

Tessitura



**EUROPEAN
CONFERENCE 2015**

**5 & 6 NOVEMBER
NOTTINGHAM**

COMMUNICATION MANAGEMENT & EXTRACTIONS

TO WHOM IT MAY CONCERN.....

PRESENTER

: Ben Magson, Tessitura Network



Today's Topics

- Why the Change?
- New Terminology
- Constituent Communication Management
- Contact Point Purpose Set-Up
- Implementation Suggestions
- Updates to Extractions
- Resources
- Q&A



WHY THE CHANGE?

(HINT: BECAUSE WE LOVE YOU GUYS!)







You told us...

Your customers want:

- More control over how they are being contacted – phone, email, snail mail, etc.
- More choices for different types of communication – what goes where?
- To be able to opt in/opt out of certain communications





You also told us...

You want:

- More robust ways to segment communications to patrons
- Better tracking of patron communication preferences
- More transparency in extraction criteria
- Enhanced functionality in affiliations, for communication purposes





A Functionality Was Born

Communication Management:

The functionality to manage constituent contact preferences, as well as list and extraction functionality, for finding the constituents you want to contact **AND** pulling the appropriate contact data for the communication.



Definitions

Contact Point



Destination and method for a specific communication - the 'how' of communicating to a patron (email, phone, mail)



Definitions

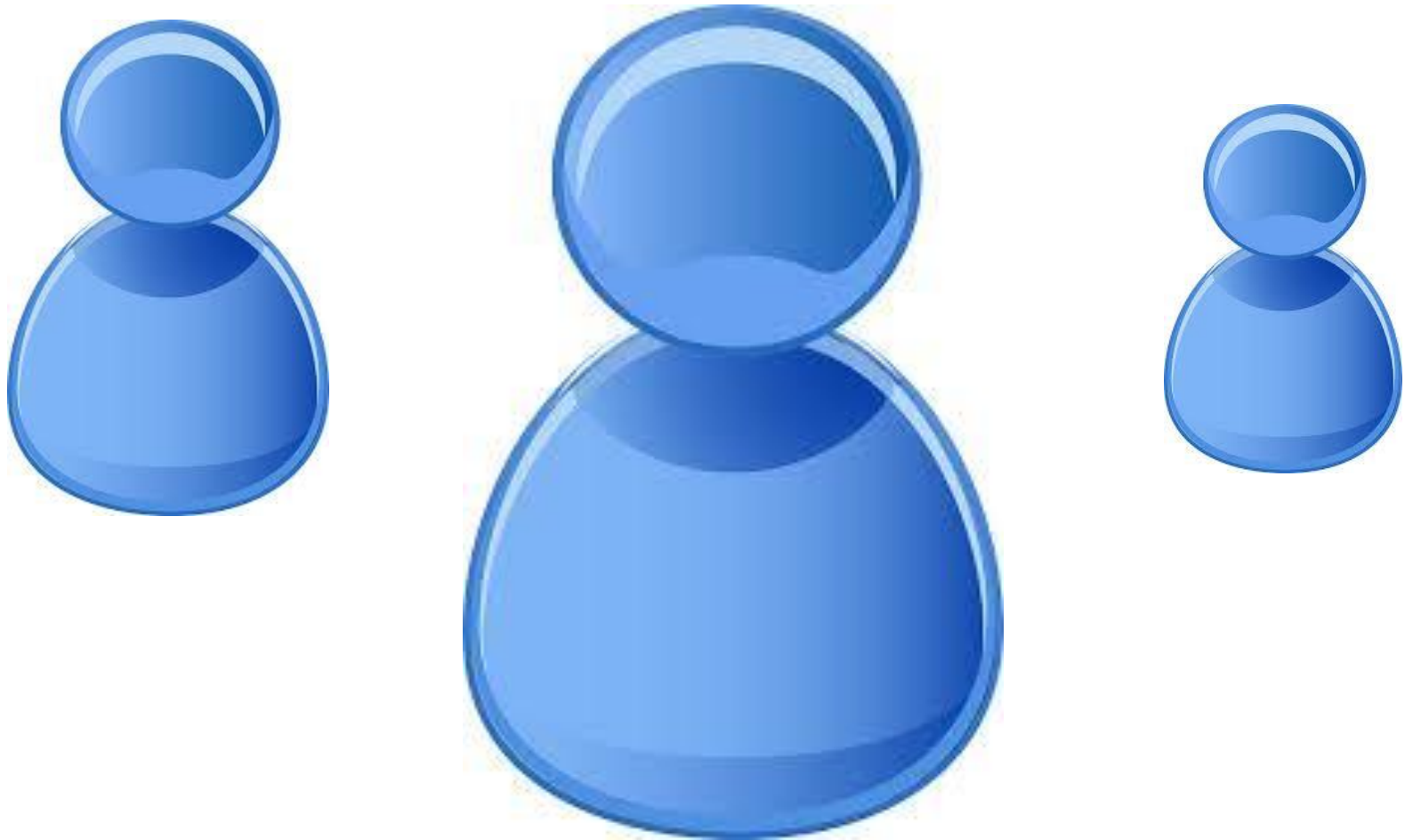
Contact Point Purpose

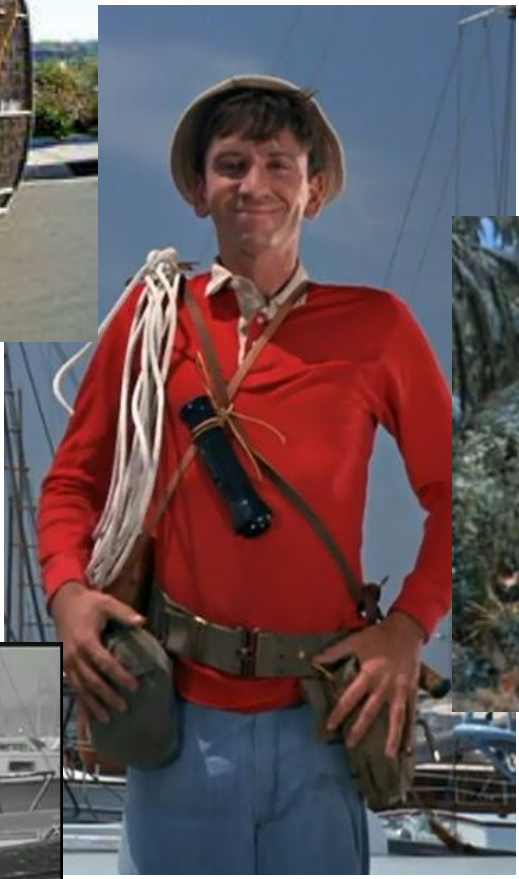


The reason for the communication - the 'why' of communicating to a patron (Newsletter, Tickets, Board information)



CONSTITUENT COMMUNICATION MANAGEMENT







Contact Details Tab

Mr. William Gilligan Memb Level: **William Gilligan**
#36599 Last Contrib:
60 Month Giving Next Event:

History	Connections	Contributions	Transactions	Ticket History	Orders	Custom
General	Names	Contact Details	Plans	Relationships	Research	Attributes

Postal Addresses Phones Electronic Addresses Contact Point Purposes Logins

William Gilligan						
★ Home Address	(standard salutation)	Label	(987) 654-3210 (876) 543-210	D TM ALL MONTHS E TM		Created: 7/27/2015 19:00:02 by mmetke at MMETKE Modified: 7/27/2015 19:03:53 by mmetke (map)
			Bills, General Information			
Business Address	(standard salutation)	Label		JAN, FEB, MAR, APR, MAY, AUG, SEP, OCT, NOV, DEC		Created: 7/27/2015 19:02:01 by mmetke at MMETKE Modified: 7/27/2015 19:02:36 by mmetke (map)
			Board Information			
Vacation Address	(standard salutation)	Label		JUN, JUL		Created: 7/27/2015 19:06:26 by mmetke at MMETKE Modified: 7/27/2015 19:07:09 by mmetke (map)
			Member Benefits, Subscription Renewals			



Contact Management - Purposes

Mr. William Gilligan #36599

Memb Level: Last Contrib: 60 Month Giving

Next Event: **William Gilligan**

History	Connections	Contributions	Transactions	Ticket History	Orders	Custom
General	Names	Contact Details	Plans	Relationships	Research	Attributes

Postal Address

Owner: **William Gilligan**

Type: Business Address Primary Inactive

Salutation: (standard salutation) Label

Street 1: Bermuda Triangle Marina

Street 2: 156 Oceanside Way, Slip #43

Street 3:

Locale: Orlando FL 32821-

Country: USA

Start Date: 00/00/0000 End Date: 00/00/0000

Months: Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Day/Eve Telemarket: Purposes Purposes Purposes

Phone 1: () - x Phone 2: () - x Fax: () - x

Purposes: Board Information

Edit

Created: 7/27/2015 19:02:01 by mmetke at MMETKE Modified: 7/27/2015 19:02:36 by mmetke

Save Cancel

William Gilligan

Home Address: Ocean Breeze, 914 Palm Court, Orlando, FL, USA

Business Address: Bermuda Triangle, 156 Oceanside Way, Orlando, FL, USA

Vacation Address: 5 Coconut Lane, Gilligan's Island, USA



Contact Point Purpose Radio Button



Mr. William Gilligan
#36599

Memb Level:
Last Contrib:

Next Event:

William Gilligan

60 Month Giving

History	Connections	Contributions	Transactions	Ticket History	Orders	Custom
General	Names	Contact Details	Plans	Relationships	Research	Attributes

- Postal Addresses Phones Electronic Addresses **Contact Point Purposes** Logins

Search Purposes:

Ocean Breeze Trailer Park Phone 1 (987) 654-3210 Gilligan23@gmail.com

William Gilligan		
Bills		
Postal Address	Home Address	Ocean Breeze Trailer Park...Orlando, FL
Board Information		
Postal Address	Business Address	Bermuda Triangle Marina...Orlando, FL
E-News		
Email Address	Main Email Address	Gilligan23@gmail.com
General Information		
Postal Address	Home Address	Ocean Breeze Trailer Park...Orlando, FL
Last Minute Alerts		
Email Address	Main Email Address	Gilligan23@gmail.com
Phone	Phone 1	(987) 654-3210
Member Benefits		
Postal Address	Vacation Address	5 Coconut Lane, Gilligan's Island, VI
Subscription Renewals		
Postal Address	Vacation Address	5 Coconut Lane, Gilligan's Island, VI
Upcoming Events		
Email Address	Main Email Address	Gilligan23@gmail.com



Edit



Edit Contact Point Purposes

Edit Contact Point Purposes [?] [X]

Purposes	Available Contact Points	0 Selected	Associated Contact Points	0 Selected
Purposes	William Gilligan		William Gilligan	
Bills	Bermuda Triangle Marina...Orlando, FL		Ocean Breeze Trailer Park...Orlando, FL	
Board Information	5 Coconut Lane, Gilligan's Island, VI			
Education Info				
E-News		>>		
Fraud Alerts		<<		
General Information				
Last Minute Alerts				
Member Benefits				
Renewal Reminders				
Subscription Renewals				
Upcoming Events				

Select All Invert

Select All Invert

Close

Edit



Affiliate Contact Points

Mr. William Gilligan

Memb Level:
Last Contrib:

Next Event:

William Gilligan

#36599

60 Month Giving

History	Connections	Contributions	Transactions	Ticket History	Orders	Custom
General	Names	Contact Details	Plans	Relationships	Research	Attributes

Assoc ID	Name	Contact	Type	Alt ID	Title	Start Date	End Date
William Gilligan							
Employment							
36600	SS Minnox						

Affiliation

Owner: Mr. William Gilligan Primary

Affiliation Id: 36600 **Name:** Three Hour Tours

Type: Employee

Start Date: 06/15/2010 **End Date:** 00/00/0000

Note:

Address: Bermuda Triangle Marina...Orlando, FL, US

Salutation: Mr. William Gilligan

Title: ★ Ocean Breeze Trailer Park...Orlando, FL
5 Coconut Lane, Gilligan's Island, VI, U
Bermuda Triangle Marina...Orlando, FL

Three Hour Tours
★ Bermuda Triangle Marina...Orlando, FL

Email: Gilligan@ThreeHourTours.com

Created: 7/27/2015 Modified: 7/27/2015 19:55:48 by mmetke

Add Association

Add Affiliation

Group by Constituent



Salutations



Mr. William Gilligan
#36599

Memb Level:
Last Contrib:
60 Month Giving

Next Event:

William Gilligan

History	Connections	Contributions	Transactions	Ticket History	Orders	Custom
General	Names	Contact Details	Plans	Relationships	Research	Attributes

Salutations Aliases Program Names

William Gilligan

★ (standard salutation) Label	Mr. William Gilligan		Created: 7/27/2015 19:00:01 by mmetke at MMETKE Modified: 7/27/2015 19:00:01 by mmetke
Business Salutation Label	Mr. Gilligan First Mate William Gilligan Three Hour Tours		Created: 7/27/2015 20:00:46 by mmetke at MMETKE Modified: 7/27/2015 20:00:46 by mmetke
Informal Label			

Salutation [?] [X]

Owner: William Gilligan Gen Sal

Salutation Type: **Business Salutation** ▼

Label
 Primary

Envelope Salutation 1: First Mate William Gilligan

Envelope Salutation 2: Three Hour Tours

Business Title:

Letter Salutation: First Mate Gilligan

Created: 7/27/2015 20:00:46 by mmetke at MMETKE Modified: 7/27/2015 20:00:46 by mmetke

Save Cancel



CONTACT POINT PURPOSE SET-UP





New System Tables

- **TR_CONTACT_POINT_CATEGORY**
- **TR_CONTACT_POINT_PURPOSE_CATEGORY**
- **TR_CONTACT_POINT_PURPOSE**
- **TX_CONTACT_POINT_CATEGORY_PURPOSE**





TR_CONTACT_POINT_CATEGORY

- Holds values used to categorize **Contact Points** into postal addresses, email addresses and phone numbers
- *Do not edit this table*

CONTACT						
TR_CONTACT_POINT_CATEGORY						
TR_CONTACT_POINT_PURPOSE						
TR_CONTACT_POINT_PURPOSE_CATE						
TR_CONTACT_TYPE						

Id	Description	Contact Point Table	Contact Point Key	Create Dt	Create Loc
-2	Email Address	T_EADDRESS	eaddress_no	5/21/2013 09:56:45	KEVIN-PC
-3	Phone	T_PHONE	phone_no	5/21/2013 09:56:45	KEVIN-PC
-1	Postal Address	T_ADDRESS	address_no	5/21/2013 09:56:45	KEVIN-PC



TR_CONTACT_POINT_PURPOSE_CATEGORY

- Holds categories for **Contact Point Purposes**
- Used to apply control groups to purposes

Id	Description	Control Group	Inactive
-1 (Default Purpose Category)	(Default Control Group)		<input type="checkbox"/>
1	Opera Purposes	Opera	<input type="checkbox"/>
2	Symphony Purposes	Symphony	<input type="checkbox"/>

contact

- TR_CONTACT_POINT_CATEGORY
- TR_CONTACT_POINT_PURPOSE
- TR_CONTACT_POINT_PURPOSE_CATE
- TR_CONTACT_TYPE
- TR_GIFTAID_CONTACT_METHOD
- TX_CONTACT_POINT_CATEGORY_PUF



TR_CONTACT_POINT_PURPOSE

- Used as criterion for **Contact Point** selection in extractions, reports and utilities
- **Purpose Category** comes from **TR_CONTACT_POINT_PURPOSE_CATEGORY**

contact				
TR_CONTACT_POINT_CATEGORY				
TR_CONTACT_POINT_PURPOSE				
TR_CONTACT_POINT_PURPOSE_CATE				
TR_CONTACT_TYPE				

Id	Description	Purpose Category	Inactive	
2	Billing	(Default Purpose Category)	<input type="checkbox"/>	
1	Marketing	(Default Purpose Category)	<input type="checkbox"/>	
3	Tickets	(Default Purpose Category)	<input type="checkbox"/>	



TX_CONTACT_POINT_CATEGORY_PURPOSE

- Associates **Contact Point Categories** (postal, email, and phone) with **Contact Point Purposes**
- A Purpose can only be used with Contact Points in an associated category

Id	Purpose Id	Contact Point Category	Create Dt
4	Billing	Email Address	5/29/2013 21:59:12
2	Billing	Postal Address	5/29/2013 21:59:12
5	Marketing	Email Address	5/29/2013 21:59:12
1	Marketing	Postal Address	5/29/2013 21:59:12
6	Tickets	Email Address	5/29/2013 21:59:12
3	Tickets	Postal Address	5/29/2013 21:59:12



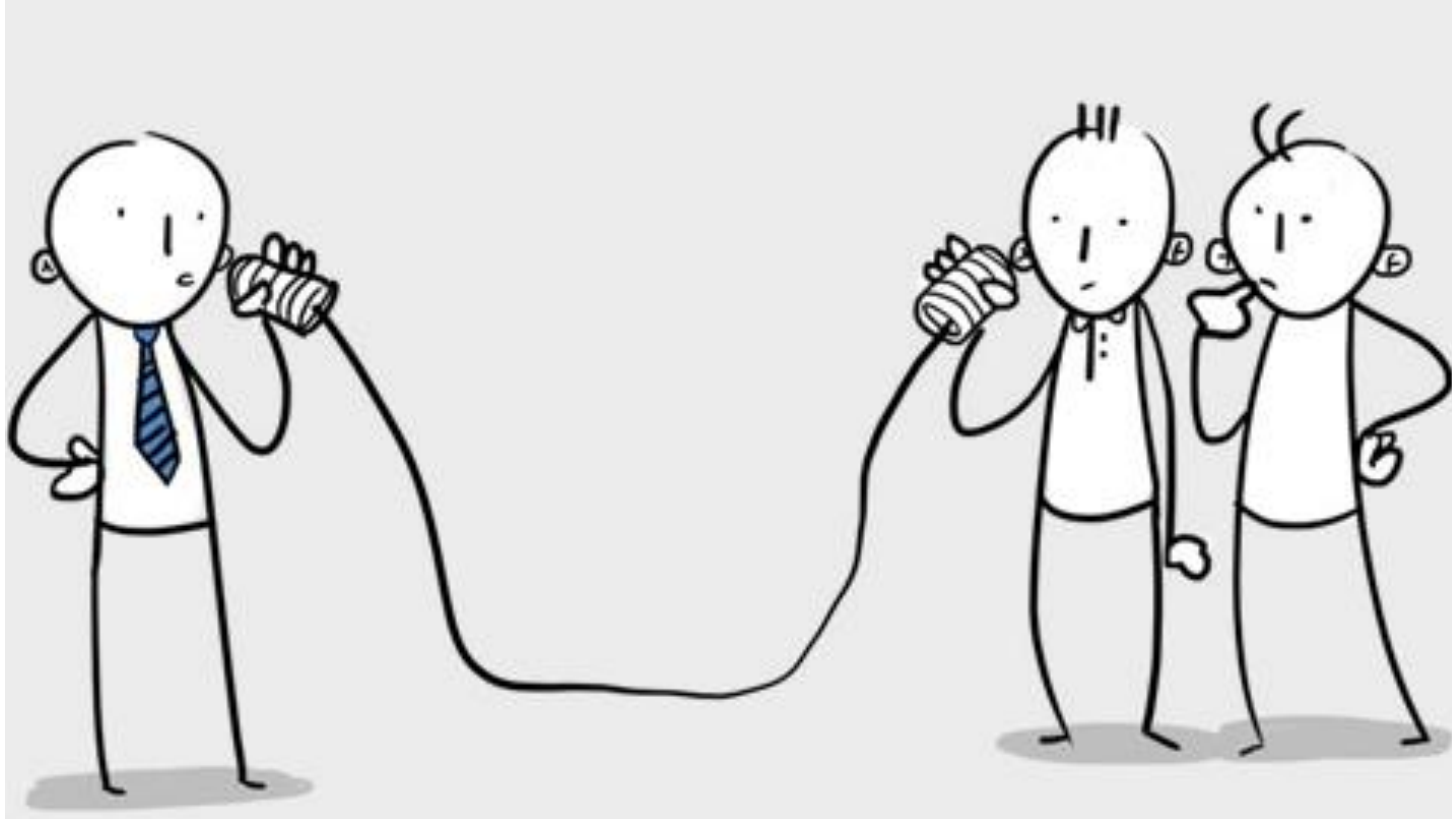
Security

- Const Purposes RB security object controls access to the Contact Point Purposes screen on the Contact Details tab
- Edit rights control the ability to change purposes



Const Purposes RB *	Radio Button
Const Ranking	Purposes Radio Button on Contact
Const Relation	Details tab in Constituents. Edit controls
Const Remind	ability to use the Edit button and
Const Research	change purposes via a popup (ID: 199
Const Research	Type: Radio Button)

IMPLEMENTATION SUGGESTIONS





Don't Panic! You can do this.

- Any Purposes from v11 will migrate into v12
- Use **Contact Point Purposes** to ease the pain of contacting Affiliates:
 - Teachers at schools
 - Employees at corporations
 - Press, VIPs, Board, etc.
- Expand your workforce
 - Add opt-in or preference questions to your communications





UPDATES TO EXTRACTIONS





Extraction Details



Extraction Details			
Description:	2015 Corporate Prospects		Created: 12/19/2014 12:33:41 by mhwall
ID: 115	TMS: <input type="checkbox"/>	Type: Mass Mailing	Control Group: (Default Control Group)
Source Defaults			
Appeal No:	2015 Corporate Giving	Usage:	All
Media:	Unknown	Start Date:	12/19/2014
Source Group:	Other	End Date:	12/31/2015
		Acquisition Cost:	0.0000
		Delivery Cost:	0.0000
		Fulfillment Cost:	0.0000
Communication Management			
Contact Point Category:		<input type="checkbox"/> Only select constituents if they have this contact point category	<input type="checkbox"/> Remove duplicate email addresses
Contact Point Purpose:		<input type="checkbox"/> Only select constituents if they have this contact point purpose	<input checked="" type="checkbox"/> Address marketing indicator
Delivery Date:	12/19/2016	<input type="checkbox"/> Allow multiple contact points per constituent	<input type="checkbox"/> Use label postal address



Communication Management Pane

Communication Management

Contact Point Category: Postal Address

Only select constituents if they have this contact point category

Remove duplicate email addresses

Contact Point Purpose: Subscription Information

Only select constituents if they have this contact point purpose

Address marketing indicator

Delivery Date: 08/14/2006

Allow multiple contact points per constituent

Use label postal address

- Filter based on **Contact Point** and **Contact Purpose**
- More targeted method of *including* or *excluding* constituents by contact information
- Allow for multiple contact points to be included per constituent



Example: Catalog Mailing

I want to mail the catalog of our upcoming events to all Individuals and Households in my database that have a postal address.



Example: Catalog Mailing

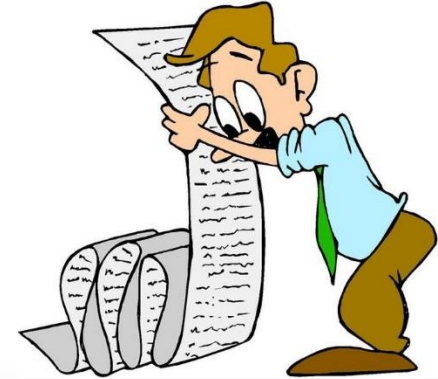
Communication Management			
Contact Point Category:	Postal Address	<input checked="" type="checkbox"/> Only select constituents if they have this contact point category	<input type="checkbox"/> Remove duplicate email addresses
Contact Point Purpose:		<input type="checkbox"/> Only select constituents if they have this contact point purpose	<input type="checkbox"/> Address marketing indicator
Delivery Date:	08/31/2015	<input type="checkbox"/> Allow multiple contact points per constituent	<input type="checkbox"/> Use label postal address

- **Contact Point Category** - postal, email or phone
- When checked, constituents who do not have a **Contact Point** of the selected category are suppressed when counts are generated
- Constituents with *inherited*, qualifying contact points are *not* filtered out.





Checking the Results - Suppression Report



Suppression Report

List: (KA =28) - General Catalog Mailing. Designed on: 8/2/2014

Printed on 8/2/2014 04:12 PM

Seg	Description	Priority	Qualified	Assigned	Ind	Ind-HH	HH	Org	Suppressed
					Suppressing Segment				
001	Inactive Accounts	10	25	0	0	0	0	0	
					Contact Point Category				25
002	Do Not Mail	20	4	4	1	2	1	0	
					No Suppression				
003	Individuals and Households	30	1,147	1,113	1,062	0	51	0	
					Contact Point Category				7
					001 - Inactive Accounts				25
					002 - Do Not Mail				2





Checking the Results - Segment Contents Report

Selection

(All Segments) ▼

Number to display from each segment:

Communication Management

Category: Postal Address **Delivery Date:** 8/21/2014

Purpose:

Must have Contact Point Category Must have contact point purpose

Multiple contact points Remove duplicate email addresses

Constituent ID	Constituent Name	Contact Point	Relationship Reason	Related
Segment: (Contact Point Category) (suppression)				
0				
14	Ms. Miller Omar Kaniye			
25	Ms. Blake Collin Spritzer			
1063	Mr. Jon Jones			
1074	Ann Smith			
1076	Aaron Jones			
1080	Mr. Albert Smythe			
1089	Donald Dupe			
1102	Dan and Jane Smith Household			
1103	Dan Smith			
Segment: 002 Do Not Mail (suppression)				
12	Mr. Adrienn Della Pitcole	1 Canon Plaza, Anaheim, CA, USA		
1007	Huntress	816 25TH ST, Anacortes, WA, USA		
1034	Mrs. Bonnie Huntress	816 25TH ST, Anacortes, WA, USA		
1035	Mr. Jason Huntress	816 25TH ST, Anacortes, WA, USA		
Segment: 003 Individuals and Households				
2	Ms. Haskell Koganti Vanzile	425 Lafayette St, Bala-Cynwyd, PA, USA		
3	Mr. Carter Clarence Kotzman	249 W 17th St, Reno, NV, USA		
4	Mr. Newton Izzy Lowe	71 W 23rd St, Wild Rose, WI, USA		
5	Mr. Jean Toni Colman	1250 N Grove St, Alliance, NE, USA		
6	Ms. Kenneth Rex Krunbholz	517 W Miller St, Columbus, OH, USA		
7	Bedford	4925 E Oceanside Blvd, Cohoes, NY, USA		
8	Mr. Key Murry Tracey	525 Blossom Rd, Alsip, IL, USA		
9	Mr. Tammy Claudette Demorrow	18700 Beach Blvd Suite 250, York, PA, USA		
10	Ms. Selby Jackson Parzel	9531 E Beverly Rd, Santa Rosa, CA, USA		
11	Mr. Hubert Mike Stromboe	444 Market St Suite 2420, Salt Lake City, UT, USA		



Segment Contents

Selection

(All Segments)

Communication Management

Category: Postal Address **Delivery Date:** 1/31/2014

Purpose: General Information

Must have Contact Point Category Must have contact point purpose
 Multiple contact points Remove duplicate email addresses

Constituent ID	Constituent Name	Contact Point	Relationship Reason	Related : ▲
Segment: 001 SUPPRESS - Do Not Mail (suppression)		Qualified: 10 Assigned: 10 Pieces:		
2	Jerry and Jeanne Seinfeld Household	890 Johnson Ct., Pleasant Hill, CA, USA		
3	Mr. Darren M. Halford, Jr	70 Clinton Ave...Burlington, CT, USA		
4	Mr. Darren M. Halford, Jr			
34	Mrs. Dora Explorer	577 Addison Ave Apt 104, Hamden, CT, USA		
107	Prof. Sandra Y Ashby, MD	2/58 Camden St, Bethany, CT, USA		
120	Two Member	4 Main Street, New Haven, CT, USA		
200	Ms. Denise Harold	75 5th St W Ste 101...Meriden, CT, USA		
35414	James and Ann Dutmer Household	9704 Halsey Street, New Haven, CT, USA	Replace w/Primary Hhld	74
35640	Ryan Mcfadden	61 N Pineapple Ave, Stratford, CT, USA		
35645	Bob & Karen Kennedy	4203 Maria Lane, Bethel, CT, USA		
Segment: 002 SUPPRESS - Solicitation Codes (suppression)		Qualified: 2 Assigned: 1 Pieces:		
35853	Howie and Lovie Thurston Household	P.O. Box 123, Hot Springs, VA, USA		
Segment: 003 SUPPRESS - Constituency Code (suppression)		Qualified: 18 Assigned: 16 Pieces:		
5	Mrs. Lara Ashley	2 Edward Road #2, West Hartford, CT, USA		
32	Steve A Göwer	22 Kings Avenue...Hartford, CT, USA		
87	Mr. Jo Bloggs	39 Smith Street, Bethany, CT, USA		
161	John and Rita Dunbar Household	3300 Thompson Ave NE...New Haven, CT, USA		
193	William Jones and Senna Williams Household	101 Web Street, Heritage Village, CT, USA	Replace w/Primary Hhld	35541
35099	Ms. Janet Richards	40 Maybery Park Road, Groton Long Point, CT, US		
35466	Charles and Carolyn Leiferson Household	3152 NE Irving St...New Haven, CT, USA		
35577	Walter Jones	1900 Main Street, Hamden, CT, USA		
35578	Richard Browne and Laura O'Dell Household	200 26th Ave North, Saint Petersburg, FL, USA	Replace w/Primary Hhld	35579
35581	Marty & Mary Anne Kennedy	4835 Cypress Tree Drive, Tampa, FL, USA	Replace w/Primary Hhld	35583

Example: E-Newsletter Distribution

It's time to send out the E-Newsletter to everyone who has opted in to receive it. I want to make sure that I don't hit ANY of the wrong email addresses and I want to remove duplicates.



Example: E-Newsletter Distribution

Mr. and Mrs. William Gilligan

#36599

Memb Level:
Last Contrib:
60 Month Giving

Next Event:

William

★ - William

★ - Mary

History	Connections	Contributions	Transactions	Ticket History	Orders	Custom
General	Names	Contact Details	Plans	Relationships	Research	Attribute

Postal Addresses
 Phones
 Electronic Addresses
 Contact Point Purposes
 Logins

William and Mary Ann Gilligan Household			
★ Main Email Address	Gilligan23@gmail.com	Marketing HTML	Created: 8/3/2015 19:56:40 by mmetke at MMETKE Modified: 8/3/2015 20:11:11 by mmetke
	E-News, General Information, Last Minute Alerts, Upcoming Events		
William Gilligan			
★ Main Email Address	Gilligan23@gmail.com (standard salutation)	Marketing HTML	Created: 7/27/2015 19:00:03 by mmetke at MMETKE Modified: 8/3/2015 19:49:15 by mmetke
	E-News, Last Minute Alerts, Upcoming Events		
Business Email Address	Gilligan@ThreeHourTours.com Business Salutation	Marketing HTML	Created: 7/27/2015 19:49:38 by mmetke at MMETKE Modified: 8/3/2015 19:49:22 by mmetke
	E-News		
Mary Ann Gilligan			
★ Personal Email	MaryAnn45@gmail.com (standard salutation)	Marketing HTML	Created: 8/3/2015 19:58:15 by mmetke at MMETKE Modified: 8/3/2015 19:58:15 by mmetke
	E-News, Fraud Alerts, General Information, Last Minute Alerts, Renewal Reminders, Upcoming Events		
Business Email Address	MGilligan@CoconutQueen.com (standard salutation)	Marketing HTML	Created: 8/3/2015 20:00:25 by mmetke at MMETKE Modified: 8/3/2015 20:00:25 by mmetke
	E-News, General Information, Upcoming Events		



Example: E-Newsletter Distribution



Mr. and Mrs. William Gilligan

#36599

Memb Level:

Last Contrib:

60 Month Giving

History	Connections	Contributions	Transactions	Ticket His
General	Names	Contact Details	Plans	Relations

Postal Addresses Phones Electronic Addresses Contact Point Purposes Logins

William and Mary Ann Gilligan Household

★ Main Email Address Gilligan23@gmail.com  
Marketing HTML 
E-News, General Information, Last Minute Alerts, Upcoming Events

William Gilligan

★ Main Email Address Gilligan23@gmail.com  
(standard salutation) Marketing HTML 
E-News, Last Minute Alerts, Upcoming Events



Example: E-Newsletter Distribution

Communication Management

Contact Point Category: Only select constituents if they have this contact point category Remove duplicate email addresses

Contact Point Purpose: Only select constituents if they have this contact point purpose Address marketing indicator

Delivery Date: Allow multiple contact points per constituent Use label postal address

Segment	SQL	Swap HH	Rel Opt	Description	Select Priority	DLoad Priority	Outside Flag	Suppr Flag	Maximum to DLoad	Random Select%	Random Extract%	Number Qualified	Number Assigned	Number Pieces	Appeal	Media	Source Group	Us
002	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Suppress Inactive Accounts	10	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	13	8	8				
003	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	E-News opt-Ins	20	20	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0	12	12	12				

- Constituents who do not have a contact point of the selected category are suppressed when counts are generated
- Contact points with the selected category and purpose are chosen, otherwise the primary contact point for the category is chosen





Example: E-Newsletter Distribution

Communication Management

Contact Point Category: Email Address Only select constituents if they have this contact point category

Contact Point Purpose: E-News Only select constituents if they have this contact point purpose

Delivery Date: 08/24/2015 Allow multiple contact points per constituent

Remove duplicate email addresses
 Address marketing indicator
 Use label postal address

Segment	SQL	Swap HH	Rel Opt	Description	Select Priority	DLoad Priority	Outside Flag	Suppr Flag	Maximum to DLoad	Random Select%	Random Extract%	Number Qualified	Number Assigned	Number Pieces	Appeal	Media	Source Group	Us
002	✓	✓	○	Suppress Inactive Accounts	10	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	13	8	8				
003	✓	○	○	E-News opt-Ins	20	20	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0	12	12	12				



- Individuals with inherited, qualifying contact points from a HH are **NOT** filtered out



Checking the Results – Segment Content Report

Constituent ID	Constituent Name	Contact Point
Segment:	(Contact Point Category) (suppression)	Qualified: Assign
4	Mr. Darren M. Halford, Jr	
120	Two Member	
35645	Bob & Karen Kennedy	
35672	Bryan and Brooke Johnson Household	
35846	David Ellis and Camille Sutton Household	
Segment:	003 E-News opt-Ins	Qualified: 12 Assign
35810	Josiah and Suzy Davidson Household	thedavidsons@email.mail
35812	Dr. Suzy Davidson	suzyd@email.mail
35833	Ms. Andrea Jackson	andrea@gmail.com
36443	Anakin Skywalker	skywalker@gmail.com
36475	Alex Smith	asmith@gmail.com
36477	Wayne and Suzanne Bigbucks Household	TheBigBucks@gmail.com
36549	Mr. John Johnston	john.johnston@demo.ca
36550	Ms. Jane Smithson	jane.smithson@demo.ca
36599	William and Mary Ann Gilligan Household	Gilligan23@gmail.com
36601	Capt. Jonas "Skipper" Grumby	Skipper@ThreeHourTours.com
36618	Mr. William Gilligan	Gilligan23@gmail.com
36619	Mrs. Mary Ann Gilligan	MaryAnn45@gmail.com



Example: E-Newsletter Distribution

Segment	SQL	Swap HH	Rel Opt	Description	Select Priority	DLoad Priority	Outside Flag	Suppr Flag	Maximum to DLoad	Random Select%	Random Extract%	Number Qualified	Number Assigned	Number Pieces	Appeal	Media	Source Group	Use
002	✓	✓	○	Suppress Inactive Accounts	10	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	13	0					
003	✓	○	○	E-News opt-Ins	20	20	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0	12	12	12				



- If duplicates are from constituents in different segments, the constituents from the lower priority segment is removed



- If duplicate constituents are in the same segment, the higher constituent ID is removed



Checking the Results – Segment Content Report


Constituent ID	Constituent Name	Contact Point	Qualified:	Assigned:
Segment: (Duplicate Email) (suppression)			Qualified:	Assigned:
36618	Mr. William Gilligan	Gilligan23@gmail.com		
Segment: (Contact Point Category) (suppression)			Qualified:	Assigned:
4	Mr. Darren M. Halford, Jr			
120	Two Member			
35645	Bob & Karen Kennedy			
35672	Bryan and Brooke Johnson Household			
35846	David Ellis and Camille Sutton Household			
Segment: 003 E-News opt-Ins			Qualified: 12	Assigned:
35810	Josiah and Suzy Davidson Household	thedavidsons@email.mail		
35812	Dr. Suzy Davidson	suzyd@email.mail		
35833	Ms. Andrea Jackson	andrea@gmail.com		
36443	Anakin Skywalker	skywalker@gmail.com		
36475	Alex Smith	asmith@gmail.com		
36477	Wayne and Suzanne Bigbucks Household	TheBigBucks@gmail.com		
36549	Mr. John Johnston	john.johnston@demo.ca		
36550	Ms. Jane Smithson	jane.smithson@demo.ca		
36599	William and Mary Ann Gilligan Household	Gilligan23@gmail.com		
36601	Capt. Jonas "Skipper" Grumby	Skipper@ThreeHourTours.com		
36619	Mrs. Mary Ann Gilligan	MaryAnn45@gmail.com		

Example: Holiday Card

I need to pull a list of addresses for our Holiday card. I want to make sure I hit the right seasonal address, and that they are formatted for labels.



Example: Holiday Card

 **Mr. and Mrs. William Gilligan** Memb Level:
 Last Contrib:
#36599 Next Event:

60 Month Giving

History	Connections	Contributions	Transactions	Ticket History
General	Names	Contact Details	Plans	Relationships

Postal Addresses Phones Electronic Addresses Contact Point Purposes Logins

William and Mary Ann Gilligan Household

★ Home Address (standard salutation)	Label	(987) 654-3210 (876) 543-210	D TM ALL MONTHS E TM
Ocean Breeze Trailer Park 914 Palm Court, Space #9 Orlando FL 32821- USA		Bills, General Information	
Vacation Address (standard salutation)			JAN, FEB, NOV, DEC
5 Coconut Lane Gilligan's Island VI 99999- USA		Member Benefits, Subscription Renewals	

William Gilligan

Business Address	Business Salutation	ALL MONTHS
Bermuda Triangle Marina 156 Oceanside Way Orlando FL 32821- USA		Board Information Holiday Card



Example: Holiday Card

Communication Management

Contact Point Category: Postal Address Only select constituents if they have this contact point category Remove duplicate email addresses

Contact Point Purpose: Holiday Card Only select constituents if they have this contact point purpose Address marketing indicator

Delivery Date: 12/11/2015 Allow multiple contact points per constituent Use label postal address

Segment	SQL	Swap HH	Rel Opt	Description	Select Priority	DLoad Priority	Outside Flag	Suppr Flag	Maximum to DLoad	Random Select%	Random Extract%	Number Qualified	Number Assigned	Number Pieces	Appeal	Media	Source Group	Us
001	✓	●	●	SUPPRESS Inactive Records	10	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	2,395	289					
004	✓	●	●	SUPPRESS Do Not Mail	20	20	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	14	12					
005	✓	●	●	2014-2015 Ticket Buyers	30	30	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0	37	35	35				

- Addresses active on the date entered are selected
- If a constituent does not have an active address on the date entered, *purpose* takes priority over *delivery date*.





Example: Holiday Card

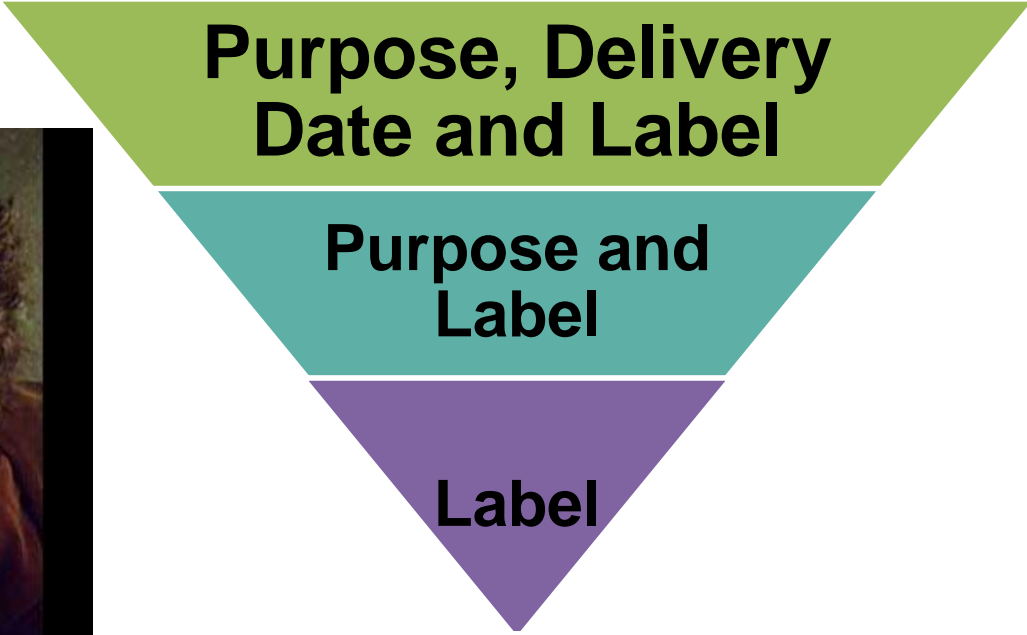
Communication Management

Contact Point Category: Postal Address Only select constituents if they have this contact point category
 Remove duplicate email addresses

Contact Point Purpose: Holiday Card Only select constituents if they have this contact point purpose
 Address marketing indicator

Delivery Date: 12/11/2015 Allow multiple contact points per constituent
 Use label postal address

Segment	SQL	Swap HH	Rel Opt	Description	Select Priority	DLoad Priority	Outside Flag	Suppr Flag	Maximum to DLoad	Random Select%	Random Extract%	Number Qualified	Number Assigned	Number Pieces	Appeal	Media	Source Group	Us
001	✓	●	●	SUPPRESS Inactive Records	10	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	2,395	289					
004	✓	●	●	SUPPRESS Do Not Mail	20	20	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	14	12					
005	✓	●	●	2014-2015 Ticket Buyers	30	30	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0	37	35	35				





Checking the Results – Segment Contents Report

- A – The Business address with the correct purpose
- B – The Vacation address with the correct delivery date
- C – The Primary address with the Label format

Constituent ID	Constituent Name	Contact Point	Re
Segment:	005 2014-2015 Ticket Buyers	Qualified: 37 Assigned: 35	Pie
36599	William and Mary Ann Gilligan Household	Ocean Breeze Trailer Park...Orlando, FL, USA	
36600	Three Hour Tours	Bermuda Triangle Marina...Orlando, FL, USA	
36601	Capt. Jonas "Skipper" Grumby	Bermuda Triangle Marina...Orlando, FL, USA	

Example: Teachers!

I want to email the Education flyer to all the teachers who brought school groups last year.



Example: Teachers!

Segmentation Management

Contact Point Category: **Only select constituents if they have this contact point category** **Remove duplicate email addresses**
Contact Point Purpose: **Only select constituents if they have this contact point purpose** **Address marketing indicator**
Delivery Date: **Allow multiple contact points per constituent** **Use label postal address**

Segment	SQL	Swap HH	Rel Opt	Description	Select Priority	DLoad Priority	Outside Flag	Suppr Flag	Maximum to DLoad	Random Select%	Random Extract%	Number Qualified	Number Assigned	Number Pieces	Appeal	Media	Source Group	Us
001	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SUPPRESS No Emarketing	10	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	7	6					
002	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2014 School Groups	20	20	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0	30	16	16				

Criteria	Operator	Value	Search Household
<input checked="" type="checkbox"/> Constituent Type	In	(1 value selected) Community Org. Corporation Education Institution Endowment Fund Estate	<input type="checkbox"/>


Add Affiliated Individuals

Add Individuals with these Affiliation Types: (1 value selected)
 Filter Affiliations By List: **Teacher (Employment)**
 Include Inactive Affiliations: Nanny (Family)
 Use Affiliation Start and End Dates: Adult Member (Household)
 Child Member (Household)
 Family (Household)



Example: Teachers!



 **Prof. Roy Hinkley**
#36620

Memb Level:
Last Contrib:
60 Month Giving

History | Connections | Contributions | Transactions

General | Names

Name		
ID	Prefix	First Name
36620	Prof.	Roy

Mailing Address

Salutation 1: Prof. Roy Hinkley
Salutation 2:
Business Title:
Street 1: 823 Tweed Place
Street 2:
Street 3:
Locale: South Britain CT 06487-
Country: USA Home Address
Dear: Prof. Hinkley

Other

Original Source: Data Entry
Email: TheProf@gmail.com
Constituent Type: Individual
Last Activity Date: 8/3/2015

Affiliation

Owner: Prof. Roy Hinkley Primary

Affiliation Id: 36200 Name: Nueva Esperanza Academy Charter School

Type: **Teacher**

Start Date: 09/02/2013 End Date: 00/00/0000 Include In Search Re Inactive

Note:

Address: 301 W Hunting Park Ave, South Britain, CT **Email:** ProfHinkley@NEACS.edu

Salutation: Prof. Roy Hinkley

Title: 10th Grade Science **Salary:**



Example: Teachers!

Communication Management

Contact Point Category: Only select constituents if they have this contact point category Remove duplicate email addresses
 Contact Point Purpose: Only select constituents if they have this contact point purpose Address marketing indicator
 Delivery Date: Allow multiple contact points per constituent Use label postal address

Segment	SQL	Swap HH	Rel Opt	Description	Select Priority	DLoad Priority	Outside Flag	Suppr Flag	Maximum to DLoad	Random Select%	Random Extract%	Number Qualified	Number Assigned	Number Pieces	Appeal	Media	Source Group	Us
001	✓	○	○	SUPPRESS No Emarketing	10	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	7	6					
002	✓	○	✓	2014 School Groups	20	20	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0	30	16	16				



Constituents using addresses linked to an affiliation will be filtered if the address does not have the qualifying contact point





Checking the Results - Segment Contents Report

Constituent ID	Constituent Name	Contact Point
Segment:	(Contact Point Category) (suppression)	Qualified: Assigned:
32	Steve A Gower	
35097	Sally Jones	
35645	Bob & Karen Kennedy	
35866	Mr. John Williams	
36037	Donnie Bell	
36038	Judy Nguyen	

Segment:	002 2014 School Groups	Qualified:	31	Assigned:
35720	Mrs. Kacy Zagorc	tzagorc@tessituranetwork.com		
35728	Mrs. Frances Leah Mazer	aandfmazer@yahoo.com		
35746	Holly Jamenson	hjamenson@ctcharterschool.com		
36585	Ms. Julie Best	jbest@scrippsranh.org		
36586	Mrs. Lana O'Shea	loshea@srippsranh.org		
36620	Prof. Roy Hinkley	ProfHinkley@NEACS.edu		

Contact Point	Relationship Reason	Related ID	Related Constituent Name
ProfHinkley@NEACS.edu	Add Individual	36200	Nueva Esperanza Academy Charter School

Additional Criteria Fields



Allow Multiple Contact Points

Communication Management

Contact Point Category:

Contact Point Purpose:

Delivery Date:

Only select constituents if they have this contact point category

Only select constituents if they have this contact point purpose

Allow multiple contact points per constituent

- If a constituent has multiple contact points that qualify, all will be included
 - For example, output all phone numbers or emails on file for a constituent





Eaddress Marketing Indicator

Communication Management

Contact Point Category:

Only select constituents if they have this contact point category

Remove duplicate email addresses

Contact Point Purpose:

Only select constituents if they have this contact point purpose

Address marketing indicator

Delivery Date:

Allow multiple contact points per constituent

Use label postal address

Electronic Address

Owner:

Address:

Type:

Salutation:

Start Date: End Date:

Months:

<input checked="" type="checkbox"/> Jan	<input checked="" type="checkbox"/> Feb	<input checked="" type="checkbox"/> Mar	<input checked="" type="checkbox"/> Apr	<input checked="" type="checkbox"/> May	<input checked="" type="checkbox"/> Jun
<input checked="" type="checkbox"/> Jul	<input checked="" type="checkbox"/> Aug	<input checked="" type="checkbox"/> Sep	<input checked="" type="checkbox"/> Oct	<input checked="" type="checkbox"/> Nov	<input checked="" type="checkbox"/> Dec

Primary Inactive

Allow HTML Allow Marketing

Purposes:

- E-News
- General Information
- Upcoming Events

Created: 8/3/2015 20:00:25 by mmetke at MMETKE Modified: 8/3/2015 20:00:25 by mmetke



OTHER CHANGES TO EXTRACTIONS





New Segment Criteria

- Postal Address Purpose
- Electronic Address Purpose
- Phone Purpose
- Phone Number
- Phone Type
- Phone Day/Eve
- Telemarketing Indicator





Extract Constituents Window



7 Extract Constituents for DEV-KJS-Individual Giving ...

Destination

File List Include Source File

Data File:

Source File:

Output

Include Decoys Decoy Segment:

Generate Source Codes Create Promotions Now

Format Phones and Postal Codes

Tab-Delimited Fixed Length

Output Set:

Communication Management

Delivery Point Category: Email Address

Delivery Point Purpose: Marketing

Delivery Date: 05/01/2013

Only select constituents if they have this delivery point category Use Label Postal Address

Allow multiple delivery points per constituent Address Marketing Indicator

Only select constituents if they have this delivery point purpose

Data Selection

Salutation Type:

Memb Organization:

Schedule

Run Now On: at:

OK Cancel

Extracting to a File gives me the Contact Point from the Segment Contents Report?!? Who knew?!?





Data Selection Pane

Data Selection

Salutation Type:

Memb Organization:

If targeting affiliates and the affiliated address, set **Salutation Type** to capture the **Business** salutation that also contains the organization name.

Professor Roy Hinkley
Nueva Esperanza Academy

301 W Hunting Park Ave
South Britian, CT 06487

← **Business Salutation**

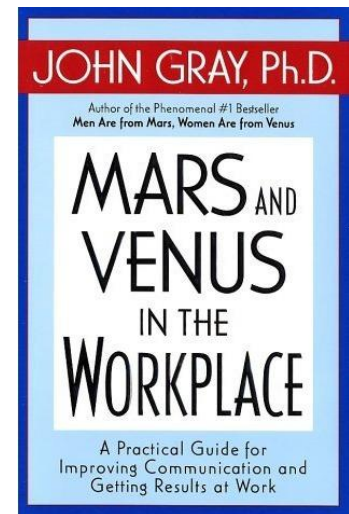
← **Affiliate Address**



Segments – Advanced Relationship Indicators

Segment	SQL	Swap HH	Rel Opt	Description	Select Priority	DLoad Priority	Outside Flag	Suppr Flag	Maximum to DLoad	Random Select%	Random Extract%	Number Selected	Number Assigned	Number Pieces
001	✓	✓	✓	Members	10	10	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0	113	113	113
002	✓	✓	○	Board Suppression	20	20	<input type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	1	1	1
003	✓	✓	✓	season	30	30	<input type="checkbox"/>	<input type="checkbox"/>	999,999	0	0			

- Swap HH indicates whether the Replace Individuals tab is in use
- Rel Opt indicates whether the Add tabs are in use





Definition Report



Segment Criteria Definition Report

List: (KA =96) - Space Email Blast. Designed on: 1/23/2014 15:13:34

Printed on 8/15/2015 06:21 PM

Seg	Description	Priority	Swap Rel		Criteria
			HH	Opt	
001	SUPPRESS Do Not Email	10	N	N	E-Market Restriction IN (2,1)
002	SUPPRESS Troublemakers	20	N	N	CSI Activity Type IN (23)
003	MEM Space Attendees 3 Yrs	30	N	Y	Ticket History Keyword IN (33)
			N	Y	Ticket History Perf Name >= 1/1/2011
			N	Y	Membership Current Level IN ('PR8','TEA','PR5','BA5','BA8','PR2','BA2')
006	Space Attendees 3 Yrs	40	N	Y	Ticket History Keyword IN (33)
			N	Y	Ticket History Perf Name >= 1/1/2011
004	MEM Space Interest Code	50	N	N	Constituent Interest IN (33)
			N	N	Membership Current Level IN ('PR8','TEA','PR5','BA5','BA8','PR2','BA2')
007	Space Interest Code	60	N	N	Constituent Interest IN (33)
005	MEM Planetarium Interest Code	70	N	N	Constituent Interest IN (32)
			N	N	Membership Current Level IN ('PR8','TEA','PR5','BA5','BA8','PR2','BA2')
008	Planetarium Interest Code	80	N	N	Constituent Interest IN (32)



Count Report



Tessitura Extraction Manager

List: (KA=96) - Space Email Blast. Designed on: 1/23/2014

Printed on 8/15/2015 06:24 PM

<u>Seq.</u>	<u>Description</u>	<u>Priority</u>	<u>Qualified</u>	<u>Assigned</u>	<u>Pieces</u>	<u>Ind</u>	<u>Ind-HH</u>	<u>HH</u>	<u>Org</u>	<u>Suppress</u>
001	SUPPRESS Do Not Email	10	4	3		2	0	1	0	Y
002	SUPPRESS Troublemakers	20	1	0		0	0	0	0	Y
003	MEM Space Attendees 3 Yrs	30	0	0	0	0	0	0	0	N
006	Space Attendees 3 Yrs	40	0	0	0	0	0	0	0	N
004	MEM Space Interest Code	50	5	5	5	3	0	2	0	N
007	Space Interest Code	60	14	5	5	2	2	1	0	N
005	MEM Planetarium Interest Code	70	4	0	0	0	0	0	0	N
008	Planetarium Interest Code	80	13	1	1	0	1	0	0	N
Total Non-Suppression				11	11	5	3	3	0	



Helpful Hints

- Inherited contact data between Households and primary affiliates could put someone on a list you may not expect.
- Check your results when using contact point and purpose criteria along with Search Household or Advanced Relationship options.
 - Be careful not to exclude someone from a list because Advanced Relationship options swapped the constituent with the targeted purpose for a HH without the targeted purpose.





RESOURCES





Tessitura Help System



A screenshot of the Tessitura software interface. The main window is titled "Constituents - Mr. Yosemite Sam" and displays information for "Mr. Yosemite Sam #1379", including a star icon, a pencil icon, and the address "543 Barrel Cactus Way". The "Yosemite Sam Household" section shows "Bills" with "Postal Address" and "Home A". A "Tessitura Help" window is open in the foreground, showing a search interface. The "Help Keyword" dropdown is set to "Constituents: Contact Point Purposes". The "Filter (like)" field is empty. The "Description" field contains "Contact Point Purposes (Tessitura Help System)". The "Keyword Links" field is empty. A red box highlights the help icon (a question mark) in the software's toolbar.



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WELCOME TO TESSITURA DOCUMENTATION

The Tessitura Network maintains an extensive collection of comprehensive documentation on the Tessitura application and its supporting products.

Usage and setup documentation for the Tessitura application is collected into the online Tessitura Help System, which provides simple navigation (including extensive linking between cross-referenced topics and the ability to mark favorite topics for easy reference later), improved results when you need to run a search, and interactive controls that make reading the documentation easier and more engaging.

Open the v11 Help System >

Open the v12.1 Help System >

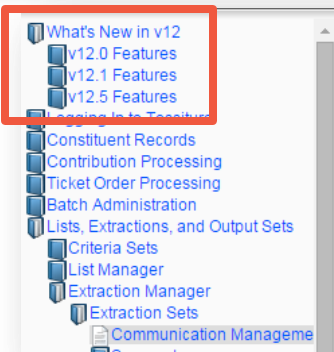
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Tessitura v12.5: [Lists, Extractions, and Output Sets](#) > [Extraction Manager](#) > [Extraction Sets](#) > Communication Management

Communication Management

Communication Management

Contact Point Category:

Only select constituents if they have this contact point category

Remove duplicate email addresses

Contact Point Purpose:

Only select constituents if they have this contact point purpose

Address marketing indicator

Delivery Date:

Allow multiple contact points per constituent

Use label postal address

The **Communication Management** section in the extraction set header allows you to filter the constituents selected for an extraction set by contact point and selected constituents based on contact point purpose. For example, this functionality will allow you to exclude constituents without an email address without having email addresses. You are also able to output multiple contact points on file for a constituent.

The Communication Management section has the following fields:



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Recorded Webinar: Enhanced Communications Management in Version 12
In this webinar, we'll cover working with the new communications management features in Version 12.

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This T-Cast explains, and demonstrates how to use, the initiator field in ticket orders and contributions and the recipient field in to ticket orders.

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[Play Mobile Version \(UK version, with info on Gift Aid\)](#)

Recorded Webinar: Using Plans and Portfolios in Version 12

This webinar covered how to work with Plans, demonstrated the ease and efficiency of managing your Plans via the new Portfolios screen, and stepped through various reporting options.

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- **BREAK 3.05PM – 3.20PM**
- **Refreshments can be found in or near all conference rooms. We suggest that you make your way to your next session before finding a drink.**

- **NEXT SESSION : 3.20PM – 4.20PM**