

## 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 comply 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 for lists and reports in its current iteration. See separate resource, *AD Consents in RE - Considerations and Shortcomings* for considerations when using this feature. Below is my sample setup for Solicit Codes, Consents and associated fields for tracking constituent preferences.

It is possible to map all consent scenarios to Solicit Codes, enabling automatic adding and 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. Below is the workaround for this: set up Business Rule mappings for each Channel with “ALL” for the Category only. Then set up mappings with other Categories and no Solicit Codes in the “assign” and “remove” fields. Instead, these are added manually after saving the consent.

Note, there is suggestion in Blackbaud’s guidance (see [“Consent Management changes in web view...consent now fully works on its own”](#)) that you could just use Consents and no Solicit Codes. I do *not* recommend doing this. Filtering needs to be built out in all output types before Consents alone can be relied on to produce accurate lists).

First, set up Solicit Codes so you have both Do Not’s and Only’s:

Solicit Codes		
Code	Definition	Notes
DO NOT CONTACT	Overrides all other codes.	
Do Not Mail	No mail of any kind.	Not to be confused with “Send mail” on specific addresses. The “Send mail to this address” checkbox in database view previously indicated validity of an address. In web view this checkbox has become “Do not mail” which captures mailing preference and validity together. However you use this checkbox make sure you have a data entry policy for it to promote consistency.
Do Not Email	No email of any kind.	

Solicit Codes		
Code	Definition	Notes
Do Not Phone	No phone calls.	
Do Not SMS	No text messages.	
Do Not Solicit	No solicitations.	
Do Not Send Invitations	No event invitations.	
Do Not Thank	No thank you letters/emails.	
Mail Consent	Ok to send mail.	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	Ok to send email.	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	Ok to call.	
SMS Consent	Ok to send text messages.	
Annual Report Only	Only send the annual report, no other mail.	
One Appeal Per Year	Only send one solicitation by mail per year.	Stick to a rule for when this is. Usually a year-end appeal. Or have multiple “this thing only” codes, ie. Spring Only.
Newsletters Only	Only send the newsletter by mail.	Use in conjunction with other “only” codes as necessary, ie. a record might have “Newsletters Only” and “Email Only” so they only want the newsletter and only by email. No mail, no thanks/invitations/annual report etc.
Membership Mail Only	Only send membership materials by mail.	
Email Only	All contact via email.	If you consistently use “Do not mail” and “Email Consent” together this code is not necessary. However it can help users by providing immediate clarity when they open a record – “Email Only” is quick to decipher, vs. noticing whether “Do not mail” and “Email Consent” are both present.
Thanks Only (Mail)	Only mail is gift acknowledgements.	
Thanks Only (Email)	Only email is gift acknowledgements.	



Once the above Solicit Codes are created you can set up four Business Rule mappings for the Do Not's that sit highest in the Solicit Code list. Mappings are created in database view\* → Config → Business Rules → Constituent options → Consent options:

Consents mapped to Solicit Codes				In practice: fields to update when adding Consent	
Consent Channel	Consent Category	Solicit Code for opt-outs and to remove with opt-in	Solicit Code for opt-ins and removal with opt-out	Attributes/Custom Fields (if used)	Other fields
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 <u>Opt in:</u> <input checked="" type="checkbox"/> Make email address Primary <u>Opt out:</u> <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 <u>Opt out:</u> <input checked="" type="checkbox"/> DNC for phone number
SMS	ALL	Do Not SMS	SMS Consent	Interests/types of messages	Consent Source <u>Opt out:</u> <input checked="" type="checkbox"/> DNC for mobile number

\*You can also manage mappings in web view, in Settings → Consent management → Menu → Edit channel settings. At the time of writing this feature is not working (it hangs) so use database view.

\*\***Consent Source** should **always** be added with **every** consent although it is not a required field (and cannot currently be made to be one). It indicates where the Consent came from. Example values would be “Returned mail”, “Email from constituent”, “Phone call from constituent”, “Gift form”, “Email unsubscribe request”.

Lastly, set up Business Rules for the “Only” Solicit Codes:

Consents not mapped to Solicit Codes				In practice: fields to update when adding Consent	
Consent Channel	Consent Category	Solicit Codes in mapping	Solicit Codes to manually add to record	Attributes	Other
Mail	Newsletters	None	Newsletters Only (if applicable)	Newsletters (if you need to track specific types)	Consent Source*
Email	Newsletters	None	Newsletters Only (if applicable)	Newsletters	Consent Source
Mail	Appeals	None	One Appeal Per Year (if applicable) or Do Not Solicit	Appeals (ie. Spring Appeal, Year-End Appeal)	Consent Source
Email	Appeals	None	One Appeal Per Year (if applicable) or Do Not Solicit	Appeals	Consent Source
Mail	Annual Report	None	Annual Report Only (if applicable)		Consent Source
Mail	Events	None	Do Not Send Invitations (if applicable)		Consent Source
Mail	Membership	None	Membership Mail Only (if applicable)		Consent Source
Mail	Thank Yous	None	Thanks Only (Mail) or Do Not Thank (if opted out of mail AND email thanks)		Consent Source “Do Not Acknowledge” on gifts if opted out
Email	Thank Yous	None	Thanks Only (Email) or Do Not Thank (if opted out of mail AND email thanks)		Consent Source “Do Not Acknowledge” on gifts if opted out

The above mappings can be used in import and plugins/add-ons (Importacular and ImportOmatic). Consents cannot be selected in database view Default Sets or Constituent Batch templates.