

## Consents in Raiser's Edge: Sample setup

Consents is a feature in The Raiser's Edge 7 and NXT that was designed for clients in the EU to help them be compliant with GDPR. It is intended to work together with Solicit Codes and acts as **a place to store a history of when consent was obtained and what it was for**. It is not a filter—see separate resource, *AD Consents in RE - Considerations and Shortcomings* for considerations when using this feature and for links to Blackbaud guidance. Below is a sample setup for Solicit Codes, Consents and associated fields for tracking preferences:

Solicit Codes	
DO NOT CONTACT	Overrides all other codes.
Do Not Mail	Not to be confused with "Send Mail" on Addresses which indicates validity of the address itself.
Do Not Email	
Do Not Phone	
Do Not SMS	
Do Not Solicit	
Do Not Send Invitations	
Do Not Thank	
Mail Consent	Use with Attributes to define the types of mail, if known. Or add further Solicit Codes ie. Mail-ALL, Mail-Appeals, Mail-News, Mail-Thanks, Mail-Annual Report.
Email Consent	Use with Attributes to define the types of email, if known. Or add further Solicit Codes ie. Email-ALL, Email-Appeals, Email-News, Email-Thanks, Email-Annual Report.
Phone Consent	
SMS Consent	
Annual Report Only	
One Appeal Per Year	Stick to a rule for when this is. Usually a year-end appeal.
Newsletters Only	No appeals, annual reports, event invitations etc.
Membership Mail Only	No appeals, annual reports, newsletters etc.
Email Only	All contact via email.
Thanks Only (Mail)	Only mail is gift acknowledgements—no appeals, newsletters etc.
Thanks Only (Email)	Only email is gift acknowledgements—no appeals, newsletters etc.

Consents mapped to Solicit Codes				Fields to update when adding Consent	
Channel	Category	Opt out assign Solicit Code Opt in remove Solicit Code	Opt out remove Solicit Code Opt in assign Solicit Code	Attributes	Other fields to update
Mail	ALL	Do Not Mail	Mail Consent	Interests/types of mail	Consent Source*
Email	ALL	Do Not Email	Email Consent	Interests/types of email	Consent Source* Opt in: <input checked="" type="checkbox"/> Primary for email address Opt out: <input checked="" type="checkbox"/> Requests no Email <input checked="" type="checkbox"/> DNC for email address
Phone	ALL	Do Not Phone	Phone Consent	Interests/types of calls	Consent Source* Opt out: <input checked="" type="checkbox"/> DNC for phone number
SMS	ALL	Do Not SMS	SMS Consent	Interests/types of messages	Consent Source* Opt out: <input checked="" type="checkbox"/> DNC for mobile number

\* **Consent Source** should **always** be added although it is not a required field (and cannot be made to be one). It indicates where the Consent came from—ie. Returned mail, Email from constituent, Phone call from constituent, Donation response form, Email unsubscribe request.

Note: It is possible to map all consent scenarios to Solicit Codes, enabling automatic adding/deleting of Solicit Codes when a consent is added. There is an “ALL” Channel option that automatically adds consents for all methods of communication (it cannot be mapped but can be selected on records). However, selecting this Channel adds every mapped Consent combination to the record—so if you have set up multiple mappings with various Solicit Codes, they will all be added to the record. Since the Channel table is not editable, and therefore the “ALL” Channel cannot be inactivated, this behavior cannot be overridden. The workaround is to set up mappings for each Channel with “ALL” for the Category only (as in the table above). Mappings with other Categories should have no Solicit Codes in the “assign” and “remove” fields. Instead, these are added manually after saving the consent (see table below for suggestions).

Consents not mapped to Solicit Codes				Fields to update when adding Consent	
Channel	Category	Opt in – manually update Solicit Code	Opt out – manually update Solicit Code	Attributes	Other
Mail	Newsletters	Newsletters Only (if applicable)		Newsletters = Yes/No	Consent Source*
Email	Newsletters	Newsletters Only (if applicable)		Newsletters = Yes/No	Consent Source*
Mail	Appeals	One Appeal Per Year (if applicable)	Do Not Solicit	Appeals = Yes/No	Consent Source*
Email	Appeals	One Appeal Per Year (if applicable)	Do Not Solicit	Appeals = Yes/No	Consent Source*
Mail	Annual Report	Annual Report Only (if applicable)		Annual Report = Yes/No	Consent Source*
Mail	Events		Do Not Send Invitations		Consent Source*
Mail	Membership	Membership Mail Only (if applicable)		Membership Mailings = Yes/No	Consent Source*
Mail	Thank Yous	Thanks Only (Mail)	Do Not Thank (if opted out of mail AND email thanks)		Consent Source* “Do Not Acknowledge” on gifts if opted out
Email	Thank Yous	Thanks Only (Email)	Do Not Thank (if opted out of mail AND email thanks)		Consent Source* “Do Not Acknowledge” on gifts if opted out

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