

Keeping your data clean through:

designing account data structure, managing
suppressed emails, and building queries and emails

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Presenters

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What this session seeks to cover

Are you set up for success in these three key areas:

ACCOUNT DATA STRUCTURE











MANAGING SUPPRESSED EMAILS

BUILDING QUERIES AND EMAILS?

Offer practical “to dos” that you can take back to your office

Account Data Structure

Account settings>Account data structure





Supporter Fields	en-US	pt-BR	fr-FR	en-GB	ar-LB	de-DE	fr-CA	+
<input type="checkbox"/>	Field Type	Name	Tag	Available to Forms	Input Type	Edit		
<input type="checkbox"/>		Title	Title	visible	Text			
<input type="checkbox"/>		First Name	First Name	visible	Text			
<input type="checkbox"/>		Last Name	Last Name	visible	Text			
<input type="checkbox"/>		Address 1	Address 1	visible	Text			
<input type="checkbox"/>		Address 2	Address 2	visible	Text			
<input type="checkbox"/>		City	City	visible	Text			

Account Data Structure Continued

Knowing your data

BUILDING BLOCKS, DATA DICTIONARY, LEGOS, SKELETON...

Permissions - Synching from a database of record – Connecting with gateways – Building profiles – Building forms - exports

- Input Types: Text, Select, Checkbox, Split Select, Radio, Uneditable text, Number, Textarea
- Tagged Fields (First Name, Email Address, **Country**, Bank Account Type) 
- Untagged Fields (RE Constituent ID, **Last Gift Date**, **Last Gift Amount**) 
- Transactional (stored) (Donation Amount, Credit Card Expiration, Recurring Day) 
- Transaction (not stored) (Credit Card Number, CVV Code) 

Account Data Structure

What lessons have you learned?

Any takeaway that you learned today?

Questions?

Managing suppressed emails

Email > Email suppression

Manage suppressed emails

The suppression list is comprised of suppressed e-mail addresses, which have been collected from the emails that have been sent from Engaging Networks. External email servers return 'bounce codes' which allow the software to determine if email addresses are valid or if there have been delivery errors.

There are three main reasons for a supporter to be suppressed:

1. An email sent to the user resulted in a hard bounce
2. A supporter's email successively returns a series of soft bounces, resulting in a conversion to a hard bounce
3. A supporter complains that an outgoing email was spam/junk

Over the last 30 days, there were



Hard Bounces

Email addresses that have returned a 'hard bounce' reply from external mail servers. For example: 'bad-mailbox'.

1,058

[View](#)

[Download](#)



Soft Bounces

Email addresses that have had successive 'delivery issue' replies returned from external mail servers. For example: 'over-quota' or 'no-answer-from-host'.

613

[View](#)

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Spam Complaints

For the email providers (Hotmail, AOL, Yahoo etc.) that send 'spam complaint' reports back, this number indicates the supporters who hit the 'Spam/Junk' button on receiving the email.

91

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Managing Suppressed Emails Cont...

Email>Email suppression

Hard Bounces

Email addresses that have returned a 'hard bounce' reply from external mail servers. For example : 'bad-mailbox'.

Soft Bounces

Email addresses that have had successive 'delivery issue' replies returned from external mail servers. For example : 'over-quota' or 'no-answer-from-host'.

Spam Complaints

For the email providers (Hotmail, AOL, Yahoo etc.) that send 'spam compliant' reports back, this number indicates the supporters who hit the 'Spam'/Junk' button on receiving the email.

Suppressed List

Email addresses that were suppressed due to hard/soft bounces and/or spam complaints that were received.

Not Opted In

This number indicates supporters who have no 'Y' value against any 'Opt-in questions' in the account.

Auto Generated Addresses

The system allows for supporters who have no email addresses to be randomly assigned one, if imported with the [AUTO] value. These addresses end with @noaddress.ea and are never emailed.

Managing Suppressed Emails

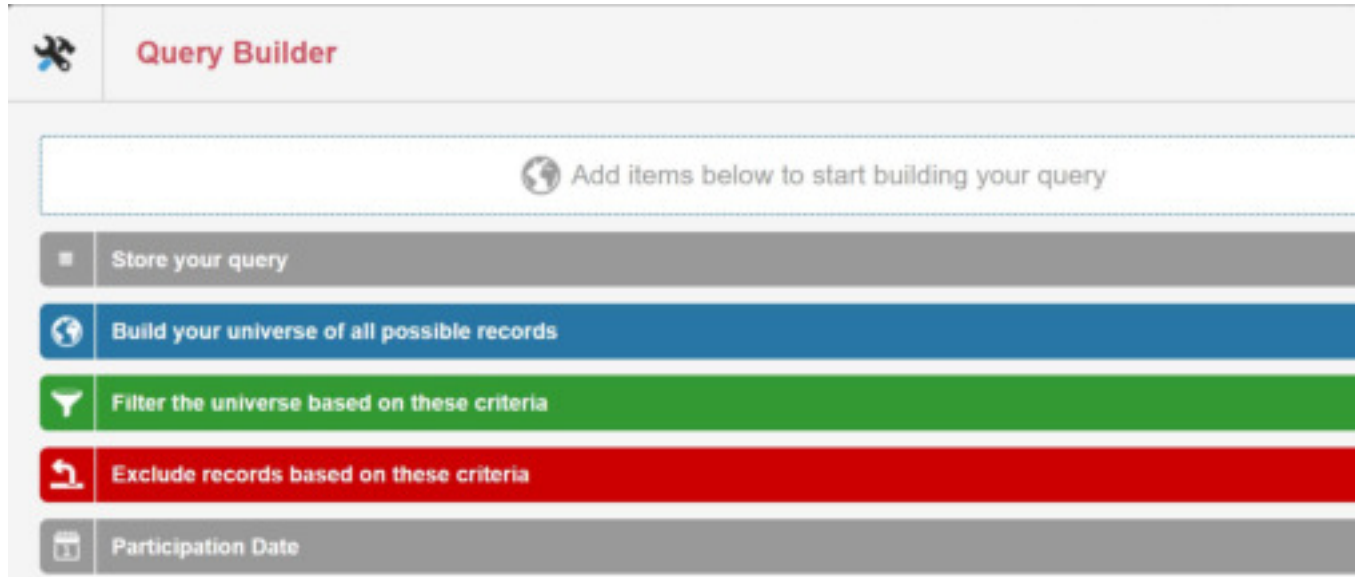
What lessons have you learned?

Any takeaway that you learned today?

Questions?

Building queries and emails

Data & Reports>Data>Export> Export Supporter Data



The screenshot shows the 'Query Builder' interface. At the top left is a wrench icon and the text 'Query Builder'. Below this is a large white box with a globe icon and the text 'Add items below to start building your query'. Underneath are five horizontal buttons: a grey button with a square icon labeled 'Store your query', a blue button with a globe icon labeled 'Build your universe of all possible records', a green button with a funnel icon labeled 'Filter the universe based on these criteria', a red button with a red X icon labeled 'Exclude records based on these criteria', and a grey button with a calendar icon labeled 'Participation Date'.

Building queries and emails

Protecting IP address reputation – Consent – Email deliverability

SUPPRESSING “MANAGE SUPPRESSIONS”

ENGAGEMENT SCORE OF 11 All other “opted in” records that have been on file for at least 12 months.

SEED LISTS ACROSS EMAIL PROVIDERS

ADD WHITELISTING REQUESTS TO EMAILS

INSERTING YOUR UNSUBSCRIBE LINK IN AN EMAIL



ATTACHING SAVED QUERIES NOT OPT-IN LISTS



Building queries and emails

What lessons have you learned?

Any takeaway that you learned today?

Questions?

In summary

- **You account data structure is interconnected with: the permissions you set for users who can edit it, your gateway, your profiles, your forms, and your exports**
- **Country Label “United States”, ISO 2 digit Value US; build lists**
- **Untagged Field Dates format - YYYYMMDD**
- **Untagged Field Amounts format - as a number not as currency 10000 vs. \$10,000**
- **Tag and build profiles of suppressed records, hard bounces, soft bounces 3x+**
- **Delete those records that you are able to; Do not delete records with a recurring gift**
- **Delete old profiles**
- **Suppress supporters with an engagement score of 11 in queries**
- **Create seed lists across email providers**
- **Discern which unsubscribe insertion link in emails is appropriate for your organization**
- **Monitor if your colleagues are correctly inserting the unsubscribe link and attaching saved queries**
- **Check your expiration years on forms (edit select value #2)**
- **Other:**
 - *To deter fraud, close and redirect “old” donation forms*
 - *Utilize Captcha when required*
 - *Work with your gateway(s) to block the IP addresses of persistent “fraudsters”*

Thank you!

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