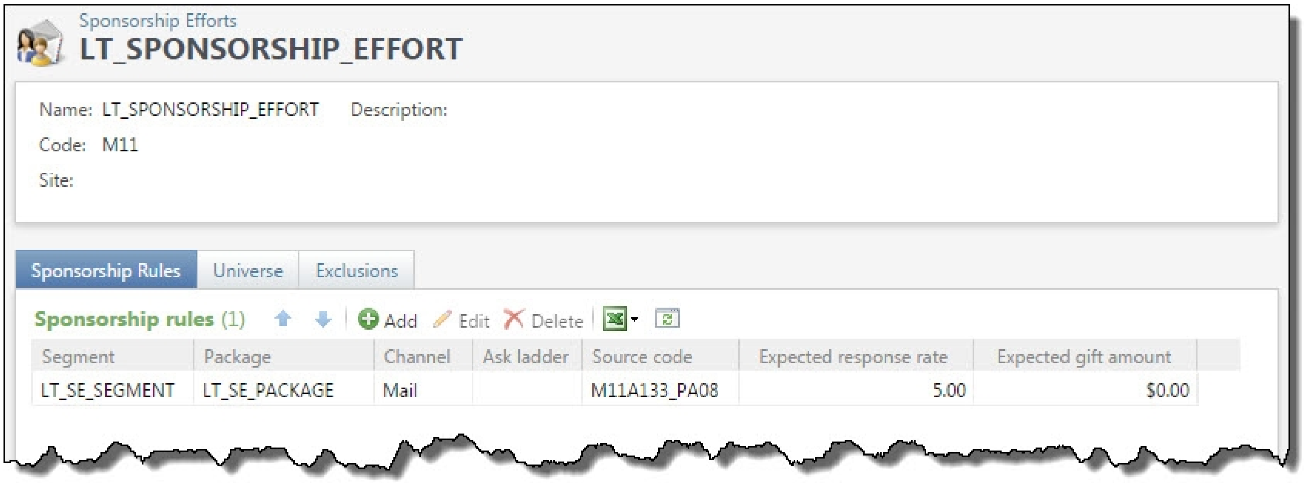
KPIs tab

Screen Item	Description
KPIs	Select the checkbox for each KPI to track for the marketing effort. These appear on the KPIs tab of the marketing effort. When you activate the marketing effort, the program automatically creates an instance of each marketing effort KPI you selected and associates it with the activated marketing effort. The KPIs you select also appear on a KPI dashboard.

Template Page for Sponsorship Efforts

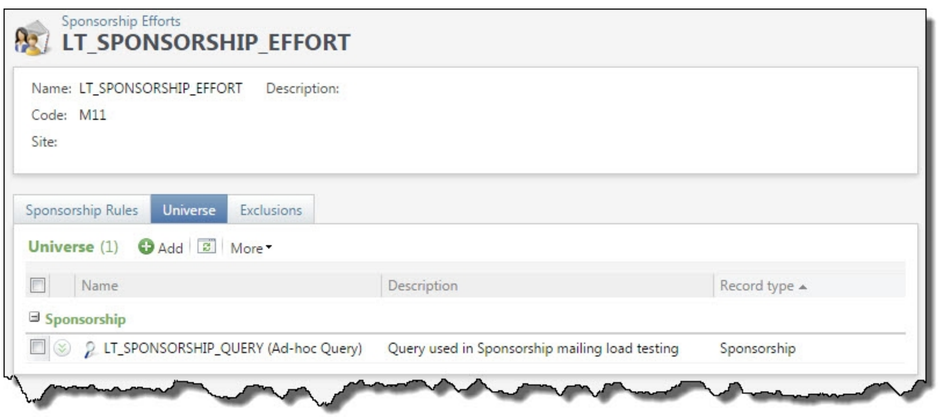
Use the template page for an individual sponsorship effort process to manage the sponsorship rules, universe, and exclusions for that process. To access a sponsorship effort process's template page, on the Templates tab, select a sponsorship effort process and click **Go to template**. The template page for the selected process appears.

On the Sponsorship rules tab, view any sponsorship rules for the selected process. The tab lists information about the sponsorship rules such as the required segment, package, and assumptions.



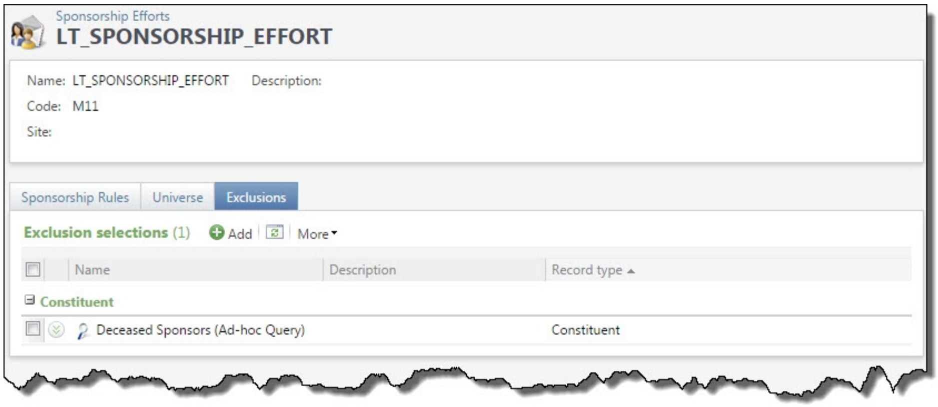
On this tab, you can add, edit, and delete sponsorship rules. For more information about these tasks, seeAdd Sponsorship Effort Rules on page 235.

On the Universe tab, the **Universe** grid lists any inclusions selected for the sponsorship effort process and displays the name and description of each selection.



On this tab, you can search for a specific universe selection, and add, edit, or delete the inclusions defined for the effort. For more information about these tasks, see Universe Tab on page 117.

On the Exclusions tab, the **Exclusion selections** grid lists any exclusions selected for the sponsorship effort process and displays the **Name** and **Description** of each exclusion selection.



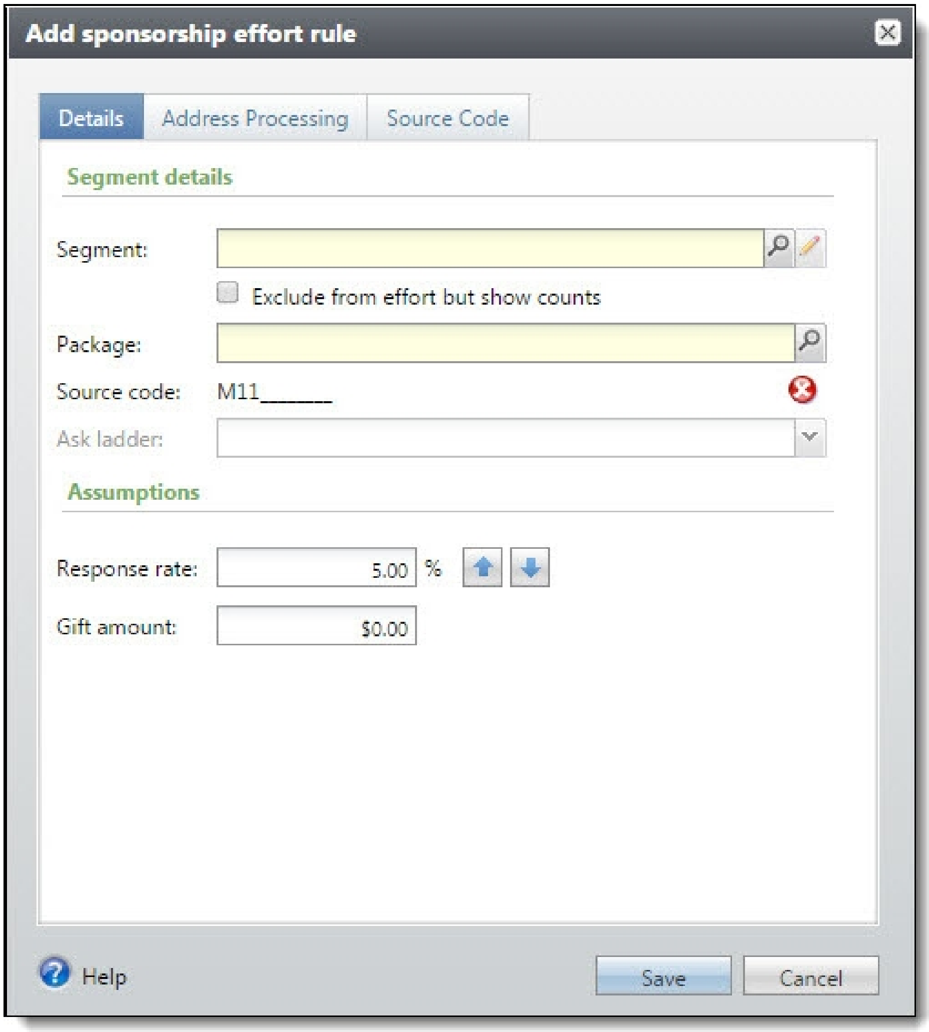
On this tab, you can search for a specific exclusion selection, and add, edit, or delete exclusions. For more information about these tasks, seeExclusions Tab on page 118.

Add Sponsorship Effort Rules

Sponsorship effort rules are criteria you define to determine when and how sponsorship effort processes are run, and the segments included in the effort. You can add one or multiple sponsorship effort rules to each sponsorship effort process. Each sponsorship effort rule you add maps one-to-one with a segment in the sponsorship effort.

Add a sponsorship effort rule

1. On a sponsorship effort template page, select the Sponsorship rules tab.
2. On the action bar, click **Add**. The Add sponsorship effort rule screen appears.



3. On this screen, you can enter **Segment details**, **Package details**, and define **Assumptions**.

   For information about the items on this screen, see Add Sponsorship Effort Rule Screen on page 236.

4. Click **Save**. You return to the Sponsorship rules tab. The data you entered appears in the **Sponsorship rules** grid.

Add Sponsorship Effort Rule Screen

Screen Item	Description
Segment	Use the binoculars to search for a specific segment to use for the sponsorship effort. You must select a sponsorship segment. If you select a segment with a source code part value assigned, this value defaults into the source code field below.

Screen Item	Description
Exclude from effort but show counts	To exclude the segment from the sponsorship effort, select this option. 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. Segment exclusions also allow you to group remainders from a segment so they are not included in other segments. For more information, seeSegment Exclusions on page 82. When you select this option, all other options are disabled.
Segment code	This field displays the default source code part value from the selected revenue segment or you can enter a value.
Ask ladder	If you include ask ladders on a sponsorship effort, select the ask ladder you want to associate with this sponsorship process.
Package	Click the binoculars to search for the package to associate with this segment. Packages are the different pieces available for a marketing effort. If you select a package with a source code part value assigned, this value defaults into the source code field below.
Package code	This field displays the default source code part value from the selected package or you can enter a value.
Ask ladder	If you include ask ladders on a sponsorship effort, select the ask ladder you want to associate with this sponsorship process.
Cost	The **Cost** field displays the cost for the package you select. The cost defaults from the information entered for the package on the Packages page.
Response rate	You can enter a default expected **Response rate** to your sponsorship effort. Entering this information enables you to compare the expected versus actual response rate when you analyze the sponsorship effort later.
Gift amount	You can specify a default expected **Gift amount** from respondents. Entering this information enables you to compare the expected versus actual response rate when you analyze the sponsorship effort later.

Move Sponsorship Effort Rules

Use the arrows to move selected rules up or down in the grid. The order of rules in the grid is important because rules are processed in order from top to bottom.

Run Sponsorship Effort Process

Once you add or edit the sponsorship effort process, you run the process to create sponsorship efforts for sponsors.

Run a sponsorship effort process

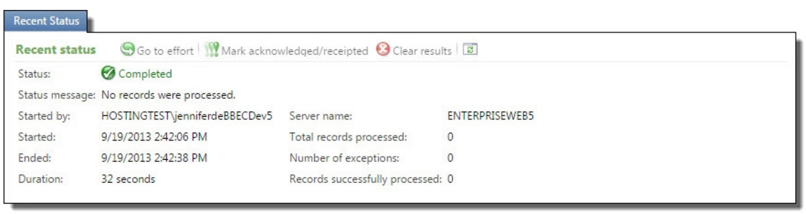
1. On the Templates tab, select a sponsorship effort process to run.
2. Click **Start process**. The Process status page appears on the Recent status tab.

Tabs of a Process Status Page

Each business process in the database has a status page. The process status page contains information specific to the process. You enter this information when you add the process to the database. Each process status page also includes information about the most recent instance and historical data about the process. On some process status pages, you can manage the job schedules of the process. To help manage this information, each process status page contains multiple tabs.

Recent Status Tab

On the Recent status tab, you view the details of the most recent instance of the process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many of those records processed successfully and how many were exceptions.

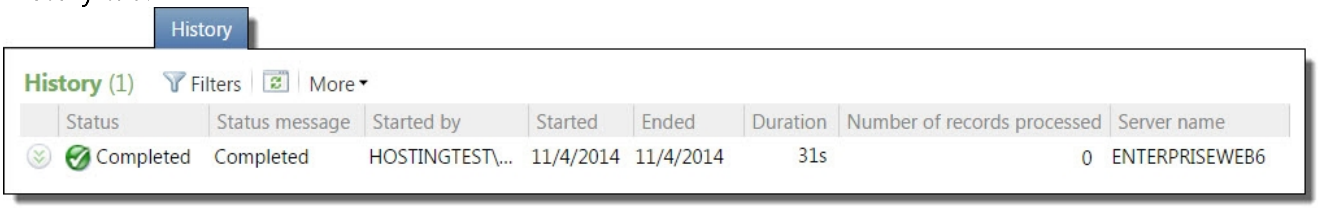


History Tab

Each time you run a business process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the process. The information in the grid includes the status and date of the instance.

On the History tab, you can limit the status records that appear in the grid. You can filter by the process status. If you filter the records that appear in the grid, it can reduce the amount of time it takes to find a process instance. For example, if you search for an instance that did not finish its operation, you can select to view only status records with a **Status** of Did not finish. To filter the records that appear in the grid, click the funnel in the action bar. The **Status** field and **Apply** button appear so you can select the status of the instances to appear in the grid. To update the information that appears, click **Refresh List** on the action bar.

Depending on your security rights and system role, you can delete a status record from the grid on the History tab.



Delete a Status Record from the History Tab of a Process Status Page

On the History tab of a process status page, you can delete a specific status record of the process. When you delete a status record, you delete the specific instance and all of its history.

Delete a status record from the History tab

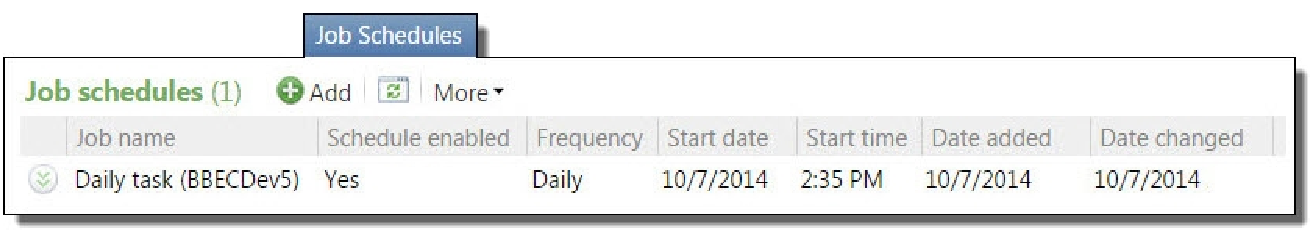
1. On the History tab of the process status page, select a status record and click **Delete**. A confirmation message appears.

> ***Note:*** You can filter the records in the grid by the status of the process to reduce the amount of time it takes to find an instance of the process. For example, to search for a completed instance, click the funnel icon, select "Completed" in the **Status** field, and click **Apply**. Only completed instances appear in the grid.

2. Click **Yes**. You return to the History tab. The selected status record no longer appears.

Job Schedules Tab (Not Available on All Process Pages)

On the Job schedules tab, you can view the job schedules of the process in the database. The details in this grid include the name, whether a job schedule is enabled, the frequency of the job schedule, the start date and time and end date and time, and the date the job schedule was added and last changed in the database. You enter this information when you set the job schedule of the process.



Depending on your security rights and system role, you can add, edit, and delete job schedules that appear on the Job schedules tab. To update the information that appears, click **Refresh List**.

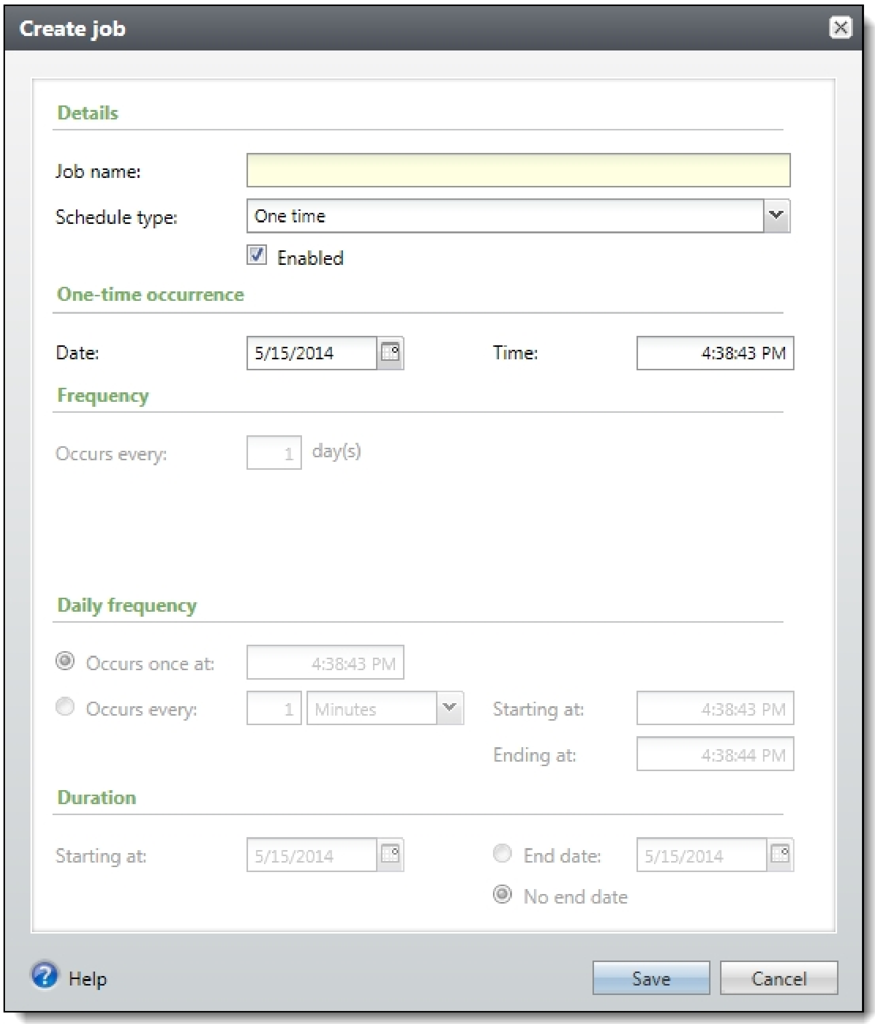
Schedule Process Jobs

You can create a job schedule to automatically run a business process. When you create a schedule for a process, the program exports and runs the process at the scheduled instance or interval. For example, you can schedule a process to run at a time convenient for your organization, such as overnight. To create a job schedule, click **Add** on the Job schedules tab of the process status page. The Create job screen appears.

> ***Note:*** To create a job schedule from any tab of the process status page, click **Create job schedule** under **Tasks**.

Create a job schedule

1. On the Job schedules tab of the process, click **Add**. The Create job screen appears.



2. In the **Job name** field, enter a name for the scheduled process.
3. By default, the schedule is active. To suspend it, clear the **Enabled** checkbox.
4. In the **Schedule type** field, select how often to run the process. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*. Your selection determines which other fields are enabled.

   a. For a process that runs once, select the date and time to run it.
   b. For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it. For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs.
   c. For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.
5. To return to the Job schedules tab, click **Save**.

Edit Job Schedules

After you create a job schedule for a process, you can update it. For example, you can adjust its frequency. You cannot edit the package selected to create the job schedule.

Edit a job schedule

1. On the Job schedules tab, select a job and click **Edit**. The Edit job screen appears. The options on this screen are the same as the Create job screen. For information about these options, see Create Job Screen on page 241.
2. Make changes as necessary. For example, in the **Schedule type** you can change how often to run the process.
3. Click **Save**. You return to the Job schedules tab.

Create Job Screen

Screen Item	Description
Job name	Enter a name for the job schedule.
Schedule type	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*.
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs just once, select the date and time to run it.
Frequency	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.

Screen Item	Description
Daily frequency	For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select **Occurs once at** and enter the start time. To run a process at intervals, select **Occurs every** and enter the time between instances, as well as a start time and end time.
Start date	For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.

Delete Job Schedules

On the Job schedules tab of the status page, you can delete a job schedule of the process. This deletes the scheduled job as well as any changes made to it outside the program.

Delete a job schedule

1. On the Job schedules tab, select the job and click **Delete**. A confirmation screen appears.
2. Click **Yes**. You return to the Job schedules tab.

Start Process

This task allows you to start the selected business process from the process page.

Edit Process

This task allows you to edit the selected business process form the process page.

Create Job Schedule

This task allows you to create a job schedule that tells the application when to automatically run the selected business process.

Delete Process

This task allows you to delete the selected business process from the process page. Before you delete a process, we strongly recommend you back up your data. Unless you previously save the transmission file or prenotification authorization file, once you delete the process, you can no longer use its output file that contains the data extracted from your database.

Exception Report

When you run a process, the process status page appears and displays the number of records that did and did not process. Records that fail to process are called exceptions. When there are exceptions, you can view the Exception Report for the generated process. This report lists the expectations generated and explains why each did not process properly. You can view the most recent Exception Report from the Recent status tab of the process page. If you want to view an older report, you can do so from the History tab of the process page.

To print a report, click the **Print** button on the toolbar of the report. You can also set up the page format for the print job to determine how the printed report looks. You can also use the report information in another software application or save the report in another file format, such as to share the data with someone who cannot access the program. When you click the **Export** button on the toolbar, you can export the information into a shared application, such as Microsoft *Excel*, or save the report into an easily shared format, such as Adobe *Acrobat* (*.pdf) or a Web archive (*.mhtml).

Process Status Report

When you execute a process in *Sponsorships*, the process generates a status report which is housed on the Recent Status tab of the process page. For example, if you execute a sponsorship transfer the Transfer Report appears on the Recent Status tab. The report lists details about the transfer, such as all sponsors included in the transfer, the original sponsorships and the new sponsorships. A link to this report also appears on the History tab of the process page. From this tab you can view any archived status reports.

To print a report, click the **Print** button on the toolbar of the report. You can also set up the page format for the print job to determine how the printed report looks. You can also use the report information in another software application or save the report in another file format, such as to share the data with someone who cannot access the program. When you click the **Export** button on the toolbar, you can export the information into a shared application, such as Microsoft *Excel*, or save the report into an easily shared format, such as Adobe *Acrobat* (*.pdf) or a Web archive (*.mhtml).

Generate Windows Scripting File

A Windows Scripting File (*.wsf) is an executable script file format for Windows that can incorporate VBScript (*.vbs) routines and include XML elements.

Generate a Windows Scripting File

1. On the process that requires a Windows Scripting File, click **Generate WSF** under **Tasks**.
2. Your browser prompts you to open or save the file. To save the file, choose the file location.

Note: The download process varies according to the browser you use.

Sponsorship Effort Records

When a sponsorship effort process runs successfully, the program automatically creates an effort. The sponsorship efforts record page is similar to the record page for other marketing efforts. It includes the same tabs and you can perform the same tasks as a direct marketing effort. For more information about marketing effort records, see Marketing Effort Records on page 114.

Segments for Sponsorship Efforts

You can add sponsorship segments and segment groups to sponsorship efforts. For example, if the effort is a reminder to existing sponsors whose sponsorships are expiring soon, you can add segments that contain constituents whose sponsorships are set to expire in 20 weeks, grouped by sponsorship level.

For more information about how to create a sponsorship segment, see Sponsorship Segments on page 253. For more information about segment tasks, see Manage Segments on Marketing Efforts on page 75.

Segments

Segments enable you to group donors on the basis of a wide variety of different characteristics, such as recent giving history and wealth. Segmentation is key to the effectiveness of your fundraising by enabling you to target your best prospects with customized direct marketing efforts. Segmentation helps you determine where you can generate the greatest return on your investment. You can specify different packages and apply them to particular segments of your constituents.

You may want to base segments on previous marketing campaigns, statistical scoring (such as recency, frequency, monetary values), or biographical traits (such as age or gender). A variety of features are available in the program to help you analyze the success of your individual segments, including reports such as the Segment Average Gift Comparison report and the Segment Retention and Attrition report. After you create segments, you can add them to direct marketing efforts individually or in groups.

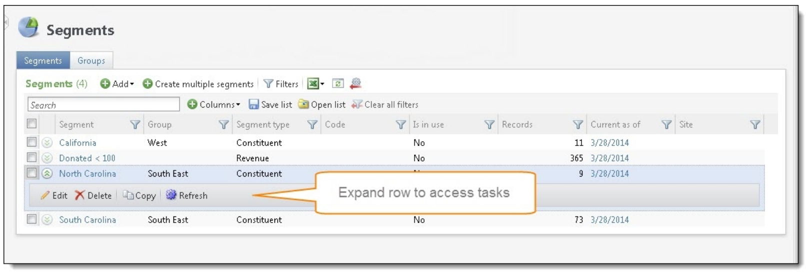
Segment Workflow

The main reason to use segmentation is that different groups of donors will have different responses to direct marketing efforts. Targeting specific groups allows you to increase the effectiveness of your efforts. You can specify different packages and apply them to particular segments of your constituents.

- ☐ Create individual segments or create multiple segments at the same time. After you create segments, you can apply them to your efforts. For more information, see Manage Segments on page 247.
- ☐ Create a constituent segment and specify the selections to use to filter your source records and select the records to include in the segment. Selections form the backbone of your segments. You can create the selections in advance or while you add the segments. For more information, see Constituent Segments on page 247.
- ☐ Add list segments to use with imported and vendor-managed lists. These segments help you track the costs and record counts for imported and vendor-managed lists used on efforts. For more information, see Add List Segments on page 288.
- ☐ Add revenue segments to group donors for acknowledgement efforts. For more information, see Revenue Segments on page 249.
- ☐ Add membership segments to group constituents for membership efforts. For more information, see Membership Segments on page 251.
- ☐ Add sponsorship segments to group sponsors for sponsorship efforts. For more information, see Sponsorship Segments on page 253.
- ☐ Create multiple segments. The segment builder allows you to create multiple segments from a limited number of selections. For more information, see Segment Builder on page 267.
- ☐ Group segments to apply all segments in a group to a direct marketing effort instead of applying them individually.

Manage Segments

You can create and manage your organization’s segments and segment groups from the Segments page. To access this page from *Marketing and Communications*, under **Acquisition and segmentation**, click **Segments**.



In the Segments list, you can view information about each segment in the database, such as its type, groups, and number of records. You can also customize the list. You can add and remove columns and choose how they filter and sort. For example, for the **Segment type** column, you can set the filters to display only revenue segments. You can also save list parameters to quickly display different views of the list. For example, you may want fewer columns displayed for revenue segments or in a different order. To save list parameters, click **Save list**. You can also search the list by keyword.

Show Me: Watch this video to learn more about list features.

You can also complete tasks for a segment from the Segments page. To access task buttons, click the double arrows next to a segment to expand the row. Use the task buttons to edit, delete, copy, or refresh a segment.

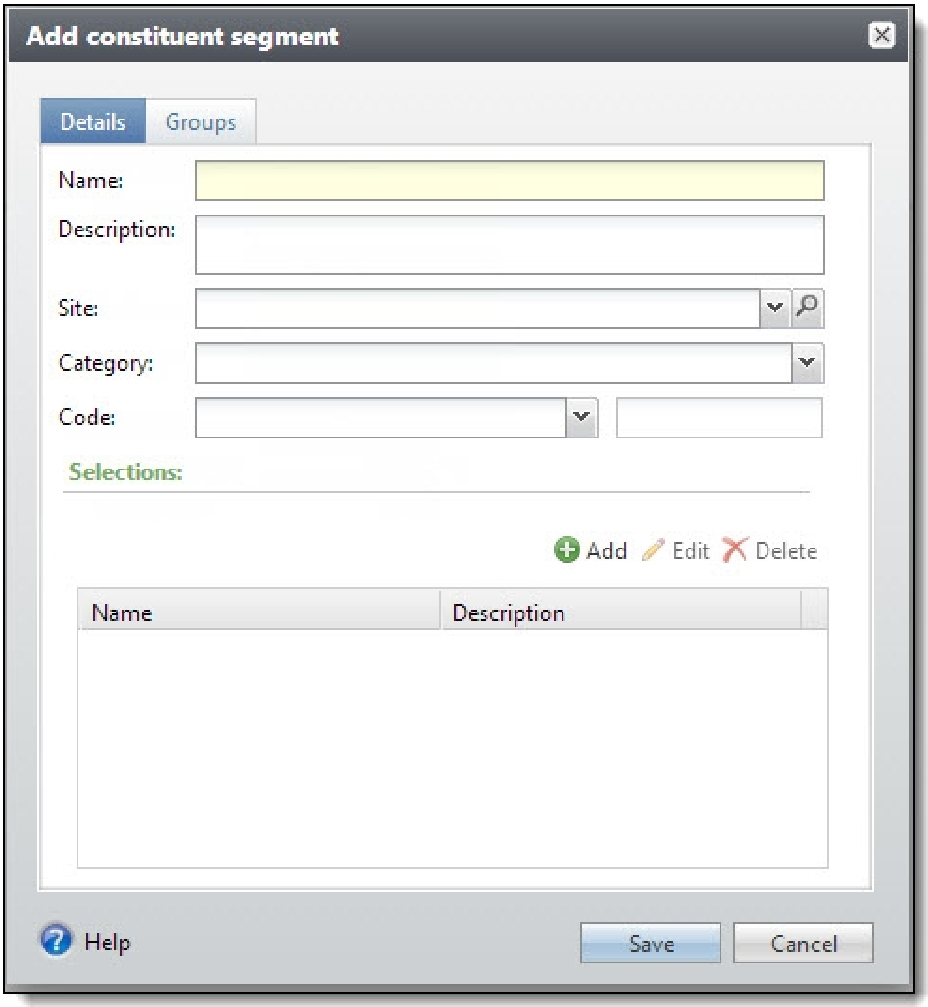
Constituent Segments

You can create constituent segments based on one or more selections of constituents. You can create selections in advance or when you add a segment. When you assign the segment to a group, it can be generated for a direct marketing effort along with all the other segments in the group at the same time.

Segments use static selections which means they maintain the same records until the selection is refreshed manually or as part of an automated process. Static selections provides better performance for activated efforts and enables them to open faster.

Add a constituent segment

1. From *Marketing and Communications*, click **Segments**. The Segments page appears.
2. Under **Tasks**, click **Add a constituent segment**. The Add constituent segment screen appears.



3. In the **Name** and **Description** fields, enter a name and description to identify the segment in efforts and analyses.
4. In the **Site** field, select the site to associate with the segment. Only users associated with the selected site can access the segment.
5. In the **Category** field, select a category to group related records for comparison and reporting. For example, "0-3 Month Subscribers."
6. If your organization configures source code parts and layouts, a code field appears. To help track the effectiveness of the segment, select the code to identify the segment. The values available are those defined on the Source Code Parts tab of the Source Codes page. If you select the same code as another segment, you receive a warning that you will create duplicate segments. You can click **Ignore** to create the segment anyway.
7. In the **Selections** grid, select a constituent selection or add one to specify the constituents to include in the segment. You can include multiple selections. The order of the selections is not important. Only records that meet the criteria for each selection are included in the segment. If you select the exact same selections as another segment, you receive a warning that you will

create duplicate segments. You can click **Ignore** to create the segment anyway. For more information about segment selections, see Segment Selections on page 275.

8. To assign the segment to a group, select the Groups tab. When a segment is part of a group, you can add it and all the other segments in the group to an effort at one time. For more information about how to create segment groups, see Segment Groups on page 273.
9. Click **Save**. You return to the Segments page.

List Segments

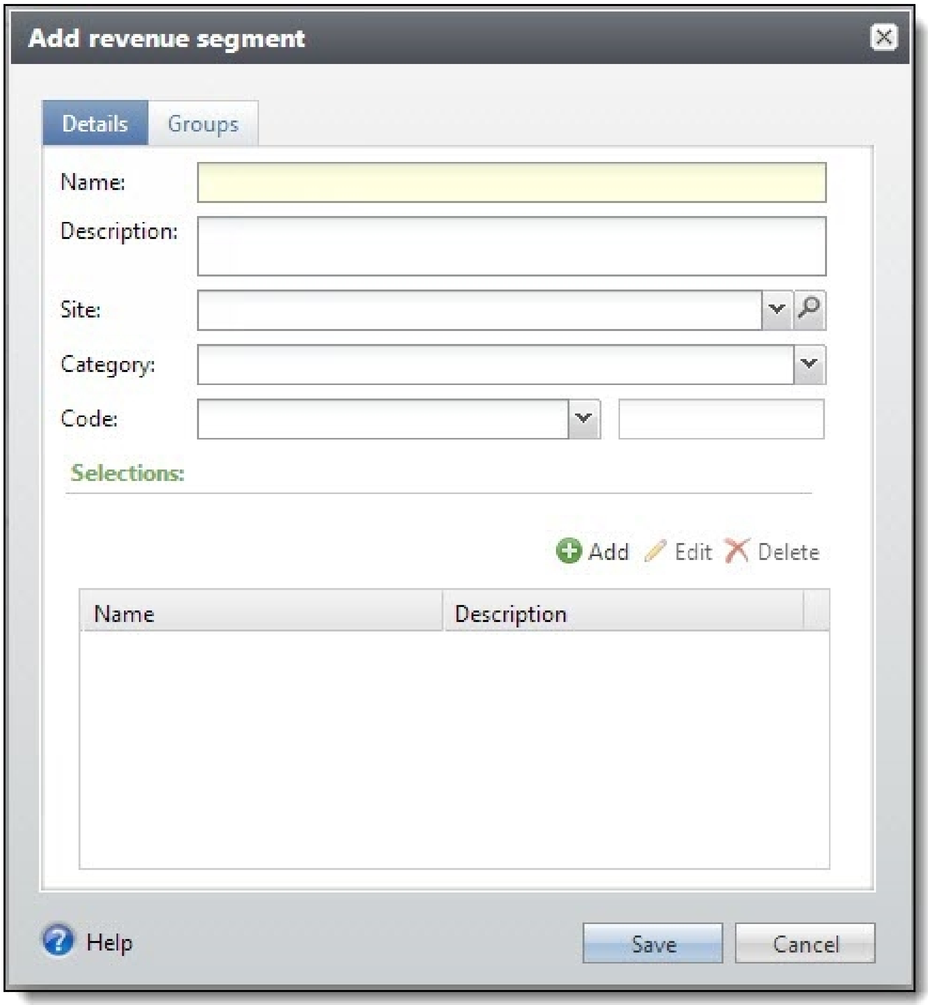
You can add list segments to use with imported and vendor-managed lists. These segments help you track the costs and record counts for imported and vendor-managed lists used on direct marketing efforts. For more information about list segments, see Add List Segments on page 288.

Revenue Segments

You can add revenue segments to group donors for acknowledgement efforts. For example, you can create segments that identify new donors or existing donors who gave more than $500.

Add a revenue segment

1. From *Marketing and Communications*, click **Segments**. The Segments page appears.
2. Under **Tasks**, click **Add a revenue segment**. The Add revenue segment screen appears.



3. In the **Name** and **Description** fields, enter a name and description to identify the segment in efforts and analyses.
4. In the **Site** field, select the site to associate with the segment. Only users associated with the selected site can access the segment.
5. In the **Category** field, select a category to group related records for comparison and reporting. For example, “First-time donor.”
6. If your organization configures source code parts and layouts, a code field appears. To help track the effectiveness of the segment, select the code to identify the segment. The values available are those defined on the Source Code Parts tab of the Source Codes page. If you select the same code as another segment, you receive a warning that you will create duplicate segments. You can click **Ignore** to create the segment anyway.
7. In the **Selections** grid, select a revenue selection or add one to specify which gift records to include in the segment. You can include multiple selections. The order of the selections is not important. Only records that meet the criteria for each selection are included in the segment. If you select the exact same selections as another segment, you receive a warning that you will

create duplicate segments. You can click **Ignore** to create the segment anyway. For more information about segment selections, see Segment Selections on page 275.

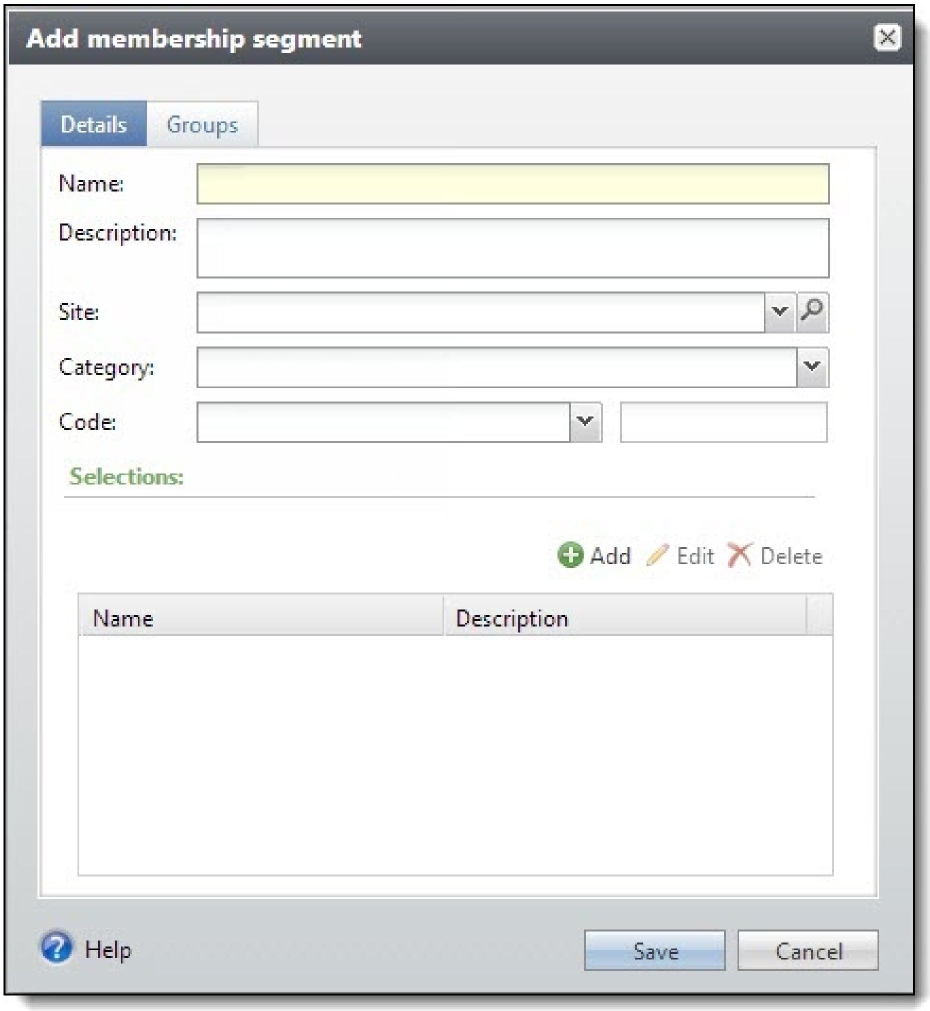
8. To assign the segment to a group, select the Groups tab. When a segment is part of a group, you can add it and all the other segments in the group to an effort at one time. For more information about how to create segment groups, see Segment Groups on page 273.
9. Click **Save**. You return to the Segments page.

Membership Segments

You can create membership segments to group constituents based on membership information. For example, you can create a segment to identify constituents with the highest membership level whose membership is set to expire in 20 weeks.

Add a membership segment

1. From *Marketing and Communications*, click **Segments**. The Segments page appears.
2. Under **Tasks**, click **Add a membership segment**. The Add membership segment screen appears.



3. In the **Name** and **Description** fields, enter a name and description to identify the segment in efforts and analyses.
4. In the **Site** field, select the site to associate with the segment. Only users associated with the selected site can access the segment.
5. In the **Category** field, select a category to group related records for comparison and reporting. For example, “Expires in 20 weeks.”
6. If your organization configures source code parts and layouts, a code field appears. To help track the effectiveness of the segment, select the code to identify the segment. The values available are those defined on the Source Code Parts tab of the Source Codes page. If you select the same code as another segment, you receive a warning that you will create duplicate segments. You can click **Ignore** to create the segment anyway.
7. In the **Selections** grid, select a membership selection or add one to specify which memberships to include in the segment. You can include multiple selections. The order of the selections is not important. Only records that meet the criteria for each selection are included in the segment. If you select the exact same selections as another segment, you receive a warning that you will create duplicate segments. You can click **Ignore** to create the segment

anyway. For more information about segment selections, see Segment Selections on page 275.

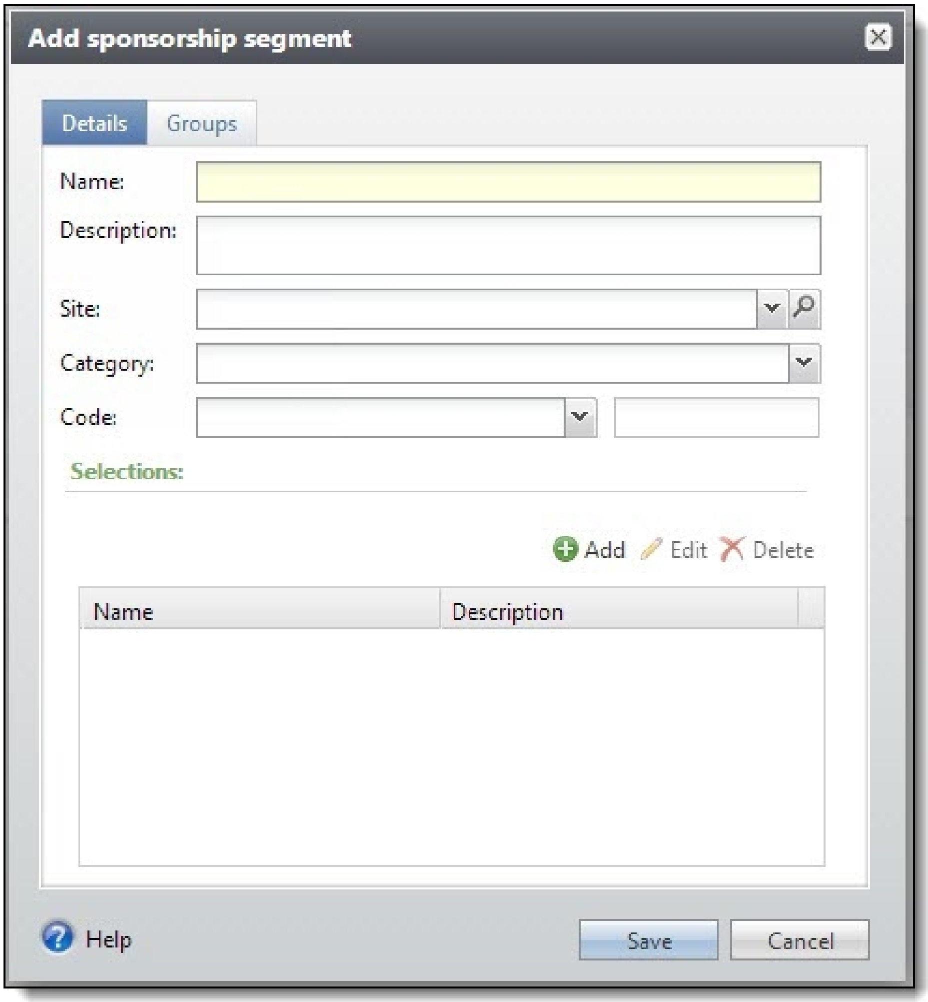
8. To assign the segment to a group, select the Groups tab. When a segment is part of a group, you can add it and all the other segments in the group to an effort at one time. For more information about how to create segment groups, see Segment Groups on page 273.
9. Click **Save**. You return to the Segments page.

Sponsorship Segments

You can create sponsorship segments to group constituents based on sponsorship information. For example, you can create a segment to identify constituents with the highest sponsorship level whose sponsorship is set to expire in 20 weeks.

Add a sponsorship segment

1. From *Marketing and Communications*, click **Segments**. The Segments page appears.
2. Under **Tasks**, click **Add** a **Add a sponsorship segment**. The Add sponsorship segment screen appears.



3. In the **Name** and **Description** fields, enter a name and description to identify the segment in efforts and analyses.
4. In the **Site** field, select the site to associate with the segment. Only users associated with the selected site can access the segment.
5. In the **Category** field, select a category to group related records for comparison and reporting. For example, "Expires in 20 weeks."
6. If your organization configures source code parts and layouts, a code field appears. To help track the effectiveness of the segment, select the code to identify the segment. The values available are those defined on the Source Code Parts tab of the Source Codes page. If you select the same code as another segment, you receive a warning that you will create duplicate segments. You can click **Ignore** to create the segment anyway.
7. In the **Selections** grid, select a sponsorship selection or add one to specify which sponsorships to include in the segment. You can include multiple selections. The order of the selections is not important. Only records that meet the criteria for each selection are included in the segment. If you select the exact same selections as another segment, you receive a warning that you will create duplicate segments. You can click **Ignore** to create the segment

anyway. For more information about segment selections, see Segment Selections on page 275.

8. To assign the segment to a group, select the Groups tab. When a segment is part of a group, you can add it and all the other segments in the group to an effort at one time. For more information about how to create segment groups, see Segment Groups on page 273.
9. Click **Save**. You return to the Segments page.

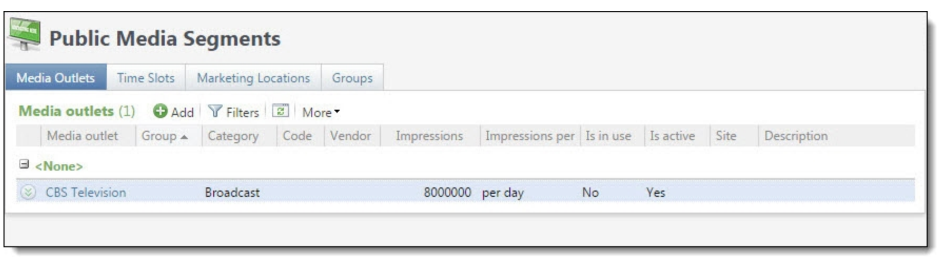
Public Media Segments

With public media segments, you can manage how your organization uses passive marketing efforts, or public media efforts, to communicate to a mass audience through content not targeted toward a specific recipient. Examples of public media efforts include content broadcast on television or radio or displayed in print publications, online through website banner ads or interactive media, or on billboards or signs. For these efforts, you can use public media segments such as media outlets, time slots, and marketing locations similar to how segment your direct marketing efforts.

To access the Public media segments page from *Marketing and Communications*, click **Public media segments**. To view and manage all public media segments, from the Public media segments page, click **View public media segments**. The Public Media Segments page appears. From this page, you can use the tabs to add and manage media outlets, time slots, marketing locations, and segment groups.

Media Outlets

For public media efforts, media outlets are where your content appears. Examples of media outlets include television networks or radio stations for a broadcast effort, websites or social networking sites for an Internet effort, or magazines or newspapers for a print effort. To view and manage the media outlets your organization uses for passive marketing efforts, on the Public Media Segments page, select the Media outlets tab.



Under **Media outlets**, you can add new outlets and view the outlets already configured by your organization. For each outlet, you can view its target segment groups, effort category, and the number of impressions associated with the outlet such as through readership or Web traffic. You can also view whether the time slot is currently used by your organization or is active.

To edit, delete, or copy a media outlet, or mark it inactive, click the down arrows to expand the row and click the relevant task button. To open a media outlet's record, click the linked name. For information about items on the record, see Segment Record on page 277.

Add Media Outlets

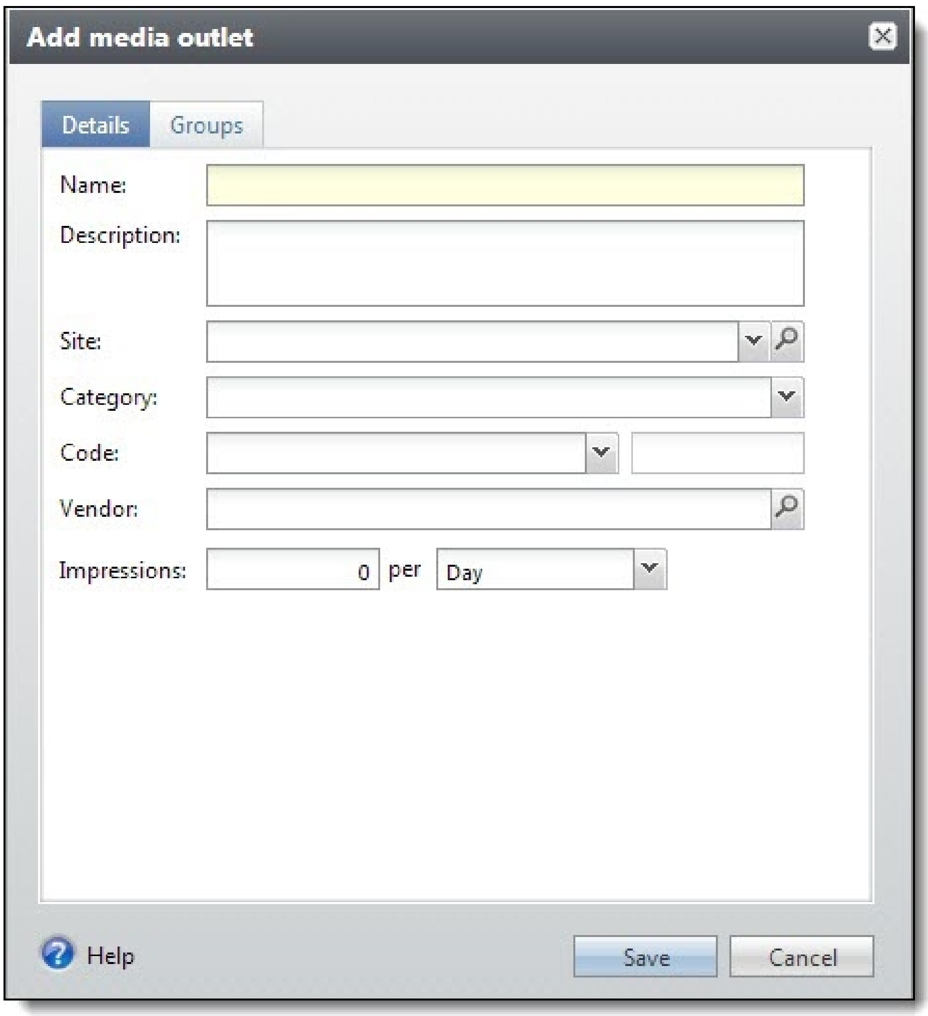
For public media efforts, media outlets are where your content appears, such as television networks, radio stations, websites, or online or print publications. You can add media outlets as necessary for your marketing efforts.

Add a media outlet

1. From *Marketing and Communications*, click **Public media segments**. The Public media segments page appears.

Note: You can also add a media outlet from the Public Media Segments page. Click **Add media outlet** under **Tasks**, or click **Add** on the action bar of the Media outlets tab.

2. Click **Add a media outlet**. The Add media outlet screen appears.



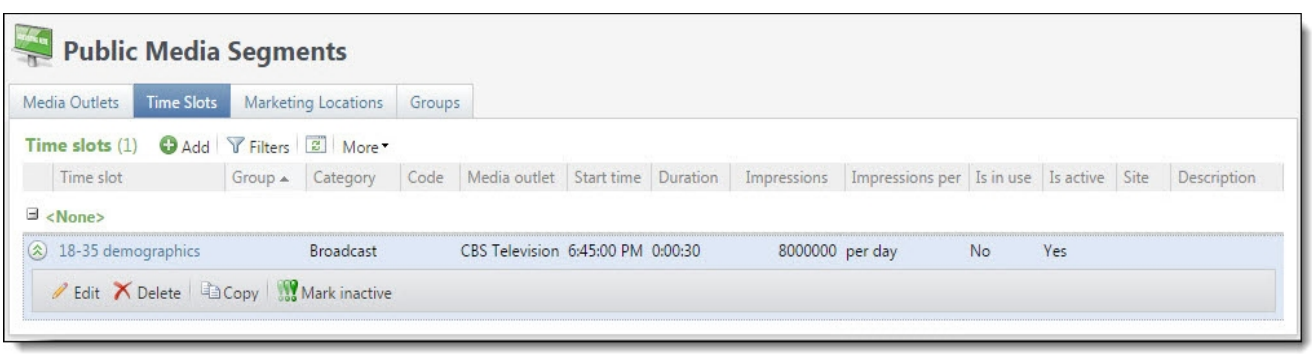
3. On the Details tab, enter a unique name and description to help identify the media outlet.

4. To restrict use of the segment to only a specific site at your organization, in the **Site** field, select the site to use the segment. A segment can be used with only public media efforts assigned to the same site.
5. In the **Category** field, select the type of public media associated with the outlet, such as Broadcast, Internet, or Print. Your organization configures the available public media categories.
6. If your organization configures source code parts and layouts, a code field appears. To help track the effectiveness of the segment, select the code to identify the segment. The values available are those defined on the Source Code Parts tab of the Source Codes page. If you select the same code as another segment, you receive a warning that you will create duplicate segments. You can click **Ignore** to create the segment anyway.
7. In the **Vendor** field, search for and select the vendor associated with the media outlet, such as a parent organization for a broadcast or Internet outlet or the publisher for a print outlet. When you search for a vendor, the results return only vendors who provide public media services.
8. Under **Impression information**, enter the audience size per day or marketing effort, such as based on total readership, Web traffic, or ratings information.
9. To assign the media outlet to segment groups, such as the target audience or audience demographic for the media group, select the Groups tab and select the applicable segment groups. When a segment is part of a group, you can add it and all the other segments in the group to an effort at one time. For more information about how to create segment groups, see Segment Groups on page 273.

   For information about how to configure segment groups for public media segments, see Segment Groups on page 273.
10. Click **Save**. The Add media outlet screen closes and the profile page for the new segment appears.

Time Slots

For broadcast marketing efforts, time slots are when your content appears. Examples of time slots include the program or time period during which the content runs or a specific day and time. To view and manage the time slots your organization uses for marketing efforts, on the Public Media Segments page, select the Time slots tab.



Under **Time slots**, you can add new time slots and view the time slots already configured by your organization. For each time slot, you can view its target segment groups, effort category, media outlet, and the number of impressions associated with the time slot such as through viewership or ratings information. You can also view whether the time slot is currently used by your organization or is active.

To edit, delete, or copy a time slot, or mark it inactive, click the down arrows to expand the row and click the relevant task button. To open a time slot's record, click the linked name. For information about items on the record, see Segment Record on page 277.

Add Time Slots

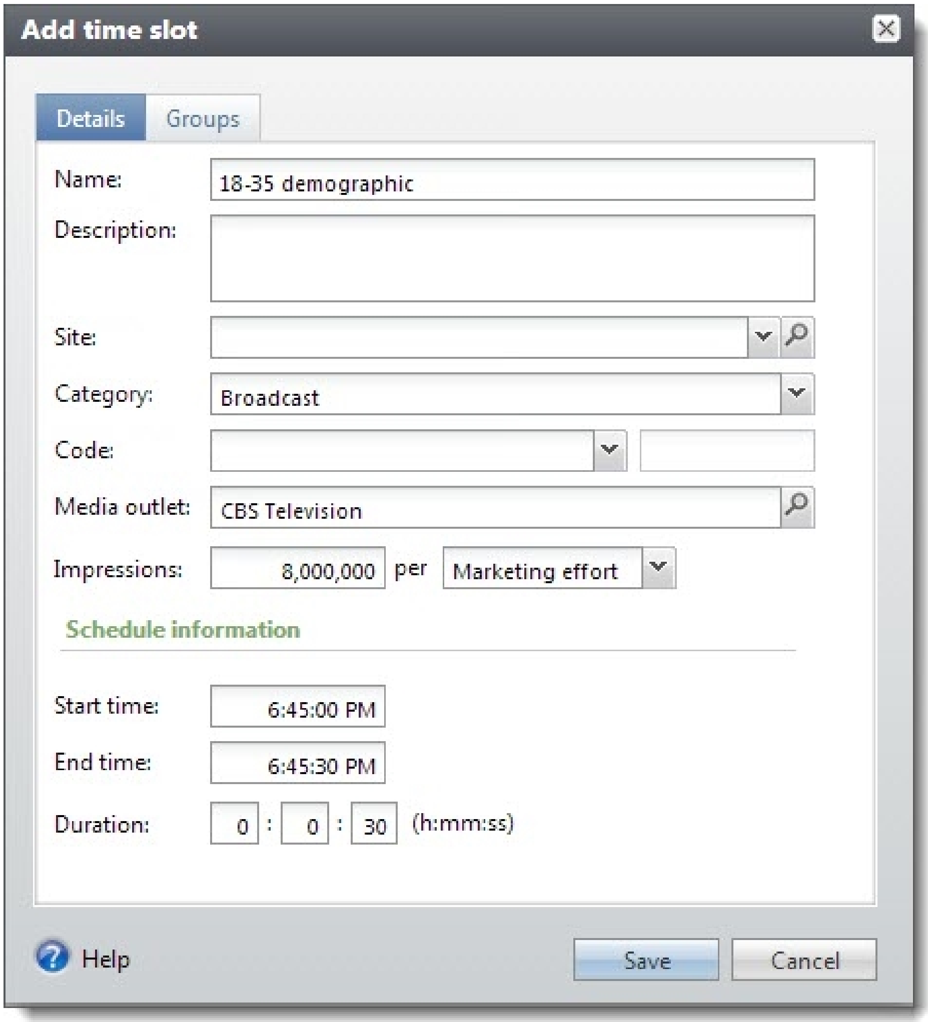
For broadcast marketing efforts, time slots are when your content appears, such as the time of day a broadcast effort airs. You can add time slots as necessary for your public media efforts. When you add a time slot, you can enter the general time frame or the exact days and time when the content appears.

Add a time slot

1. From *Marketing and Communications*, click **Public media segments**. The Public media segments page appears.

Note: You can also add a time slot from the Public Media Segments page. Click **Add time slot** under **Tasks**, or click **Add** on the action bar of the Time slots tab.

2. Click **Add a time slot**. The Add time slot screen appears.



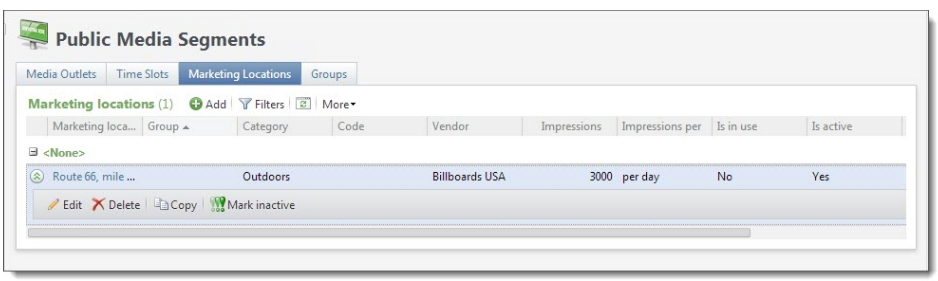
3. On the Details tab, enter a unique name and description to help identify the time slot. For example, for a broadcast effort, enter the time period, such as Morning drive, or the name of the program during which the time slot occurs.
4. To restrict use of the segment to only a specific site at your organization, in the **Site** field, select the site to use the segment. A segment can be used with only public media efforts assigned to the same site.
5. In the **Category** field, the type of public media associated with the time slot, such as Broadcast. Your organization configures the available public media categories.
6. If your organization configures source code parts and layouts, this field appears. To help track the effectiveness of the segment, select the code to identify the segment. The values available are those defined on the Source Code Parts tab of the Source Codes page. If you select the exact same code as another segment, you receive a warning that you will create a duplicate segment. You can click **Ignore** to create the segment anyway.
7. In the **Media outlet** field, search for and select the media outlet where the content appears during the time slot. For information about how to configure media outlets for public media efforts, see Media Outlets on page 255.

8. Under **Schedule information**, enter detail information about the time slot.
   a. In the **Start time** and **End time** fields, enter the start and end times of the time slot.
   b. In the **Duration** field, enter the duration of the time slot in an hours:minutes:seconds format. If you enter start and end times for the time slot, the program automatically calculates the duration.
   c. In the **Impressions** field, enter the the audience size per day or marketing effort, such as based on ratings information.
9. To assign the time slot to segment groups, such as the target audience or audience demographic for the time slot, select the Groups tab and select the applicable segment groups. When a segment is part of a group, you can add it and all the other segments in the group to an effort at one time. For more information about how to create segment groups, see Segment Groups on page 273.

   For information about how to configure segment groups for public media segments, see Segment Groups on page 273.
10. Click **Save**. The Add time slot screen closes and the profile page for the new segment appears.

Marketing Locations

For out-of-home marketing efforts such as billboards or pamphlets, marketing locations are where your content appears. Examples of marketing locations include the physical location of a billboard advertisement or a business location that displays literature such as pamphlets or a poster. To view and manage the marketing location your organization uses for marketing efforts, on the Public Media Segments page, select the Marketing locations tab.



Under **Marketing locations**, you add marketing locations and can view the locations already configured by your organization. For each location, you can view its target segment groups, effort category, vendor, and the number of impressions associated with the location such as through road or foot traffic information. You can also view whether the location is currently used by your organization or is active.

To edit, delete, or copy a marketing location, or mark it inactive, click the down arrows to expand the row and click the relevant task button. To open a location's record, click the linked name. For information about items on the record, see Segment Record on page 277.

Add Marketing Locations

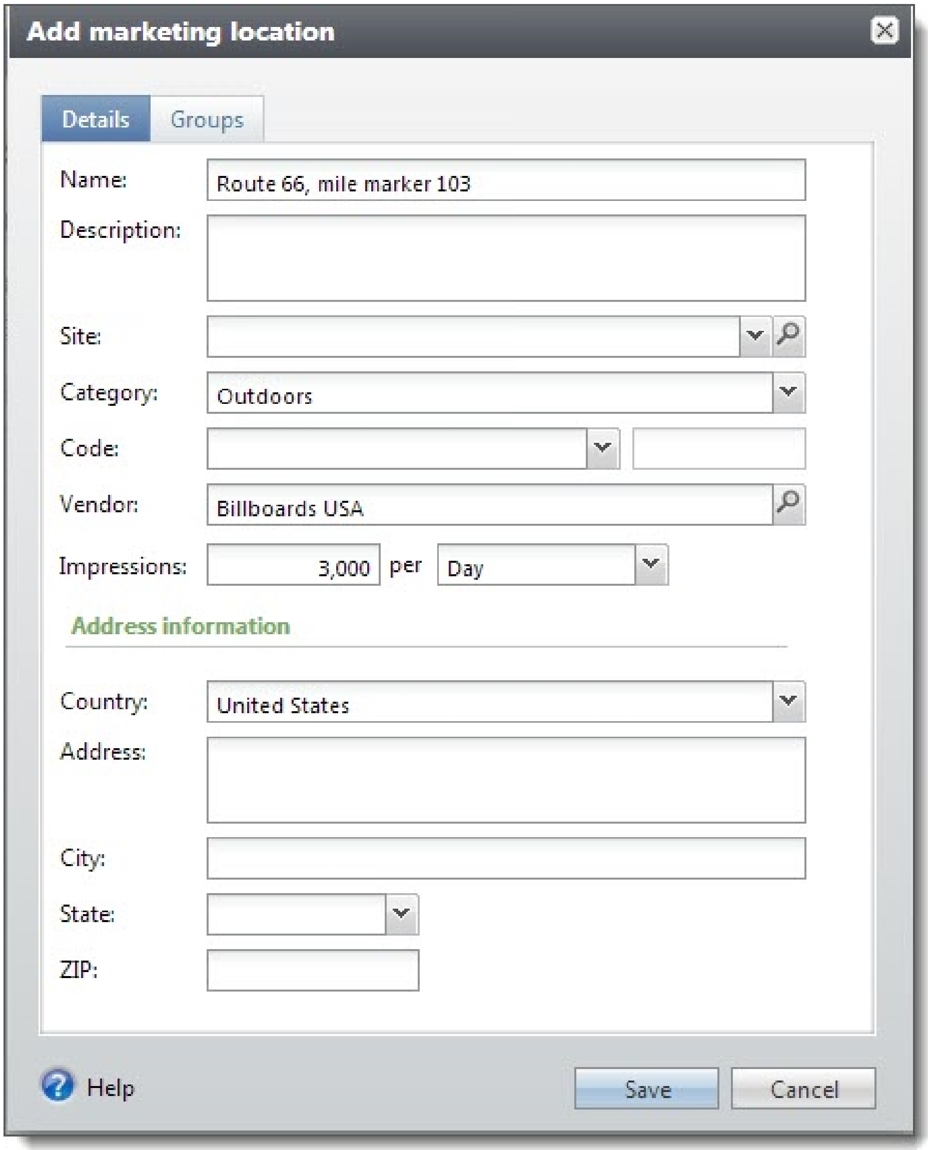
For out-of-home marketing efforts, marketing locations are where your content appears, such as the physical location of a billboard or literature such as pamphlets or posters. You can add marketing locations as necessary for your marketing efforts.

Add a marketing location

1. From *Marketing* and Communications, click **Public media segments**. The Public media segments page appears.

Note: You can also add a marketing location from the Public Media Segments page. Click **Add marketing location** under **Tasks**, or click **Add** on the action bar of the Marketing locations tab.

2. Click **Add a marketing location**. The Add marketing location screen appears.



3. On the Details tab, enter a unique name and description to help identify the marketing location.
4. To restrict use of the segment to only a specific site at your organization, in the **Site** field, select the site to use the segment. A segment can be used with only public media efforts assigned to the same site.
5. In the **Category** field, select the type of public media associated with location, such as Out-of-home. Your organization configures the categories available.
6. If your organization configures source code parts and layouts, this field appears. To help track the effectiveness of the segment, select the code to identify the segment. The values available are those defined on the Source Code Parts tab of the Source Codes page. If you select the exact same code as another segment, you receive a warning that you will create a duplicate segment. You can click **Ignore** to create the segment anyway.

7. In the **Vendor** field, for and select the vendor associated with the location, such as the company that sells advertising space at the billboard location. When you search for a vendor, the results return only vendors who provide public media services.
8. Under **Address information**, enter the street or mailing address for the location.
9. In the **Impressions** field, the audience size per day or marketing effort, such as based on road or foot traffic.
10. To assign the location to segment groups, such as the target audience or audience demographic for the time slot, select the Groups tab and select the applicable segment groups. When a segment is part of a group, you can add it and all the other segments in the group to an effort at one time.

    For information about how to configure segment groups for public media, see Segment Groups on page 273.
11. Click **Save**. The Add marketing location screen closes and the profile page for the new segment appears.

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.

From the White mail segments page, you can manage the white mail segments your organization uses for marketing efforts. To access the White mail segments page from *Marketing and Communications*, click **White mail segments**.

To view and manage all white mail segments, from the White mail segments page, click **View white mail segments**. The White Mail Segments page appears. From this page, you can add white mail segments and view those already configured by your organization.

To edit, delete, copy, or refresh a white mail segment, click the down arrows to expand the row and click the relevant task button. To open a white mail segment's record, click the linked name. For information about items on the record, seeSegment Record on page 277.

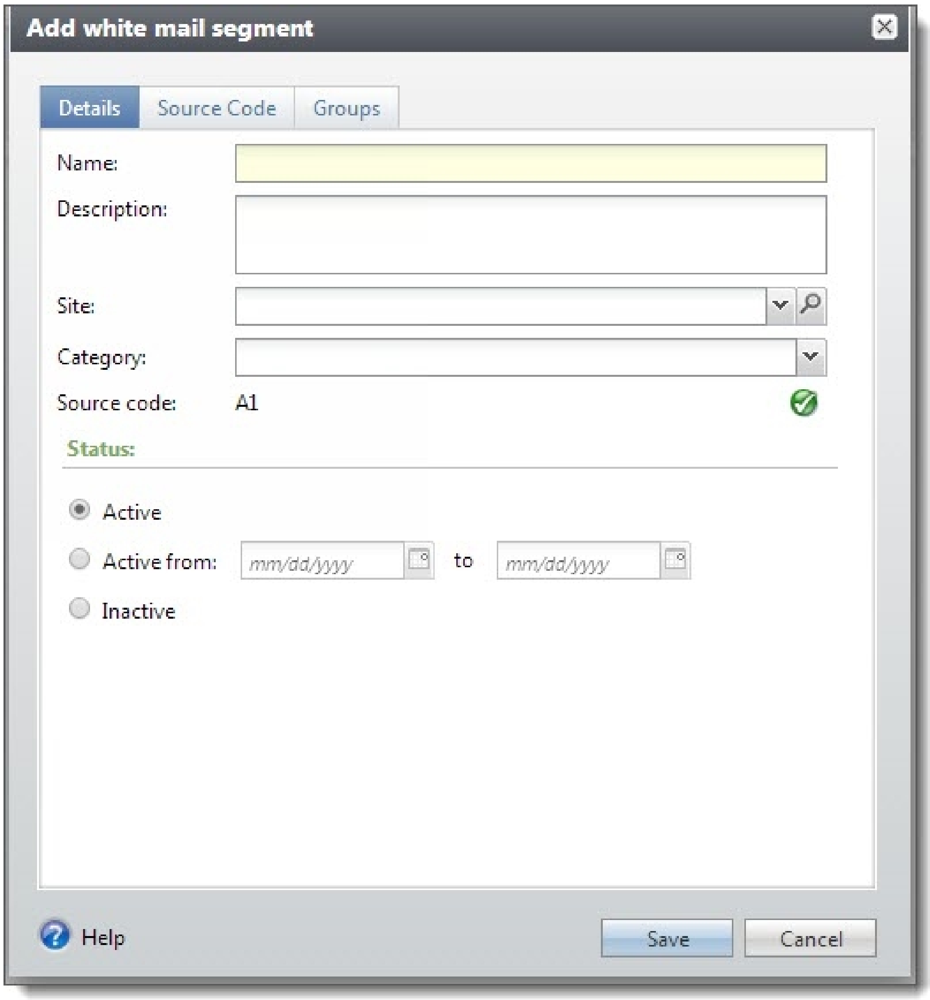
Add White Mail Segments

Use white mail segments to track gifts you receive missing a reply device. Without a reply device, you cannot use the finder number or source code to attribute the gift to a specific campaign or department.

Unlike other types of segments, white mail segments have their own source codes so they function outside 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.

Add a white mail segment

1. From *Marketing and Communications*, click **White mail segments**. The White mail segments page appears.
2. Click **Add** a **white mail segment**. The Add white mail segment screen appears.



3. In the **Name** and **Description** fields, enter a name and description to identify the segment in efforts and analyses.
4. In the **Site** field, select the site to associate with the segment. Only users associated with the selected site can access the segment.
5. In the **Category** field, a category to group related records for comparison and reporting. For example, “White mail from previous donors.”
6. The **Source code** field displays the source code entered on the Source Code tab. If there are code parts missing values, select the Source code tab to complete the source code. A red X or green checkmark indicates whether the full code is valid.

7. In the **Status** field, select the current status for the segment. To make the segment expire after a certain date, select **Active from** and select a date range.
8. Select the Source Code tab. In the **Source code** field, select a code layout. Layouts are created on the Source Codes page. After you select a source code layout, each source code part for the layout appears in the grid. Enter a value for each code part that requires one. The values allowed depend on how the source code part is defined in the layout.

   Gray fields indicate fixed codes you cannot edit. For example, you defined fixed values for the "Department" source code part — "Membership" or "Development." After you select "Membership" or "Development," the 'M' or 'D' code value appears in the field to the right and is disabled.

   Yellow fields display the format for the code you can enter. For example, you have a source code part for "Month" and you specified that the only valid format for "Month" is a two digit code (# = 0 though 9). The field displays ## to indicate that you need to enter two digits.

   The fields for Channel, Package, Segment and Test Segment display "<by channel>," "<by package>," etc.. These codes are set on the marketing effort segment.
9. To assign the segment to a group, select the Groups tab. When a segment is part of a group, you can add it and all the other segments in the group to an effort at one time. For more information about how to create segment groups, see Segment Groups on page 273.
10. Click **Save**. The White Mail Segments page appears for the new segment.

Edit White Mail Segments

You can edit white mail segments at any time. If you change a source code part on the segment, the gifts assigned to this segment are removed, and when you refresh the segment, the performance statistics no longer include those gifts. If you change the source code back to the original, the gifts are added back to the performance statistics when you refresh the segment.

View White Mail Segment Performance Status

On the performance 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.

View a white mail segment's performance status

1. From the White Mail Segments page, click the name for a white mail segment. The status page for the segment appears.

   On this page, you can view performance statistics for the white mail segment including the number of responders and responses, the total amount given, and the average gift amount.

2. Under **Tasks**, click the **Refresh segment** task to update the performance statistics or to reflect any changes made to the white mail segment record. For more information about the refresh process, see Refresh White Mail Segments on page 266.

Refresh White Mail Segments

Refresh a white mail segment to find any new gifts assigned to the segment since the last time it was refreshed. You can refresh the 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 and function independently of a marketing effort, 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.

You can refresh individual white mail segments, white mail segment groups, or all your white mail segments at the same time. Administrators can schedule the refresh process in *Administration*, **Manage Queues**.

Refresh a white mail segment

1. From the White Mail Segments page, select a white mail segment and click **Refresh**. The segment refresh process begins.
2. A message appears when the process completes and you are taken to the Status page where you can view details about the refresh.
3. To view the updated performance statistics, select the **Go to {white mail segment}** task. The status page appears and any gifts that the matchback process was able to match with the white mail segment are now included in the number of responses and total gift amounts. For more information about the status page, see View White Mail Segment Performance Status on page 265.

Refresh a white mail segment group

1. From the White Mail Segments page, on the Groups tab, select a white mail segment group and click **Refresh**. The segment group refresh process begins.
2. A message appears when the process completes and you are taken to the Status page where you can view details about the refresh.

Refresh all white mail segments

1. From the White Mail Segments page, click the **Refresh all white mail segments** task. The segment refresh process begins.
2. A message appears when the process completes and you are taken to the Status page where you can view details about the refresh.

Segment Builder

With the Segment Builder, you can quickly generate multiple segments from selections. You choose the selections and the Segment Builder combines them to create new segments. For example, you need segments that filter constituents based on specific gender, income, and age criteria. If you choose the twelve selections below, the Segment Builder generates 50 segments based on every possible combination of those selections, including Gender Is Female/Income between 20K and 30K/Age under 30 and Gender Is Male/Income between 30K and 60K/Age between 31 and 35.

Gender

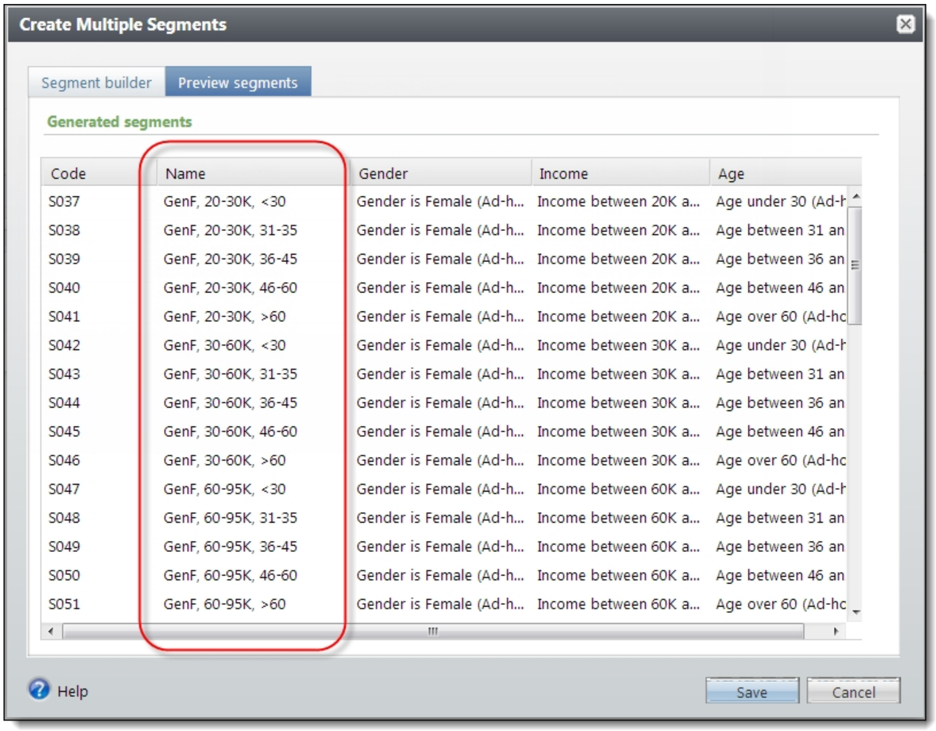
- Gender is Female
- Gender is Male

Income

- Income between 20K and 30K
- Income between 30K and 60K
- Income between 60K and 95K
- Income between 95K and 170K
- Income over 170K

Age

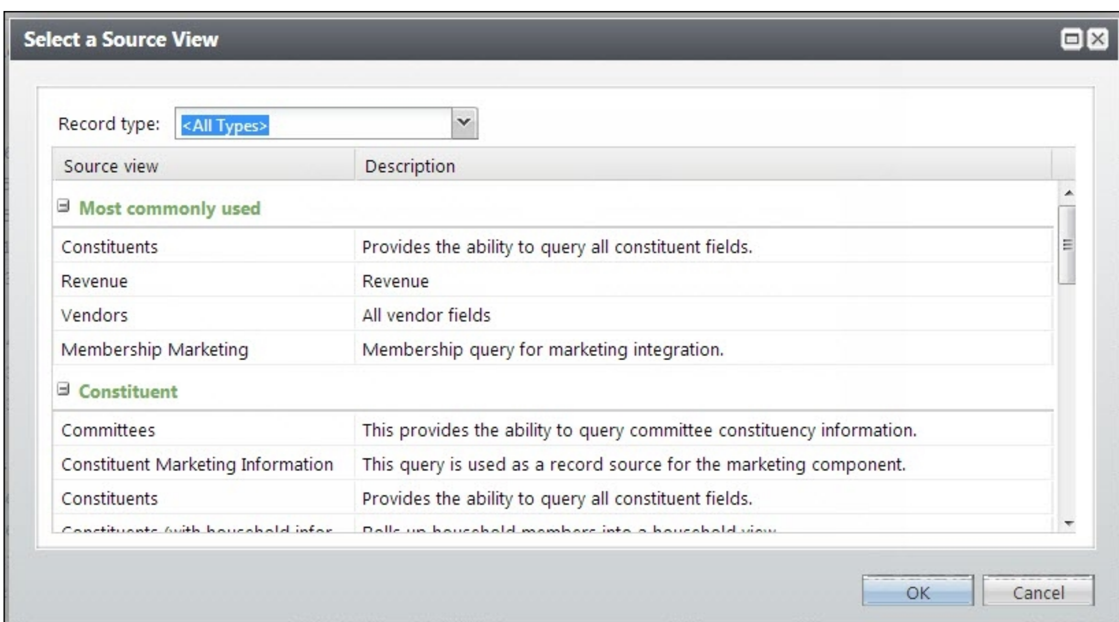
- Age under 30
- Age between 31 and 35
- Age between 36 and 45
- Age between 46 and 60
- Age over 60



As another example, you can create segments from five recency selections, five frequency selections, and five monetary selections. The total number of segments generated is 125 segments.

Generate multiple segments with the Segment Builder

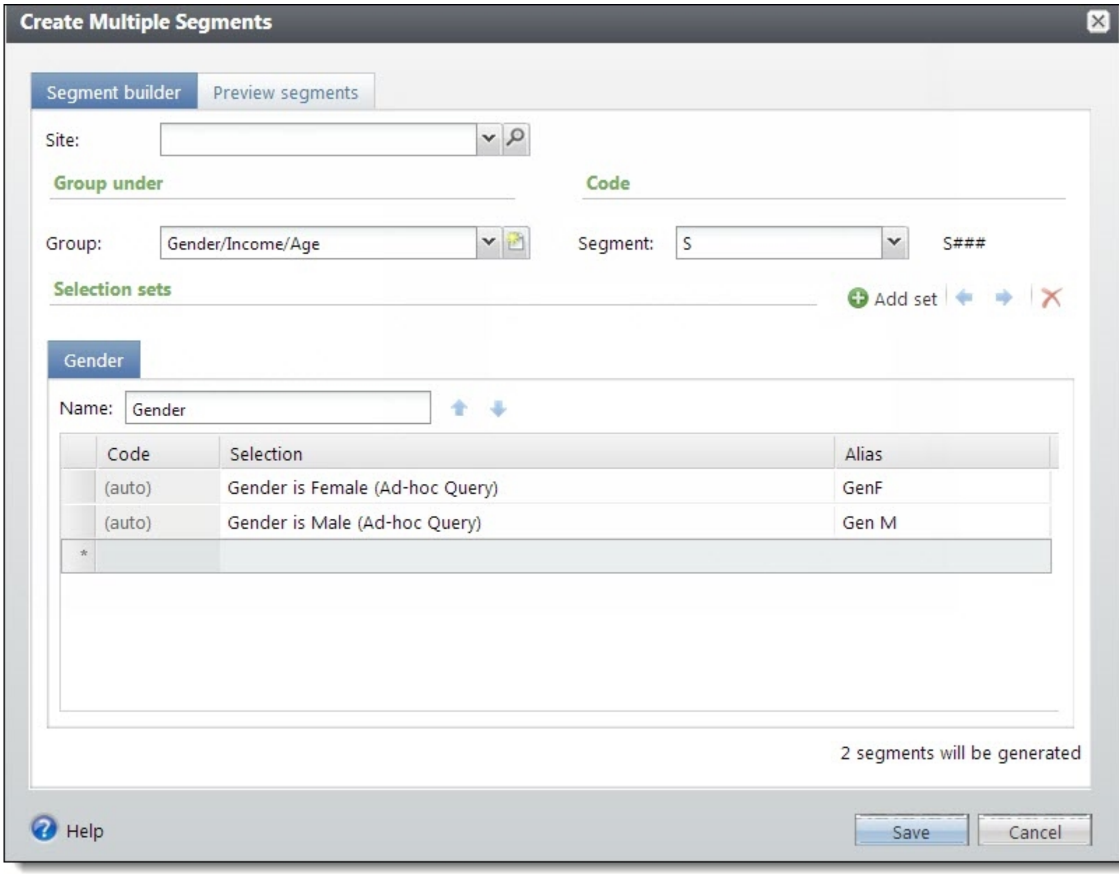
1. From the Segments page, under **Tasks**, click **Create multiple segments**. The Select a Source View screen appears.



2. Select the type of query view to use. The query view determines the types of selections available for building segments. Click **OK**. The Segment Builder tab appears.
3. If you have multiple data sources, select the **Record source** to associate with the new segments.
4. In the **Group** field, select how to group the segments generated by the Segment Builder.
   - To add segments to an existing segment group, select the group.
   - To create a new segment group for the generated segments, click the **New group** button. The Add segment group screen appears.
   - To keep the segments separate so you can add them individually to a marketing effort, select no group.

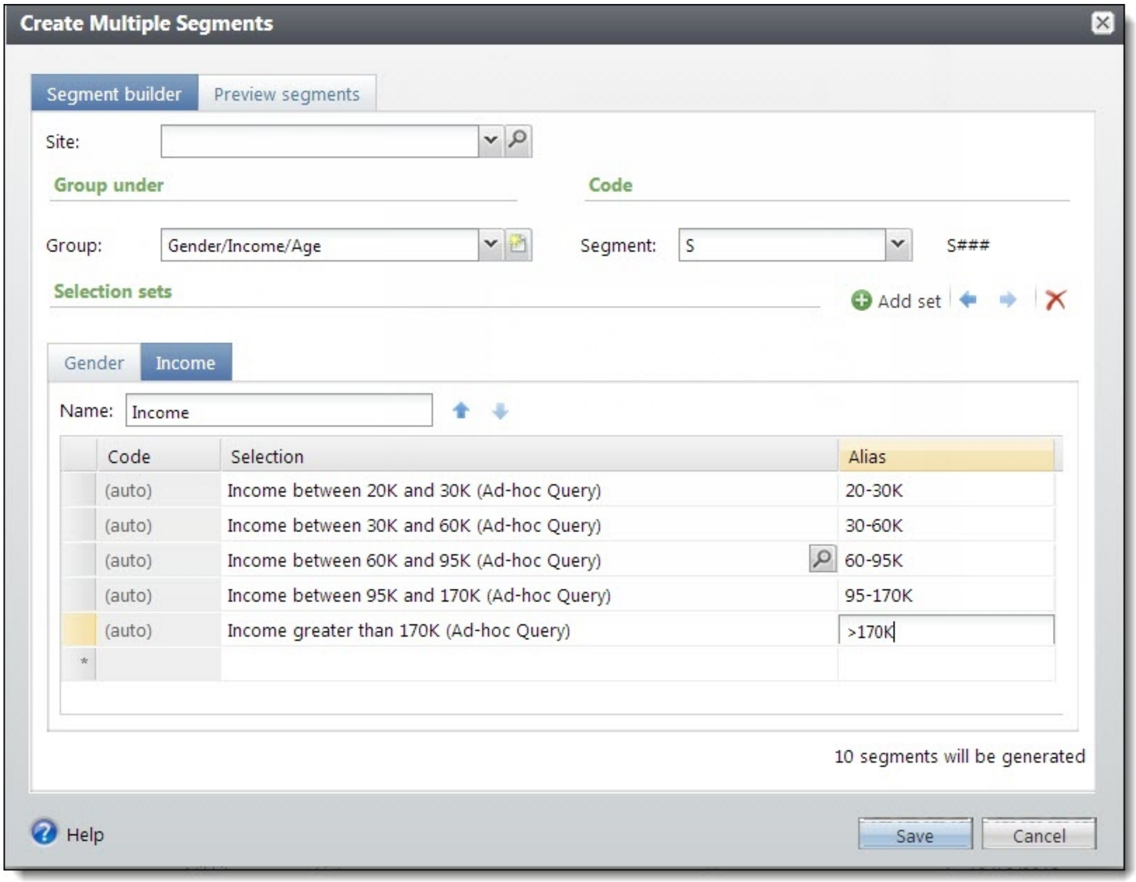
Note: For more information about segment groups, seeSegment Groups on page 273.

5. In the **Segment** field, select the source code to identify the generated segments. The values available are those defined for segments on the Source Code Parts tab of the Source Codes page.
6. Under **Selection sets**, use the tabs to define sets of selections. The program combines the selections from the sets to create segments.
7. Set 1 appears by default. In the **Name** field, enter a name to identify the set. For example, based on the scenario described earlier, enter "Gender" as the name of the first set.
8. In the grid, use the binoculars to select an existing selection or add a new one. For our example, choose selections that filter gender by Female and Male.



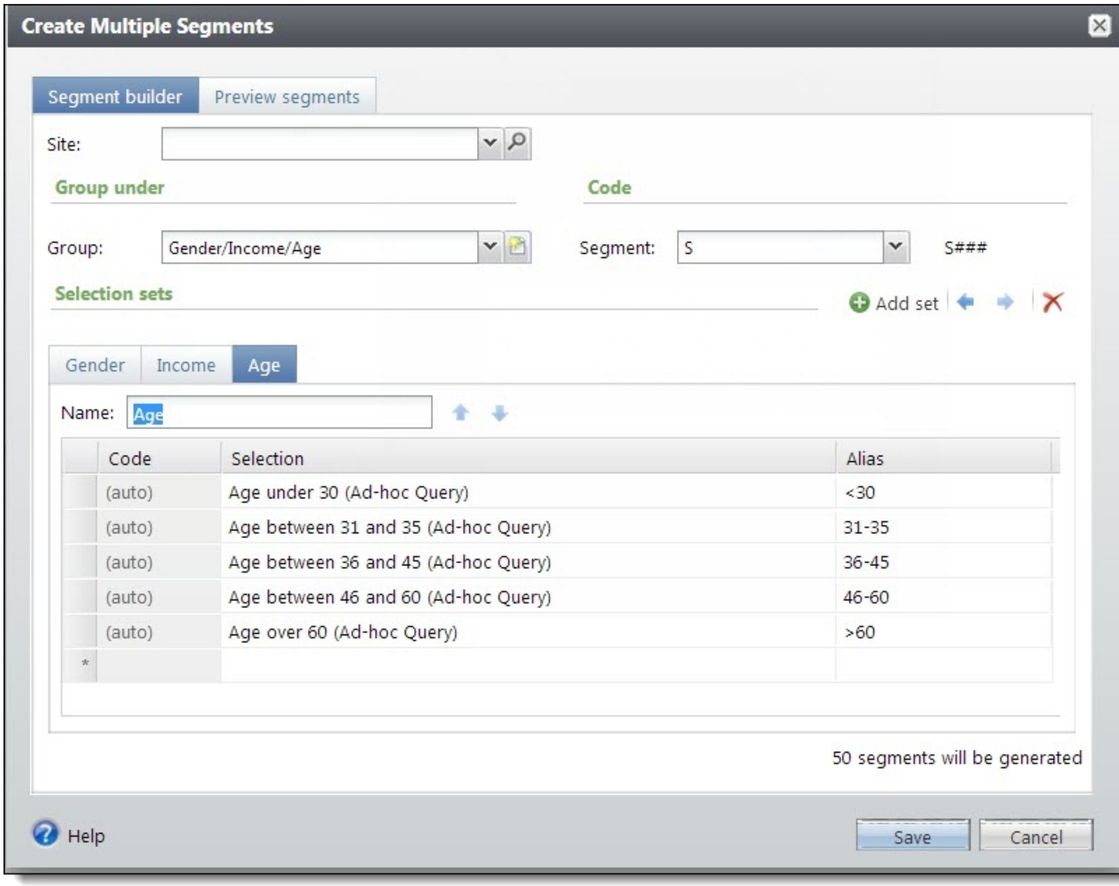
The bottom of the screen displays the number of segments that will be generated by your selections. In this case, two segments so far.

9. The program creates names for the generated segments by combining the names of the selections you include. To prevent exceeding the 100 character limit for segment names, in the **Alias** column, you can enter a shorter description to use for the generated segment name. For example, enter “GenF” as the alias for “Gender:Female.”
10. To add more selection sets, click **Add set** The Set 2 tab appears. For this example, we add a set called “Income” and choose selections that filter constituents into five income brackets.



Our segment count at the bottom of the screen now increases to 10—one segment for each income bracket for males and females.

11. For this example, we click **Add set** to add a third set. We name this set “Age” and choose selections that filter constituents into five age brackets.

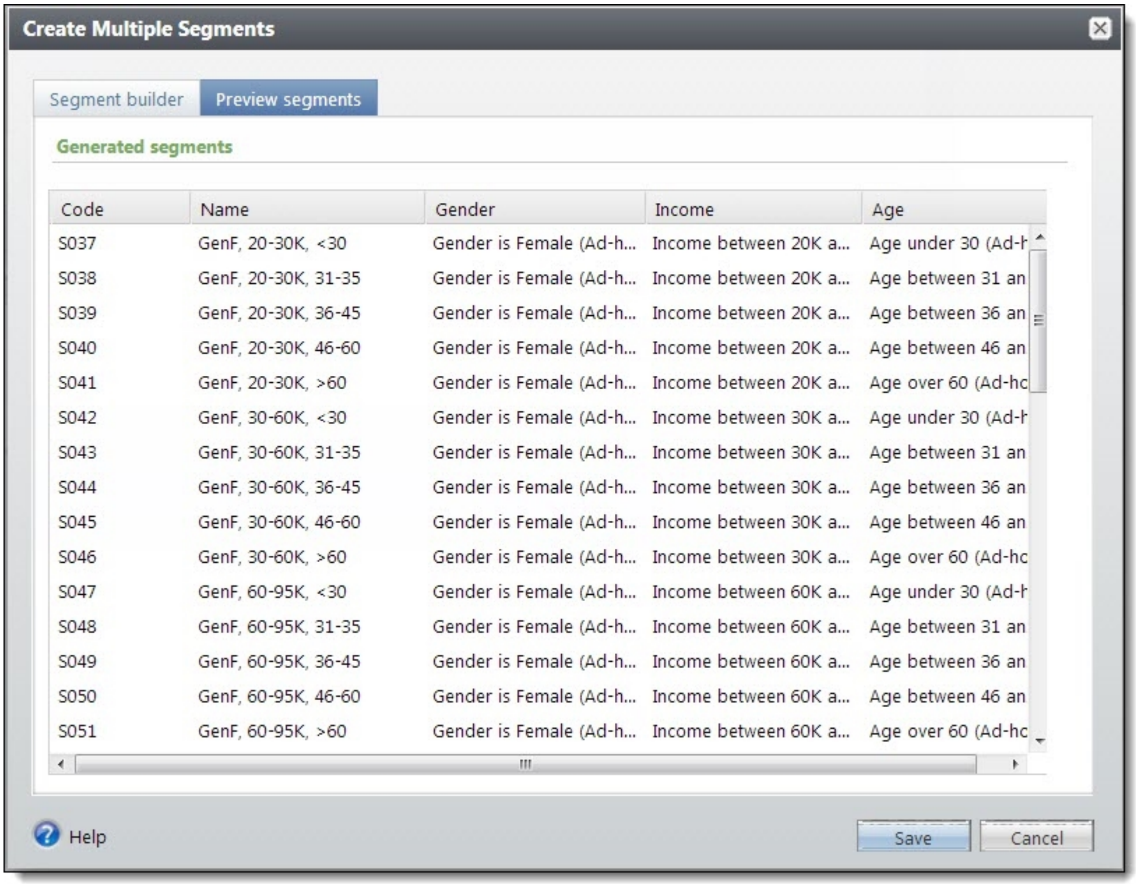


Our segment count at the bottom of the screen now increases to 50—one segment each for males and females, in each income bracket and each age bracket.

Note: Arrange the selection set tabs in the order you want the generated segment names and codes combined from left to right. For example, our Gender, Income, and Age sets will generate segment names in that order. You can use the left/right arrows to change the order of tabs.

Note: If you add generated segments to a segment group, it is also important to consider the top to bottom order of selections. Generated segments are added to the segment group in the same order as the selections on each tab. Keep in mind, when you add segments to a marketing effort, constituents are included in the first segment they meet the criteria for. Rather than reordering segments after the segment group is added to the marketing effort, it is better to define the preferred order in the Segment Builder before you generate the group. You can use the up/down arrows to change the order of selections.

12. To view the list of segments that will generate, select the Preview segments tab.

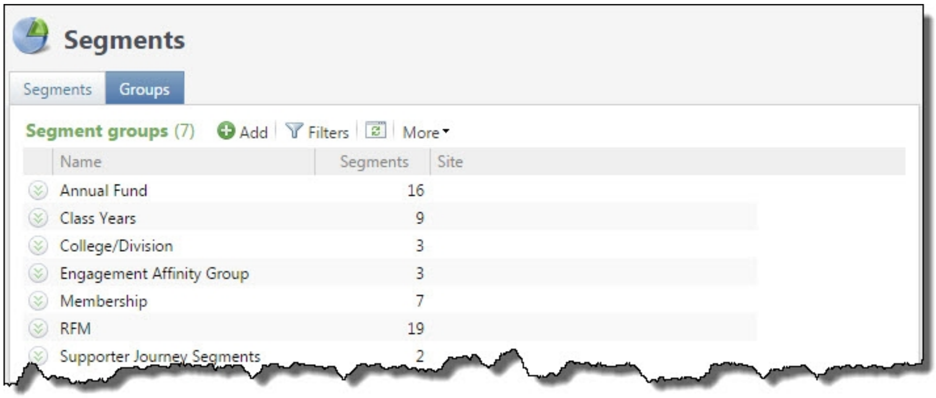


13. Click **Save** to save your settings and return to the Segments page. The generated segments are now available to add to marketing efforts.

Segment Groups

Segment groups allow you to quickly add multiple segments to a marketing effort at one time. When you use the Segment Builder to generate multiple segments from selections, you can add the generated segments to groups. For more information, see Segment Builder on page 267.

From the Groups tab on the Segments page, you can view how many segments are included in each group. You can also add, edit, and delete groups.



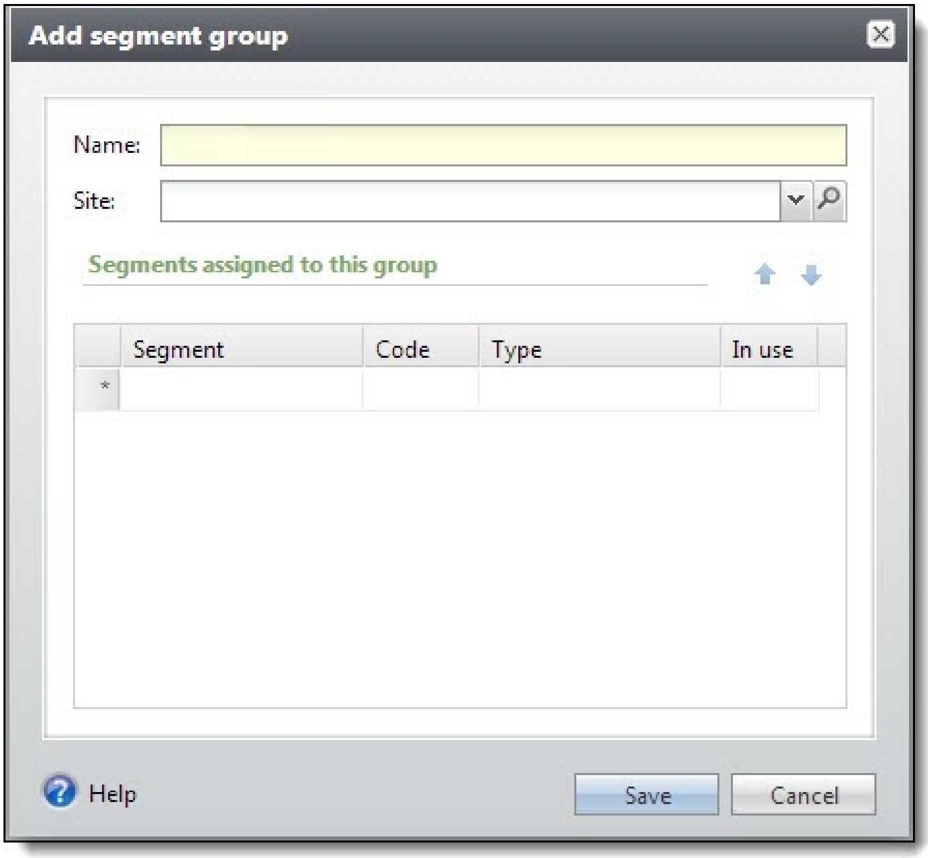
Add Segment Groups

Segment groups enable you to add multiple segments to a marketing effort at one time. When you create the group, you specify the segments it will include.

You also specify the order in which segments appear in the group. The order of segments is important because records can only be in one segment. However, the order you set in the group is only a default. After you generate segments based on a group for a direct marketing effort, you can adjust the order in the effort.

Add a segment group

1. From the Segments page, select the Groups tab. Click **Add**. The Add segment group screen appears.



2. In the **Name** field, enter name to identify the group.
3. To restrict use of the segments included in the group to only a specific site at your organization, in the **Site** field, select the site.
4. Under **Segments assigned to this group**, select each segment to include in the group.
5. You can use the up and down arrows to rearrange the order of segments in the group.
6. Click **Save**. You return to the Segments page.

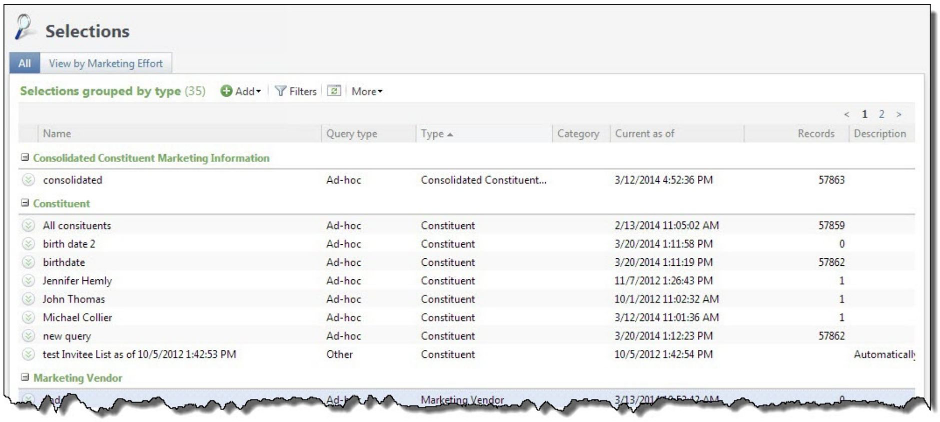
Segment Selections

Marketing selections are sets of records that form building blocks for your segments. Selections can be based on an ad-hoc or smart query, and they enable you to select and name a given set of records that can then be used or combined in segments. Segments use static selections which means they maintain the same records until the selection is refreshed manually or as part of an automated process. Static selections provide better performance for activated efforts and enables them to open faster.

Warning: Do not open a marketing selection in the *Information Library* to make it dynamic. Making it dynamic will cause issues for any segments that currently use that selection.

Use the Selections page to manage selections used by segments. From this page, you can create ad-hoc and smart query selections. On the All tab, you can view all segment selections grouped by their type of source view (marketing, constituent, vendor, etc.). You can also add queries and selections based on those queries. Additionally, when you expand a selection and click **Edit**, you can edit the query underlying that selection. You can delete selections that are not used by segments or other areas of the program. The View by Marketing Effort tab groups selections by the marketing effort that uses them.

Note: If you enabled the Consolidated Marketing List source view, it appears as a source view option for selections.



Refresh Segments

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

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

Note: You can refresh segments on a marketing automatically when you run the Calculate segment counts or activation processes.

Refresh a segment

1. From the Segments page, expand a segment and click the **Refresh** task button.

   The segment refresh process begins.

2. A message appears when the process completes and you are taken to the Status page where you can view details about the refresh.

Refresh a segment group

1. From the Segments page, on the Groups tab, select a segment group and click **Refresh**.

   The segment group refresh process begins.

2. A message appears when the process completes and you are taken to the Status page where you can view details about the refresh.

Refresh all segments

1. From the Segments page, click the **Refresh all segments** task.

   The segment refresh process begins. Depending on the number of segments and selections used in those segments, this process may take some time to complete.

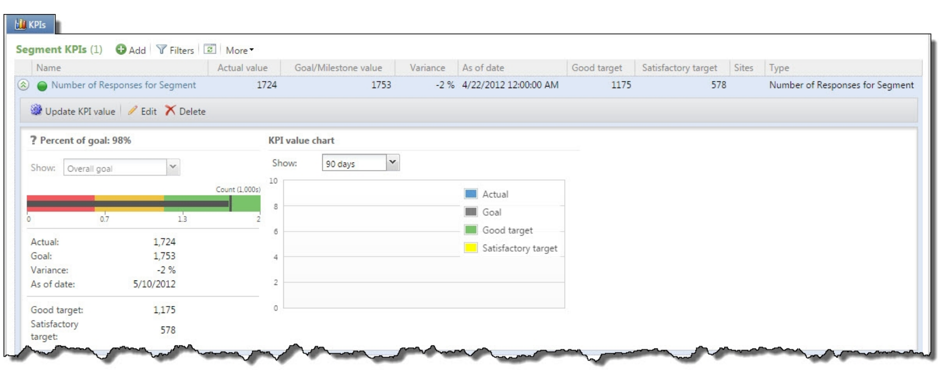
2. A message appears when the process completes and you are taken to the Status page where you can view details about the refresh.

Segment Record

From a segment record, you can view summary information about a segment such as its quantity of records and associated costs. Use tabs on the record to manage aspects of the segment such as key performance indicators (KPIs) and the marketing efforts that use the segment.

KPIs Tab

On the KPIs tab, you can add and manage key performance indicators (KPIs) used to track the effectiveness of the segment. KPIs created for segments track the segment across all efforts that use it. You must refresh segment KPIs manually.



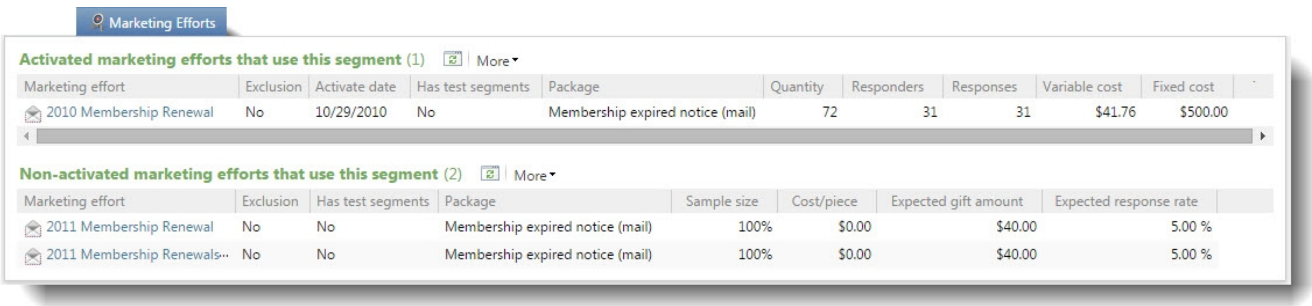
From the KPIs tab, you can go to the specific instance of a KPI and update the values for a KPI. You can also subscribe to an RSS feed to receive the latest KPI information. In the Details window, a color-coded line displays the KPI status, a graph displays the KPI value trends, and the data represented in the thermometer and graph for the KPI selected under **Segment KPIs**.

For information about KPIs, see the *Reports and KPIs Guide*.

Marketing Efforts Tab

The Marketing Efforts tab displays all marketing efforts that use the segment, grouped by activated and non-activated. The **Has test segments** column identifies marketing efforts that include the segment with one or more test segments beneath it. For marketing efforts that include test segments, values such as the cost per piece and expected gift amount reflect an average of the parent and test segments. The **Exclusion** column identifies whether the segment is used to exclude records from the marketing effort.

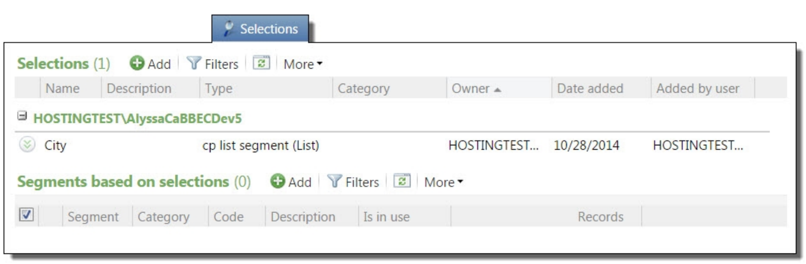
To open an effort associated with the segment, click its name in the list.



Note: The **Lift** column displays the ratio of the response rate for the segment to the response rate for the entire effort. The calculation is Segment Response Rate divided by Total Response Rate for the Effort. This statistic helps you quickly identify which segments are performing well or poorly.

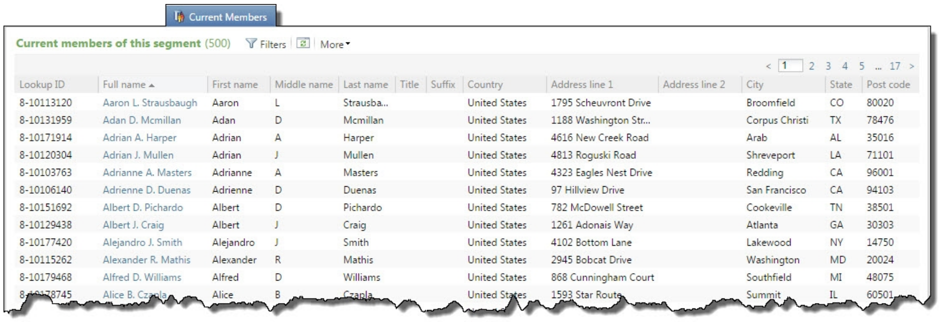
Selections Tab

The Selections tab appears for list segments with imported lists if you created a query based on the list's query source view . The Selections tab displays all selections and segments based on those selections for the imported list. You can create additional selections and segments based on selections. For more information about how to add selections, see List Segment Queries on page 295.



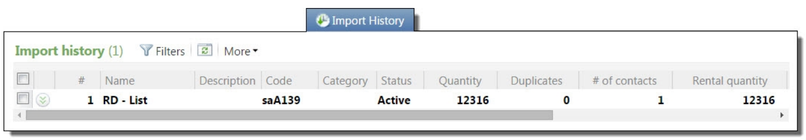
Current Members Tab

The Current Members tab displays all constituents currently included in the segment. You can filter the results that display in the list. To open the constituent record, click the segment member's name. For revenue, membership, or sponsorship segments, you also have the option to open the member's associated revenue, membership, or sponsorship record.



Import History Tab

The Import History tab appears on list segments with imported lists. This tab displays details about each imported list, such as the list name, vendor, quantity, and list costs.



To open the Import Status page to view information about the import process for an imported list, select the list and click **View import status** under **Tasks**. For more information, see List Segment Import Status Page on page 293.

You can purge list members when a list is no longer valid or your organization no longer has permission to use those records. From the Import History tab, expand the import process and click the **Purge**task button. For more information about purging, see Purge List Members on page 294.

To completely remove any trace of the imported records (including all information and IDs), you can delete the list segment's import history. From the Import History tab, expand the import process and click the **Delete** task button.

Note: You can purge or delete only import histories with a "Historical" status.

Segmented House Files

If you use strategy vendors to segment an exported file of your constituents, after they do the segmentation, they return a file to you that contains the constituent IDs as well as 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.

Note: The strategy vendor may also supply 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. For more information about how to import a marketing effort, see Import Direct Marketing Efforts on page 146.

Import Segmented House Files

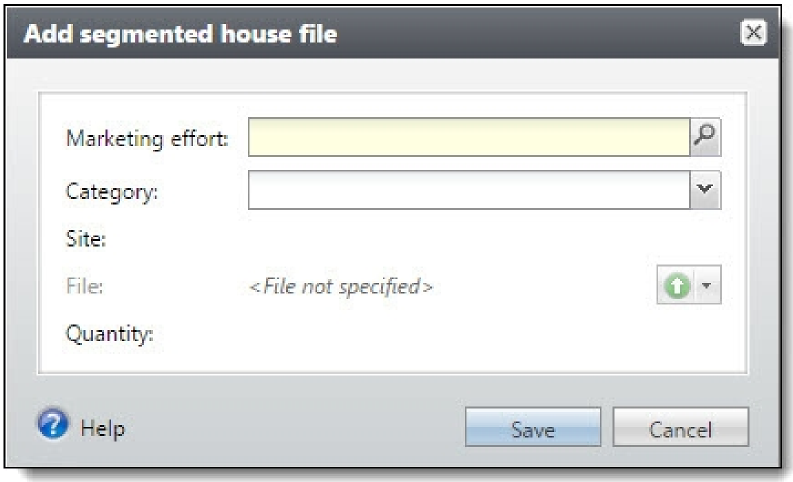
You can add one or multiple segmented house files to a marketing effort. When you add a segmented house file to a marketing effort, you import the data file received from the vendor as a *.csv file into the database.

Note: Users can run multiple segmented house file import processes at the same time. The process will fail if users attempt to run more than one segmented house file import for the same marketing effort at the same time.

Note: To re-import an updated file, delete the original segmented house file record and create a new one for the updated import file.

Import a segmented house file

1. From *Marketing and Communications*, click **Segmented house files**. The Segmented House Files page appears.
2. On the action bar, click **Add**. The Add segmented house file screen appears.

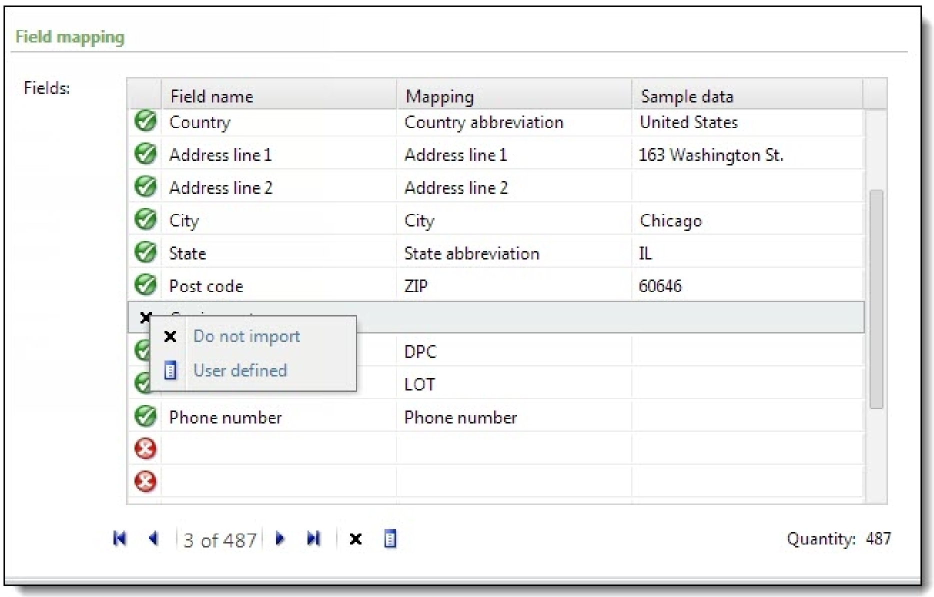


3. In the **Marketing effort** field, select the marketing effort to use the segmented house file.
4. If you have multiple record sources, select the source to use with the segmented house file.
5. To group the segmented house file with similar segmented house files, in the **Category** field, select the category for the file. Your system administrator configures the available segmented house file categories.
6. The **Site** field displays the site assigned to the selected marketing effort.
7. In the **Segmented file** field, select the *.csv file that contains the segmented records. The Select segmented file screen appears.
8. Under **Import file information**, the **File name** field displays the name of the selected import file.
9. Select a layout that specifies how to map imported fields to fields in your database. You can choose an existing layout or create a new one.
10. If you create a new layout, in the **New layout** field, enter the name for the layout.
11. in the **ID column** field, select which column of the import file contains the record ID to use to identify records in the house file.
12. 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. If you select “Alternate lookup ID,” in the **Type** field, select the type of alternate lookup ID to use.
13. Under **Field Mapping**, map the fields in the segmented house file to fields in your record source. For information about how to map fields, see Segmented House File Field Mapping on page 282.
14. Click **OK**. You return to the Add segmented house file screen.
15. Click **Save**. The program begins the import. To view the status and history of the process, click **View import status**. The Import status page displays detailed counts by segment as well as any import exceptions, such as duplicate finder numbers. For more information, see View Import Status on page 283.

Segmented House File Field Mapping

When you create a new file layout, you must map fields in the segmented house file to fields in the record source against which you import the records. The program maps the record identifier you selected for the ID column automatically and also attempts to map any recognizable fields in the segmented house file to known fields in your record data source. We recommend you verify the accuracy of those mappings. You can select to not import individual fields and instead define a field to map to if it does not already exist in the source. For information about file layout fields, see Segmented House File Layouts on page 284.

Under **Field Mapping** on the Select segmented file screen, you can use several tools to complete the mapping.



Before you can successfully import the segmented house file, you must map or specify all fields as Do not import. For any row that displays the "x" icon, you must either map the field to a source field, or select to not import it. All fields selected to import must display a checkmark before you can successfully import the file.

On the Select segmented file screen, the **Fields** grid contains three columns.

- **Field name** - The name of the field in the segmented house file.
- **Mapping** - A dropdown list of all available fields from the target record source.
- **Sample data** - The first line of each file as it pertains to the selected file layout, so you can determine the correct file layout and help avoid importing files against the wrong file format.

With the arrow buttons at the bottom of the grid, you can cycle through the rows in the import file.

When you right-click on a row and select "Do not import," the program does not import the information for the selected field, and no column appears for it in the imported table.

Warning: You must map the record identifier you selected for the ID column and the source code fields.

Because the program saves the file layout, you can use it to import another segmented house file with the same fields.

View Import Status

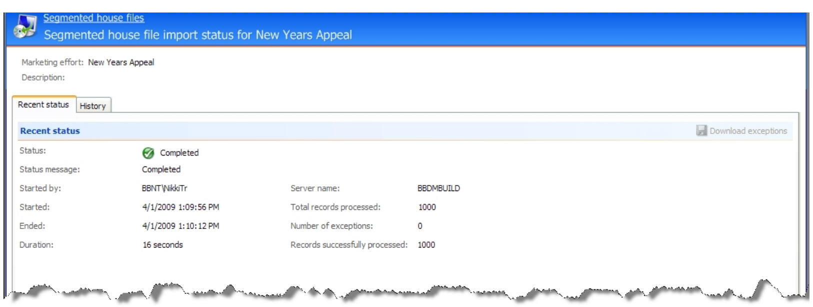
After you import a segmented house file, to view the status and history of the process, click **View import status**. The Import status page displays detailed counts by segment as well as any import exceptions, such as duplicate finder numbers. To save an output file that contains any segmented records that failed to import and the reason they failed, click **Download exceptions**. You can return this file to the vendor for corrections and then import the corrected version.

Records fail to import for these reasons:

- Duplicate finder numbers or record IDs
- Finder numbers not in the reserved range
- Source code not in the marketing effort
- Finder numbers failed the check digit test
- Finder numbers in the imported file do not match finder numbers reserved in the marketing effort
- Record ID is not formatted correctly
- The import file contains duplicates because records were merged after you exported the file

View status and history for segmented house files

1. From *Marketing and Communications*, click **Segmented house files**. The Segmented House Files page appears.
2. On the Segmented House Files tab, select the file to view and click **View import status**. The Import Status page for the file appears.



The Recent status tab displays information such as the number of records processed successfully and the number of exceptions. The History tab displays information about previous import processes for this segmented house file.

3. To return to the marketing effort, click **Go to effort** under **Tasks**.

Segmented House File Layouts

File layouts define the file structure of a segmented house file. Most vendors provide segmented house files in a specified format that typically does not change. When you use multiple segmented house files from the same vendor, a file layout eliminates the need to map the segmented house file fields each time you import a segmented house file.

Note: A file layout is associated with a particular record source. If you save a file layout for one source and import a segmented house file into another source, the previously saved file layout will not be available for the new import.

To add a new file layout, a valid *.csv file is required. The first row of the file must contain header fields. After you select the file, the header fields appear in the **Field Name** column, where you can map to pre-defined program fields or fields you define yourself.

During the mapping process, the program attempts to auto-map fields. The program fields are used throughout the program when you create new marketing efforts or query on segmented house file information. The available fields are:

- System record ID
- Finder number
- Source code
- Lookup ID
- Alternate lookup ID

On the File Layouts tab of the Segmented House Files page, you can view a list of saved file layouts. Click the name of the layout to open a page where you can view a list of all imported segmented house files that use the layout.

Acquisition Lists

Acquisition lists are files with names and addresses of potential donors that you rent or purchase from vendors. These files may also contain other information that is not essential for sending a marketing effort but that you may find useful to report on the success or failure of a particular list. For this reason, nonessential fields (fields other than name and address) are considered part of each list and are not discarded.

List Workflow

The main steps in the process to import a list into the program are:

- **Establish Duplicate Criteria**. Before you import a list into the program, an administrator should configure the criteria to determine whether a record on the list is already present in your record source. In *Administration*, you select the source to use as a target for a list on the Record Source page. For information about how to establish duplicate criteria, see the Record Sources chapter of the *Administration Guide*.
- **Add the List**. The list acts as a list header that holds general information about the list. It serves as a way to group the related list segments that make up the list. For example, a list can group all imported and vendor-managed segments used for a marketing effort. You can have a list called Reader's Digest and its list segments are Readers Digest 0-12 month subscribers and Readers Digest 13-24 month subscribers.
- **Add List Segments**. Use list segments to import and manage list records. You can specify information about the list and the rules for how to use it. When you add an imported list, you must first determine how the fields in the import file will map to your record source. When you import your first list, you must create a file layout to determine how the fields in the list map to those in your record source. For more information about how to add list segments, see Add List Segments on page 288.
- **Create a File Layout**. The program will intelligently map as many fields as possible, and you can manually map fields the program is unable to match. After you save a file layout, you can use it when you import other lists into the record source. For example, different lists from the same vendor may use the same layout. For more information, see List File Layouts on page 291.
- **Import the List**. Bring the records into the program via a .csv import file. The records are now available to include in your marketing effort segments. After you import the list, it can be added to the Consolidated Query View to create queries that pull in all records meeting the criteria, whether the records came from your source or a list. For more information, see List Segment Queries on page 295. For more information about how to import lists, see Import Lists on page 290.
- **Add List segments to Direct Marketing Efforts**. Assign list segments to marketing efforts and specify how to use them — whether the segments are a test, retest, continuation, or reuse. For more information, see Add List Segments to a Direct Marketing Effort on page 140.
- **Reuse Lists**. You can reuse lists. For example, each year you can use the New Year's List for the New Year's appeal marketing effort. Rather than create a new list each year for the appeal, you can reuse the New Year's list and add new list segments for each new year (for example, 2008, 2009, and 2010) or create one list segment for which you change the import file each year. When you change the import file on a list segment, information about the old import file is preserved on the Import history tab. Also, you can still look up members of the old list file using their finder numbers.
- **Delete or Purge Lists**. When the imported records for a list segment are no longer valid or your organization no longer has permission to use those records, you can purge the list segment's import history from the system. Once purged, the list segment remains on the list's Segments tab and the segment's Import history tab with a status of "Purged". The list segment no longer contains identifying personal information for its members (such as name or address), but their finder numbers will still return marketing effort information.

  To completely remove any trace of the imported records (including all information and IDs), you can delete the list segment's import history.

When you create an export file for a marketing effort, you can include the **Finder number** field that provides a sequential number assigned to each name on a marketing effort list and helps you match a gift to a particular marketing effort to enable tracking and reporting on the marketing effort's performance. For more information about how to create and export marketing efforts, see Add Direct Marketing Efforts on page 133.

Add Lists

List files can be purchased or rented from third-party vendors, created internally, or acquired through trade with other organizations. To accurately report on list performance, you must associate a list with a vendor when you add it.

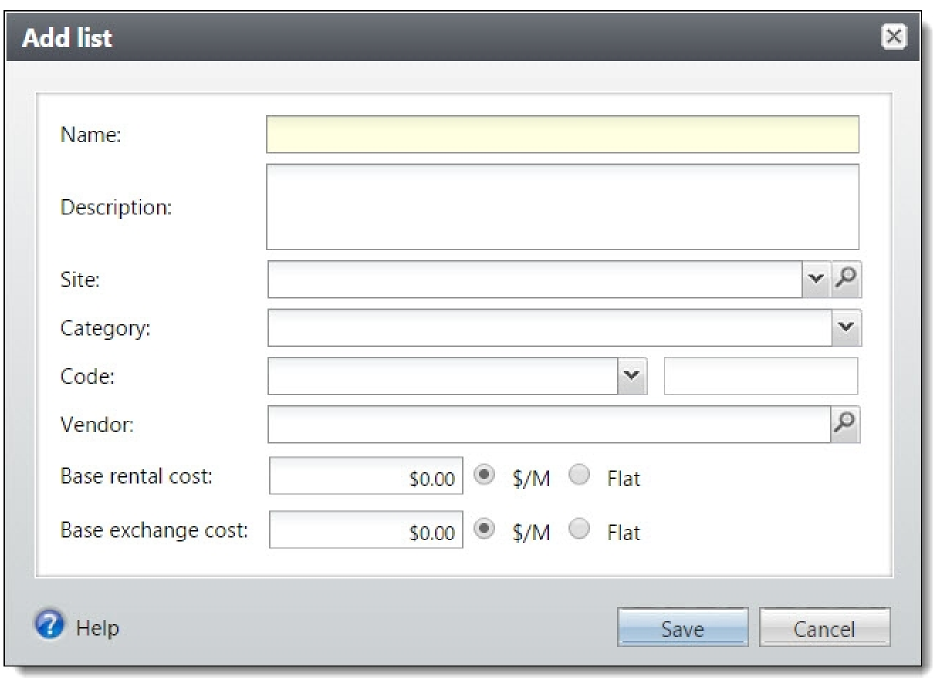
After those people start to give gifts, you will need to refresh the marketing effort to see any results. When you refresh the marketing effort, a "matchback" occurs. The matchback attempts to match the finder numbers on the gift records with the finder numbers in each segment in your marketing effort. If the codes match, those gifts are counted as responders to the appropriate segment. Because you can also use the gift record to identify the constituent who gave the gift, by extension the constituent is also associated with the segment.

In order for a gift from a new constituent via a vendor-managed list to match a marketing effort segment, the gift must include a matching appeal ID, marketing effort ID, and source code. Gifts from constituents who are not in the marketing effort that include the appeal ID and marketing effort ID are considered Indirect Responses. Gifts from constituents who are not in the marketing effort that contain only the appeal ID are considered Unresolved Responses.

The name of the list is the only information required to add a new list.

Add a list

1. From *Marketing and Communications*, click **Acquisition lists**. The Acquisition Lists page appears.
2. Click **Add an acquisition list**. The Add list screen appears.



3. On this screen, you enter detailed information about the list. For information about the items on this screen, see Add List Screen on page 288.
4. Click **Save**. You return to the Acquisition Lists page.

Add List Screen

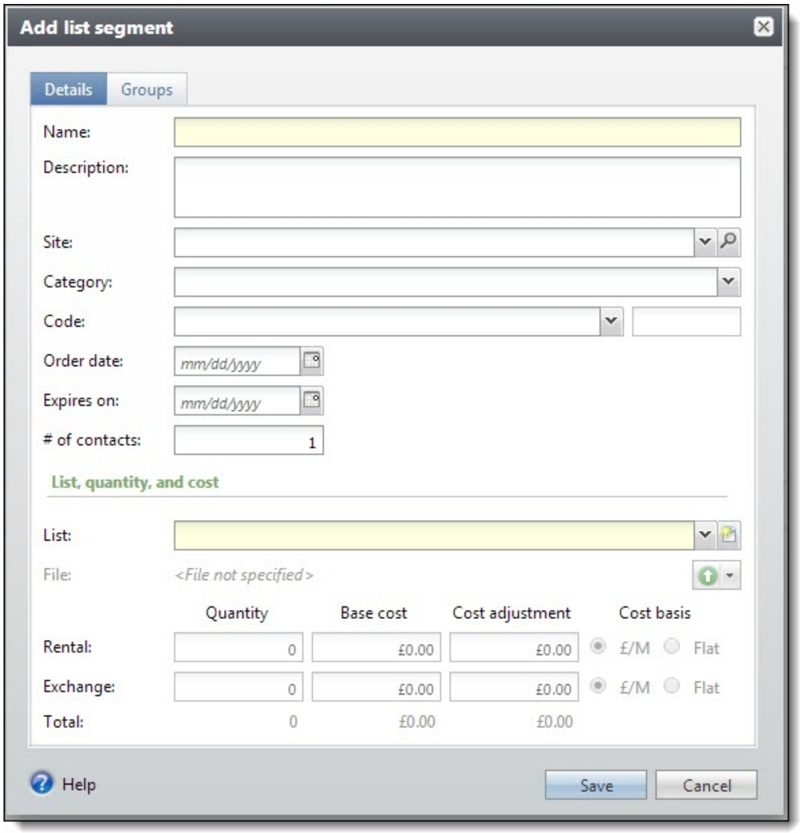
Screen Item	Description
Name	Enter a name for the list
Description	Enter a description to help identify the list.
Site	System administrators can establish security access to lists based on site. When you select a site in the **Site** field, only users associated with the selected site can access the list.
Category	Select a category to group related lists for comparison and reporting.
Code	If your organization configures source code parts and layouts, this field appears. To help track the effectiveness of the list, select the code to identify the list. The values available are those defined on the Source Code Parts tab of the Source Codes page.
Vendor	If the list is vendor-managed, select the vendor that provided the list. Click the **Add vendor** button to add a vendor. For more information about how to add vendors, see Add Vendors on page 324.
Base rental cost	If you rent the list, enter the baseline cost to rent it and select whether the cost is per thousand records or a flat fee. Additional rental costs are tracked on the list segment. For more information, see Add List Segments on page 288.
Base exchange cost	If you exchange the list, enter the baseline cost to exchange it and select whether the cost is per thousand records or a flat fee. Additional exchange costs are tracked on the list segment. For more information, see Add List Segments on page 288.

Add List Segments

You can add list segments to use with imported and vendor-managed lists. Use these segments to track the costs and record counts for lists used on direct marketing efforts. For more information, see Add List Segments to a Direct Marketing Effort on page 140.

Add a list segment

1. From *Marketing and Communications*, click **Segments**. The Segments page appears.
2. Under **Tasks**, click **Add a list segment**. The Add list segment screen appears.



3. In the **Name** and **Description** fields, enter a name and description to identify the segment in efforts and reporting.
4. In the **Site** field, select the site to associate with the segment. Only users associated with the selected site can access the segment.
5. In the **Category** field, select a category to group related records for comparison and reporting. For example, "0-3 Month Subscribers."
6. If your organization configures source code parts and layouts, a code field appears. To help track the effectiveness of the segment, select the code to identify the segment. The values available are those defined on the Source Code Parts tab of the Source Codes page. If you select the same code as another segment, you receive a warning that you will create duplicate segments. You can click **Ignore** to create the segment anyway.
7. In the **Order date** field, enter the date you purchased the list.
8. In the **Expires on** field, enter the date after which members of the list cannot be contacted.
9. In the **# of contacts** field, enter the number of times you can contact each member of the list before the expiration date.
10. In the **List** field, select an acquisition list or create a new one.
11. To import the list, in the **File** field, select the .csv file with the list data. When you import a list, you can select an existing import layout or create a new one. The import processes when you click **Save**. For information about the Import list screen, see Import Lists on page 290. To remove the import file, Click **Clear**.

12. For **Rental** and **Exchange**, you can enter information about the costs associated with rented and exchanged lists. The **Total** displays the sum of the **Rental** and **Exchange** columns. If you select an import file, the total must equal the quantity from the import file.
    a. In the **Quantity** column, enter the number of records included in the rented and/or exchanged lists. If the list is imported, the **Rental** field displays the number of records in the list.
    b. The **Base cost** column displays the baseline costs defined on the acquisition list to rent or exchange the list. Additional rental and exchange costs are tracked on the list segment.
    c. In the **Cost adjustment** column, enter any additional costs associated with the list and select whether the cost basis is per thousand records or a flat fee.
13. To assign the segment to a group, select the Groups tab. When a segment is part of a group, you can add it and all the other segments in the group to an effort at one time. For more information about how to create segment groups, see Segment Groups on page 273.
14. Click **Save**. You return to the Segments page.

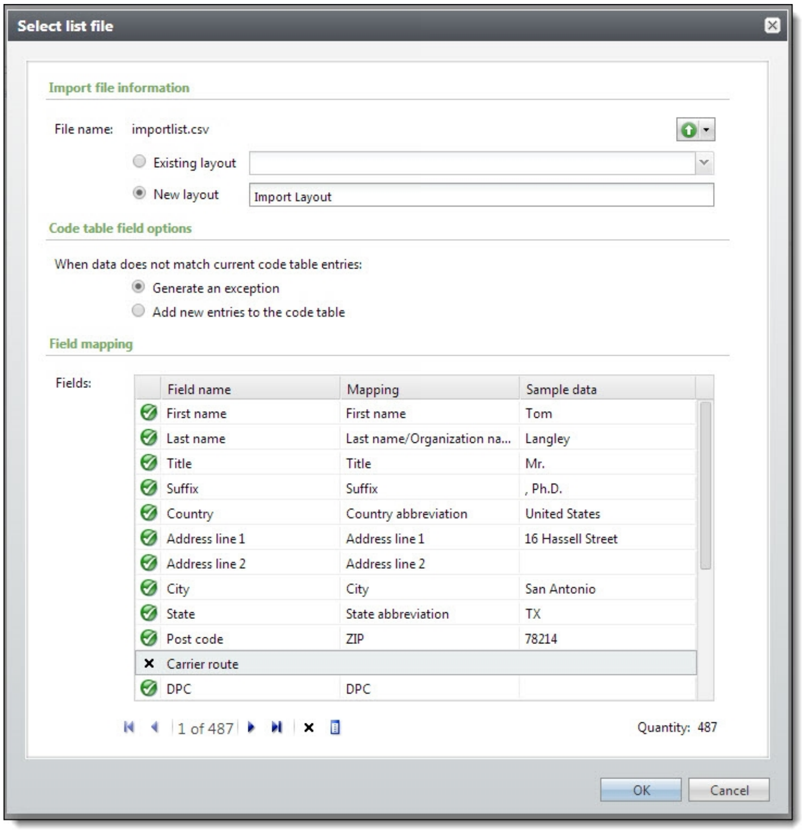
Import Lists

When you create an imported list segment, you can import the .csv file with the list data into the program. When you import a list, you can use an existing layout or create a new one.

To reuse a list segment, you can change its imported list file. For example, each year you can use the New Year's List for the New Year's appeal mailing. Rather than creating a new list each year for the appeal, you can reuse the New Year's list and create one list segment for which you change the import file each year. When you change the import file on a list segment, information about the old import file is preserved on the Import history tab. Also, you can still look up members of the old list file using their finder numbers. To change the import file, on the Edit list segment screen, click **Clear** next to the **Import file** field. This clears the existing import file so you can select the new import file.

Import a list

1. From the Add list segment screen, in the **File** field, click the file upload button and browse to a valid .csv file. This file will be copied into the database as part of the import process.The Select list file screen appears.



2. Choose an import file layout. In the **Existing layout** field, you can select a layout created for a previous import file that includes the same fields. Otherwise, select **New Layout** and enter a name. For more information about file layouts, see List File Layouts on page 291.
3. Under **Code table field options**, select what should occur when the import file includes code table entries such as titles or suffixes that do not already exist in your database. To receive an error when the file is imported, select **Generate exception**. To automatically add the entries to the table, select **Add new entries to code table**.
4. Under **Field mapping**, the program maps the fields in the list according to the selected file layout. For more information about mapping fields, see List Field Mapping on page 292.
5. Click **Import** to begin the import process. The List Segment Import Status page appears while the import processes. For more information see, List Segment Import Status Page on page 293.
6. When you return to the segment, the Import History tab lists each import instance. For more information, see Import History Tab on page 279.

List File Layouts

File layouts define the file structure of a list file. Most list vendors provide list files in a specified format that typically does not change. When you use multiple lists from the same vendor, a file layout eliminates the need to map all the list fields each time you rent a new list. You can define a file layout once and reuse the layout each time you import a list from the vendor into the program.

Note: A file layout is associated with a record source. If you save a file layout for one source and import a list into another source, the file layout will not be available in the **Layout** field for the new import.

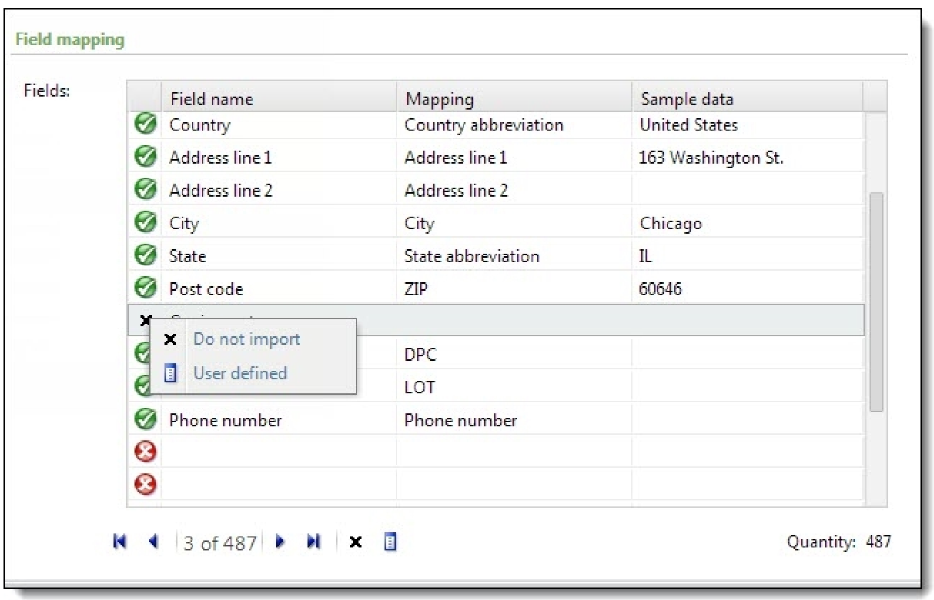
A valid .csv file is required to add a file layout. The first row of the file must contain header fields. After you select the file, the header fields appear in the **Field Name** column where they can be mapped to pre-defined program fields or to fields you define yourself.

From the File Layouts tab on the Acquisition Lists page, you can view file layouts created from previous list imports.

List Field Mapping

When you create a file layout, you must map fields in the imported list to their equivalent in your database. The program attempts to map fields in the list to fields in your record data source (for example, name and address). You should verify the accuracy of those mappings.

Under **Field Mapping** are several tools to help you map fields.



- **Field Name** - Displays the header fields from the imported list.
- **Mapping** - Select which record source field to map to the imported field.
- **Sample Data** - Displays data from the imported list to help you determine the correct field mappings.

Fields that need to be mapped display a red “x” icon. All fields must be mapped or specified as “Do not import” before you can successfully import the list. For any row with the red “x” icon, you either map the field to a source or user defined field, or specify that it not be imported. All rows must display the green checkmark before the file can be successfully imported.

The arrow buttons at the bottom of the grid allow you to move through the rows of data from the import file.

To exclude a field in the list from the import process, right-click the field name and select **Do not Import**.

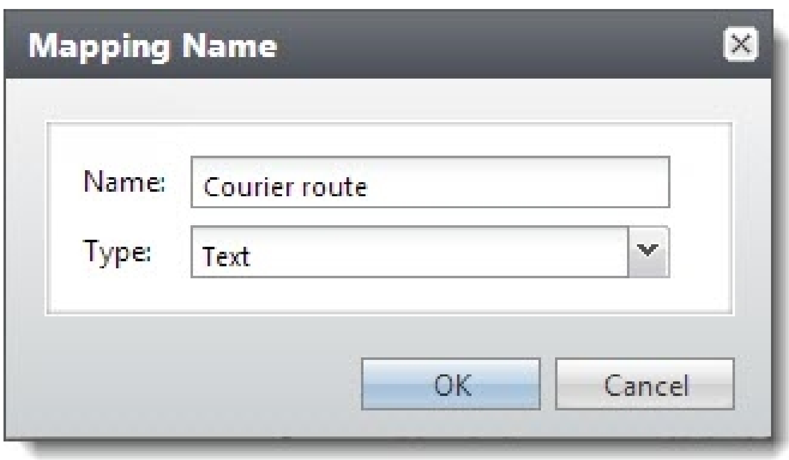
If the list includes a field you want to import that does not exist in your record source, you can create a user defined field. For example, an import file may include a column for **Interests**, such as golf or fishing. If there is no existing **Interests** field in your database, you need to create a user defined field in order to map that field in the file layout.

As part of the import process, the program creates a query view that includes all imported list fields, including user defined. To create a query based on this source view, click **Show in query designer**. You can filter the query by the **Interests** field to find all records in the list with the same interests. If you import multiple lists with this same file layout and add those lists to the consolidated query view, you can use the **Interests** field to group records across those lists by types of interest.

Note: You can only import individual constituents. If you include organizations in the import file they are added as individual records.

Create a user defined field

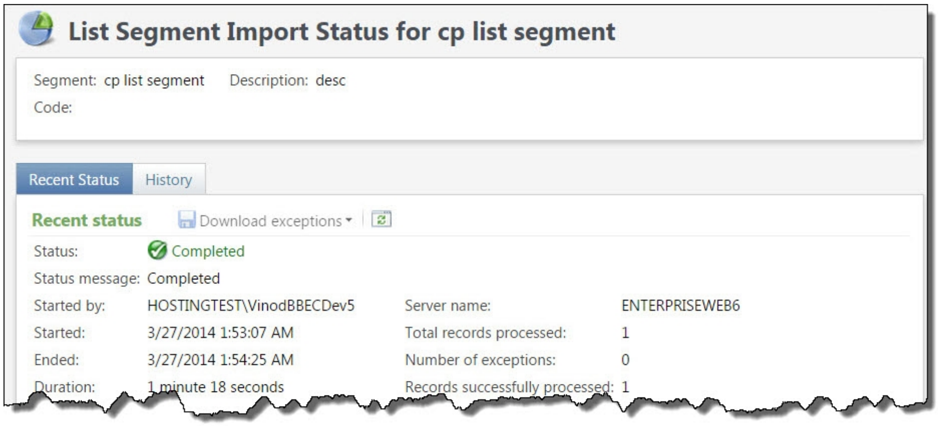
1. Right-click on a row in the **Fields** grid and select **User defined**. The Mapping Name screen appears.



2. Enter the name for the field to display in query views.
3. Select the type of data the field will contain.
4. Click **OK** to save the field and return to the **Fields** grid.

List Segment Import Status Page

After you import a list file, the List Segment Import Status page appears.



The Recent status tab provides details about the most recent operation of the import process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to run the process; the total number of records processed; and how many records processed successfully and how many were exceptions. Each time you run the import process, the program generates a status record of the instance.

On the History tab, you can view historical status record information about each instance of the import process. The information in the grid includes the status of the instance; the start time, end time, and duration of the instance; the person who started the instance; the total number of records processed during the instance; and the server used to run the process for the instance.

Purge List Members

When the imported records for a list segment are no longer valid or your organization no longer has permission to use those records, you can purge the list segment’s import history from the system. From the list segment's Import History tab, expand the import process and click the **Purge** task button.

Once purged, the list segment remains on the list’s Segments tab and the segment’s Import History tab with a status of “Purged”. The list segment no longer contains identifying personal information for its members (such as name or address), but their finder numbers still return marketing effort information.

Note: You can purge or delete only import histories with a “Historical” status.

Delete Import History

To completely remove any trace of the imported records (including all information and IDs), you can delete the list segment’s import history. From the list segment's Import History tab, expand the import process and click the **Delete** task button.

Note: You can purge or delete only import histories with a “Historical” status.

List Segment Queries

All queries, or groupings of records, are based on "source views." Selecting a specific source view instructs the program to select a particular type or group of records for inclusion in the query. For example, creating a query based on the Vendor source view would group vendor records based on the criteria you specify, while a query based on the Constituent source view would group constituent records. Source views determine the field categories available for a query.

When you import a list, the program creates a query source view related to the list automatically. When you click **Show in query designer** under **Tasks**, you can create a query based on this source view. The view contains a selection (grouped set of IDs) that includes only members of the imported list.

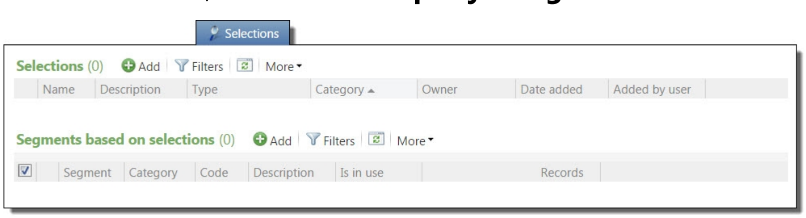
From the Selections tab of an imported list, you can create additional selections to further group records from an imported list. You can also create additional segments based on the selections and specify separate quantity ratios and costs from the "parent" segment. For example, you may want to send an effort to everyone in the list, but you want to send a different package to people in the city in which your organization is located. You can create a selection and corresponding segment where City = your city. Then use direct marketing efforts to send a package to the segment based on this selection and a different one to the parent segment.

Segments based on selections can be created only from the parent segment's page; however, these appear as regular list segments throughout the program and can be used in the same ways. Also, because these segments are based on selections, they can be refreshed just like constituent segments.

Note: Additionally, a "Consolidated Marketing List" source view is available that can show all data contained in a record source, as well as the data from lists associated with that record source that you specify to include in the consolidated list. This view enables you to tell whether a record came from your source or a list. For more information, see Consolidated Marketing List Source View on page 297.

Add a selection based on a list segment

1. From the Segments tab of the Segments page, select the list segment you want to view. The Segment page appears.
2. Under **Tasks**, click **Show in query designer**. The Selections tab appears.



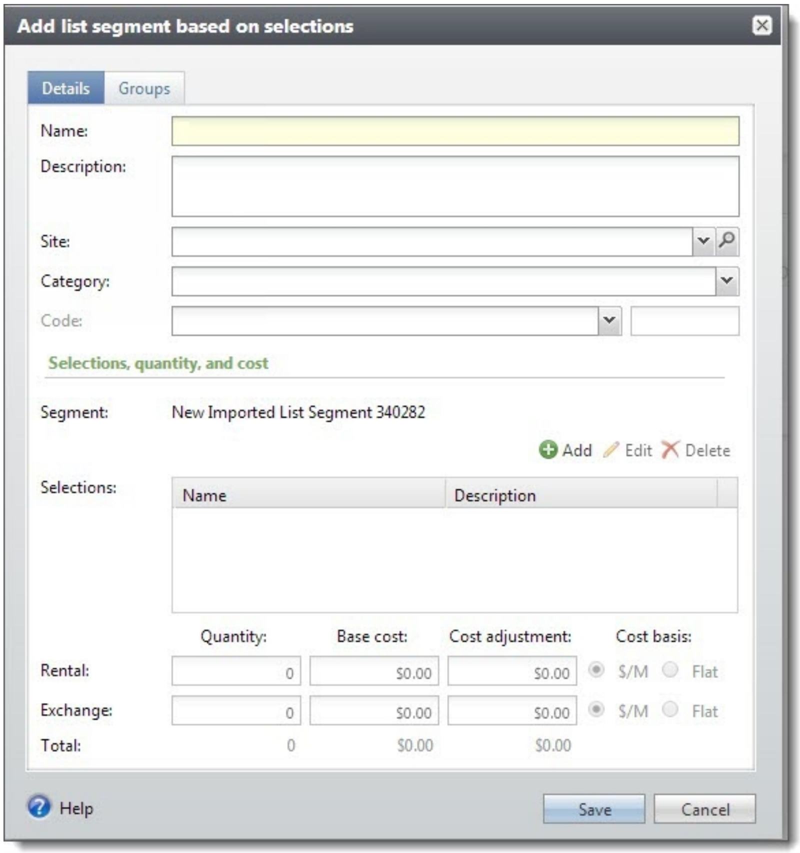
3. In the Selections area, click **Add**. The New Ad-hoc query screen appears.

   A selection is available for the original list query. The records available for this query are those that are members of the imported list. Any filter criteria you add to the query will be filtering from this pool of records.

For more information about the other options available when creating a query, see the *Query and Export Guide*.

Add a list segment based on a selection

1. From the Selections tab of a list segment, click **Add** in the Segments based on selections area. The Add list segment based on selections screen appears.



2. In the **Name** and **Description** fields, enter the name for the segment and a description tto identify the segment in efforts and analyses.
3. In the **Site** field, select the site to associate with the segment. Only users associated with the selected site can access the segment.
4. In the **Category** field, select a category to group related records for comparison and reporting. For example, “0-3 Month Subscribers.”
5. If your organization configures source code parts and layouts, a code field appears. To help track the effectiveness of the segment, select the code to identify the segment. The values available are those defined on the Source Code Parts tab of the Source Codes page. If you select the same code as another segment, you receive a warning that you will create duplicate segments. You can click **Ignore** to create the segment anyway.
6. The **Segment** field displays the name of the parent segment.

7. In the **Selections** grid, select the selections to base the segment on. Click **Add** to search for an existing selection or create a new one. For more information about how to add selections, see Add a selection based on a list segment on page 295.
8. For **Rental** and **Exchange**, you can enter information about the costs associated with rented and exchanged lists. The **Total** displays the sum of the **Rental** and **Exchange** columns. If you select an import file, the total must equal the quantity from the import file.
   a. In the **Quantity** column, enter the number of records included in the rented and/or exchanged lists. If the list is imported, the **Rental** field displays the number of records in the list.
   b. The **Base cost** column displays the baseline costs defined on the acquisition list to rent or exchange the list. Additional rental and exchange costs are tracked on the list segment.
   c. In the **Cost adjustment** column, enter any additional costs associated with the list and select whether the cost basis is per thousand records or a flat fee.
9. To assign the segment to a group, select the Groups tab. When a segment is part of a group, you can add it and all the other segments in the group to an effort at one time. For more information about how to create segment groups, see Segment Groups on page 273.
10. Click **Save**. You return to the Selections tab where the new segment now appears in the Segments based on selections area.

Show in Query Designer

When you import a list, a query source view related to the list is automatically created. To create a query based on this source view, click **Show in query designer**. The Selections tab appears and you can create selections based on the query source view and segments based on those selections. For more information about how to add selections and segments based on selections, see List Segment Queries on page 295.

Consolidated Marketing List Source View

The program includes a Consolidated Marketing List source view that includes all data contained in your house file record source, as well as the data from any imported lists you choose to include.

This consolidated view enables you to create queries across that view to pull in all records meeting the criteria, whether the records came from your source or the list. You can create new queries based on this source view for use with your segments. Periodically, you will need to run a process 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.

Warning: To turn on the consolidated list source view, you simply add a list segment to the view. After you enable the consolidated list, you cannot turn it off except by restoring your database to a backup. You can choose not to use the consolidated view once it is enabled, but you will still see Consolidated Constituent Marketing Information as a source view when you create selections and export definitions.

Add a list segment to the consolidated list

1. From a list segment's page, select the **Add to consolidated list** task.
2. A message appears verifying that you want to add this list to the consolidated list.
3. Click **Yes**. The list is now included in the Consolidated Marketing List source view.

Remove a list from the consolidated list

1. From a list segment's page, select the **Remove from consolidated list** task.
2. A message appears verifying that you want to remove this list from the consolidated list.
3. Click **Yes**. The list is no longer included in the Consolidated Marketing List source view. Records from the list segment will not be included in queries created from this source view.

Update field information in the consolidated list query view

1. From a list segment's page, select the **Update consolidated list query view** task.
2. The process updates the field information in the consolidated list query view to match the record source's query view.

Troubleshooting Consolidated List Selections

If you import a list and no records are added to your consolidated segments when you refresh them, even though you know records on the list meet the criteria of the consolidated selections underlying the segments, make sure the list is included in your consolidated marketing list.

For example, if your segments are based on selections created from your house file data source, the list records will not be available until you add the list to the consolidated list and recreate the selections for the segments using the consolidated list as the source.

Process Duplicates in Lists

When you run the **Process duplicates** task, the program compares members of a list segment to members of your record source to determine duplicates. After you import or update a list, you can run this process to determine if any of the list members are duplicates.

When setting up a record source, you can specify the criteria used to determine when records are duplicates.

Note: The **Process duplicates** task is available only when a list segment contains all the fields defined on the duplicate criteria tab of the record source. For more information, see the Record Sources chapter of the *Administration Guide*.

Process duplicates for a list

1. From a list segment's page, select the **Process duplicates** task.
2. The Import Status page appears when processing completes.

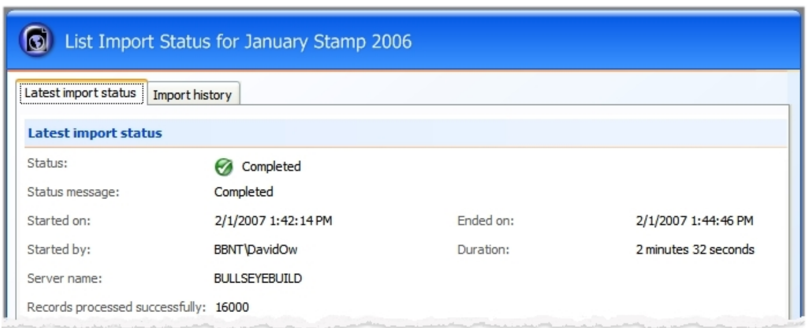
3. Any duplicate records found in the list are included in the **Duplicate Queries** source view.

View Process Duplicates Status

After processing duplicates on a list segment, you can view the status and history of the process at any time by clicking the **View process duplicates status** task link.

View status and history for processing duplicates

1. From a list segment's page, click **View process duplicates status**. The Import Status page for the selected list appears.



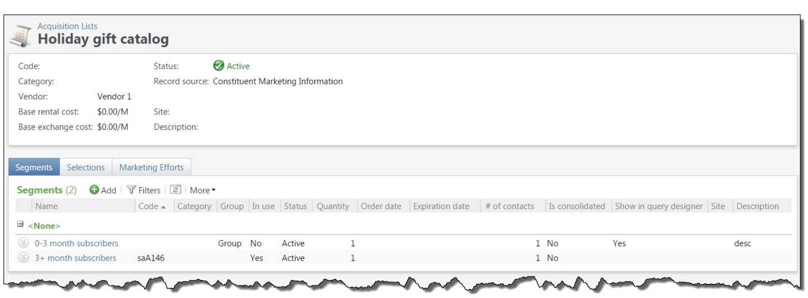
2. The Latest import status tab displays information such as number of records processed successfully and number of exceptions. Importing history information is also displayed for the remove duplicates process on the Import history tab.
3. Click **Go to {name of list}** in the task pane to return to the list page.

Manage Lists

From a list record, you can view summary information about the list, segments related to the list, selections created from imported list segments, and marketing efforts where the associated list segments are used.

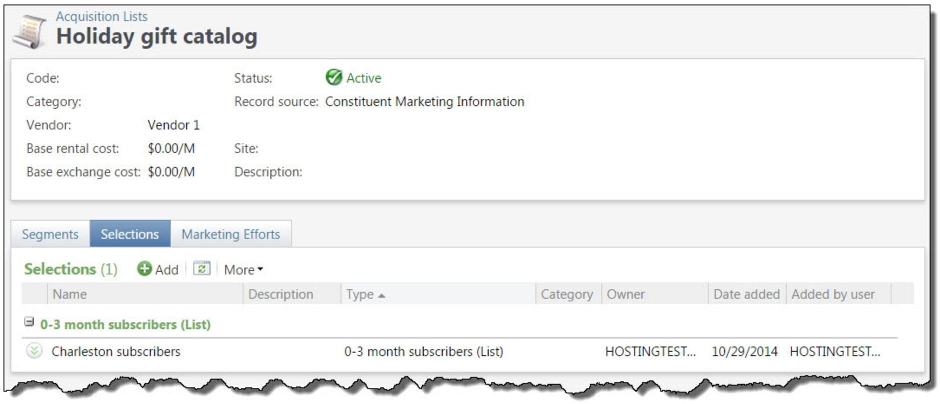
Segments Tab

The Segments tab lists all list segments that use the list.



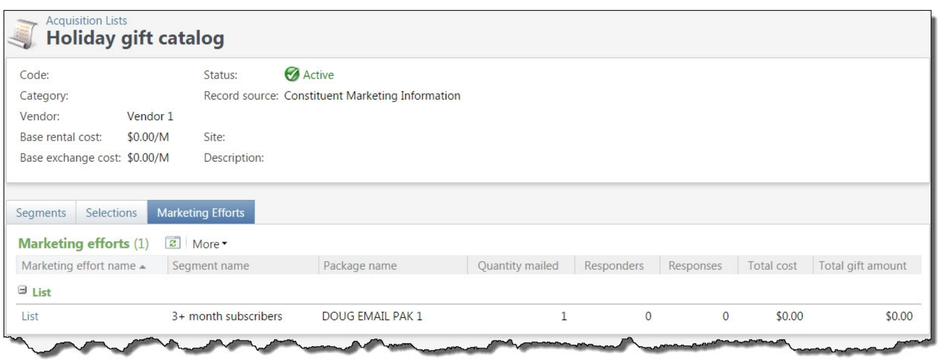
Selections Tab

The Selections tab displays all selections for each list segment associated with the list. You can create additional selections. For information about how to add selections, see List Segment Queries on page 295.



Marketing Efforts Tab

The Marketing Efforts tab displays all marketing efforts that currently use the list.



Finder Files

With finder files, you can keep rented and exchanged names and addresses separate from your house file until those recipients make a donation. A finder file is a list of names provided by a list vendor who assigns a finder number to each name in the list based on the range you reserved for the effort.

This is the common workflow for finder files:

- Create list segments based on non-imported acquisition lists that specify the vendor and rental and/or exchange quantities.
- Create a direct marketing effort.
- Add list segments to the marketing effort. Assign to each segment the source code provided to the vendor.
- Reserve the range of finder numbers provided to the vendor.
- Activate the marketing effort.
- From the **Finder files** area in *Marketing and Communications*, import the finder file from the vendor. The Finder File Import process imports the list of recipients and their assigned finder numbers, and validates that the finder numbers fall within the range reserved for the marketing effort. The program also matches the source code for each person in the file to the source codes assigned to the list segments. After the import, the list segment counts display the number of records included from the finder file.

Import Finder Files

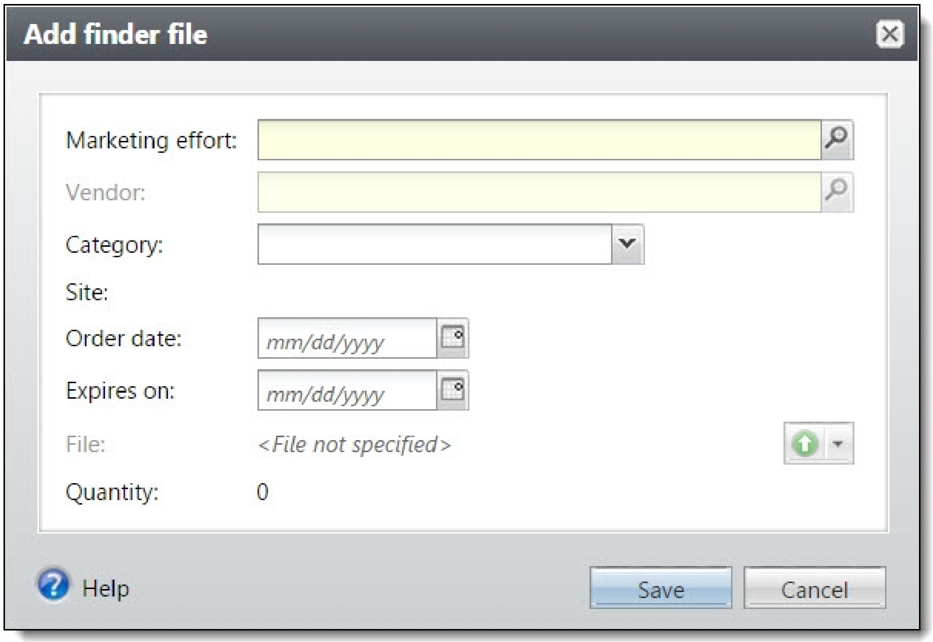
You can add one or multiple finder files to a marketing effort. When you add a finder file to a marketing effort, you import the finder records received from the vendor as a *.csv file.

Import a finder file

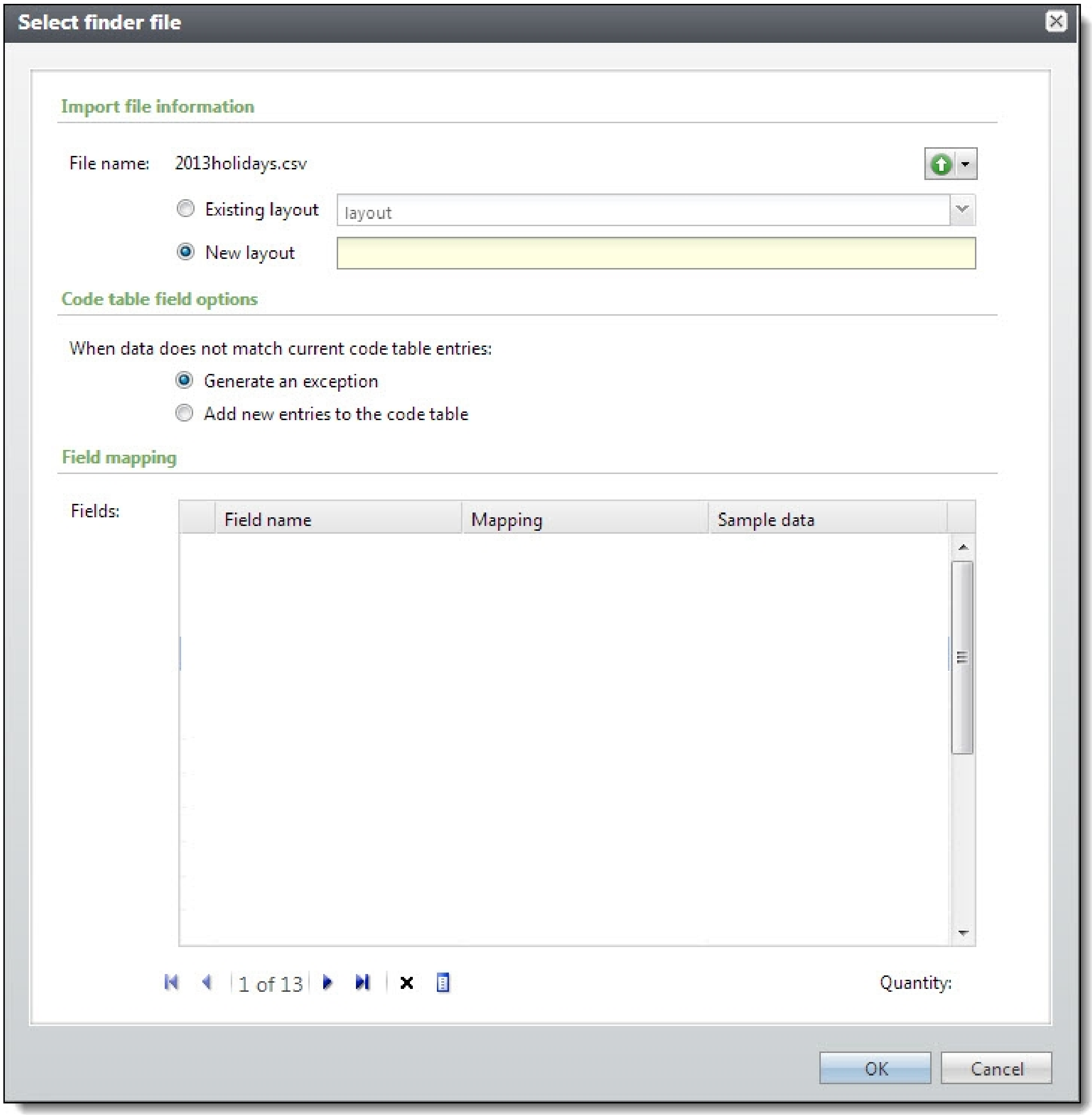
1. From *Marketing and Communications*, click **Finder files**. The Finder Files page appears.

Note: You can also add finder files from the Finder numbers tab of an activated marketing effort.

2. On the action bar, click **Add**. The Add finder file screen appears.



3. In the **Marketing effort** field, select the marketing effort to use the finder file. You must select an activated marketing effort that includes a list segment for each imported list, source codes that match the source codes provided by the vendor, and finder numbers reserved by vendor.
4. In the **Vendor** field, select the vendor that provided the finder file. You can select only vendors with a range of finder numbers reserved for the selected marketing effort. For more information about how to reserve finder numbers, see Reserve Finder Numbers on page 127.
5. If you have multiple record sources, select the source to use with the finder file.
6. To group the finder file with similar finder files, in the **Category** field, select the category. Your system administrator configures the available finder file categories.
7. The **Site** field displays the site assigned to the selected marketing effort.
8. In the **Order date** field, select the date the finder file was ordered from the vendor.
9. In the **Expires on** date, select the date after which to purge the finder file from the program. This field does not cause the purge to occur; it simply records the date.
10. In the **Finder file** field, select the *.csv finder records file and click the file upload button. The Select finder file screen appears.



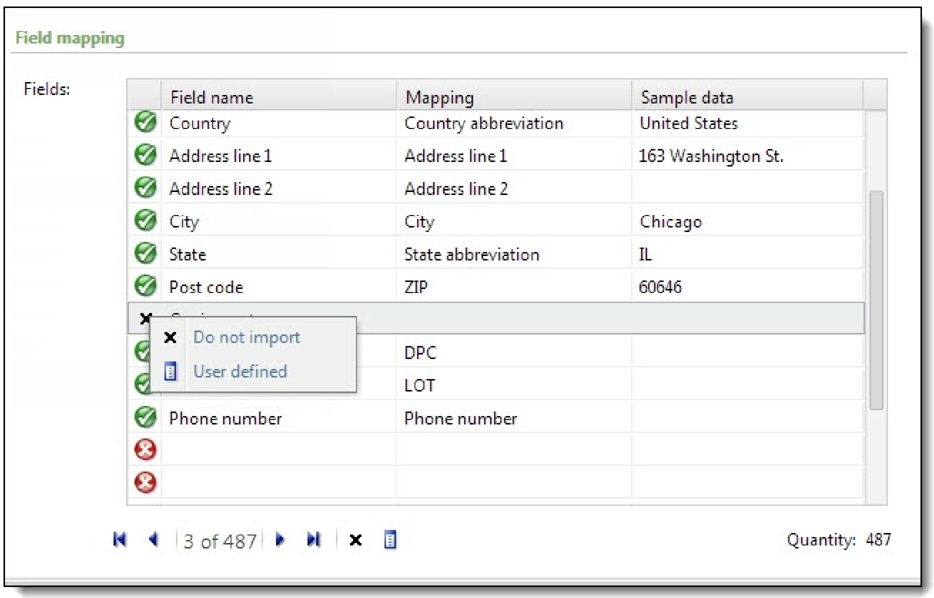
11. Under **Import file information**, the **File name** field displays the name of the selected import file.
12. Select a layout that specifies how to map imported fields to fields in your database. You can choose an existing layout or create a new one.
13. If you create a new layout, in the **New layout** field, enter the name for the layout.
14. Under **Code table field options**, select how to handle code table entries in the import file that do not already exist in your database. You can receive an error when the file is imported or automatically add the entries to the table.
15. Under **Field Mapping**, map the fields in the finder file to fields in your record source. For information about how to map fields, see Finder File Field Mapping on page 304.
16. Click **OK**. You return to the Add finder file screen.

17. Click **Save**. The program begins the import. To view the status and history of the process, click **View import status**. The Import status page displays detailed counts by segment as well as any import exceptions, such as duplicate finder numbers. For more information, see View Import Status on page 305.

Finder File Field Mapping

When you create a new file layout, you must map fields in the finder file to fields in the record source against which you import the records. The program attempts to map any recognizable fields in the finder file to known fields in your record data source, such as name and address. We recommend you verify the accuracy of those mappings. You can select to not import individual fields and instead define a field to map to if it does not already exist in the source. For information about file layout fields, see Finder File Layouts on page 306.

Under **Field Mapping** on the Select finder file screen, you can use several tools to complete the mapping.



Before you can successfully import a finder file, you must map all fields included in the file. Rows that display an “x” must be mapped to a source or user-defined field, or specified **Do not import**. All rows must display the checkmark before you can successfully import the file.

When you right-click on a row and select **Do not import**, the program does not import the information for the selected field, and no column appears for it in the imported table.

If necessary, you can create a user defined field that is not one of the known fields in your record source. For example, a finder file may contain an **Interests** field which you want to import even though it is not part of your data source. The program creates a query view that contains all imported finder file fields, so after you import the finder file you can group records based on the **Interests** field to find everyone who has a particular interest, such as golf.

Because the program saves the file layout, you can use it to import another finder file with the same field. You can then add these finder files to the consolidated query view and group records across both (or all) imported finder files with “Interests” to find everyone from every imported finder file with a specific interest.

Use the arrow buttons at the bottom of the grid to move between rows in the import file.

On the Select finder file screen, the **Fields** grid contains three columns:

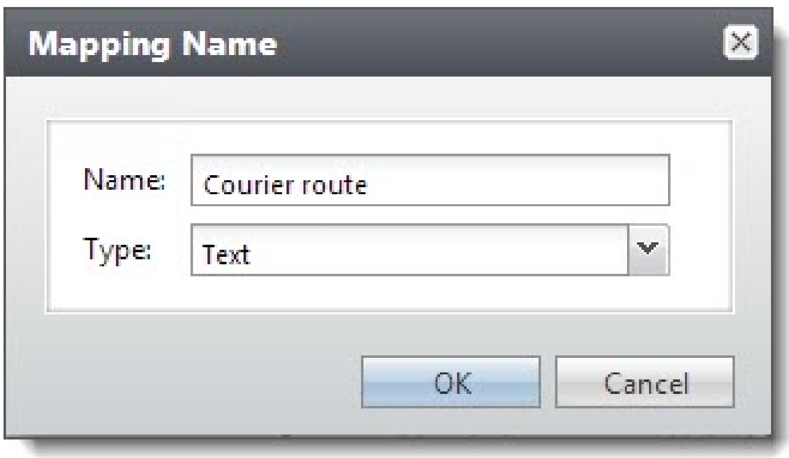
- **Field name** - The name of the field in the finder file.
- **Mapping** - A dropdown list of all available fields from the target record source.
- **Sample data** - The first line of each file as it pertains to the selected file layout, so you can determine the correct file layout and help avoid importing files against the wrong file format.

Warning: You must map the **Finder Number** and the **Source Code** fields.

Note: You can only import individual constituents. If you include organizations in the import file they are added as individual records.

Create a user defined field

1. Right-click on a row in the **Fields** grid and select “User defined”. The Mapping Name screen appears.



2. Enter the name for the field to display in query views.
3. Select the type of data the field contains.
4. Click **OK**. You return to the **Fields** grid.

View Import Status

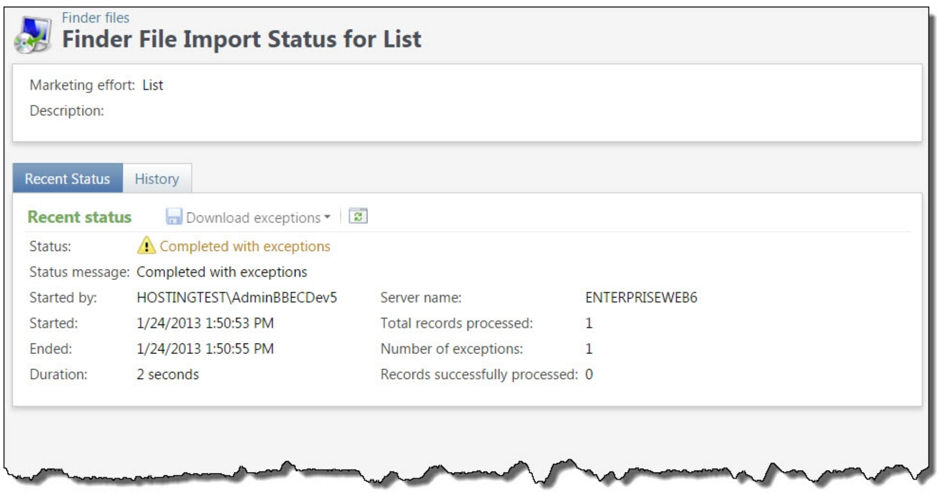
After you import a finder file, to view the status and history of the process, click **View import status**. The Import status page displays detailed counts by segment as well as any import exceptions, such as duplicate finder numbers. To save a *.csv file that contains any finder records that failed to import and the reason they failed, click **Download exceptions**. You can return this file to the vendor for corrections and then import the corrected version.

Records fail to import for these reasons:

- Duplicate finder numbers
- Finder numbers not in the reserved range
- Source code not in the marketing effort
- Finder numbers failed the check digit test

View status and history for finder files

1. From *Marketing and Communications*, click **Finder files**. The Finder Files page appears.
2. On the Finder Files tab, select the file to view and click the import date under the **Import date** column. The Import Status page for the file appears.



   The Recent status tab displays information such as the number of records processed successfully and the number of exceptions. The History tab displays information about previous import processes for this finder file.

3. To return to the marketing effort, click **Go to [effort name]** under **Tasks**.

Finder File Layouts

File layouts define the file structure of a finder file. Most vendors provide finder files in a specified format that typically does not change. When you use multiple finder files from the same vendor, a file layout helps eliminate the need to map the finder file fields each time you rent a new finder file. You can define a file layout once and use it each time you import a finder file from the vendor.

Note: A file layout is associated with a particular record source. If you save a file layout for one source and import a finder file into another source, the previously saved file layout will not be available for the new import.

To add a new file layout, a valid *.csv file is required. The first row of the file must contain header fields. After you select the file, the header fields appear in the **Field Name** column, where you can map to pre-defined program fields or fields you define yourself.

Warning: You must map the **Finder Number** and the **Source Code** fields.

During the mapping process, the program attempts to auto-map fields. The program fields are used throughout the program when you create new marketing efforts or query on finder file information. The available fields are:

- Not Mapped
- Salutation
- Title
- First Name
- Middle Name
- Last name
- Suffix
- Organization Name
- Name Line 1
- Name Line 2
- Name Line 3
- Address Line 1
- Address Line 2
- Address Line 3
- City
- State
- Zip code
- Country

On the File Layouts tab of the Finder Files page, you can view a list of saved file layouts. Click the name of the layout to open a page where you can view a list of all imported finder files that use the layout.

Edit Finder Files

You can edit some information on a finder file, such as order date, expiration date and category. You cannot edit the vendor or marketing effort associated with the file.

Note: You cannot edit a finder file to re-import an updated file. To re-import, delete the original finder file and create a new one for the updated import file.

Source Codes

The Database Marketing Institute defines a source code as "a series of letters or numbers affixed to an outgoing advertisement or promotion that identifies the list, the offer, the package, and the segment (as well as the media) in which the promotion was made. Source Codes are essential to testing the success of any direct marketing effort."

Use **Source Codes** in *Marketing and Communications* to create source code parts and layouts based on your organization's structure, and then apply these to your marketing efforts. Later, you can you use the source code in reports and other data management tools to analyze the success of marketing efforts

Source Code Workflow

Setting up source codes requires several steps.

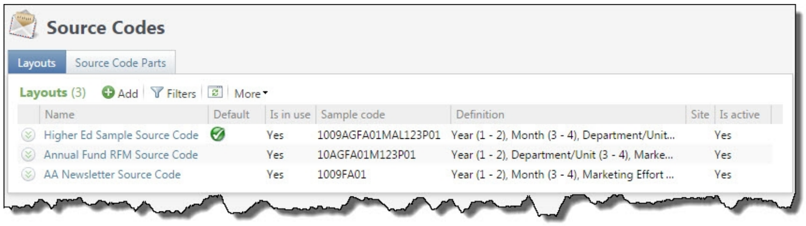
- Define your source code structures outside of the program. The structure refers to the relative positions of the code parts in your source code. For example, position 1 is for the Program code, 2-5 is for the Campaign code and 6-7 is for the Year. You need to define only one or two structures.

- Create source code layouts and source code parts based on the structures. Source code parts are the elements that build the code. When you create a part, you define all the possible values for that type of element. Layouts define the rules for the source code, including the position, format, and valid values for the code parts. For example, when you build a source code for membership renewals, you can define rules for the layout such as the Program code is always M, followed by the Campaign Code RENB or RENA, and the Year code is 10, 11, or 12. When you build a source code for direct marketing, the Program code is R or Q, followed by a variety of Campaign codes and the Year code. The layouts for membership renewal and direct marketing are different, yet they adhere to the same structure. For more information, see Add Source Code Parts on page 310 and Add Source Code Layouts on page 314.
- Add source code parts to layouts and define which code values can be used for the layout. For example, position 1 is the Program code part for the membership renewal and direct marketing layouts. However, for the membership renewal layout, only the M value is valid for that code part, while R or Q are both valid values for the direct marketing effort. When you create the source code part for Program, you would include the M, R, and Q values, plus any others you need for other types of marketing efforts. When you add the Program code part to layouts, you select to use only those part values that apply to that type of effort. For more information, see Add Source Code Parts to Layouts on page 317.
- Assign part code values to segments, packages, and lists, or you can choose to increment the values so the program automatically generates the next available value. When you create a marketing effort that uses these segments, packages, or lists, their part code values roll up to the effort’s source code. You can use these default values or enter other values. These values must follow the restrictions defined by the layout selected for the marketing effort.
- Select a source code layout on the Source Code tab when you create a marketing effort. If the layout includes user defined part types, you can enter or select values for those parts.
- Activate a marketing effort. The source code layout is copied and locked, so changes made to the original source code layout do not impact the activated marketing effort.
- Specify the codes that should be included on the various response devices included in the marketing effort when you export the marketing effort to a fulfillment house. When gifts come in from the marketing effort, the appropriate code is entered on each gift record so you can analyze the specific combination of package, segment, etc. that resulted in the gift.

Note: When you create a marketing effort from a planned marketing effort in a marketing plan, the source code entries are copied to that marketing effort. Changes made to the codes on the marketing effort do not update the codes in the plan.

Manage Source Codes

From the Source Codes page, you can create new parts and layouts, and edit or delete existing ones. Because you add source code parts to layouts, you must create the parts first.



Add Source Code Parts

Source code parts are the building blocks for your source codes. Each source code part contains a specific type of information and each layout defines how those parts are used in the source code. Because these components are commonly used in source codes, the program automatically includes parts for Channel, Package, List, Effort, Segment and Test Segment. You can also create user defined parts such as Department, Program, Initiative, or Fundraising Area.

On each part type, you define all the possible values you want available for different source codes. These values can be fixed or variable. “Fixed” means the values are locked down so you can only select from the values provided. For example, you can define fixed values for the “Department” source code part, such as ‘M’ for Membership or ‘D’ for Development. Other part types need to allow variable values so you can enter different values for different situations. For these values, you can create a string of wildcard characters that defines the format allowed for that value. @ represents any letter, # represents any number and ? represents any letter or number. For example, you can define the format for the “Month” source code part as a two digit code (i.e. May = 05). The field displays ## to indicate that you need to enter two digits. Values can also be a combination of fixed and wild card characters. For example, P# means the code must start with a P and be followed by a single number, and @P means the code must start with any single letter, and be followed by a P.

For parts that require only a few possible values, such as Channel and Test Segment codes, use fixed values. For others that require a large number of code values, such as List, Package and Segment codes, use a combination of fixed and wild card characters.

Because your organization has its own unique rules for source code length and structure (your source code layouts may even change among types of marketing efforts), the program allows you to create as many source code parts and layouts as you need.

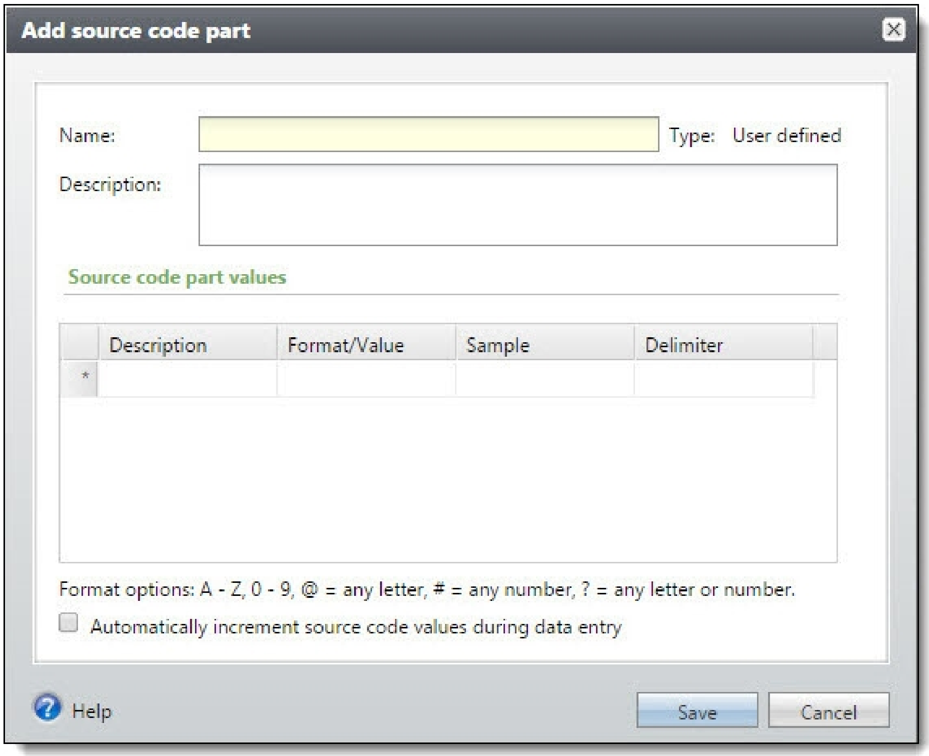
For certain record types, such as segments, lists and packages, you may manage a very large number of records that require a large number of unique code values. Because there are so many records, it is not important that you can recognize the code value for a particular record; you just need it to be 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 create a new record of that type. The table below explains how the program generates the code values based on the specified code format.

Note: It is possible to run out of code values. The program starts with the next highest code it can generate. For example, the Segment code part uses a two digit format (##). If the last code value generated for a segment was 50, then the next value will be 51. When the code values reach 99, the program starts over at 00 and then increments up to 49. Once you reach 50 again, the program notifies you that you will create a segment with a duplicate code. When you run out of values for packages or lists, you cannot save the record and you will need to create a new source code part with a wider format range. To avoid running out of unique code values, plan ahead and create a format wide enough to accomodate all your records. For example, a three-digit alphanumeric (0-9, A-Z) code provides over 46,000 unique codes, while a two-digit code provides over 1,200 unique combinations.

Format	Starting Code Value	Next Increment	
###	000 009 099	001 010 100	This format uses only numbers so the result is a range of codes from 000 to 999.
@@@	AAA AAZ AZZ	AAB ABA BAA	This format uses only letters so the result is a range of codes from AAA to ZZZ.
???	000 009 0AA	001 00A 100	This format uses letters and numbers. The program starts with 0 – 9, then continues with A – Z before cycling back to 0. This results in a range of codes from 000 to ZZZ.
@#?	A00 A09 A0Z A9Z	A01 A0A A10 B00	This format uses all three wild cards. Reading from left to right, the first position (@) allows letters only: A – Z. The next position (#) allows numbers only: 0 - 9. The last position (?) uses any character, 0 – 9, then A – Z. This format results in a range of codes from A00 to Z9Z.
X##	X01	X02	This format includes the fixed value 'X'. In this case, the program only increments the wild card positions (##). This format results in a range of codes from X00 to X99.

Add a source code part

1. From *Marketing and Communications*, click **Source codes**. The Source Codes page appears.
2. Select the Source Code Parts tab.
3. Click **Add**.
4. The Add source code part screen appears.



5. In the **Name** field, enter a name for each source code part. This is primarily intended for user defined part types.
6. In the **Description** field, enter text to help users enter a valid format for the code section when they create a marketing effort using this layout. This description appears next to the Code field for this part on segments, acquisition lists, packages, etc.
7. In the **Source code part values** grid, define the different values allowed for the source code part.
8. To allow the program to automatically generate a unique part value when you create a new record, select **Automatically increment source code values during data entry**.
9. Click **Save** to save the source code part.

Add Source Code Part Screen

Screen Item	Description
Name	Enter a **Name** for each source code part. This is primarily intended for **User Defined** type fields, but you can enter a name for any part type. This text appears as the label for the source code part field on marketing efforts, lists, packages, or segments.

Screen Item	Description
Type	The **Type** field displays the type of source code part. Program defined parts include Effort, List, Segment, Test Segment, Channel, and Package. You can edit program defined parts, but you cannot delete them. You can also add user defined parts such as Department, Program, Initiative, or Fundraising Area. Each layout can have only one Effort, Segment, Channel, List, or Package type per layout, but user defined types are unlimited.
Description	Enter a description for the part type. This description appears next to the Code field for this part on segments, acquisition lists, packages, etc. The description should explain what the code represents, for example, Marketing Effort, Segment, Channel, or List. You can select "User Defined" to create your own type, then give it an appropriate name in the next column, such as "Campaign". This description is also used when the code definition is printed.
Source code part values grid	For each row, define the different values allowed for the source code part. The grid contains the following columns: **- Description** - Enter a description for the part value. For example, "Department" or "Month". **- Format/Value** - Define fixed or formatted part values. For example, you can define fixed values for the "Department" source code part, such as 'M' for Membership or 'D' for Development. Other part types need to allow variable values. For these values, you can create a string of wildcard characters that define the format allowed for that value. @ represents any letter, # represents any number and ? represents any letter or number. For example, you can define the format for the "Month" source code part as a two digit code (i.e., May = 05). The field displays ## to indicate that you need to enter two digits. **Format Options** at the bottom of the screen display the characters that are valid for formats. Values can also be a combination of fixed and wild card characters. For example, P# means the code must start with a P and be followed by a single number, and @P means the code must start with any single letter, and be followed by a P. **- Sample** - Enter a sample of the format options you specified. The Sample must match the specified **Format/Value**. If you enter more than one **Format/Value** (separated by commas), the sample must match at least one of them. **- Delimiter** - You can optionally specify a character to be used to separate the parts of the source code.
Automatically increment source code values during data entry	If you entered a format in the **Format/Value** column, you can select this option to automatically generate unique source code part values 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.). For more information about how each code format generates the next incremental value, see the table in Add Source Code Parts on page 310.

Edit Source Code Parts

You can edit source code parts at any time. Any changes you make to a part will affect any non-activated marketing efforts with which the part is associated. Activated marketing efforts are not affected because the program copies the source code parts during activation. For example, if your segment code is ABC and you later change it to XYZ after the effort is activated, the segment code on the activated effort remains ABC.

Edit a source code part

1. On the Source Code Parts tab, select a source code part to edit and click **Edit**. The Edit source code part screen appears.
2. Edit the information as necessary on the screen. The items on this screen are the same as those on the Add source code part screen. For more information about the items on this screen, see Add Source Code Part Screen on page 312.
3. To save your changes and return to the Source Codes page, click **Save**.

Delete Source Code Parts

You can delete any parts that are not currently in use on a layout. You cannot delete program defined parts types (Channel, Package, List, Effort, Segment, or Test Segment).

Delete a source code part

1. From the Source Code Parts tab, select a source code part and click **Delete**. A message appears to ask if you are sure you want to delete the process.
2. Click **Yes**. The program deletes the process. You return to the Source Codes page.

Add Source Code Layouts

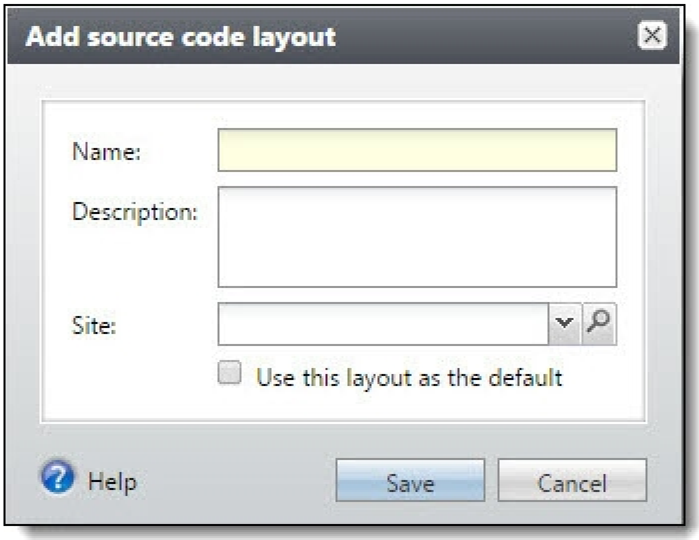
A source code layout defines the rules for a source code, including the position, format, and code parts included in the code, as well as the values allowed for those code parts. You must create source code parts before you can add a layout. For more information, seeAdd Source Code Parts on page 310.

You can create a variety of layouts to meet the different needs of your marketing programs. Layouts may include many of the same source code parts, but will allow different code values for those parts. For example, the membership renewal and direct marketing layouts use the Program code part for position 1. However, for the membership renewal layout, only the M value is valid for the Program code, while R or Q are both valid values for Program on the direct marketing layout. When you create the source code part for Program, you would include the M, R, and Q values plus any others you need for other types of marketing efforts. When you add the Program code part to layouts, you select to use only those part values that apply to that type of marketing effort.

Because your organization has its own unique rules for source code length and structure (your source code layouts may even change among types of marketing efforts), the program allows you to create as many source code parts and layouts as you need.

Add a source code layout

1. From *Marketing and Communications*, click **Source codes**. The Source Codes page appears.
2. Select the Layouts tab.
3. Click **Add**. The Add source code layout screen appears.



4. In the name field, enter a name for the new layout. Each layout must have a unique name.
5. In the Description field, enter a description to help you identify the layout.
6. To make this layout the default on marketing efforts, mark **Use this layout as the default** checkbox. This is only a default, you can select another layout when you create marketing efforts.
7. System administrators can establish security access to source code layouts based on site. When you select a site in the **Site** field, only users associated with the selected site can access the source code layout.
8. Click **Save** to save the source code layout. The Source Code page for that layout appears. On this page, you can add parts to the layout. For more information about how to add parts, see Add Source Code Parts to Layouts on page 317.

Edit Source Code Layouts

You can edit source code layouts at any time. Any changes you make to a layout will affect any non-activated marketing efforts with which the layout is associated. Activated marketing efforts are not affected because the program copies the source code parts during activation. For example, if your segment code is ABC and you later change it to XYZ after the effort is activated, the segment code on the activated effort remains ABC.

Edit a source code layout

1. On the Source Codes page, select the Layouts tab.
2. Select a layout and click **Edit**. The Edit source code layout screen appears
3. The items on this screen are the same as available when you add a layout. For more information, see Add Source Code Layouts on page 314.
4. After you make your changes, click **Save** to save the layout and return to the Source Codes page.

Delete Source Code Layouts

You cannot delete source code layouts that are in use in non-activated marketing efforts. Activated marketing efforts are not affected because the program copies the source code parts during activation. For example, if your segment code is ABC and you later change it to XYZ after the effort is activated, the segment code on the activated effort remains ABC. To ensure that a layout used in non-active marketing efforts is not used with future marketing efforts you add, you can instead mark it inactive. For more information, see Mark Source Code Layouts Inactive on page 316.

Note: If you delete the default source code layout, no layout will default into the **Source code** field when you add a marketing effort.

Delete a source code layout

1. On the Source Codes page, select the Layouts tab.
2. Select a layout and click **Delete**. A message appears verifying that you want to delete the layout.
3. Click **Yes**. If the layout is not in use in any non-active marketing efforts, it is deleted.

Mark Source Code Layouts Inactive

As an alternative to deleting a source code layout and removing it from your database, you can mark it as inactive. Inactive source code layouts are not available to use with new marketing efforts, but remain associated with any current marketing efforts for which they have been specified. If you need to use an inactive layout with new marketing efforts you can activate it at any time.

Mark a source code layout inactive

1. On the Source Codes page, select the Layouts tab.
2. Select a layout and click **Mark inactive**. A message appears verifying that you want to make the layout inactive.
3. Click **Yes**. The layout is inactive and not available for use in new marketing efforts.

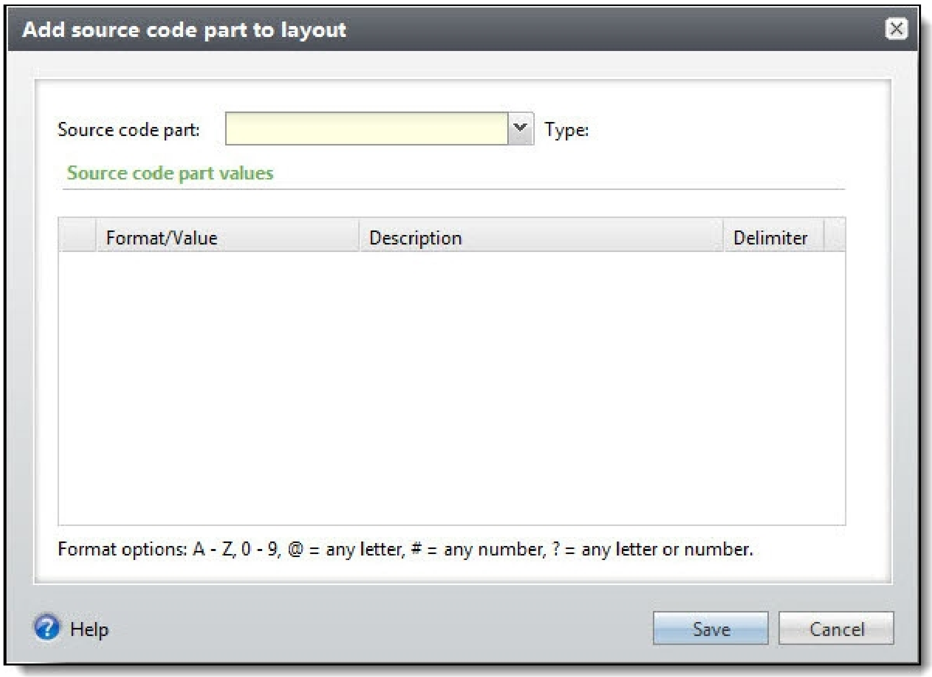
Note: You can make the layout active again at any time by selecting it and clicking **Mark active**.

Add Source Code Parts to Layouts

After you create a layout, you can add source code parts to it. When you add a source code part, you select which code values are valid for the layout. You can also specify the position for each part type in the code.

Add a source code part to a layout

1. From the Source Codes page for a layout, click **Add**. The Add source code part to layout screen appears.



2. In the **Source code part** field, select the type of part to add to the layout. A grid appears below that contains all the possible values assigned to that part type.
3. Mark each format/value that is valid for this layout.
4. Click **Save**. You return to the Source Codes page for the layout and the part appears in the grid.
   - The grid displays the part's current position in the source code layout. To change the position, select the part and click **Move up** or **Move down**.
   - To view all the values allowed for the parts, click **Expand all**. To hide these, click **Collapse all**.

Edit Source Code Parts on Layouts

You can edit the parts used on source code layouts at any time. Any changes you make to a layout will affect any non-activated marketing efforts with which the layout is associated. Activated marketing efforts are not affected because the program copies the source code parts during activation. For example, if your segment code is ABC and you later change it to XYZ after the effort is activated, the segment code on the activated effort remains ABC.

Edit a source code part on a layout

1. From the Source Codes page for a layout, select a part and click **Edit**. The Edit source code part to layout screen appears.
2. Select a layout and click **Edit**. The Edit source code layout part screen appears
3. The items on this screen are the same as available when you add a part to a layout. For more information, see Add Source Code Parts to Layouts on page 317.
4. After you make your changes, click **Save** to save the layout and return to the Source Codes page for the layout.

Delete Source Code Parts From Layouts

You can delete user defined source code parts from a layout. You cannot delete program defined parts types (Channel, Package, List, Effort, Segment, or Test Segment).

Delete a source code part from a layout

1. From the Source Codes page for a layout, select a part and click **Delete**. A message appears verifying that you want to delete the part from the layout.
2. Click **Yes**. If the part is not in use in any non-active marketing efforts, it is deleted.

Source Code Validation

When you create a list, package, or segment, you do not have to assign a code to it. However, once you assign that list, package, or segment to a marketing effort, you must enter a code if the list, package, or segment code parts are included in the selected source code layout.

Package and List code parts require unique values.

Marketing Effort, Test Segment, Channel, and user defined code parts do not require unique values.

You may assign the same code value to multiple segments, but you receive a warning message. For example, your direct marketing and membership programs both have their own set of segment codes. Both programs have a segment code of M12 but they mean different things — for direct marketing, M12 represents donors who gave in the last 12 months, while for membership M12 represents members who will lapse in the next 1 to 2 months. In this case, you will want to allow the segment to be used for both instances even though they are technically duplicates.

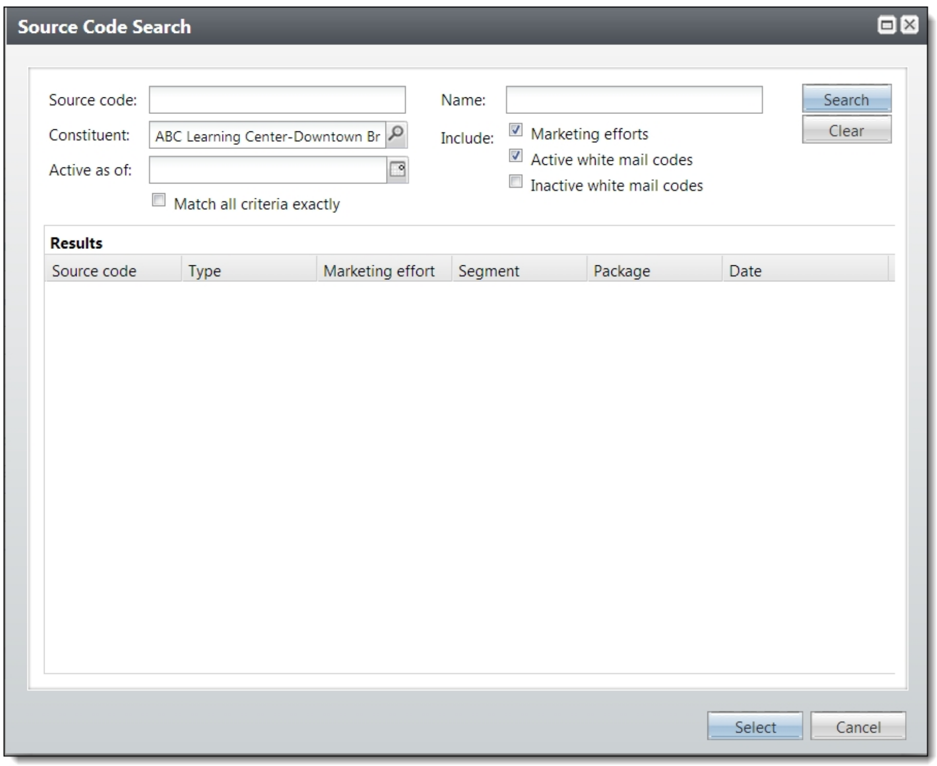
Direct marketing efforts that include only constituent segments do not require a source code. If you do include a source code on the effort, the segments do not require unique source codes.

Direct marketing efforts that include one or more list segments require unique source codes in order to link a donation back to a specific segment within the effort. All public media efforts require unique source codes for the same reason.

The program does not verify that source codes are unique among marketing efforts. Your source code rules and layouts must enforce that.

Search for a Source Code

To locate and open a specific source code, you can use the Source Code Search screen.



When you search for a source code, you can enter criteria about the source code such as Name and Active as of date.

To include all source codes used on a marketing effort previously, select **Marketing efforts** next to **Include**.

To view a list of all source codes a constituent received previously, enter the constituent's name in the **Constituent** field, and clear the **Marketing efforts** checkbox next to **Include**.

To include all source codes associated with active white mail segments, select **Active white mail codes** next to **Include**

To include all source codes associated with inactive white mail segments, select **Inactive white mail codes** next to **Include**

You can enter partial names or individual letters in the search criteria fields. Also, the search process is not case-sensitive. You can leave the fields blank and the search will return all your materials, but if the program locates over 100 records, only the first 100 will appear in the **Results** grid.

Seeds and Vendors

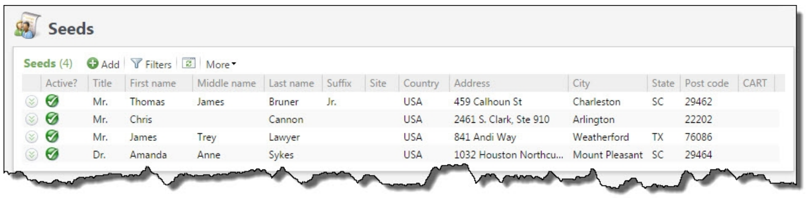
In *Marketing and Communications*, seeds are usually internal people at your organization who you include in your marketing efforts as test recipients for verification. Vendors provide materials and services, such as acquisition lists and creatives, to help you develop marketing efforts

Manage Seeds

Seeds are usually internal people at your organization you can include in marketing efforts to verify that the processing house sends out the packages correctly. Other times, you may want to specify special constituents as seeds, such as Board Members, simply because they want to see each marketing effort.

You can associate one or more seeds with a marketing effort. Every seed associated with a marketing effort receives one of each package contained in the marketing effort. Because seeds are test recipients who do donate based on the effort, they are not included in any calculations or ROI numbers for the marketing effort. Seeds appear in the export file once for every package in the marketing effort when you export the marketing effort to the processing house.

You can manage all aspects of your seeds from the Seeds page. To access the Seeds page, from *Marketing and Communications*, click **Seeds**.



You can add, edit, or delete seeds from this page. Rather than delete a seed from the database, you can also mark a seed as inactive when it is not needed anymore.

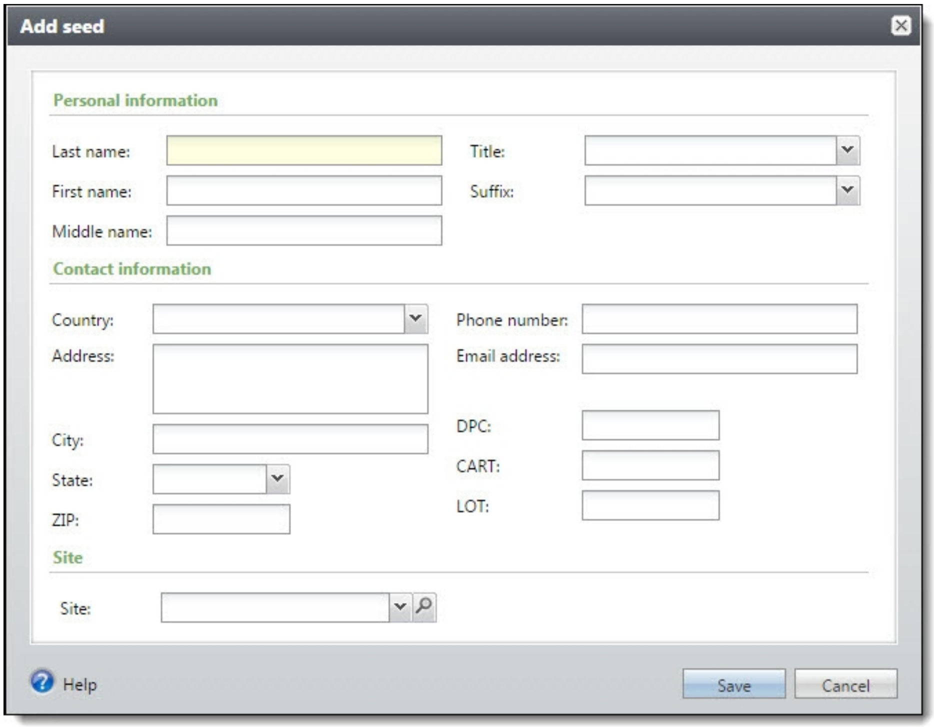
After you configure seeds, you can assign them to communication templates and marketing efforts. For more information, see Seeds Tab on page 124.

Add Seeds

You can add seeds to your marketing efforts. Seeds receive one piece of mail for each package in the marketing effort. The more information you provide about the seed, the more information the program can export during a marketing effort for that seed. For optimum reporting, seeds should not also exist as donors in your record source.

Add a seed

1. From *Marketing and Communications*, click **Seeds**. The Seeds page appears.
2. Under **Seeds**, click **Add** on the action bar. The Add seed screen appears.



3. Enter personal and contact information for the seed. We recommend you enter as much information as possible about the seed so you can have as much information as possible to export for the seed during a marketing effort.
4. To restrict use of the seed to a specific site at your organization, under **Site**, select the site to use the seed.
5. Click **Save**. You return to the Seeds page. Under **Seeds**, the new seed appears.

Search for Seeds

Use the Seed Search screen to locate marketing seeds. On the Seeds page. click **Search for a seed** in the explorer bar.

You can enter partial names or individual letters in the search criteria fields. Also, the search process is not case-sensitive. You can leave the fields blank to search all vendors and vendor contacts, but if the program finds more than 100 records, only the first 100 will appear in the **Results** grid.

Manage Vendors

From the Vendors page, you can track all aspects of your vendor information, including addresses, email addresses, phone numbers, and more. On the Vendors tab, you can add and edit vendors. On the Manage Contacts tab, you can view and open your vendor contacts.

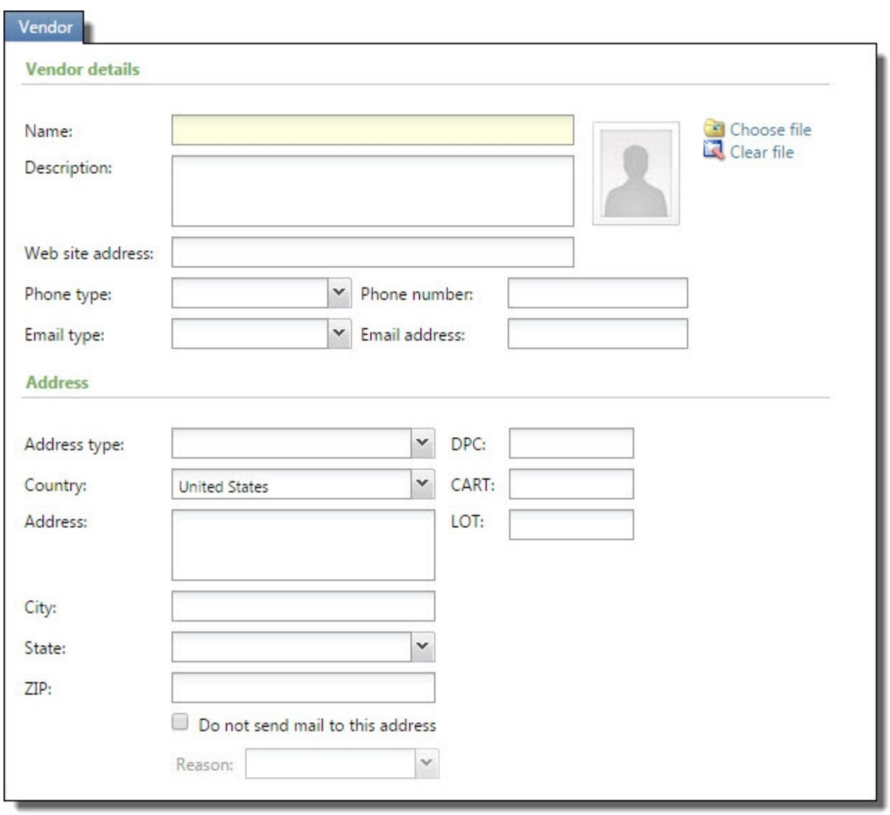
You can add new vendors and their associated contacts and services. You also can open, edit, and delete existing vendor records.

Add Vendors

After you add vendors, you can associate them with lists you purchase, or packages you provide with marketing efforts. When you add a vendor, you can include address, email, and phone information. After you add the record, you can edit the record to add additional information.

Add a vendor

1. From *Marketing and Communications*, click **Vendors**. The Vendors page appears.
2. Under Tasks, click **Add a vendor**. The Add vendor screen appears.



3. On this screen, you enter the information about the vendor.

For more information about the Primary contact tab or Services tab, see Add Primary Contacts on page 325 or Add Vendor Services on page 327.

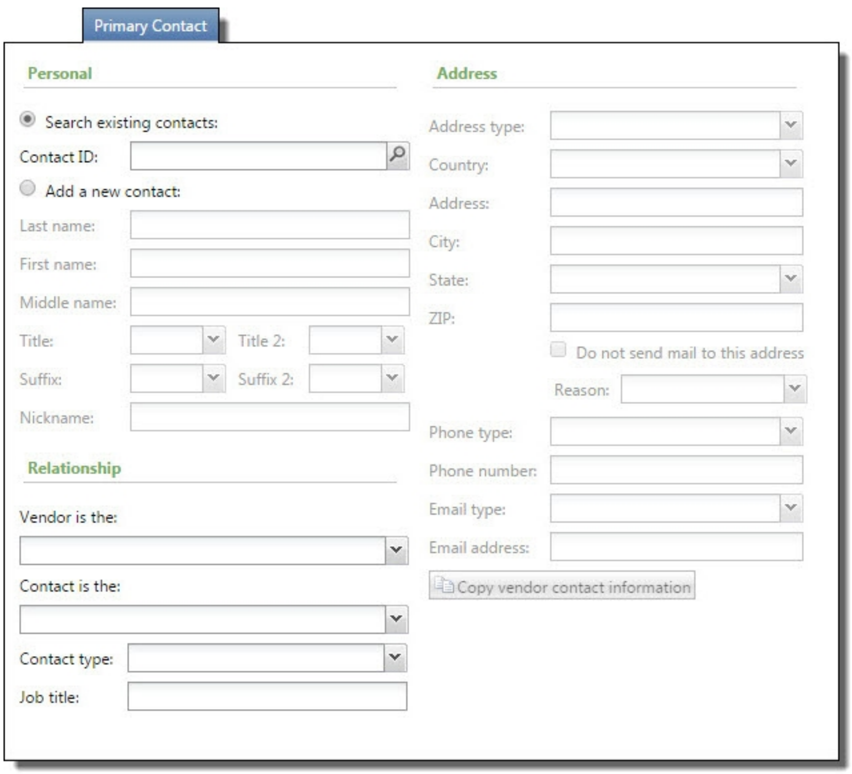
4. Click **Save**. You return to the Vendors page.

Add Primary Contacts

On the Primary contact tab, you can designate the vendor's primary contact. On the Relationships tab of the vendor record, you can add additional contacts or change the primary contact. For more information about the Relationships tab, see Relationships Tab on page 332.

Add a primary contact to a vendor record

1. From the Add vendor screen, select the Primary contact tab.



2. On this screen, enter the information about the primary contact. For details about the items on this screen, see Primary Contact Tab on page 325.
3. Click **Save**. The saved contact appears on the Manage Contacts tab of the Vendors page.

Primary Contact Tab

This table explains the items on the screen that may require additional information. These items also appear on the Add/Edit contact screen accessed from the Relationships tab of the vendor record.

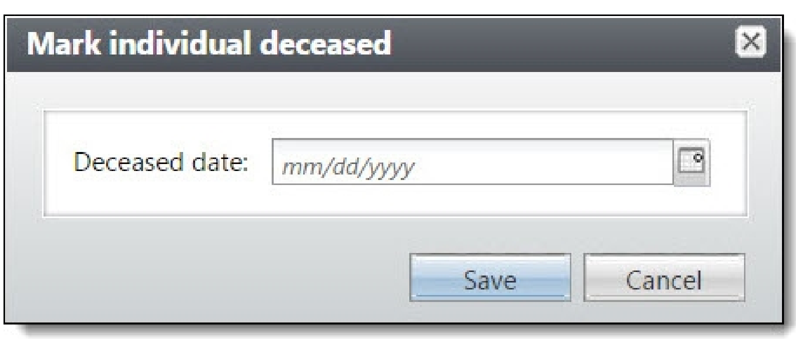
Screen Item	Description
Personal	Use **Search existing contacts** to search for an existing contact record. Information from the selected record defaults into the fields. Use **Add a new contact** to enter the contact's name. The program performs duplicate checking to prevent adding the same contact twice.
Relationship	In the **Vendor is the** field, enter or select the vendor's affiliation to the contact. For example, you may designate AB&C Group as the "Employer.". In the **Contact is the** field, enter or select the contact's affiliation to the vendor. For example, you may select Tim Jones is the "Employee." Select a contact type and position. When you access the Add/Edit contact screen from a vendor or contact record, the **Add Primary Contact** checkbox appears. If the vendor has no other contacts assigned, the checkbox is marked by default. If the vendor already has a primary contact, you can select this checkbox to make the current contact the primary instead.
Address	Enter address, phone, and email information for the contact.
Copy vendor contact information	If the contact's address information is the same as the vendor, you can click **Copy vendor contact information** to quickly add the vendor's information to the contact.

Mark Contact as Deceased

When an individual constituent passes away, you can mark the constituent as deceased. When you mark a contact as deceased, you select the date the contact passed away. Deceased contacts remain in your database and can be reactivated if incorrectly marked as deceased.

Mark a vendor contact as deceased

1. On the Vendors page, select the Manage Contacts tab.
2. Under **Contacts**, select the contact to mark as deceased and click **Go to contact** on the action bar. The contact rcord appears.
3. Under **Tasks**, click **Mark deceased**. The Mark individual deceased screen appears.



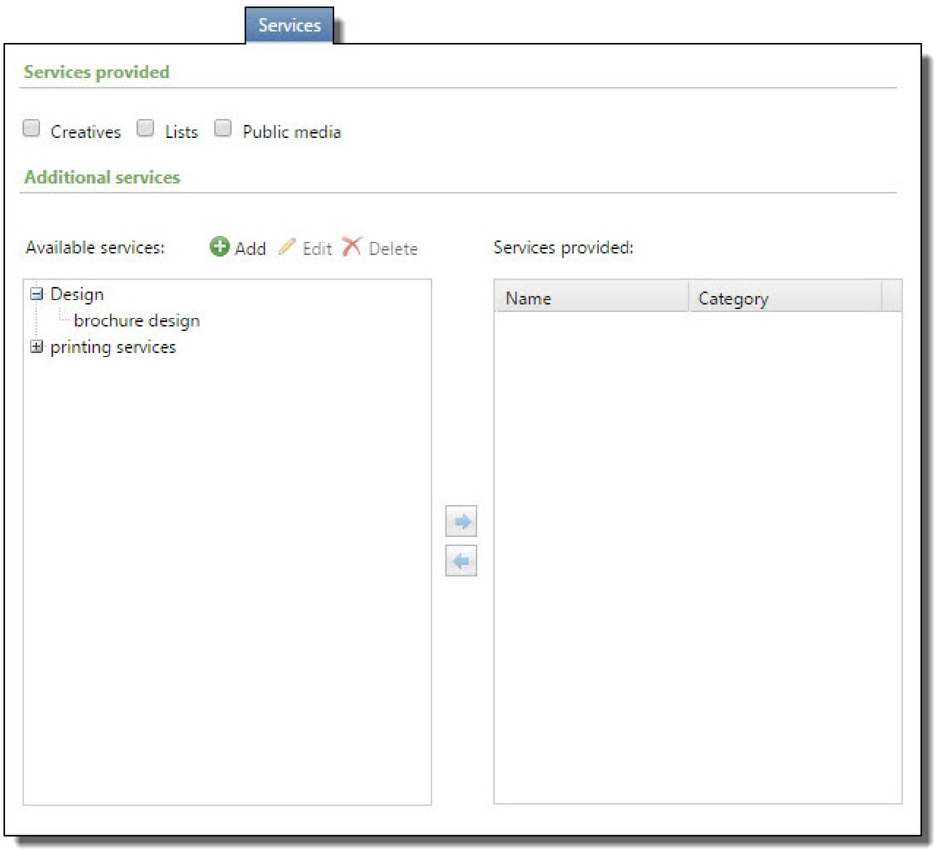
4. In the **Deceased date** field, select the date the contact passed away.
5. Click **Save**. You return to the contact record.

Add Vendor Services

On the Services tab, you can add the services provided by the vendor.

Add a service to a vendor record

1. From the Add vendor screen, select the Services tab.



2. On this screen, you assign services to the vendor. For details about the items on this screen, see Services Tab on page 327.
3. Click **Save**. You return to the Vendors page.

Services Tab

This table explains items on the screen that may require additional information. These items also appear on the Edit services screen that appears when you click **Edit services** in the explorer bar of a vendor record.

Screen Item	Description
Services provided	If the vendor provides creatives or lists as services, select these checkboxes. When you select these options, the Creatives and Lists tabs appear on the vendor record.
Available services	If the vendor provides other services, you can select these from the **Available services** box. To add a service not listed, click **Add**.

Edit Vendor Services

To edit vendor services, click **Edit services** on the explorer bar of a vendor record.

Edit vendor services

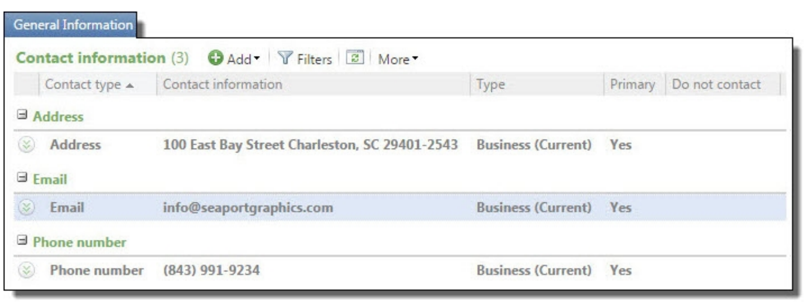
1. From a vendor record, click **Edit services** in the explorer bar. The Edit services screen appears.
2. On this screen, you edit the services assigned to the vendor. For details about the items on this screen, see Services Tab on page 327.
3. Click **Save**. You return to the vendor record.

Vendor Records

When you open a vendor record, it appears with several tabs. On these tabs, you can edit contact information, relationships, and creatives and lists associated with the vendor.

General Information Tab

On the General Information tab, you can add and edit address information, email addresses, and telephone numbers.

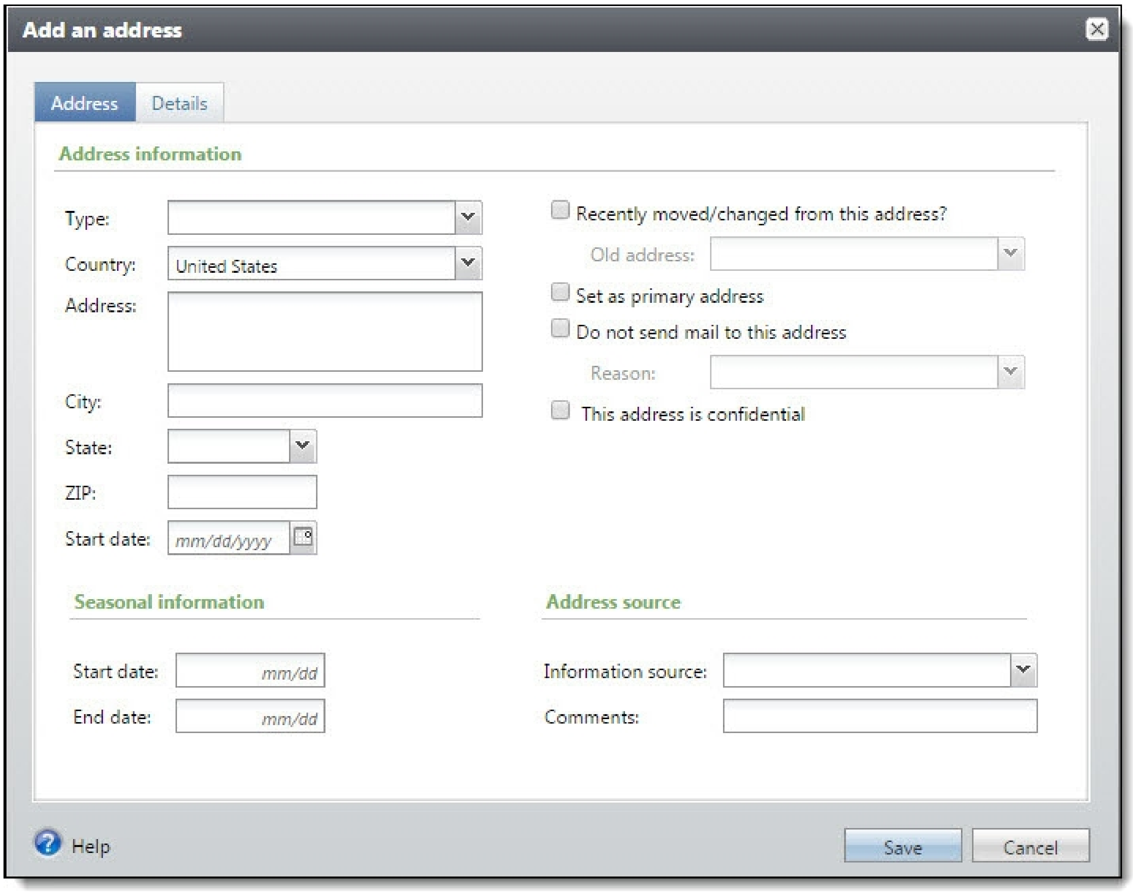


To edit the vendor's contact information, select a vendor in the grid and click **Edit**. The Edit vendor screen appears. For more information, see Add vendor addresses on page 329.

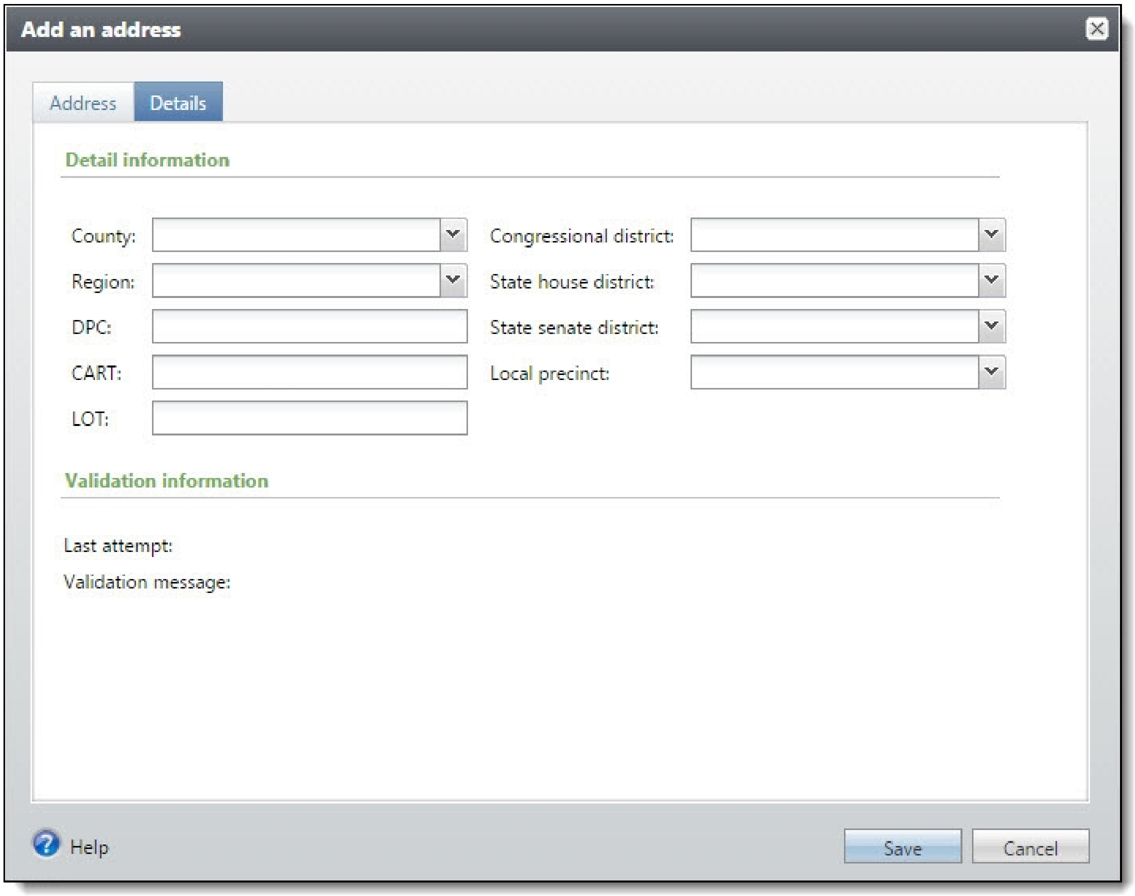
To edit the vendor's name, description, or web address, you can click **Edit vendor information** under **Tasks**.

Add vendor addresses

1. On the General Information tab of a vendor record, click **Add**, **Address**. The Add address screen appears.



2. Enter address information.
3. Select **Set as primary address** to designate this as the vendor's primary address. If you specify only one address for a vendor, the checkbox defaults to marked.
4. Select **Do not send mail to this address** if the vendor requests that you not send mail to this address. You can also select a reason in the **Reason** field.
5. If the vendor requested that the address is not to be shared with others outside your organization, select **This address is confidential**. When you mark an address as confidential, it is not excluded from reports or queries. A lock icon and the word "Confidential" appears with the address on the tab so users know not to share the address information.
6. For a seasonal address, enter a start date and end date to indicate when the vendor receives mail at this address.
7. Under **Address source**, you can select a source for the address information, as well as enter any comments. For example, if the vendor lets you know about a new address, you can add the address and select "Vendor Request" for the information source.
8. Select the Details tab.



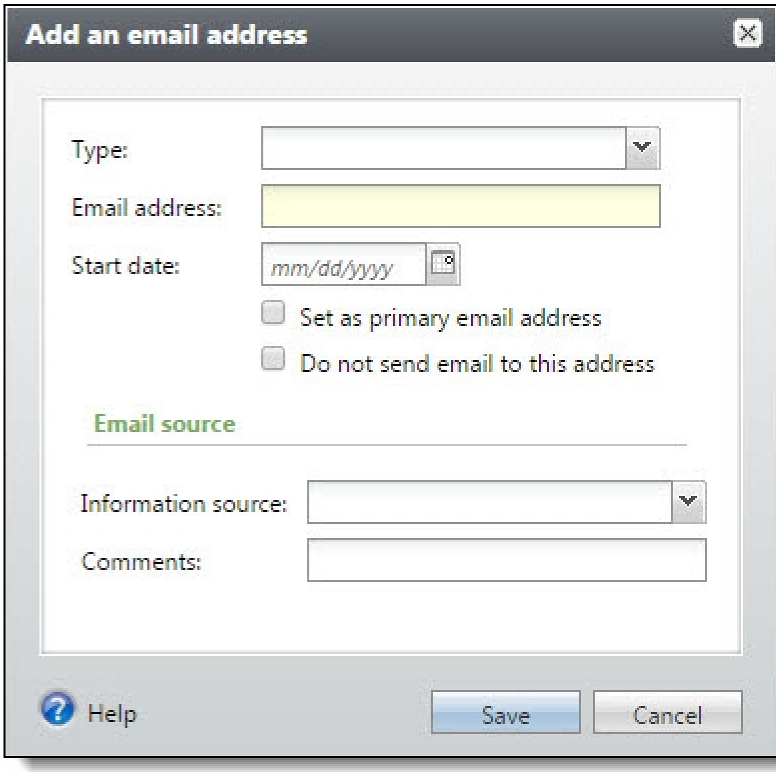
9. Enter additional details about the vendor’s address.
10. Click **Save**. You return to the General Information tab. The new address appears in the grid.

Add Vendor Email Addresses

You can add email addresses for a vendor at any time.

Add vendor email addresses

1. Click **Add, Email address**. The Add email address screen appears.



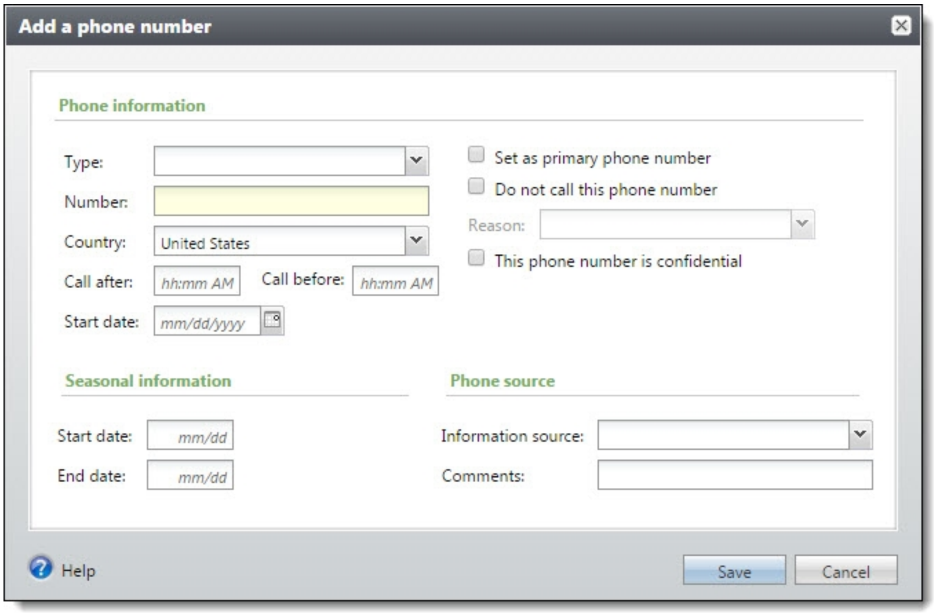
2. Select the email type and enter the email address.
3. If this is the address where the vendor wants to receive email, select **Set as primary email address**. If you specify only one email address for a vendor, the checkbox is selected by default.
4. Select **Do not send email to this address** if the vendor requests that you not use this email address.
5. Under **Email source**, you can select a source for the email address information, as well as enter any comments. For example, if the vendor lets you know about a new email address, you can add the email address and select “Vendor Request” for the information source.
6. Click **Save**. You return to the General information tab. The new email address appears in the grid.

Add Vendor Phone Numbers

You can add phone numbers for a vendor at any time.

Add or edit a vendor phone number

1. Click **Add**, **Phone number**. The Add phone number screen appears.

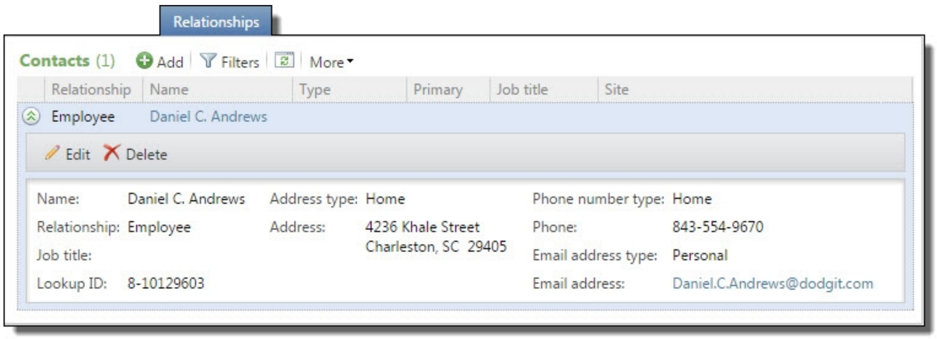


2. Select a phone type and number.
3. In the **Country** field, select the country that uses the phone format you want to apply to this number.
4. You can use **Call after** and **Call before** to specify times to use the phone number to indicate the vendor's preferences, such as "call after 9:00 a.m."
5. You can use **Start date** and **End date** to indicate when the number is valid.
6. If this is the primary phone number for the vendor, select **Set as primary phone number**. Usually you add the primary phone number when you add the vendor, but you can change that here. If you specify only one phone number, the checkbox is selected by default.
7. If the vendor requests that you not call the number, select **Do not call this phone number**.

   Once you mark a number as "Do not call," you can also select a reason to explain why the number is no longer to be used, such as "Vendor preference."
8. If the vendor requested that the phone is not to be shared with others outside your organization, select **This phone number is confidential**. When you mark a phone number as confidential, it is not excluded from reports or queries. A lock icon and the word "Confidential" appears with the number on the tab so users know not to share the information.
9. Under **Phone source**, you can select a source for the phone number information, as well as enter any comments. For example, if the vendor lets you know about a new phone number, you can add the number and select "Vendor Request" for the information source.
10. Click **Save**. You return to the General information tab. The new phone number appears.

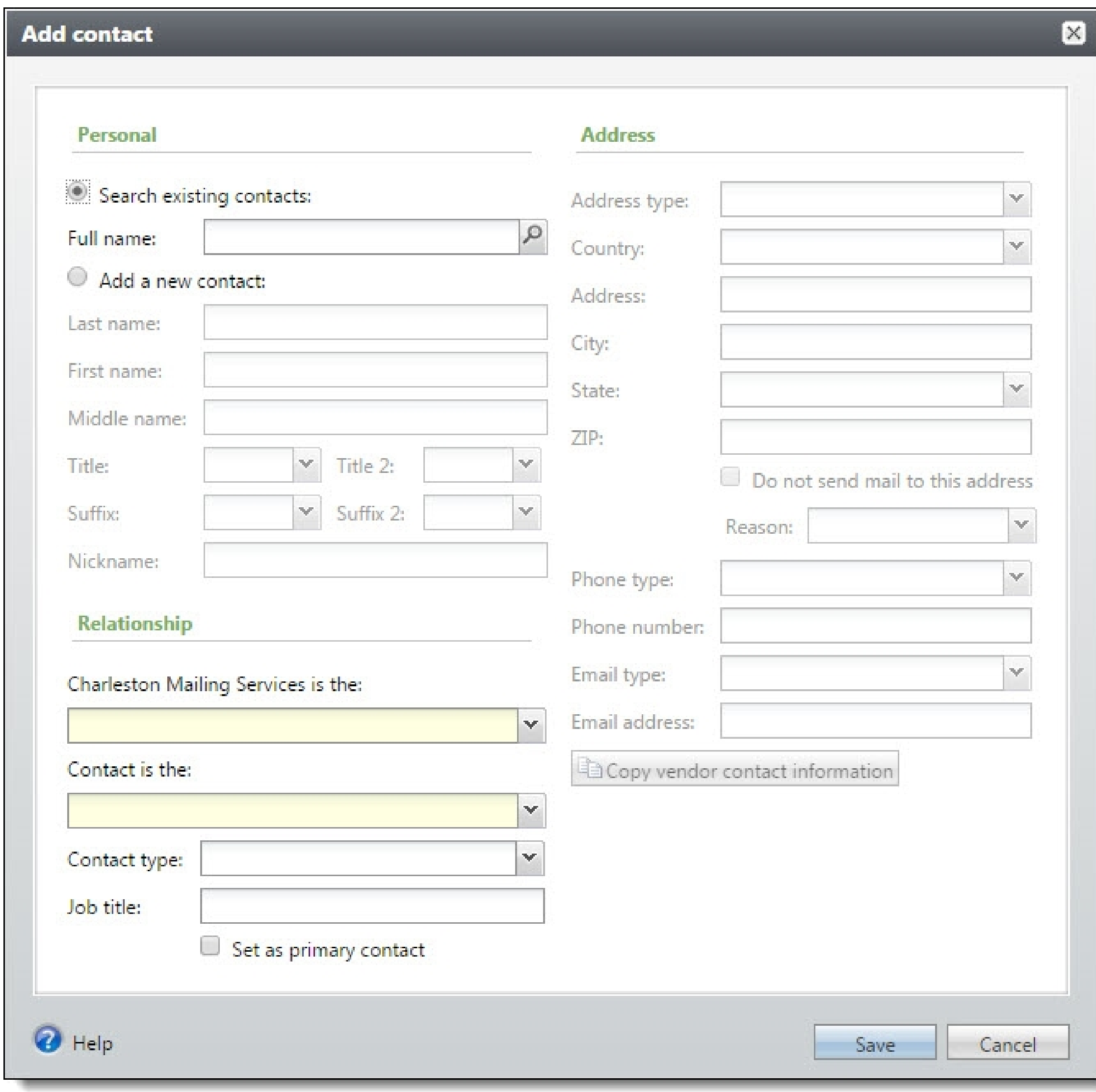
Relationships Tab

On the Relationships tab, you can add or edit vendor contact information and relationships.



Add contacts

1. On the Relationships tab of a vendor record, in the **Contacts** grid, click **Add** on the action bar, or select an address and click **Edit**. The Add contact or Edit contact screen appears.

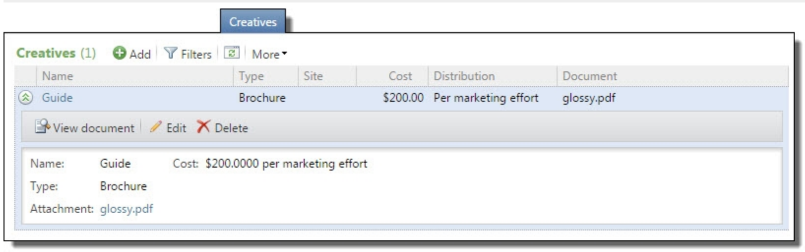


2. On this screen, you enter personal, relationship, and address information for the contact. For details about the items on this screen, see Primary Contact Tab on page 325.
3. Click **Save**. You return to the Relationships tab. The contact appears in the grid.

View Creatives Associated with a Vendor

On the Creatives tab of a vendor record, you can view and mange the creatives associated with the vendor. Creatives can be images, digital media files, or advertising copy for your public media efforts.

Note: The Creatives tab appears only if you select **Creatives** as a service the vendor provides or add the vendor from a creative record. For more information about how to adjust the services a vendor provides, see Edit Vendor Services on page 328.



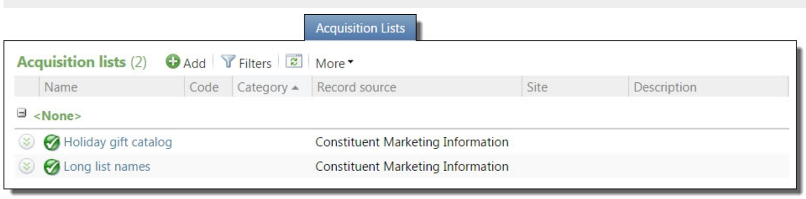
When you add a creative from a vendor record, the program automatically associates the vendor with the creative.

For information about how to add and manage creatives, see Manage Creatives on page 349.

Acquisition Lists Tab

On the Acquisition lists tab of a vendor record, you can add and manage the lists associated with the vendor.

Note: The Acquisition lists tab appears only if you select **Lists** as a service the vendor provides. For more information about how to adjust the services a vendor provides, see Edit Vendor Services on page 328.



When you add a list from a vendor record, the program automatically associates the vendor with the list.

For information about how to add and manage acquisition lists, see Acquisition Lists on page 285.

View Public Media Segments Associated with a Vendor

On the Public media tab of a vendor record, you can add and manage the media outlets or marketing locations associated with the vendor, such as for public media efforts.

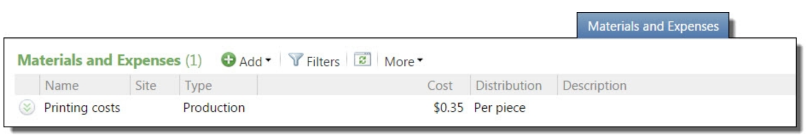
Note: The Public media tab appears only if you select **Public media** as a service the vendor provides. For more information about how to adjust the services a vendor provides, see Edit Vendor Services on page 328.

When you add a public media segment from a vendor record, the program automatically associates the vendor with the segment.

For information about how to add and manage public media segments, see Public Media Segments on page 255.

View Materials and Expenses Associated with a Vendor

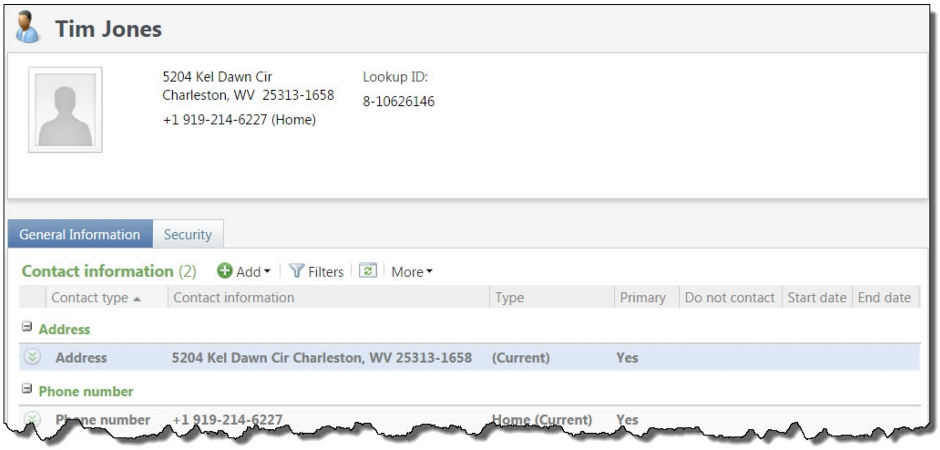
On the Materials and Expenses tab of a vendor record, you can add and manage the materials and expenses associated with a vendor. For example, for a print shop, you can associate the cost to produce copies of marketing documents.



When you add a material or expense from a vendor record, the program automatically associates the vendor with the material or expense.

Contact Records

To access the contact page from the Relationships tab, click the name of the contact in the **Name** column. The contact's page appears.



When you open a contact record, you can edit the contact’s marketing effort address, phone number, and email address. For more information, see General Information Tab on page 328.

To edit the contact's name, description, web address or picture, click **Edit contact information** under **Tasks**.

Packages

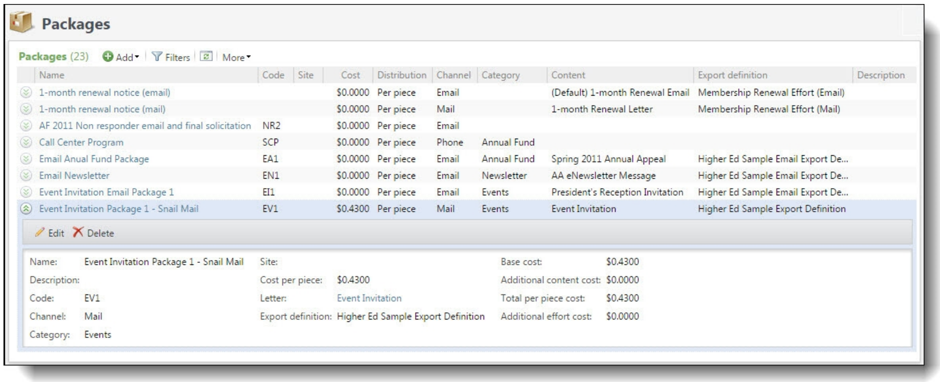
With packages, you can group items delivered to a constituent or recipient in a marketing effort. For example, a package may contain an appeal letter or acknowledgement letter, or it may include tickets to an event enclosed in an appeal card. You can deliver packages through email, postal mail, or over the telephone. For public media efforts, packages may include creatives such as digital files used in broadcast or internet ads.

When you create segment groups, you can specify a default package to apply to each segment in the group. After you add the group to a marketing effort, you can select another package for each segment in the group.

From *Marketing and Communications*, you can manage the packages and their associated letters, creatives, and materials and expenses.

Manage Packages

Packages enable you to group items delivered to a marketing effort recipient, such as an appeal letter or event tickets. To view information about the package your organization uses, from *Marketing and Communications*, click **Packages** and then **View packages**. The Packages page appears.



Under **Packages**, you can view information about each package, such as code, cost and distribution, content, and export definition. To view additional information about a package, such as the number of creatives and total per piece cost, click the double arrows next to the package on the action bar. The **Details** window appears. To close the window, click the double arrows next to the package on the action bar.

To view more detail information about a package, such as about its creatives, documents, or materials and expense, select it in the grid. The record of the package appears. For information about the items on the record, see Package Record on page 365.

Tip: To view the record of a specific package, you can search the database for the package.

To help find a package in the grid, you can filter the packages that appear by criteria such as category. On the action bar, select the criteria of the packages to view and click **Apply**. Under **Packages**, only the packages that meet the filter criteria appear. To display all packages in the grid, click **Reset**.

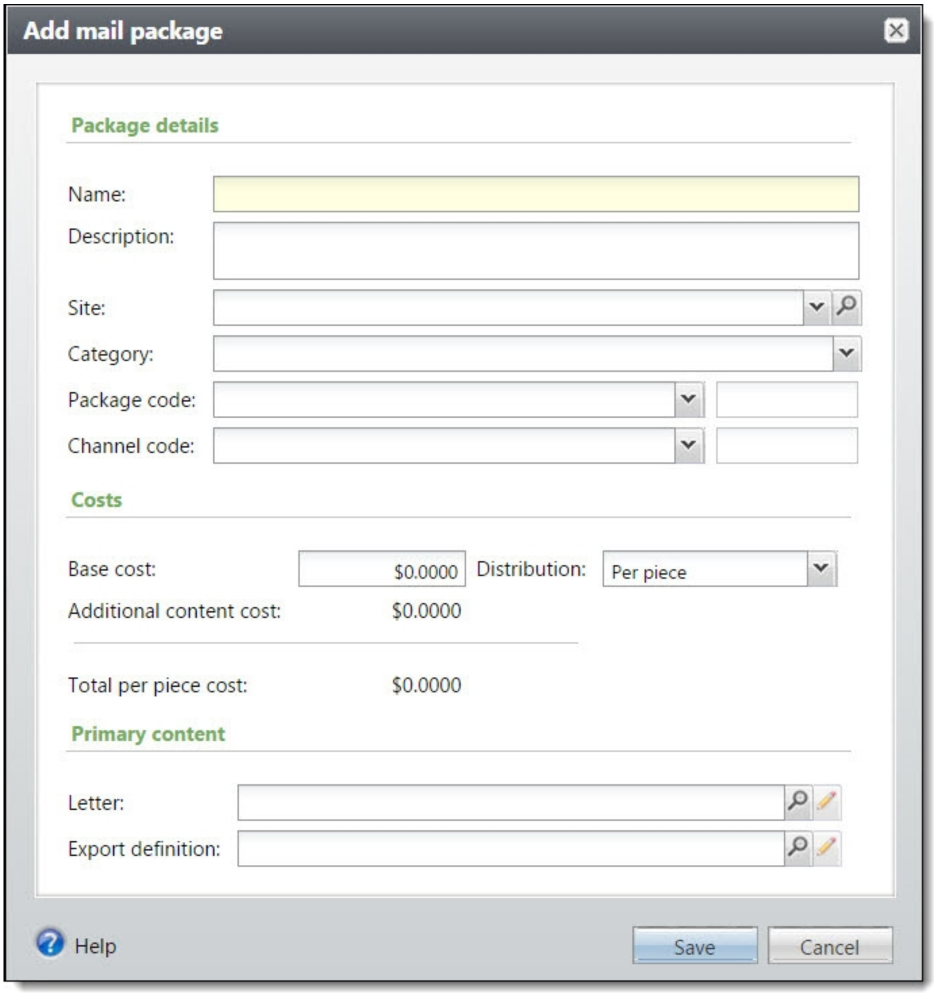
From the grid, you can add and manage packages for marketing efforts as necessary.

Add Mail Packages

You can add packages for items that you send through the mail. When you add a package, you must enter its name and base cost. You can also provide a description to help identify the package and a source code to help analyze its effectiveness.

Add a mail package

1. From *Marketing and Communications*, click **Packages**. The Packages page appears.
2. Click **Add**, **Mail package**. The Add mail package screen appears. For information about the items on this screen, see Add Mail Package Screen on page 341.



3. Under **Package details**, enter a unique name and description to help identify the package.
4. To restrict use of the package to only a specific site, in the **Site** field, select the site to use the package.
5. To group the package with similar packages, in the **Category** field, select the category for the package. For example, to group the package with other mail packages, select Mail.

Note: Your system administrator configures the available package categories.

6. To help track the effectiveness of the mail package, in the **Package code** and **Channel code** fields, select the source code formats to use and enter the codes to identify the package and mail channel.
7. Under **Costs**, enter the base cost, or the cost before you include content, for the package. Select whether the cost is per piece, response, marketing effort, or per thousand. To not include the package in the overall cost of the marketing effort, select Do not include.
8. Under **Primary content**, search for and select the letter to include in the package. When you select a letter, the **Export definition** displays the export definition used with the letter.
9. Click **Save**. You return to the Packages page.

Add Mail Package Screen

The table below explains the items on the Add mail package screen. For information about how to access this screen, see Add Mail Packages on page 339.

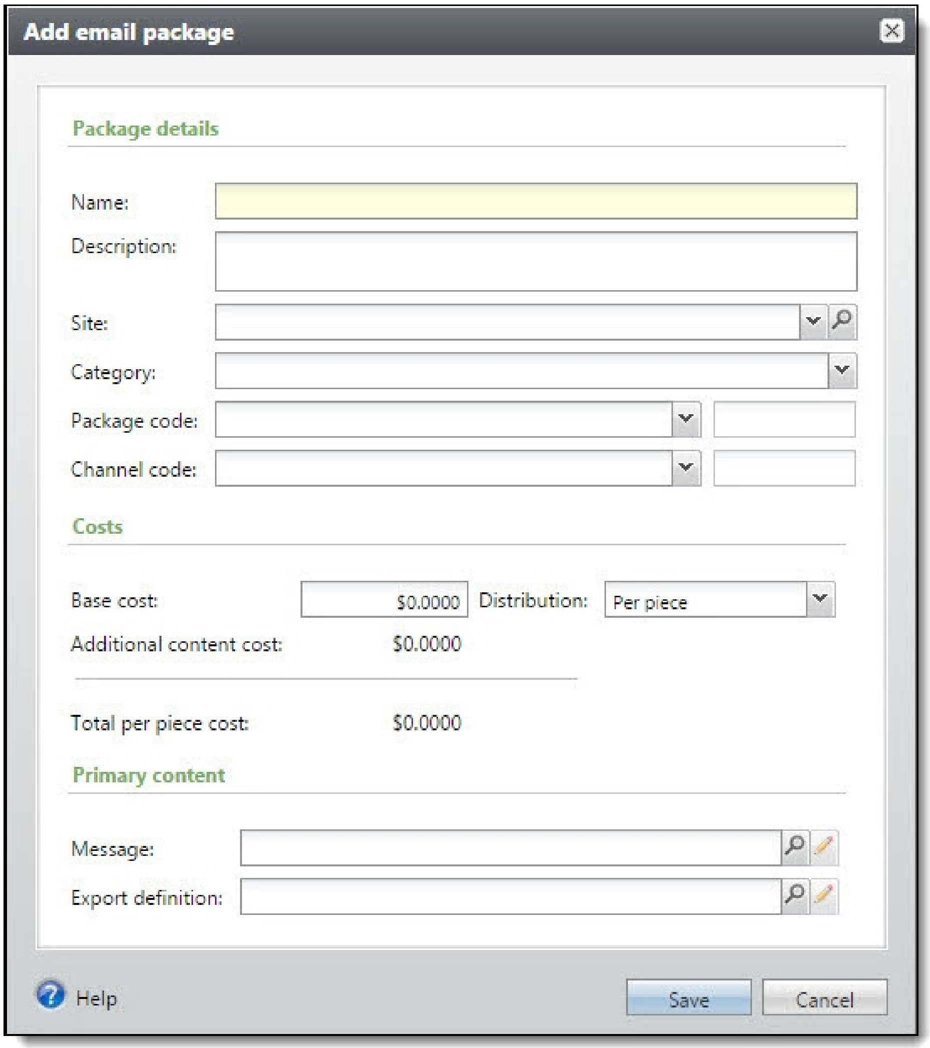
Screen Item	Description
Name	Enter a unique name to help identify the package.
Description	Enter additional information to further identify the package, such as an explanation of its content or intended recipients.
Site	To restrict use of the package to only users at a specific site at your organization, select the site to use the package.
Category	To group the package with other similar packages, select the category of the package such as Mail or Letter.
Package	If your organization configures source code parts and layouts, this field appears. To help track the effectiveness of the package, select the source code format and enter the code to identify the package.
Channel	If your organization configures source code parts and layouts, this field appears. To help track the effectiveness of the packages sent by mail, select the source code format and enter the code to identify the channel.
Costs	In the **Base cost** field, enter the starting cost for the package and select whether the cost is per piece, response, marketing effort, or per thousand. If you select Per marketing effort, the program distributes the base cost across all segments that use the package within a marketing effort. To not include the package in the overall cost of the marketing effort, select Do not include. Typically, the base cost is $0.0000, as the creatives, documents, materials, and expenses associated with the package determine the overall cost of the package. After you configure the content to include in the package, the program uses the additional cost of the content to calculate the total cost of the package.
Letter	Search for and select the letter to include in the package.
Export definition	Search for and select the export definition to use with the package. When you select the letter to include in the package, this field displays the export definition used with the letter.

Add Email Packages

You can add packages for items that you intend to send electronically through email. When you add a package, you must enter its name and base cost. You can also provide a description to help identify the package and a source code to help analyze its effectiveness.

Add an email package

1. From *Marketing and Communications*, click **Packages**. The Packages page appears.
2. Click **Add**, **Email package**. The Add email package screen appears. For information about the items on this screen, see Add Email Package Screen on page 343.



3. Under **Package details**, enter a unique name and description to help identify the package.
4. To restrict use of the package to only a specific, in the **Site** field, select the site to use the package.
5. To group the package with similar packages, in the **Category** field, select the category for the package. Your system administrator configures the available package categories. For example, to group the package with other email packages, select Email.
6. To help track the effectiveness of the email package, in the **Package** and **Channel** fields, select the source code formats to use and enter the codes to identify the package and email channel.

7. Under **Costs**, enter the starting cost, or the cost before you include content, for the package. Select whether the cost is per piece, response, marketing effort, or per thousand. To not include the package in the overall cost of the marketing effort, select Do not include.
8. Under **Primary content**, search for and select the export definition to use with the package.
9. Click **Save**. You return to the Packages page.

Add Email Package Screen

The table below explains the items on the Add email package screen. For information about how to access this screen, see Add Email Packages on page 341.

Screen Item	Description
Name	Enter a unique name to help identify the package.
Description	Enter additional information to further identify the package, such as an explanation of its content or intended recipients.
Site	To restrict use of the package to only users at a specific site at your organization, select the site to use the package.
Category	To group the package with other similar packages, select the category of the package such as Email.
Package	If your organization configures source code parts and layouts, this field appears. To help track the effectiveness of the package, select the source code format and enter the code to identify the package.
Channel	If your organization configures source code parts and layouts, this field appears. To help track the effectiveness of the packages sent by email, select the source code format and enter the code to identify the channel.
Costs	In the **Base cost** field, enter the starting cost for the package and select whether the cost is per piece, response, marketing effort, or per thousand. If you select Per marketing effort, the program distributes the base cost across all segments that use the package within a marketing effort. To not include the package in the overall cost of the marketing effort, select Do not include. Typically, the base cost is $0.0000, as the creatives, documents, materials, and expenses associated with the package determine the overall cost of the package. After you configure the content to include in the package, the program uses the additional cost of the content to calculate the total cost of the package.

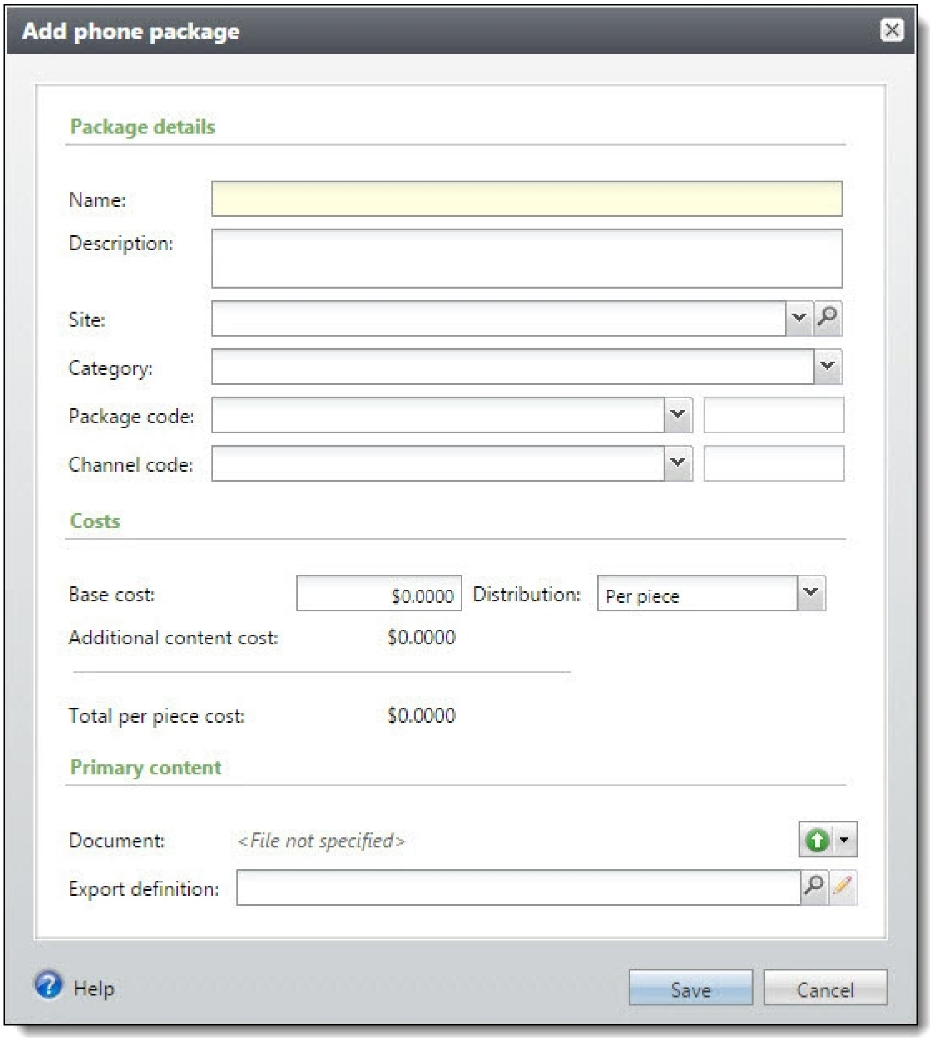
Screen Item	Description
Message	If ***Blackbaud Direct Marketing*** is integrated with ***Blackbaud Internet Solutions***, this field appears. Select the email message to include in the package. For information about how to create an email message, see Add Blackbaud Internet Solutions Email Messages on page 364.
Export definition	Search for and select the export definition to use with the package. When you select a Blackbaud Internet Solutions email message to include in the package, this field displays the export definition used with the message.

Add Phone Packages

You can add packages for content that you intend to communicate over the telephone, such as for a phonathon. When you add a package, you must enter its name and base cost. You can also attach a Microsoft *Word* document to the package, such as the script used by callers to communicate its content.

Add a phone package

1. From *Marketing and Communications*, click **Packages**. The Packages page appears.
2. Click **Add**, **Phone package**. The Add phone package screen appears. For information about the items on this screen, see Add Phone Package Screen on page 346.



3. Under **Package details**, enter a unique name and description to help identify the package.
4. To restrict use of the package to only a specific site, in the **Site** field, select the site to use the package.
5. To group the package with similar packages, in the **Category** field, select the category for the package. Your system administrator configures the available package categories. For example, to group the package with other phone packages, select Telephone.
6. To help track the effectiveness of the phone package, in the **Package** and **Channel** fields, select the source code parts to use and enter the codes to identify the package and phone channel.
7. Under **Costs**, enter the starting cost, or the cost before you include content, for the package. Select whether the cost is per piece, response, marketing effort, or per thousand. To not include the package in the overall cost of the marketing effort, select Do not include.
8. To attach a Microsoft *Word* document to the package, such as the script for callers to use, in the **Document** field, click the green arrow. On the Open screen, browse to and select the document to use with the package.

9. Search for and select the export definition to use with the package.
10. Click **Save**. You return to the Packages page.

Add Phone Package Screen

The table below explains the items on the Add phone package screen. For information about how to access this screen, see Add Phone Packages on page 344.

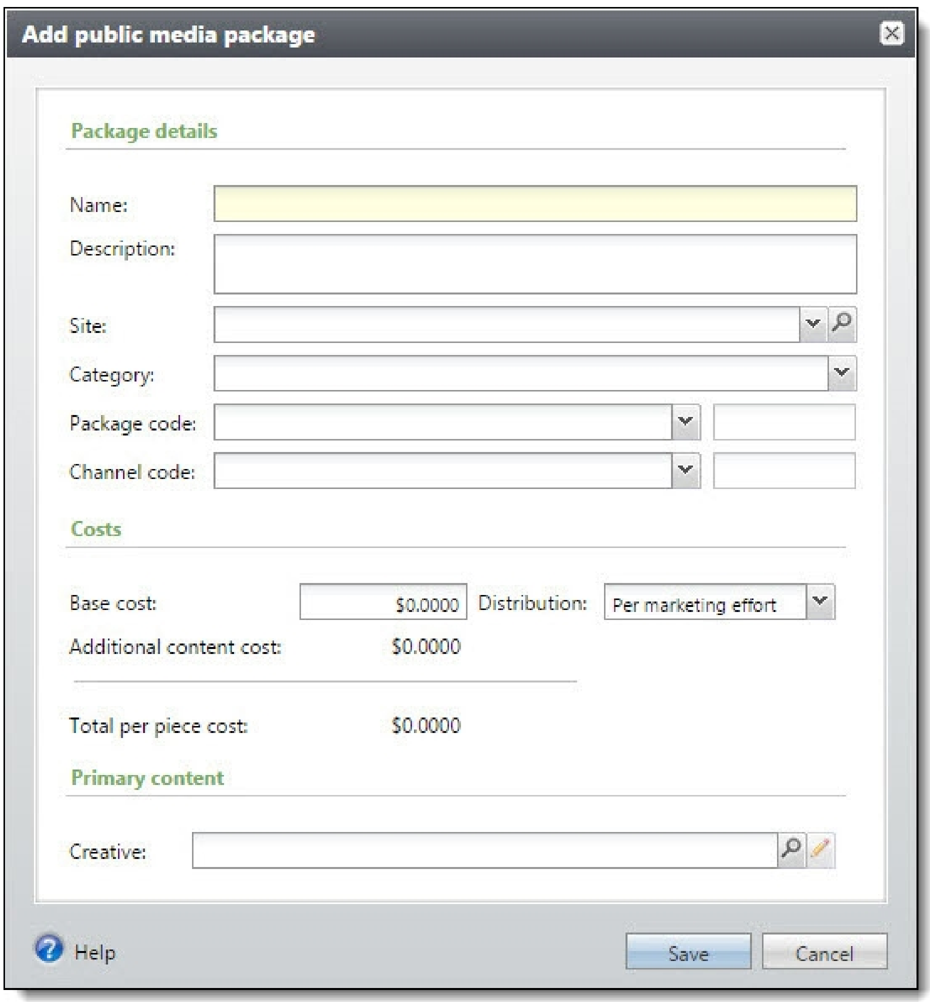
Screen Item	Description
Name	Enter a unique name to help identify the package.
Description	Enter additional information to further identify the package, such as an explanation of its content or intended recipients.
Site	To restrict use of the package to only users at a specific site, select the site to use the package.
Category	To group the package with other similar packages, select the category of the package such as Telephone.
Package	If your organization configures source code parts and layouts, this field appears. To help track the effectiveness of the package, select the source code part and enter the code to identify the package.
Channel	If your organization configures source code parts and layouts, this field appears. To help track the effectiveness of the packages sent by phone, select the source code part and enter the code to identify the channel.
Costs	In the **Base cost** field, enter the starting cost for the package and select whether the cost is per piece, response, marketing effort, or per thousand. If you select Per marketing effort, the program distributes the base cost across all segments that use the package within a marketing effort. To not include the package in the overall cost of the marketing effort, select Do not include. Typically, the base cost is $0.0000, as the creatives, documents, materials, and expenses associated with the package determine the overall cost of the package. After you configure the content to include in the package, the program uses the additional cost of the content to calculate the total cost of the package.
Document	To attach a Microsoft *Word* document to the package, such as the script used by callers, click the green arrow and browse to the document to use. To remove an attached document, such as to attach a different file, click the down arrow and **Clear**.
Export definition	Search for and select the export definition to use with the package.

Add Public Media Packages

You can add packages for content that you intend to communicate through public media efforts such as billboards, website banner ads, and advertisements broadcast over television or radio. When you add a package, you must enter its name and base cost. You can also select the creative information to include in the package, such as a digital media file for a broadcast advertisement or an image file for a billboard or banner ad.

Add a public media package

1. From *Marketing and Communications*, click **Packages**. The Packages page appears.
2. Click **Add**, **Public Media package**. The Add public media package screen appears. For information about the items on this screen, see Add Public Media Package Screen on page 348.



3. Under **Package details**, enter a unique name and description to help identify the package.

4. To restrict use of the package to only a specific site, in the **Site** field, select the site to use the package.
5. To group the package with similar packages, in the **Category** field, select the category for the package. Your system administrator configures the available package categories. For example, to group the package with other public media packages, select Public Service Announcement (PSA).
6. To help track the effectiveness of the public media package, in the **Package** and **Channel** fields, select the source code parts to use and enter the codes to identify the package and the public media channel such as television or website.
7. Under **Costs**, enter the starting cost, or the cost before you include content, for the package. Select whether the cost is per piece, response, marketing effort, or per thousand. To not include the package in the overall cost of the marketing effort, select Do not include.
8. Under **Primary content**, search for and select the creative information to use with the package, such as a digital media file for a broadcast advertisement or an image file for a billboard or website banner ad.
9. Click **Save**. You return to the Packages page.

Add Public Media Package Screen

The table below explains the items on the Add public media package screen. For information about how to access this screen, seeAdd Public Media Packages on page 347.

Screen Item	Description
Name	Enter a unique name to help identify the package.
Description	Enter additional information to further identify the package, such as an explanation of its content or intended recipients.
Site	To restrict use of the package to only users at a specific site, select the site to use the package.
Category	To group the package with other similar packages, select the category of the package such as Public media.
Package	If your organization configures source code parts and layouts, this field appears. To help track the effectiveness of the package, select the code to identify the package. The values available are those defined on the Source Code Parts tab of the Source Codes page.

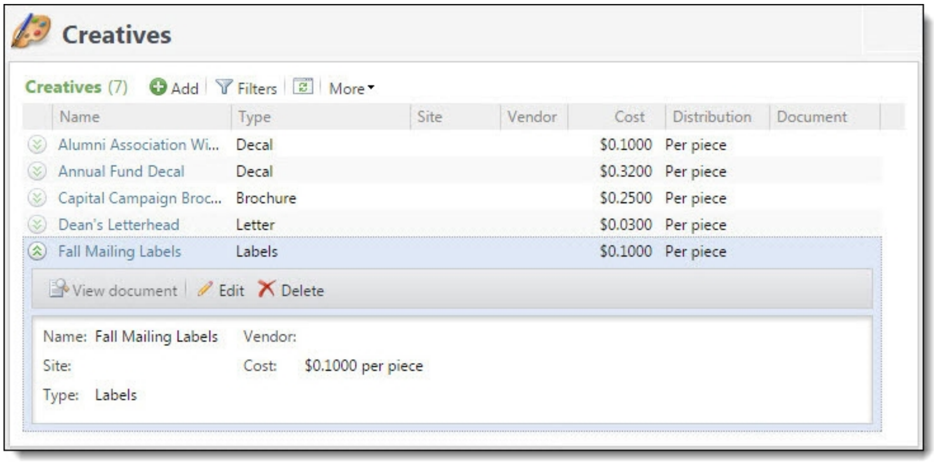
Screen Item	Description
Channel	If your organization configures source code parts and layouts, this field appears. To help track the effectiveness of the channel, select the code to identify the channel. The values available are those defined on the Source Code Parts tab of the Source Codes page.
Costs	In the **Base cost** field, enter the starting cost for the package and select whether the cost is per piece, response, marketing effort, or per thousand. If you select Per marketing effort, the program distributes the base cost across all segments that use the package within a marketing effort. To not include the package in the overall cost of the marketing effort, select Do not include. Typically, the base cost is $0.0000, as the creatives, documents, materials, and expenses associated with the package determine the overall cost of the package. After you configure the content to include in the package, the program uses the additional cost of the content to calculate the total cost of the package.
Creative	Select the creative information to include in the package, such as the digital media file for a broadcast advertisement or an image file for a billboard or banner ad. For information about how to create a creative, see Add Creatives on page 350.

View a Package Record

To quickly access a package record from the Packages page, select a package in the grid. For information about package records, see Add Public Media Packages on page 347.

Manage Creatives

Creatives are the content used in packages you include with public media efforts such as broadcast advertisements, billboards and print literature, or online banner ads. Examples of creatives are images and digital media files of the content used in a marketing effort. The program enables you to manage, track, and analyze the different creatives your organization uses. To view information about the creatives your organization uses, from *Marketing and Communications*, click **Creatives** and then **View creatives**. The Creatives page appears.



Under **Creatives**, you can view information about each creative, such as type, cost and distribution, and attached document. To view additional information about a creative, such as its description, click the down arrows next to the creative in the grid. The **Details** window appears. To close the window, click the down arrows next to the creative. To view a document or file attached to a creative, such as an image file or a digital media file, click **View document** on the action bar.

To view more detail information about a creative and its attachments, select it in the grid. The record of the creative appears. For information about the items on the record, see Creative Record on page 368.

Tip: To view the record of a specific creative, you can search the database for its record.

To help find a creative in the grid, you can filter the creatives that appear by type, vendor, or site. Select **Filters**.On the action bar, select the criteria of the creatives to view and click **Apply**. In the grid, only the creatives that meet the filter criteria appear. To display all creatives in the grid, click **Reset**.

Each creative is associated with a specific vendor and can be defined and edited on the vendor record. However, creatives are to be used in marketing efforts. In a marketing effort, you create packages to indicate the actual pieces of mail the potential donor receives when you communicate marketing content to different segments of potential donors. Each package can be associated with one or more creatives. From the grid, you can add and manage creatives for packages as necessary.

Add Creatives

When you add a creative, you can associate it with a vendor and enter its cost. The program can use this cost to calculate the cost of packages that use the creative, which can then be used to calculate the total cost of a marketing effort.

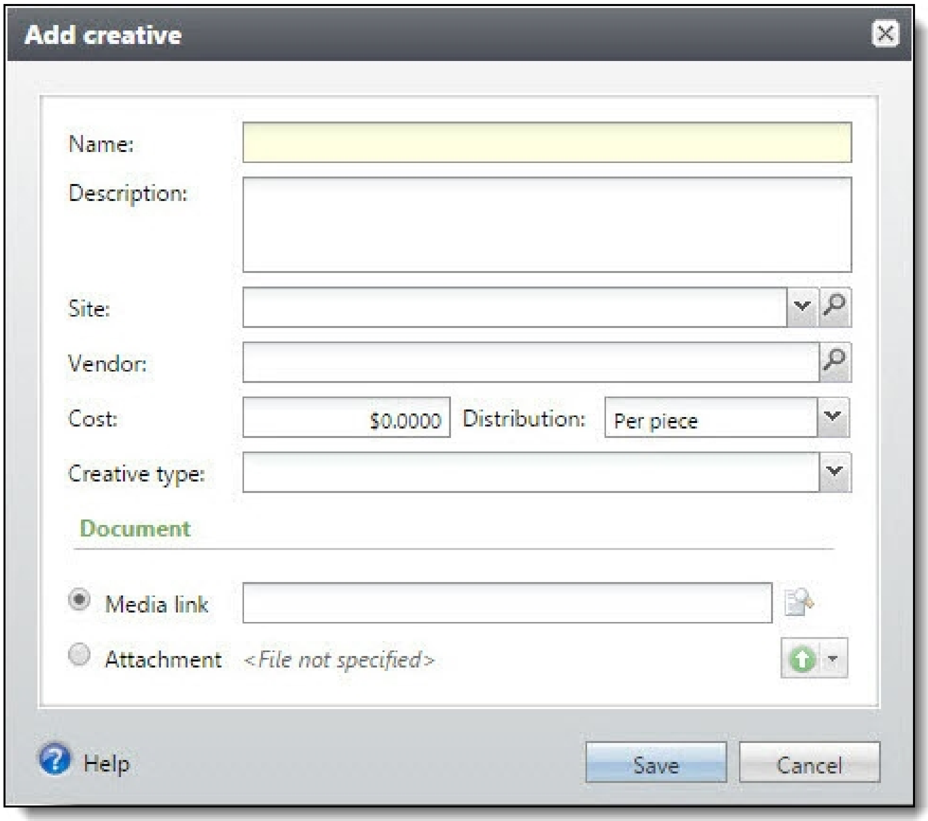
You can associate a digital file with creative records. You can save the digital file as an attachment stored on your server or link to a digital file outside of your database. Because a creative may not be a digital file, you are not required to associate a digital file to a creative.

You can add a creative from *Marketing and Communications* or the Creatives tab of a vendor record.

Add a creative

1. From *Marketing and Communications*, click **Creatives**. The Creatives page appears.

2. Click **Add**. The Add creative screen appears. For information about the items on this screen, see Add Creative Screen on page 352.



3. Enter a unique name and description to help identify the creative.
4. To restrict use of the creative to only a specific site, in the **Site** field, select the site to use the creative.
5. In the **Vendor** field, search for and select the vendor that provides the creative.
6. In the **Cost** field, enter the cost for the creative. Select whether the cost is per piece, response, marketing effort, or per thousand. To not include the creative in the overall cost of a package or marketing effort, select Do not include.
7. To group the creative with similar creatives, in the **Creative type** field, select the type of the creative, such as image or digital media. Your system administrator configures the available creative types.
8. To attach the primary content of the creative, such as an image file or a digital media file, under **Document**, select whether to link to the file or attach the file to the creative.
   - To link to a file outside of your database such as on a website or network location, select **Media link** and enter the web address or network path.
   - To attach a file to the record of the creative in your database, select **Attachment** and click the green arrow to browse to the file.

Note: After you save the creative, you can attach additional files associated with the creative from its record. For example, if you negotiate with a vendor to purchase a creative, you can attach any applicable proposals, contracts, or emails. For information about how to attach files to a creative, see Add Attachments to a Creative on page 369.

9. Click **Save**. The record of the creative appears. For information about the items on this record, see Creative Record on page 368.

Add Creative Screen

The table below explains the items on the Add creative screen. For information about how to access this screen, see Add Creatives on page 350.

Screen Item	Description
Name	Enter a unique name to help identify the creative.
Description	Enter additional information to further identify the creative, such as an explanation of its content or intended recipients.
Site	To restrict use of the creative to only users at a specific site, select the site to use the creative.
Vendor	Select the vendor who provides the creative. If necessary, you can add a new vendor here. When you add a creative from a vendor record, this field is not available. The program automatically associates the creative to the vendor from which you add the creative.
Cost	Enter the cost for the creative and select whether the cost is per piece, response, marketing effort, or per thousand. If you select Per marketing effort, the program distributes the cost across all packages that use the creative within a marketing effort. To not include the creative in the overall cost of a package or marketing effort, select Do not include.
Creative type	Select the type of creative, such as image or digital media.
Media link	To link the creative to a digital file stored outside of your database, select this option and enter the web address or file path for the file. If you select this option, do not link to a file on your local hard drive, as other users cannot access it.
Attachment	To store a digital file on your server as an attachment to the creative, select this option and click the green arrow to browse to the file. When you save the creative, a program uploads the file to the server and stores it in the database so users can access it from any workstation that runs the program. If you attach an image file, a thumbnail of the image appears when you open the creative record. Otherwise, the icon associated with the specified file type appears.

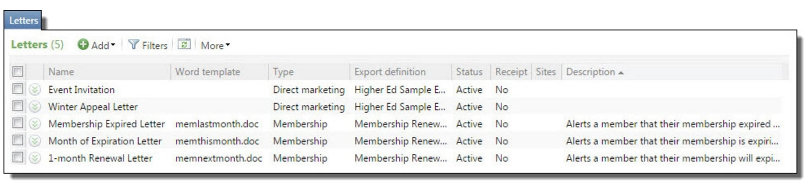
View a Creative Record

To quickly access a creative record from the Creatives page or elsewhere in the program, select the creative in the grid. For information about creative records, see Creative Record on page 368.

Manage Letters and Documents

You can include letters in packages you send to constituents or prospects, such as part of an appeal or to acknowledge a donation. You can also include marketing documentation such as reports or pamphlets in your packages. To view information about the letters and documents your organization includes in packages for marketing efforts, from *Marketing and Communications*, click **Letters and documents** and then **View letters and documents**. The Letters and Documents page appears.

On the Letters tab, you can view the letters available for use in packages. For each letter, you can view its type, export definition, and status. The **Word template** column displays the file name of the Microsoft *Word* document used to create each letter. To open and view a template in *Word*, click the down arrows next to the letter name and click **View template** on the action bar.

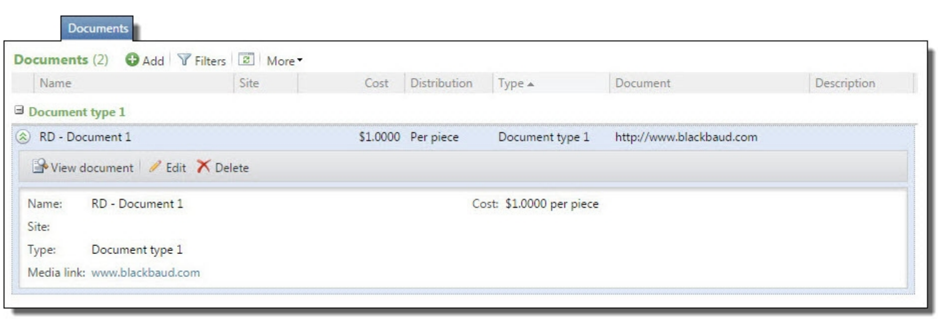


To help find a letter in the grid, you can filter the letters that appear by type and select whether to display inactive letters. Click **Filters** on the action bar. Select the criteria of the letters to view and click **Apply**. In the grid, only the letters that meet the filter criteria appear. To display all letters in the grid, click **Reset**.

Tip: To view or edit information about a specific letter, you can search the database for the letter.

From the tab, you can add and manage letters for packages as necessary.

On the Documents tab, you can view the marketing documentation available for use in packages. For each document, you can view its cost and type. The **Document** column displays the file name of each document. To open and view a document in its native program, click the down arrows next to the document name in the grid and click **View document** on the action bar.



To help find a document in the grid, you can filter the documents that appear by type or site.Click **Filters** on the action bar. Select the criteria of the documents to view and click **Apply**. In the grid, only the documents that meet the filter criteria appear. To display all documents in the grid, click **Reset**.

Tip: To view or edit information about a specific document, you can search the database for the document.

From the tab, you can add and manage marketing documents for packages as necessary.

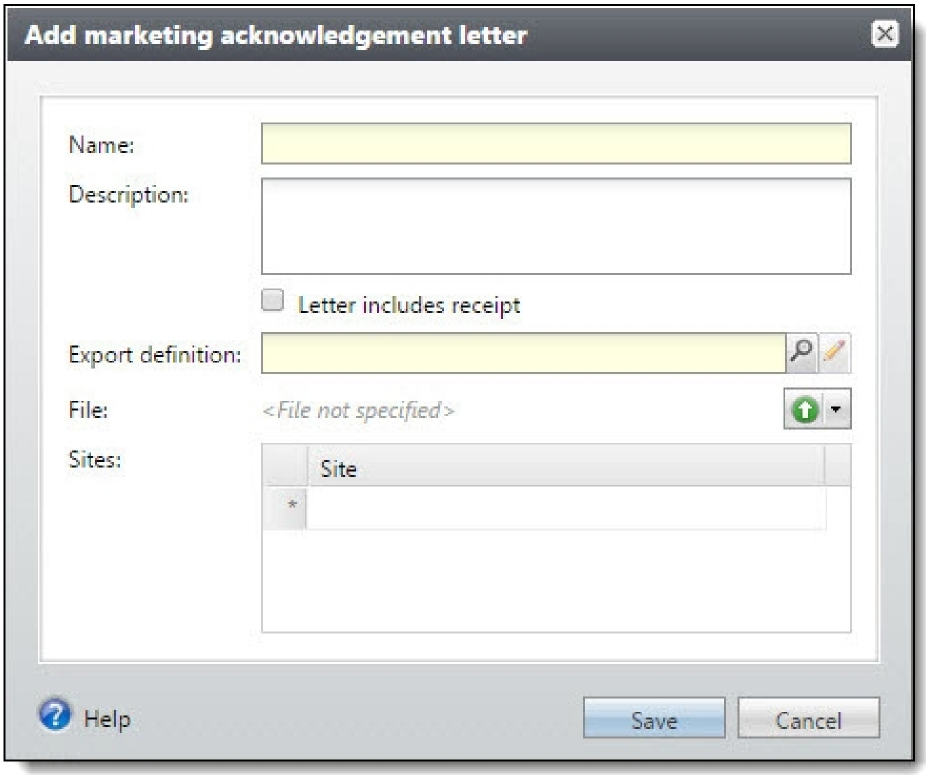
Add Letters for Packages

Before you can generate a marketing effort process, you must add the letter to use with the process. Before you add a letter, we recommend you create a template for the letter in Microsoft *Word*. The program can then merge information from your database with the template to generate letters specific to each recipient. For assistance with the merge process in *Word*, see the *Word* help file or visit www.blackbaud.com for Knowledgebase articles about the merge process with Blackbaud programs.

You can create letters to use with your packages for appeals and acknowledgements. You can also create letters for packages to support your membership and sponsorship programs.

Add a letter

1. From *Marketing and Communications*, click **Letters and documents** and then **View letters and documents**. The View letters and documents page appears.
2. Click the applicable **Add** task. For example, to add a marketing acknowledgement letter, click **Add marketing acknowledgement letter**. The Add marketing acknowledgement letter screen appears. For information about the items on this screen, see Add Letter Screen on page 355.



3. Enter a unique name and description to help identify the letter.

Note: For an acknowledgement letter, select whether the letter includes a receipt for the acknowledged donation.

4. In the **Export definition** field, select the export definition to use with the letter. The export definition determines the fields available to merge with the Microsoft *Word* template used with the letter.

   If you select a site in the **Site** field, only export definitions assigned to the same site are available for selection.
5. In the **Word template** field, click the green arrow and browse to the *Word* document to use as a template for the letter.
6. To restrict use of the letter to only specific sites at your organization, in the **Site** field, select the sites to use the letter. A letter can be used with only mail packages assigned to the same sites.
7. Click **Save**. The Letters and Documents page appears, open to the Letters tab.

Add Letter Screen

The table below explains the items on the Add letter screen. For information about how to access this screen, see Add Letters for Packages on page 354.

Screen Item	Description
Name	Enter a unique name to help identify the letter.
Description	Enter additional information to further identify the creative, such as an explanation of its content or intended recipients, such as "Only use for Annual Fund donors."
Letter includes receipt	For an acknowledgement letter, this checkbox appears. To include a receipt for the donation with the acknowledgement, select this checkbox.
Export definition	Your system administrator configures the export definitions available for use with letters. The export definition determines the fields available to merge with the Microsoft *Word* template to generate the letters. To view the fields available to export, select the Preview tab of the marketing effort process or view the header row in your *.csv file after you run the process. If you select a site in the **Site** field, only export definitions assigned to the same site are available for selection.
Word template	This field displays the Microsoft *Word* document file used as a template for the letter. To use a *Word* document from your hard drive or network, click the green arrow and browse to the *Word* document to use as a template for the letter. To edit the document file, open the document in *Word*. To use a different document file, click **Clear** and then choose the file to use. After you save the letter, to open the document in *Word*, click its link when you edit the letter, or click the down arrows next to the letter name on the Letters and Documents tab and click **View template** on the action bar. For information about how to select a different template for a saved letter, see Update the Microsoft Word Template for a Letter on page 357.
Site	System administrators can establish security access to letters based on site. When you select one or more sites in the **Site** field, only users associated with the selected sites can access the letter.

View the Microsoft Word Template for a Letter

From the Letters tab on the Letters and Documents page, you can open the document file used as a template for a letter in Microsoft *Word*. To open a *Word* template, click the down arrows next to the name of the letter on the Letters tab and click **View template**. *Word* opens and displays a view-only version of the template file.

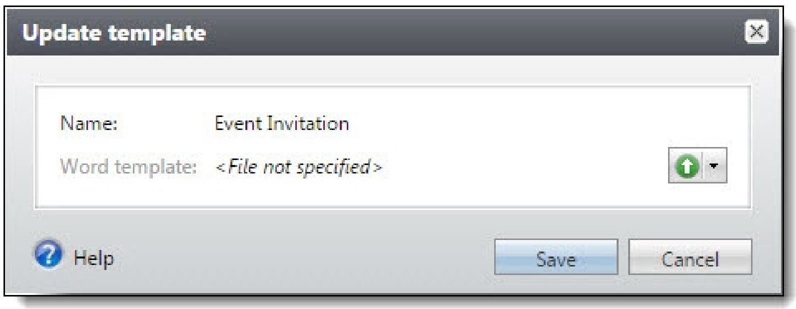
If you edit the template file in its view-only mode, you must select **File**, **Save As** from the menu bar in Microsoft *Word* and overwrite the file to apply your changes. To edit the template, we recommend open the file directly in *Word*.

Update the Microsoft Word Template for a Letter

After you add a letter, you can update the Microsoft *Word* document used as its template to select a different template.

Update a letter template

1. From *Marketing and Communications*, click **Letters and documents** and then **View letters and documents**. The View letters and documents page appears.
2. On the Letters tab, click the down arrows next to the letter for which to update its template.
3. On the action bar, click **Update template**. The Update template screen appears.



4. In the **Word template** field, the file name of the *Word* document used as the letter template appears. To select a different file, click the down arrow and select **Clear file**. To browse to the file to use, click the green arrow to browse to the file to use.
5. Click **Save**. You return to the Letters and Documents page.

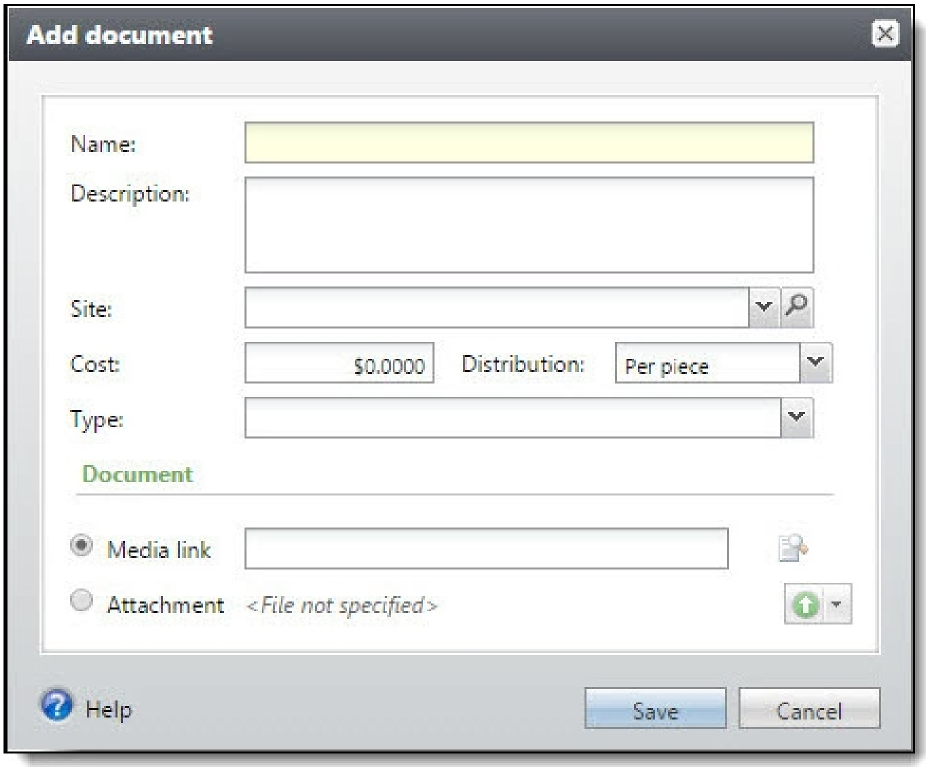
Add Marketing Documents

Your packages may include static marketing documentation such as pamphlets or reports. When you add a document, you can enter its cost. The program can use this cost to calculate the cost of packages that use the document, which can then be used to calculate the total cost of a marketing effort.

You can associate a digital file with marketing documents. You can save the digital file as an attachment stored on your server or link to a digital file outside of your database. Because a document may not have a digital file, you are not required to associate a digital file to a document.

Add a marketing document

1. From *Marketing and Communications*, click **Letters and documents**. The Letters and documents page appears.
2. Click **Add a document**. The Add document screen appears. For information about the items on this screen, see Add Marketing Document Screen on page 358.



3. Enter a unique name and description to help identify the document.
4. To restrict use of the document to only a specific site, in the **Site** field, select the site to use the document.
5. In the **Cost** field, enter the cost for the document. Select whether the cost is per piece, response, marketing effort, or per thousand. To not include the document in the overall cost of a package or marketing effort, select Do not include.
6. To group the document with similar documents, in the **Type** field, select the type of the document, such as report or pamphlet. Your system administrator configures the available document types.
7. To attach the primary content of the document, such as a Microsoft *Word* document (*.doc) or an Adobe portable document format (*.pdf) version, under **Document**, select whether to link to the file or attach the file to the document.
   - To link to a file outside of your database such as on a website or network location, select **Media link** and enter the web address or network path.
   - To attach a file to the document in your database, select **Attachment** and click the green arrow to browse to the file.
8. Click **Save**. The Letters and Documents page appears, open to the Documents tab.

Add Marketing Document Screen

The table below explains the items on the Add document screen. For information about how to access this screen, see Add Marketing Documents on page 357.

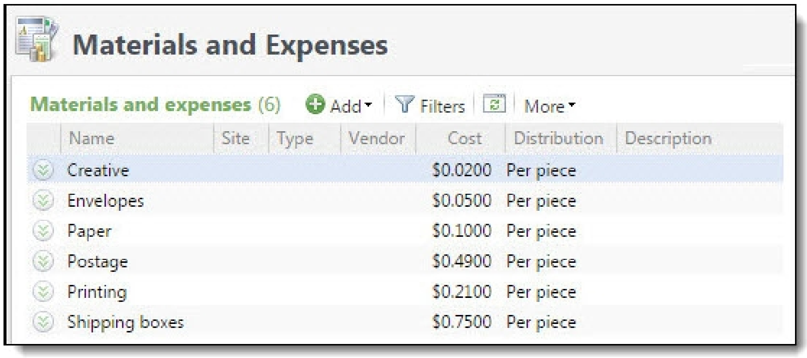
Screen Item	Description
Name	Enter a unique name to help identify the document.
Description	Enter additional information to further identify the document, such as an explanation of its content or intended recipients.
Site	To restrict use of the document to only users at a specific site, select the site to use the document.
Cost	Enter the cost for the document and select whether the cost is per piece, response, marketing effort, or per thousand. If you select Per marketing effort, the program distributes the cost across all packages that use the document within a marketing effort. To not include the document in the overall cost of a package or marketing effort, select Do not include.
Type	Select the type of document, such as pamphlet or report.
Media link	To link the document to a digital file stored outside of your database, select this option and enter the web address or file path for the file. If you select this option, do not link to a file on your local hard drive, as other users cannot access it.
Attachment	To store a digital file on your server as an attachment to the document, select this option and click the green arrow to browse to the file. When you save the document, a program uploads the file to the server and stores it in the database so users can access it from any workstation that runs the program.

View a Marketing Document

When you add a marketing document, you can associate a digital file with it as an attachment or a media link. From the Documents tab on the Letters and Documents page, you can open the digital file associated with a document. To open a document, select it under **Documents** and click **View document**. For an attachment, the native program of the file type opens and displays the document. For a media link, your web browser opens and displays the document.

Manage Materials and Expenses

Your packages may have associated materials, such as paper, envelopes, and shipping containers. Materials can also include small gifts you include in a package such as pens or magnets with your organization’s logo. Your organization may also incur costs, or expenses, to implement a package such as for postage or printing. To view information about the materials and expenses associated with the packages your organization uses for marketing efforts, from *Marketing and Communications*, click **Material and expenses** and then **View materials and expenses**. The Materials and Expenses page appears.



On this page, you can view the materials and expenses associated with packages. For each material or expense, you can view its type, vendor, and cost. To help find a material or expense in the grid, you can filter the items that appear by type or site. On the action bar, click **Filters** and select the criteria of the materials or expenses to view and click **Apply**. In the grid, only the items that meet the filter criteria appear. To display all materials and expenses in the grid, click **Reset**.

Tip: To view or edit information about a specific material or expense, you can search the database for it.

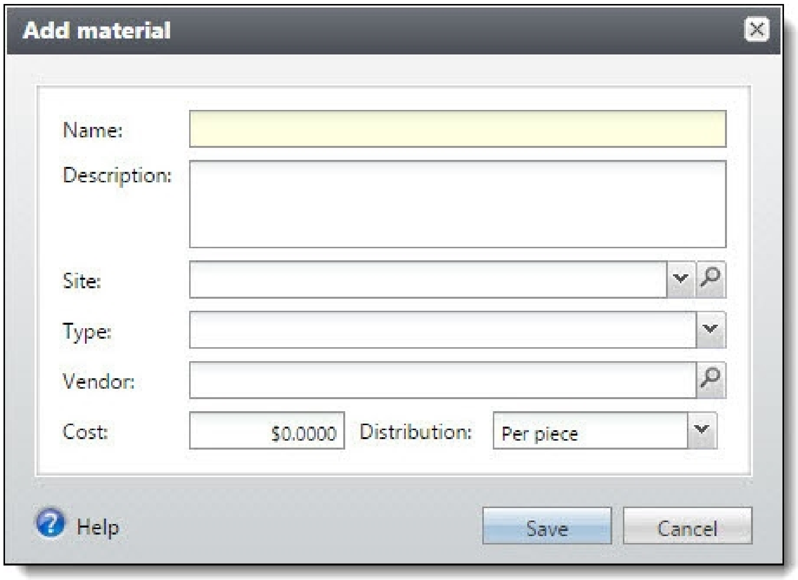
From the grid, you can add and manage materials and expenses for packages as necessary.

Add Package Materials

Your packages may have associated materials, such as paper, envelopes, and shipping containers. Materials can also include small gifts you include in a package such as pens or magnets with your organization’s logo. When you add material, you can enter its cost. The program can use this cost to calculate the cost of packages that use the material, which can then be used to calculate the total cost of a marketing effort.

Add material for packages

1. From *Marketing and Communications*, click **Materials and expenses**. The Materials and expenses page appears.
2. Click **Add material**. The Add material screen appears. For information about the items on this screen, see Add Material Screen on page 361.



3. Enter a unique name and description to help identify the material.
4. To restrict use of the material to only a specific site, in the **Site** field, select the site to use the material.
5. To group the material with similar material, in the **Type** field, select the type of the material such as shipping goods or promotional gift.

Note: Your system administrator configures the available material types.

6. In the **Vendor** field, search for and select the vendor that provides the material.
7. In the **Cost** field, enter the cost for the material. Select whether the cost is per piece, response, marketing effort, or per thousand. To not include the material in the overall cost of a package or marketing effort, select Do not include.
8. Click **Save**. The Packages page appears, open to the Materials and Expenses tab.

Add Material Screen

The table below explains the items on the Add material screen. For information about how to access this screen, see Add Package Materials on page 360.

Screen Item	Description
Name	Enter a unique name to help identify the material.
Description	Enter additional information to further identify the material, such as an explanation of when to use the material.
Site	To restrict use of the material to only users at a specific site, select the site to use the material.

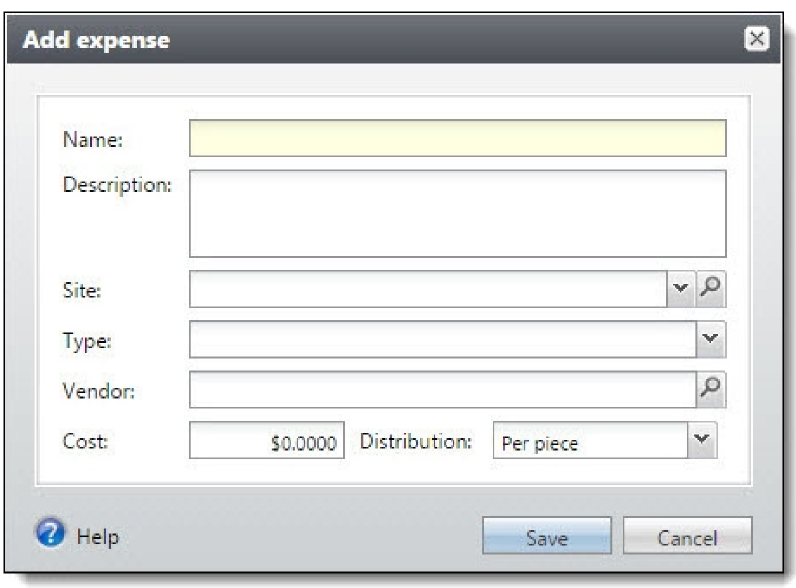
Screen Item	Description
Type	Select the type of material, such as shipping goods or promotional gift.
Vendor	Select the vendor who provides the material. If necessary, you can add a new vendor here. When you add material from a vendor record, this field is not available. The program automatically associates the material to the vendor from which you add the material.
Cost	Enter the cost for the material and select whether the cost is per piece, response, marketing effort, or per thousand. If you select Per marketing effort, the program distributes the cost across all packages that use the material within a marketing effort. To not include the material in the overall cost of a package or marketing effort, select Do not include.

Add Package Expenses

Your packages may have associated expenses, such as for postage or to print and collate its content. When you add an expense, you can enter its cost. The program can use this cost to calculate the cost of packages that incur the expense, which can then be used to calculate the total cost of a marketing effort.

Add an expense for packages

1. From *Marketing and Communications*, click **Materials and expenses**. The Materials and expenses page appears.
2. Click **Add an expense**. The Add expense screen appears. For information about the items on this screen, seeAdd Expense Screen on page 363.



3. Enter a unique name and description to help identify the expense.

4. To restrict use of the expense to only a specific site, in the **Site** field, select the site to use the expense.
5. To group the expense with similar expenses, in the **Type** field, select the type of the expense such as shipping or production.

Note: Your system administrator configures the available expense types.

6. In the **Vendor** field, search for and select the vendor associated with the expense.
7. In the **Cost** field, enter the cost of the expense. Select whether the cost is per piece, response, marketing effort, or per thousand. To not include the expense in the overall cost of a package or marketing effort, select Do not include.
8. Click **Save**. The Packages page appears, open to the Materials and Expenses tab.

Add Expense Screen

The table below explains the items on the Add expense screen. For information about how to access this screen, see Add Package Expenses on page 362.

Screen Item	Description
Name	Enter a unique name to help identify the expense.
Description	Enter additional information to further identify the expense, such as an explanation of when you incur the expense.
Site	To restrict use of the expense to only users at a specific site at your organization, select the site to use the expense.
Type	Select the type of expense, such as shipping or production.
Vendor	Select the vendor associated with the expense. If necessary, you can add a new vendor here. When you add an expense from a vendor record, this field is not available. The program automatically associates the expense to the vendor from which you add the material.
Cost	Enter the cost of the expense and select whether the cost is per piece, response, marketing effort, or per thousand. If you select Per marketing effort, the program distributes the cost across all packages that use the expense within a marketing effort. To not include the expense in the overall cost of a package or marketing effort, select Do not include.

Manage Blackbaud Internet Solutions Email Messages

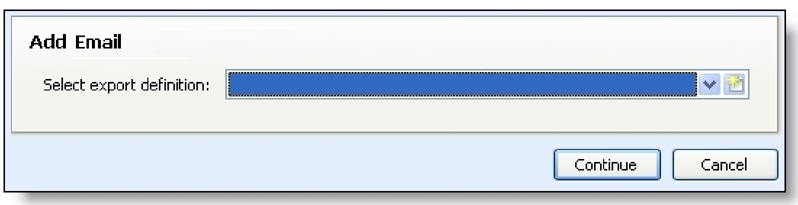
If ***Blackbaud Direct Marketing*** is configured to integrate with ***Blackbaud Internet Solutions***, the Blackbaud Internet Solutions Emails page is available. From this page, you can add and manage ***Blackbaud Internet Solutions*** email messages created in ***Blackbaud Direct Marketing***.

Add Blackbaud Internet Solutions Email Messages

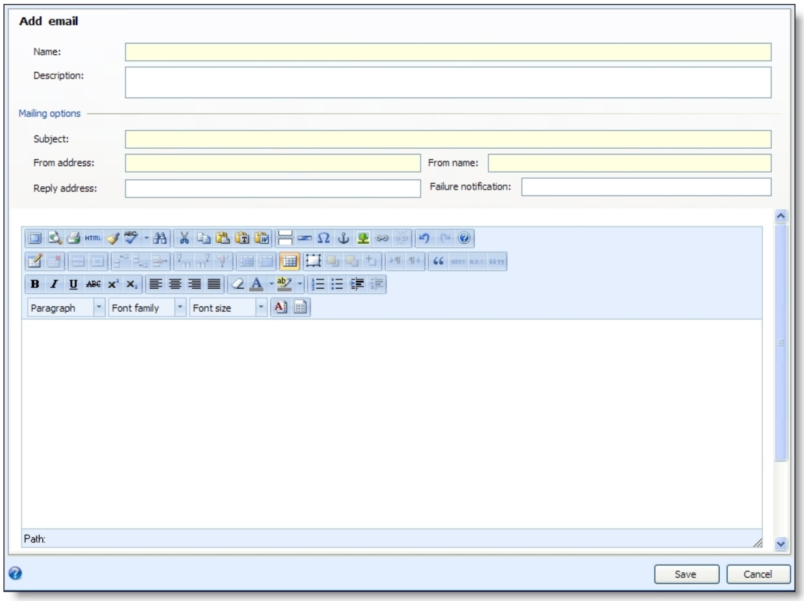
After you configure integration with ***Blackbaud Internet Solutions***, you can create the email messages used with email packages from the Blackbaud Internet Solutions Emails page.

Add a Blackbaud Internet Solutions email message

1. From *Marketing and Communications*, click **Blackbaud Internet Solutions emails**. The Blackbaud Internet Solutions emails page appears.
2. Click **Add a Blackbaud Internet Solutions email**. The Add Blackbaud Internet Solutions Email screen appears.



3. Select an email export definition. The export definition defines the merge fields available in the email. The selected definition must include the **Finder number**, **Full name**, and **Email address** fields.
4. Click **Continue**. The Add email screen appears.



This screen is similar to the email properties and design screens in ***Blackbaud Internet Solutions***. For information about the items on this screen, see the ***Blackbaud Internet Solutions*** *Email Guide*.

5. Click **Save**. You return to the Blackbaud Internet Solutions Emails tab.

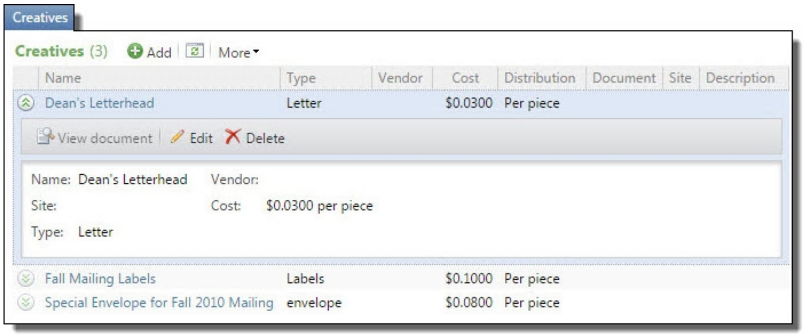
Package Record

On a package record, you can view details about the package, such as name and description, source code, channel, category, and cost. You can also view information about the cost and primary content of the package. To view a package record from the Packages page, click the name of the package in the grid. You can also search the database for a package record.

From the record, you can view and manage the content and the materials and expenses associated with the package. To help you navigate through this information, the record contains multiple tabs.

Package Creatives

Creatives are the content you include in packages you include with public media efforts such as billboards or online advertisements. Examples of creatives are images and digital media files of the content used in a marketing effort. To view the creatives included in a package, select the Creatives tab on the package record.



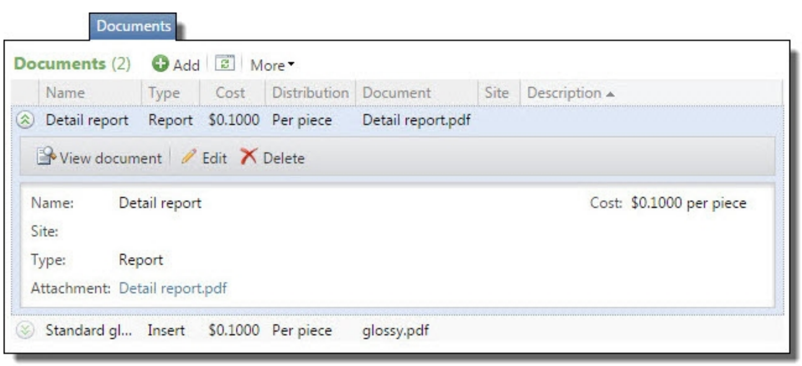
On this tab, you can view the creatives included in the package. When applicable, the program includes the cost of these creatives as additional content cost to calculate the total cost per piece for the package. For each creative, you can view information such as type, cost and distribution, and attached document. To view additional information about a creative, such as its description, click the down arrows next to the package. The **Details** window appears. To view a document or digital file attached to a creative, click **View document** on the action bar.

To view more detail information about a creative and its attachments, click on the name of the creative in the grid. The record of the creative appears. For information about the items on the record, see Creative Record on page 368.

From the grid, you can manage the creatives for the package.

Package Documents

Your packages may include static marketing documentation such as pamphlets or reports. To view the marketing documents included in a package, select the Documents tab on the package record.



On this tab, you can view the documents included in the package. For each document, you can view its type and cost. When applicable, the program automatically includes the cost of these documents as additional content cost to calculate the total cost per piece for the package.

Note: From the Documents tab, you can manage only static marketing documentation such as reports or brochures. For a mail package, the **Letter** field displays the letter included in the package such as for an appeal or acknowledgement. To edit the letter included in a mail package, you must edit the package.

From the grid, you can add and manage the documents for the package.

Add Marketing Documents to a Package

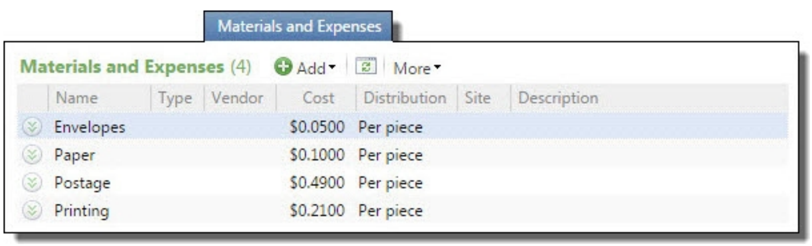
Your packages may include static marketing documentation such as pamphlets or reports. You can add documents to a package from its record.

Add a document to a package

1. Access the record of the package to which to add a document.
2. Select the Documents tab.
3. On the action bar, click **Add**. The Marketing Document Search screen appears.
4. Search for and select the document to add to the package. You return to the Documents tab. In the grid, the selected document appears.

Package Materials and Expenses

Your packages may have associated materials, such as paper, envelopes, and shipping containers. Your organization may also incur additional costs, or expenses, such as for postage or to print documents. To view the materials and expenses associated with a package, select the Materials and Expenses tab on the package record.



Name	Type	Vendor	Cost	Distribution	Site	Description
Envelopes			$0.0500	Per piece		
Paper			$0.1000	Per piece		
Postage			$0.4900	Per piece		
Printing			$0.2100	Per piece		

On this tab, you can view the materials and expenses associated the package. For each material or expense, you can view its type, vendor, and cost. When applicable, the cost of these materials and expenses is included as additional content cost to calculate the cost per piece for the package.

From the grid, you can add and manage the materials and expenses for the package.

Add Materials and Expenses to a Package

A package may have associated materials and expenses such as shipping goods or printing costs. You can add materials and expenses to a package from its record.

Add a material to a package

1. Access the record of the package to which to add material.
2. Select the Materials and Expenses tab.
3. On the action bar, click **Add** and select **Material**. The Marketing Material Search screen appears.

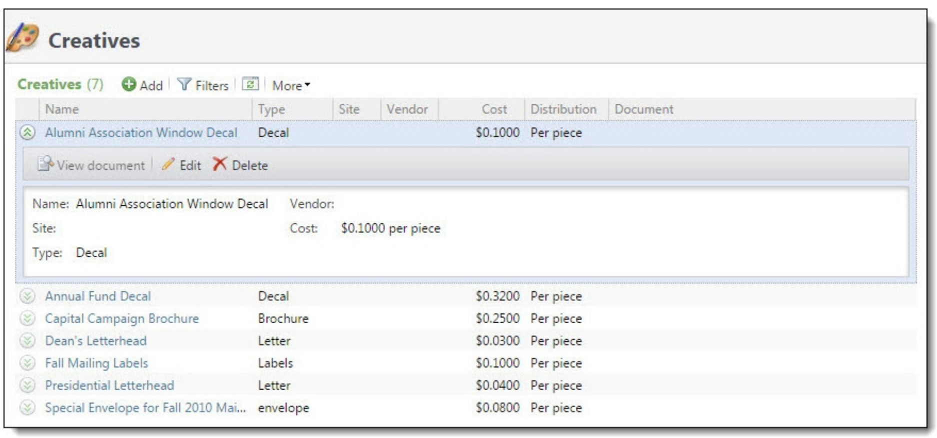
4. Search for and select the material to add to the package. You return to the Materials and Expenses tab. In the grid, the selected material appears.

Add an expense to a package

1. Access the record of the package to which to add an expense.
2. Select the Materials and Expenses tab.
3. On the action bar, click **Add** and select **Expense**. The Marketing Expense Search screen appears.
4. Search for and select the expense to add to the package. You return to the Materials and Expenses tab. In the grid, the selected expense appears.

Creative Record

On a creative record, you can view details about the creative, such as vendor, type, and cost. When applicable, you can also view information about the primary content attached to the creative. To view a creative record from the Packages page, click the name of the creative on the Creatives tab. You can also search the database for a creative record.



From the record, you can attach and manage files associated with the creative. For example, if you negotiate with a vendor to purchase a creative, you can attach any applicable proposals, contracts, or emails. For information about how to view and manage the attachments on a creative, see Creative Attachments on page 368.

Creative Attachments

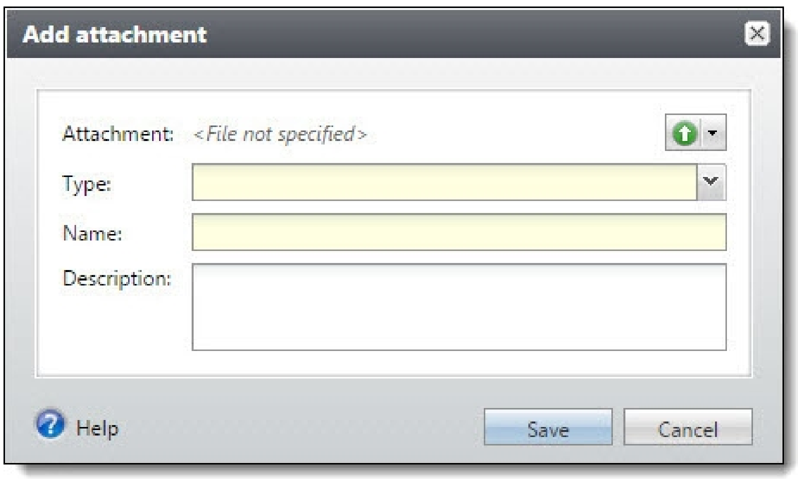
From the record, you can attach and manage files associated with the creative. For example, if you negotiate with a vendor to purchase a creative, you can attach any applicable proposals, contracts, or emails. Attachments can vary from graphics to digital files to document files such as Microsoft *Word* documents or *Excel* spreadsheets.

Add Attachments to a Creative

From a creative record, you can attach digital files associated with the creative, such as for later reference. For example, you may want to associate a particular image file with a creative.

Add an attachment

1. Access the record of the creative to which to add an attachment.
2. Under **Attachments**, click **Add** on the action bar. The Add attachment screen appears.



3. In the **Attachment** field, click the green arrow and browse to the file to attach.

Note: To remove an attachment, such as to attach a different file, click the down arrow and select **Clear**.

4. To group the attachment with similar attachments, in the **Type** field, select the type of the attachment such as image or document. Your system administrator configures the available attachment types.
5. Enter a unique name and description to help identify the attachment.
6. Click **Save**. You return to the Attachments tab where your attachment now appears.

View an Attachment on a Creative

From a creative record, you can attach and manage files associated with the creative. For example, if you negotiate with a vendor to purchase a creative, you can attach any applicable proposals, contracts, or emails. To view an attachment in its native program, click the down arrows next to the name of the attachment under **Attachments** and click **Open file** on the action bar.

Export Definitions

A marketing export definition serves as a template to use when you export data for a marketing effort. Processing houses typically specify which export fields you need to include for a particular package. When you create an export definition, the export fields you can choose from are determined by the applicable query view. For example, when you create a direct marketing export definition, the available fields are based on the constituent query view. If you enabled the Consolidated Marketing List source view, fields from imported lists are also available for direct marketing efforts.

Note: Marketing export definitions are used for marketing efforts. Constituent letters use constituent export definitions created in *Administration*. For more information about export definitions created in *Administration*, see the *Query and Export Guide*.

You can create and manage export definitions from the Marketing Export Definitions page. To access this page from *Marketing and Communications*, under **Packages**, click **Export definitions**.

In the **Marketing export definitions** list, you can view information about each marketing definition in the database, such as its type and who created it. You can also customize the list. You can add and remove columns and choose how they filter and sort. For example, for the **Type** column, you can set the filters to display only direct marketing export definitions. You can also save list parameters to quickly display different views of the list. For example, you may want fewer columns displayed for acknowledgement definitions or in a different order. To save list parameters, click **Save list**. You can also search the list by keyword.

Show Me: Watch this video to learn more about list features.

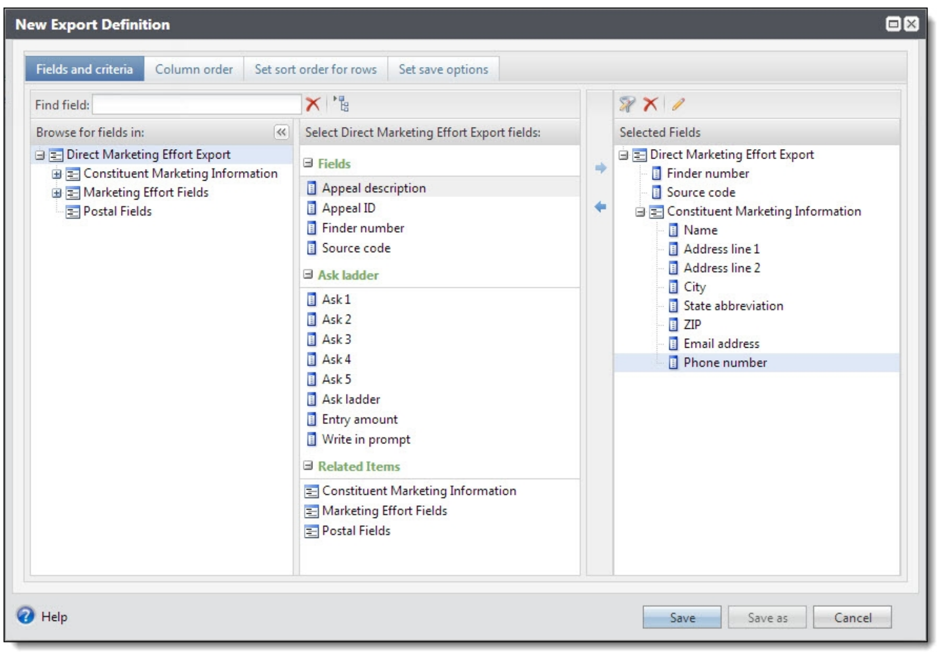
You can also complete tasks for an export definition from the Marketing Export Definitions page. To access task buttons, click the double arrows next to a definition to expand the row. Use the task buttons to edit, delete, copy, or generate a header file.

Add Export Definitions

When you create a marketing export definition, you specify which fields to include in a marketing effort export process. Export fields define which information to include on a package. For example, a direct marketing effort export definition includes the finder number, source code, and constituent name and address by default.

Add an export definition

1. From *Marketing and Communications*, click **Export definitions**. The Export Definitions page appears.
2. On the action bar, click **Add** and select the export definition type. The New Export Definition screen appears.



Under **Browse for fields in**, you can view the types of fields available to output for marketing efforts. You can expand a node to drill-down to a specific group of fields.

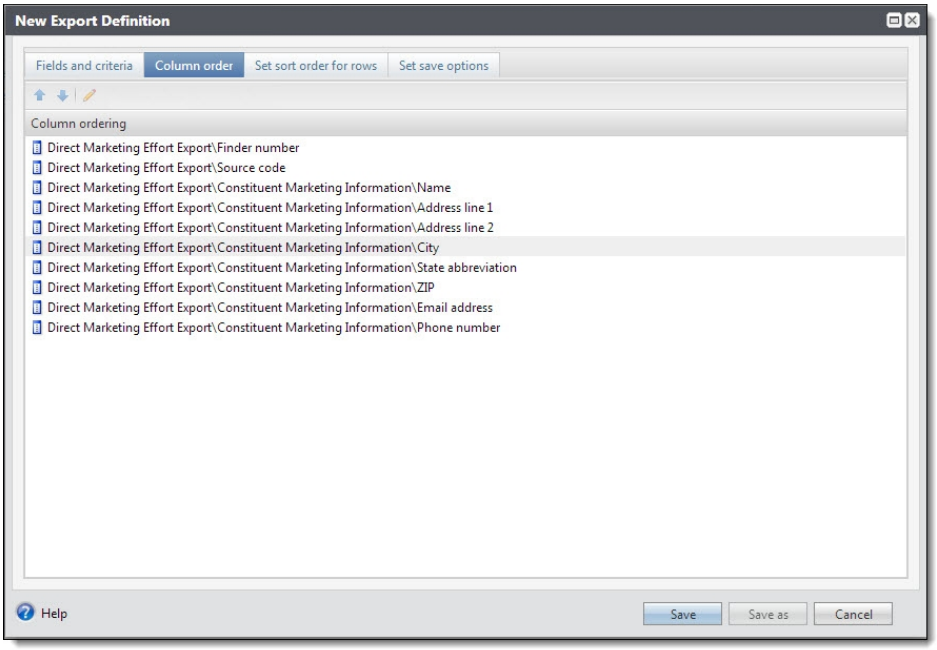
The middle pane lists the **Fields** and **System Fields** for the selected group.

Tip: To quickly search for a field, enter the field name in **Find field** and press **ENTER** on your keyboard. Applicable fields display in the middle pane. Use your arrow keys to browse through the list. If you select a group and click **Search up**, the search applies to only fields in the selected node.

3. To specify output fields for the export, select them in the middle pane and drag them into the **Selected Fields** pane. Selected fields correspond to the information you want to see in the export. These fields appear as column headings in the export output. You can rename the column headings if necessary. You must specify at least one output field.

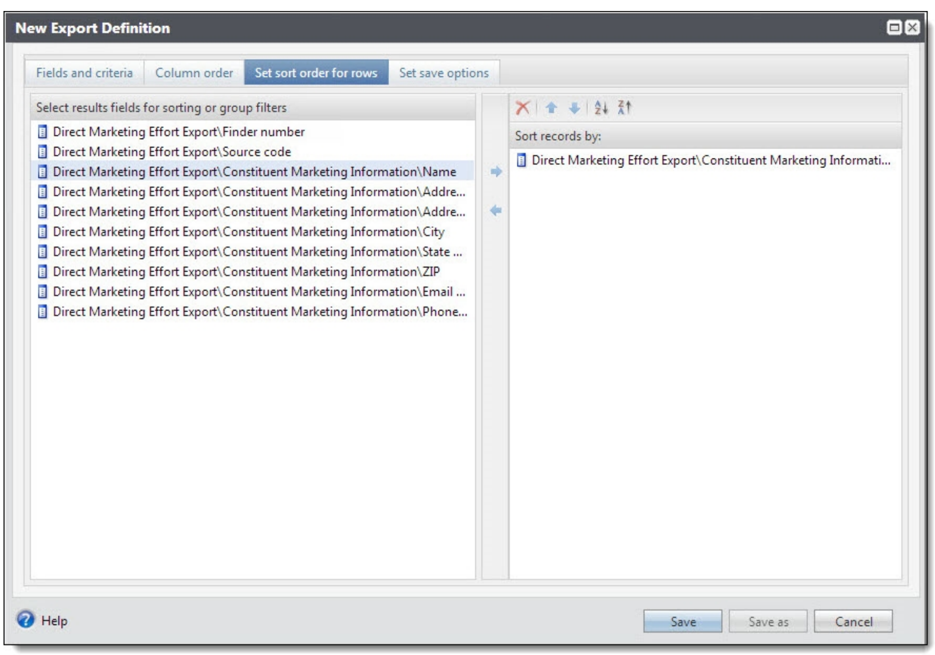
   When you select a one-to-many field, the Criteria screen appears. For more information about how to set criteria for a one-to-many field, seeExport Definitions Criteria on page 374.

4. Select the Column order tab. From this tab, you can reorder and rename column headings for the export file. Column headings identity the type of system field included in the column.



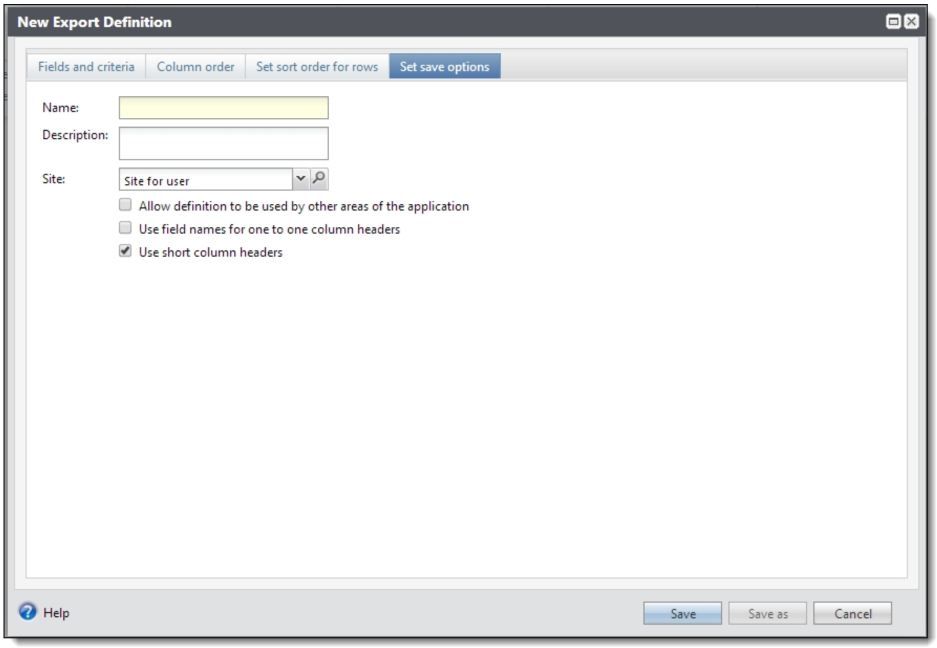
- To reorder the column names, use the up and down arrows.
- To change the column header name, select the field name and click **Change column header**. Enter a new name in the field. If you do not change the column name, the column header uses the system field name. For example, <DIRECTMARKETINGEFFORTEXPORT_SOURCECODE>.

5. Select the Set sort order for rows tab. From this 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 necessary order.



- To add a sort field, double-click or drag and drop a field to the **Sort records by** box.
- To change the sort order, select a field and click the up or down arrow.
- To reverse the sort order within a column, click the **Sort Ascending** or **Sort Descending** button.

6. Select the Set save options tab.



7. Enter a name and description for the export definition.
8. If your organization uses sites, in the **Sites** field, select which site to associate with the export definition.
9. To make this definition available for constituent letter templates, select **Allow definition to be used by other areas of the application**.
10. To use the field name as the column header for one-to-one fields, select **Use field names for one to one column headers**. For example, with this option selected, the column header for Source code is SOURCECODE. If you do not select this option, the program uses the longer, less "friendly" system field name <DIRECTMARKETINGEFFORTEXPORT_SOURCECODE>.
11. To use a shortened version of the system field name as the column header, select **Use short column headers**. For example, DirMktEffExp_SOURCECODE.

Note: If you select both options, the column header for one-to-one fields is the friendly field name and the column header for one-to-many fields is the shortened system field name. If you entered a custom name for a field on the Column order tab, the column header uses the custom name in some manner no matter which options you select. For example, if you select **Use short column headers**, the column header for a custom field name is DirMktEffExp_Custom Field Name.

12. Click **Save**. You return to the Export Definitions page.

Export Definitions Criteria

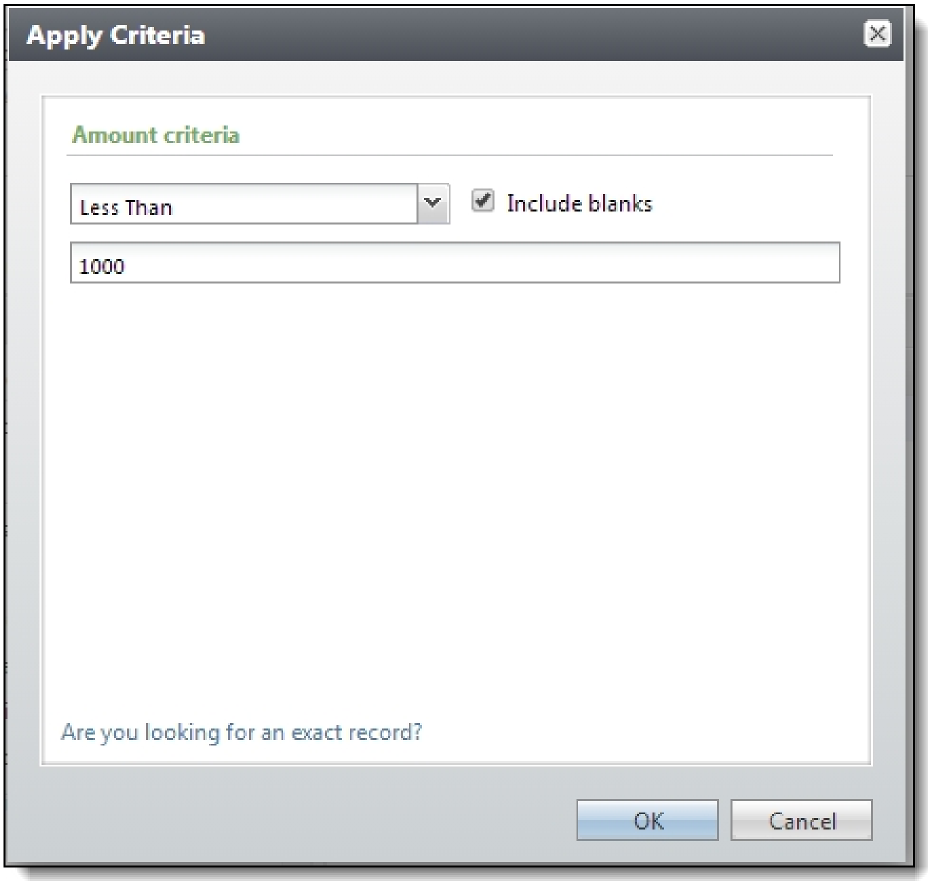
In export definitions, you can select one-to-one and one-to-many export fields. A one-to-one export field contains one value in your database. For example, **Birth date** is a one-to-one export field because constituents have one birth date. A one-to-many export field contains several values in your database. For example, **Email address** is one-to-many because constituents can have multiple email addresses.

When you select a one-to-many field on the New Export Definition screen, the Export criteria screen appears. On this screen, you define how many instances of the field you want to export and the sort order for the values.

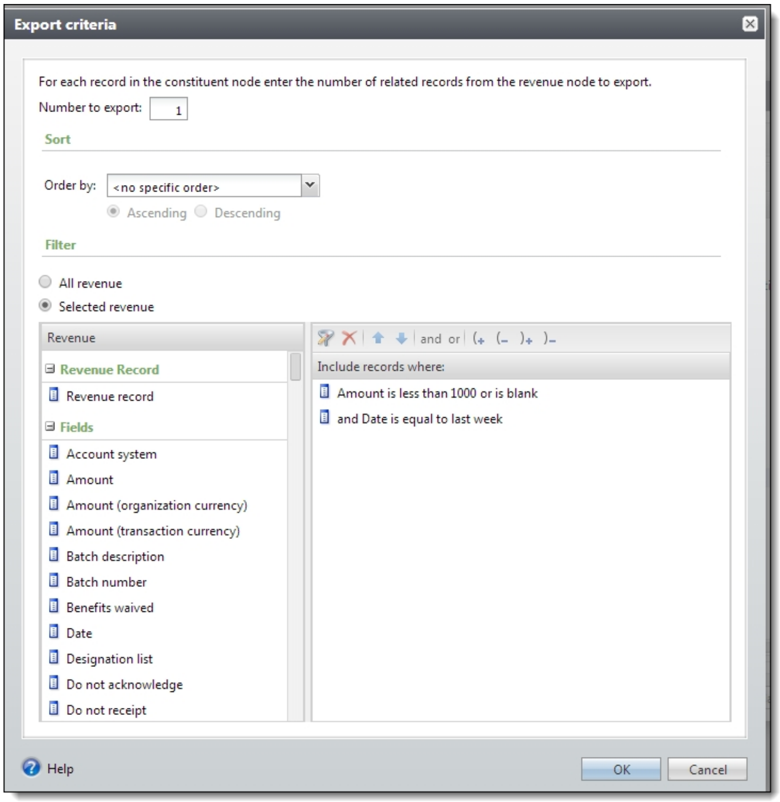
Define criteria for one-to-many fields

1. When you select a one-to-many field for an export definition, the Export criteria screen appears.
2. In the **Number to export** field, enter the number of records to export for the node or group that contains the field. For example, if you select **Email address** from **Contact** group, you can enter the number of email addresses to export for each contact.

   The number to export applies to all fields in the node. For example, if you also select **Phone** from the **Contact** node, the program will export the same number of phone numbers as email addresses.
3. Under **Sort**, in the **Order by** field, select which field to sort records by in their column of the export. Then select whether to sort in ascending or descending order. For example, if you sort by "Email type," the addresses appear in A-to-Z or Z-to-A order by email type.
4. To add filters to the fields, under **Filter**, select **Selected <node name>**.
5. Drag a filter field to the right. The Apply Criteria screen appears.



6. Select the criteria to apply. For example, if the export field is **Revenue Amount**, you can select "Less Than" and enter a value. The export definition will include gift amounts less than the entered amount.
7. Click **OK**. You return to the Export criteria screen.
8. If you add multiple filter fields, you can use the combining operator buttons to combine filtering criteria to narrow your results. For example, you can combine Revenue Amount is less than $1000 AND Revenue Date is this month.



9. Click **OK**. You return to the New Export Definition screen.

Note: To edit filter criteria for a node, right-click the node and select **Edit filter**.

10. Click **Save**. You return to the Marketing Export Definitions page.

Generate a Header File for a Marketing Export Definition

You can generate a header file in *.csv format that includes the fields names from a marketing export definition. Use the header file as a data source in Microsoft *Word* to create a mail merge document or to send to a processing house.

To generate a header file, from the Marketing Export Definitions page, expand the definition and click the **Generate header file** task button. The .csv file downloads automatically.

Note: This download process varies according to your type of browser.

Postal Templates

If you use the *Postal Discounts* preprocessing service, you can create postal templates. Rather than complete the *Postal Discounts* wizard each time you perform a postal export, you can save all the *Postal Discounts* options as a template. When you create a postal export for a marketing effort, a postal template performs all the presort calculations and exports the chosen postal fields in a selected export definition.

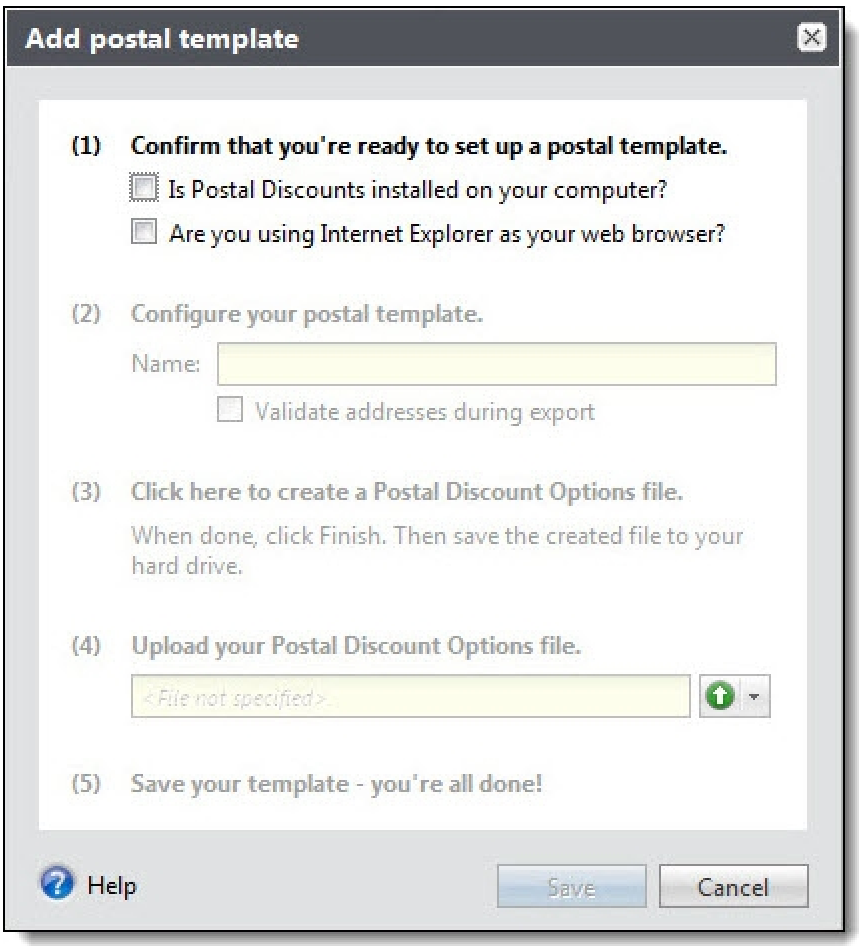
Add Postal Templates

When you add a postal template, you specify whether to validate addresses during the export. You can use the *Postal Discounts* wizard to specify the postal processing options the template performs during an export.

Add a postal template

Warning: To create postal templates, you must use *Internet Explorer* on a workstation with *Postal Discounts* installed.

1. From the Export Definitions page, click **Postal templates** under **Configuration**. The Postal Templates page appears.
2. Under **Postal Templates**, click **Add** on the action bar. The Add postal template screen appears.



3. Confirm that you are ready to set up a postal template.

- After you confirm *Postal Discounts* is installed on your computer, select **Is Postal Discounts installed on your machine?**.

- After you confirm the program is currently running in *Internet Explorer*, select **Are you using Internet Explorer as your web browser?**.

   After you select both options in step 1, additional options become available.

4. Under **Configure your postal template**, enter a name for the template. To automatically validate and fix addresses during the export process, select **Validate addresses during export**.
5. Click **Click here to create a Postal Discount Options file**. The Postal Discounts wizard appears. Use the wizard to configure your postal discount parameters. For information about these settings, click **Help** on any of the Postal Discounts wizard screens.

Note: To open the Postal Discounts wizard from the Utilities, Gadgets, and Reference page of your program installation, under **Utilities**, click **Postal Discount Options File Editor**.

6. When prompted, save the parameters as a temporary text file on your hard drive.
7. Click **Finish** to exit the wizard and return to the Add postal template screen.
8. Under **Upload your Postal Discount Options file**, browse to the postal discounts file saved to your hard drive and click **Open**.

Note: You cannot edit the parameters file outside of the wizard. After you select the file on this screen, you can delete it from your hard drive.

9. Click **Save**. You return to the Postal Templates page.