



Blackbaud CRM™ DEVELOPERS' CONFERENCE

Marketing Efforts Custom Export Process and Integration with Sales Force Marketing Cloud

- Ravi Cheemangunta
- UCLA External Affairs
- ravic@support.ucla.edu

Marketing Efforts Custom Export Process and Integration with SFMC

- Why we did it?
- The approach and how we did it (all the needed customizations using SDK)
- The Integration of the exported data with ExactTarget (SFMC)
- Demo
- Questions and Contact Info



Why customize ?

Current limitations

- Advanced users having difficulty in retrieving Giving Summary data based on a complex criteria.
- Performance related issues while applying filters.
- Inhouse built Email builder tool falling apart.

Goals

- Main goal is to open up and extend the self-serving ability to our users in creating and using Marketing efforts.
- Limit the dependency on the Data Management team to provide them the necessary Giving Summary data and hence minimizing the turnaround time to get their marketing emails ready.
- Ability to define & refine criteria after review of the extracted data.
- Integration with Sales Force Marketing Cloud.



Approach

Customized UCLA Export process

UCLA Export Effort Process

“UCLA Export Effort”
Customization accessible from
the tasks side bar menu.

Available for Direct Marketing
Efforts.

The screenshot shows the Blackbaud CRM interface. On the left, the 'Tasks' sidebar is visible, with 'UCLA Export effort' highlighted by an orange circle. The main content area is titled 'Direct Marketing Efforts' and shows a list of efforts. Below this, a detailed view for effort '8423 - AS - ITS - SFMC Testing' is displayed, including an 'Overview' section with fields like Effort ID, Appeal, Due date, Launch date, and Description. At the bottom, there is a 'Segments' section showing a table with columns for Name, Source code, and Package.

Name	Source code	Package
ITS seeds	AS0118EASITSSEEDS002	Generic Email

Export Effort Process

After the users identified their list of constituents to be included in the Extract, they will have the **option** to choose the type of data that they need for that Effort

- Bio Only
- Bio and Standard Giving data
- Bio and Custom Giving Data

Edit UCLA marketing effort export process

8422 - AS - ITS - SFMC Testing

Basic Review

Would you like to include giving data in your export?

☒ Need only Biographic data in my email

☐ Need Biographic and Standard Giving data in my email

☐ Need Biographic and Custom Giving data in my email

Email type: Preferred

Solicit code: Advancement Services - No Non-Solicit

☒ Move data to marketing cloud

Business unit: Advancement Services

Notify Email: ravic@support.ucla.edu

For direct mail exports, use the custom export mode.

Custom export

Previous Next Start Cancel

Export Options

- Extract and send the data to the specific business unit's folder in Sales Force Marketing Cloud.
- Extract the data locally and send it to the ftp location.
- We use a Custom Data list to manage mapping between CRM business unit to Sales Force unit as we have only 5 accounts.

Edit UCLA marketing effort export process

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Basic Review

Would you like to include giving data in your export?

- ☒ Need only Biographic data in my email
- ☐ Need Biographic and Standard Giving data in my email
- ☐ Need Biographic and Custom Giving data in my email

Email type: Preferred

Solicit code: Advancement Services - No Non-Solicit

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Custom export

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Output Data Elements

Standard output columns based on the type of Extract chosen by the user.

Standard Bio and Giving Data.

The screenshot shows a software window titled "Edit UCLA marketing effort export process". At the top, it displays "8422 - AS - ITS - SFMC Testing". Below this are two tabs: "Basic" (with a green checkmark) and "Review". A message says "Please confirm the following information" with a checked box for "Only export demographic data in my download and email marketing cloud".

Two red callout boxes with arrows point to specific sections of the "Output columns" list:

- Standard – Bio Data:** Points to a list of columns enclosed in an orange rounded rectangle. The columns are: PublicId, MarketingEffortId, FinderNumber, SegmentCode, SegmentName, Appeal, LookupId, Title, FirstName, LastName, EmailAddress, BirthDate, and Age.
- Standard – Giving Data:** Points to a list of columns enclosed in a green rounded rectangle. The columns are: UCLA total giving, Last gift amount, Last gift date, Last gift designation, Last gift department, Largest gift amount, Largest gift date, Largest gift designation, and Largest gift department.

At the bottom of the window, it says "Custom export" and has four buttons: "Previous", "Next", "Start", and "Cancel".

Custom Giving Data

UI allows the ability to define the additional giving related criteria for filtering data.

Custom Giving data output columns based on the criteria set by the user.

Wizard mode – only implemented for Export to Sales Force Marketing Cloud.

Other exports use “**Custom Export**” to setup.

8423 - AS - ITS - SFMC Testing

Basic Giving Criteria Giving Output Review

Would you like to include giving data in your export?

☐ Need only Biographic data in my email

☐ Need Biographic and Standard Giving data in my email

☒ Need Biographic and Custom Giving data in my email

Email type: Preferred

Solicit code: Advancement Services - No Non-Solicit

☒ Move data to marketing cloud

Business unit: Advancement Services

Notify Email: ravic@support.ucla.edu

For direct mail exports, use the custom export mode.
Custom export

Previous Next Start Cancel

Defining the Custom Criteria

Ability to setup criteria and filter the type of data.

- Legal or Recognition giving
- Cash or “Gifts & Pledges”
- Giving summary between a date range
- Filter by School, Division, Department and by a Fund



Legal Giving
Recognition Giving

Gifts & Pledges
Cash

Edit UCLA marketing effort export process

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Basic Giving Criteria Giving Output Review

What type of giving amounts would you like to include?

Legal Giving Gift & Pledges

What time frame for gifts should be included in the amounts?

From: 7/1/2017 To: 6/30/2018

What area/designation would you like to include?

School(s): Selected schools

Division(s): All divisions

Department(s): Selected departments

Designation(s):

Designation	Ignore purpose
e.g. 47933 - HZ	<input checked="" type="checkbox"/>
*	<input type="checkbox"/>

Custom export

Previous Next Start Cancel

Defining Custom Output - Summarized gift data

- List each gift
- By Fiscal Year
- For the Constituent

Ability to indicate the number of gifts or the Fiscal Years to include in the output.

The screenshot shows a software window with four tabs: 'Basic', 'Giving Criteria', 'Giving Output' (selected), and 'Review'. The 'Giving Output' tab contains the following elements:

- A question: "How would you like to summarize the donors' giving?"
- A dropdown menu currently set to "List each gift". A tooltip is visible showing the options: "List each gift", "Summarize each fiscal year", and "Summarize for the constituent".
- Text: "Gifts are listed by latest giving date."
- A question: "Number of gifts/fiscal years would you like to include?"
- A dropdown menu currently set to "3".
- Text: "Maximum of 5 recent gifts data will be listed."

A red arrow points from a red box labeled "Gift data in output" to the dropdown menu for the number of items to include.

At the bottom of the window, there are four buttons: "Previous", "Next", "Start", and "Cancel". The text "Custom export" is visible in the bottom left corner of the window.

Review criteria and output columns

Gives a preview of the criteria defined and the output (includes the custom gift summary columns)

Edit UCLA marketing effort export process

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Basic Giving Criteria Giving Output **Review**

Please confirm export setting?

- ✓ Biographic and Custom Giving data in my download and email marketing cloud
- ✓ The last 3 gifts will be listed for each constituent
- ✓ Gift & Pledges Legal giving

Filters

Custom Giving data fields

Output columns	Filter
PublicId	School
MarketingEffortId	Chancellor's Greatest Needs
FinderNumber	General Campus
SegmentCode	Division
SegmentName	All divisions
Appeal	Department
LookupId	Advancement Services
First	Alumni Affairs
LastNam	Designation
EmailAddr	All designations
BirthDate	
Age	

Custom export

Previous Next Start Cancel

Export Status

Ability to (Re)Run and check the status of the Export.

The screenshot displays the Blackbaud CRM interface. On the left, a sidebar contains a 'Tasks' list with 'UCLA export status' highlighted. A red arrow points from this task to a 'Recent Status' window. Another red arrow points from the 'UCLA export status' task to the 'UCLA export status' link in the top navigation bar. The 'Recent Status' window shows the following details:

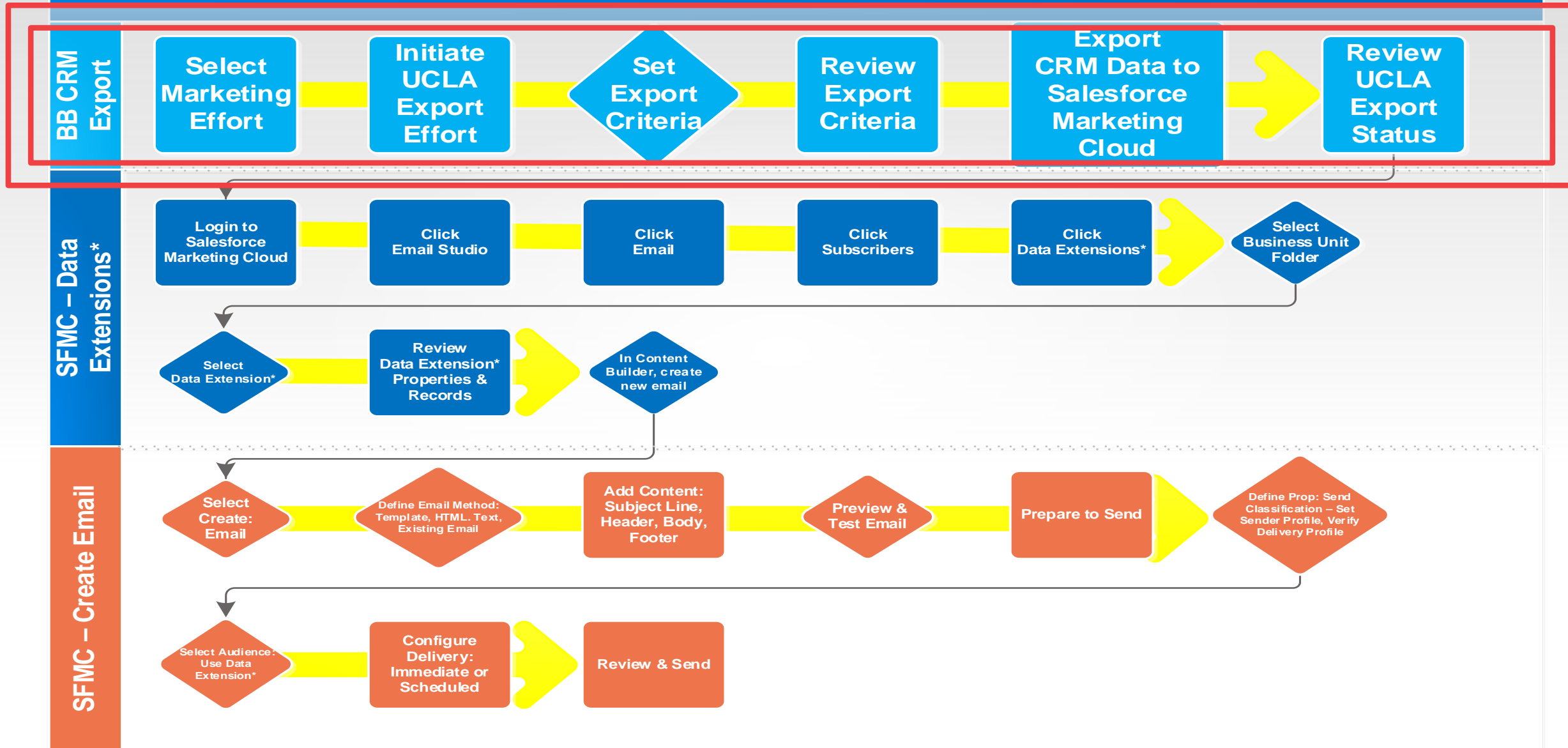
8425 - AS - ITS - SFMC Testing - Copy			
Marketing Effort: 8425 - AS - ITS - SFMC Testing - Copy			
Segment:	All segments		
Export process:	SFMC Marketing Effort Export		
Process status:	Completed		
Export status:	Uploaded to SFMC		

Below this, the 'Recent Status' tab is active, showing a table of export details:

Recent Status			
Status:	Completed		
Status message:	Completed		
Started by:	support\sakiti	Server name:	DLD
Started:	6/14/2018 8:49:44 AM	Total records processed:	3
Ended:	6/14/2018 8:50:09 AM	Number of exceptions:	0
Duration:	25 seconds	Records successfully processed:	3

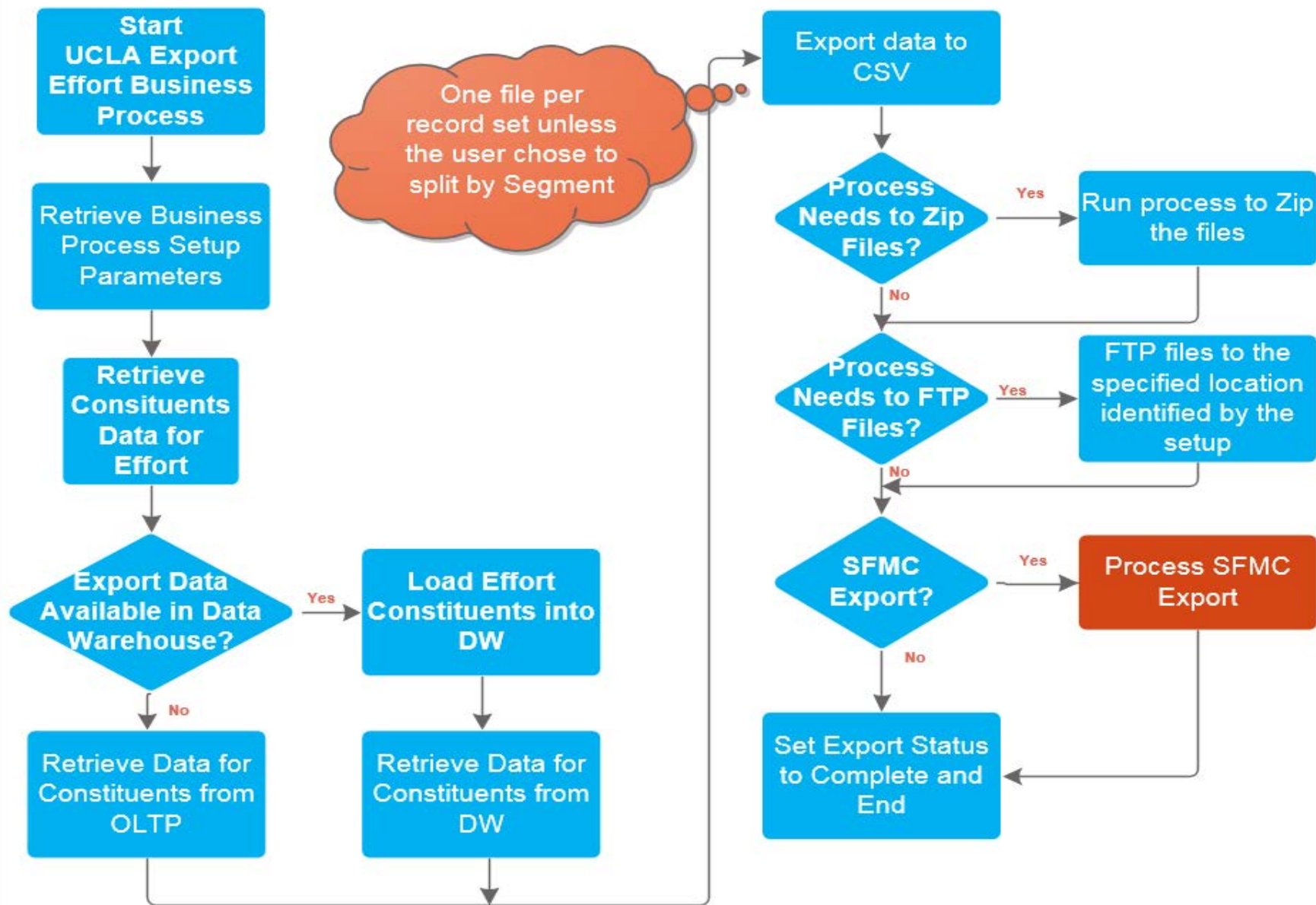


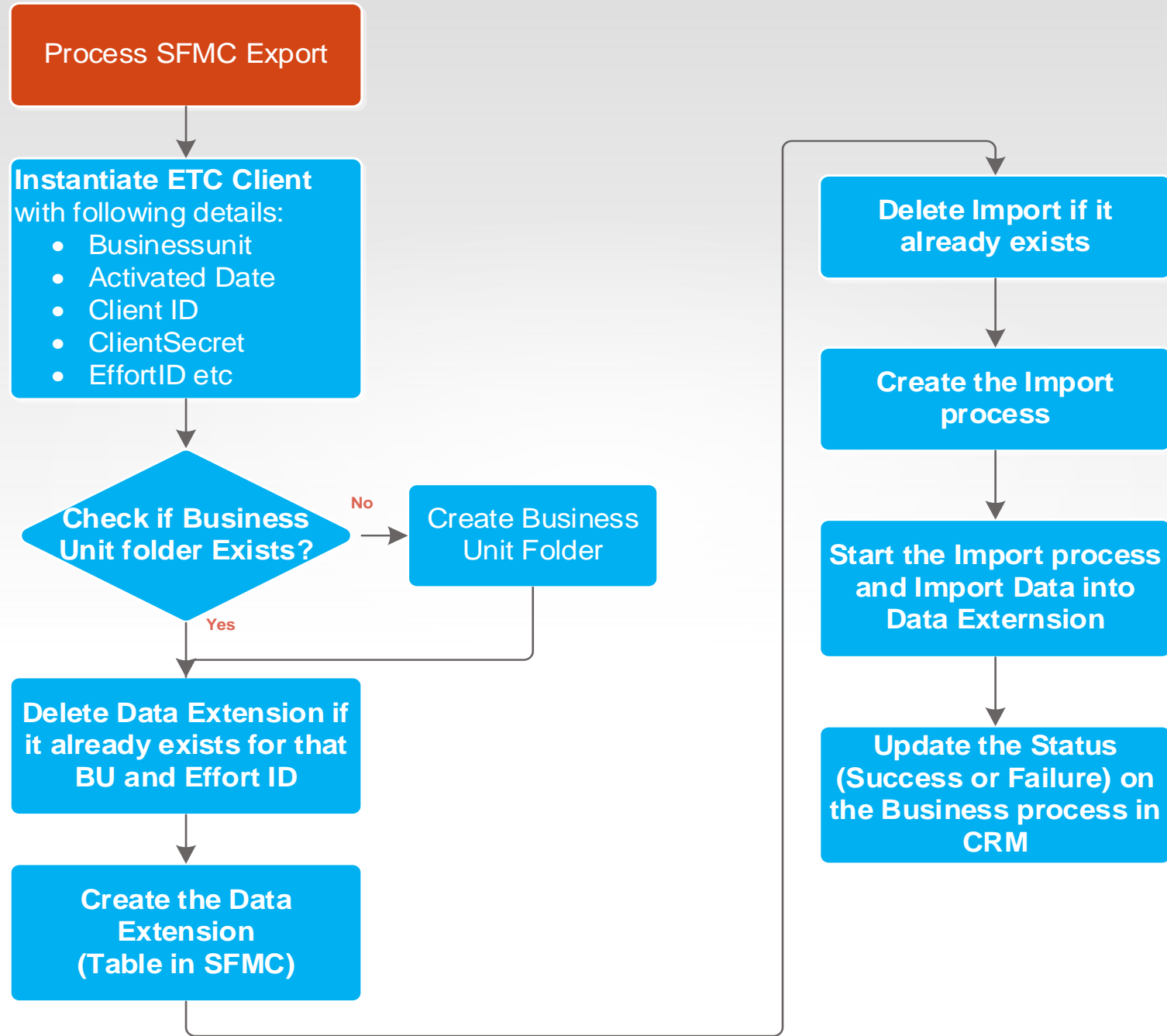
CRM – Sales Force Integration



*Note: CRM Marketing Effort data is referred to as a Data Extension once imported into Salesforce Marketing Cloud.

Custom Effort Export and Sales Force Integration





CRM – Salesforce Marketing Cloud Integration

- Used Salesforce Marketing Cloud **Fuel SDK for C#**
- .NET Framework 4.5
- REST APIs and SOAP API available. We used SOAP API.
- ClientID and Client Secret values upon registering your application.
- **Token based** access and state management.

```
Dim etClientParameters = New System.Collections.Specialized.NameValueCollection()  
etClientParameters.Add("clientId", clientId)  
etClientParameters.Add("clientSecret", clientSecret)  
etClientParameters.Add("authEndPoint", soapEndPoint)  
  
Try  
    client = New ETClient(etClientParameters)  
Catch ex As Exception  
    Throw New ApplicationException("Error creating SFMC client. Error code: " & ex.Message)  
End Try  
End Sub
```

CRM – Salesforce Marketing Cloud Integration

```
Private Function DeleteImport(ByRef client As ETClient, ByVal customerKey As String) As DeleteReturn
    Dim delete = New ETImportDefinition With {.AuthStub = client, .CustomerKey = customerKey}
    Return delete.Delete()
End Function
```

1 reference | sakiti, 49 days ago | 1 author, 1 change

```
Private Function CreateImport(ByRef client As ETClient, ByVal email As String, ByVal customerKey As String, ByVal fileName As String) As CreateReturn
    Dim import = New ETImportDefinition With {.AuthStub = client,
        .Name = customerKey,
        .CustomerKey = customerKey,
        .Description = "Automated import",
        .AllowErrors = True,
        .DestinationObject = New ETDataExtension With {.ObjectID = dataExtensionID, .Name = email},
        .FieldMappingType = ImportDefinitionFieldMappingType.InferFromDataExtension,
        .FileSpec = fileName,
        .FileType = FileType.CSV,
        .Notification = New AsyncResponse With {.ResponseType = AsyncResponse.ResponseType.ImportDefinition, .ResponseData = Nothing},
        .RetrieveFileTransferLocation = New FileTransferLocation() With {.FileTransferLocation = Nothing},
        .UpdateType = ImportDefinitionUpdateType.AddAndUpdate,
        .StandardQuotedStrings = True}
    Return import.Post()
End Function
```

2 references | sakiti, 49 days ago | 1 author, 1 change

```
Private Function StartImport(ByRef client As ETClient, ByVal customerKey As String) As PerformReturn
    Dim import = New ETImportDefinition With {.AuthStub = client, .CustomerKey = customerKey}
    Return import.Start()
End Function
```

1 reference | sakiti, 49 days ago | 1 author, 1 change

```
Private Function CreateDataExtension(ByRef client As ETClient, ByVal folderId As Integer, ByVal customerKey As String, ByVal name As String, ByVal expires As DateTime) As CreateReturn
    Dim de = New ETDataExtension()
    de.AuthStub = client
    de.FolderID = folderId
    de.Name = name
    de.CustomerKey = customerKey
    de.RetainUntil = expires.ToString()
    de.DeleteAtEndOfRetentionPeriod = True
    de.IsSendable = True
    de.IsTestable = False
    de.SendableSubscriberField = New ETProfileAttribute With {.Name = "Subscriber Key"}

    Dim columns = New List(Of ETDataExtensionColumn)()
    Dim fieldOrder = 0
    For Each dataColumn As DataColumn In metaDataTable.Columns
        Dim isPrimaryKey = IsSFMKey(dataColumn)
        Dim isRequired = isPrimaryKey OrElse IsEmailAddress(dataColumn)
        Dim column = New ETDataExtensionColumn With {.Name = dataColumn.ColumnName, .FieldType = GetFieldType(dataColumn)}
        If column.FieldType = DataExtensionFieldType.Decimal Then
            column.Precision = 16
            column.Scale = 2
        End If
        fieldOrder += 1
    Next
    de.Columns = columns
    Return de.Post()
End Function
```



Demo

Custom Export

Options to choose on any Export:

- Specific segments related data only.
- Split the output data into separate files by each segment.
- Ability to Zip the files if needed.
- Shows the list of input parameters for that process (stored procedure)

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Advance

Segments File names

☒ Select all segments ☒ Split by segment? ☒ Zip Files?

	Segment Name
<input checked="" type="checkbox"/>	ITS seeds

FTP process: SFMC FTP Business unit: Advancement Services

Export using: Custom object Object: SFMC Marketing Effort Export

No.	Parameter Name	Parameter Value	Max Le...	Default Value
3	IP_DATATYPE		0	0
4	IP_EMAILTYPE		0	0
5	IP_GIVINGTYPE		0	0
6	IP_GIFTTYPE		0	0
7	IP_FROMDATE		0	null
8	IP_TODATE		0	null
9	IP_EXCLUDEMG		0	0
10	IP_EXCLUDEGIK		0	0

In custom export mode, ignore previous/next buttons.

Show wizard

Previous Next Start Cancel

Custom Export Continued...

- Pre defined file name structure for a given Export – separate files based on the number of output datasets from the stored procedure.
- Type of delimiter used on that extract.
- Option to suppress the header and to suppress an empty file.

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Advance

Segments File names

#	Filename
1	8423_AS_ITS_SFMC_TESTING_{yyyy}{MM}{dd}{hh}{mm}{ss}.csv

Delimiter: Comma ','

☐ Suppress empty file?

☐ Suppress Header?

File Name templates – depending on export object

Segments File names

#	Filename
1	CSTM_BIO_8423_AS_ITS_SFMC_TESTING_{yyyy}{MM}{dd}{hh}{mm}{ss}.csv
2	CSTM_GIFT_8423_AS_ITS_SFMC_TESTING_{yyyy}{MM}{dd}{hh}{mm}{ss}.csv
3	CSTM_STUDENT_8423_AS_ITS_SFMC_TESTING_{yyyy}{MM}{dd}{hh}{mm}{ss}...

Delimiter: Comma ','

☐ Suppress empty file?

☐ Suppress Header?

FTP process:

Export using: Custom object

Object: CS Telemarketing Extract

No.	Parameter Name	Parameter Value	Max Le...	Default Value
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Thank you !!!

Questions ?

Contact info:

Ravi Cheemangunta

Email: ravic@support.ucla.edu