

Segment-O-Matic^{2.0}

SIMPLIFY & AUTOMATE SEGMENTATION IN THE RAISER'S EDGE®

- ➔ **Segment by anything you can query on** in The Raiser's Edge
- ➔ Segment donors in seconds to see a visual breakdown of your donor activity by **recency, frequency, and monetary value**
- ➔ Easily see who to target for events, appeals or capital campaigns with **multi-level hierarchy structuring**
- ➔ **Selection and suppression queries** ensure that only desired constituents are included
- ➔ Select individual segments by clicking on them, or blocks of segments with a click and drag
- ➔ Enter **per-unit costs** and Segment-O-Matic will keep a **running tally of your expenses**
- ➔ **"Drill down"** into any segment in list or grid view, then drill down to individual records
- ➔ Create **static queries** of selected segments
- ➔ Output a report of segmentation grids (with an additional "totals" grid) to HTML or open them in Excel
- ➔ **Assign a constituent appeal and package** to selected constituents or segments
- ➔ Automatically generate Finder Numbers
- ➔ Optionally **update number solicited for appeal and packages** and update package expenses
- ➔ **Configuration options** allow you to establish ranges for all of your segmentation metrics
- ➔ Monetary metric can be calculated using **first gift, last gift, average gift, or cumulative giving amounts**
- ➔ **Segment on any query built within The Raiser's Edge**
- ➔ **User defined** upper and lower bounds
- ➔ Custom **Segmentation Codes**
- ➔ **Export selected data** with constituent, package, appeal, segment, gift and finder number data

Quick &
Detailed RE
Segmentation!

“ For years, SOS struggled with segmenting our database. Reporting and source-coding required expensive services from outside vendors. Now, we plan to save time and money by segmenting in-house in minutes with Segment-O-Matic. Next year we predict we will save over \$2,000 in mailing costs alone! ”

– Tony Lee, SOS Children's Villages – USA

The screenshot displays the Segment-O-Matic software interface with several overlapping windows. The 'Profile v.2' window shows a 'Name' field set to 'Annual' and a 'Segmentation' tab. The 'Segmentation Results v.2' window displays a table with columns: Appeal, Package, Color, Source, Mailing ID, Comments, Cost, Constituents, and Total Cost. Below this is a 'Projections' section with a tree view showing 'Other (7)', 'Small Gift (4627)', and 'Other (681)'. The 'Hierarchy v.2' window shows a 'Name' field set to 'Constituents' and a 'Type' dropdown set to 'Query'. Below this is a table with columns: Name, Segment, Include Query, and Exclude Query. The 'Hierarchy v.2' window also shows a 'Type' dropdown set to 'Recency' and a table with columns: Name, Start Date, and End Date.

For more information or to schedule a demo, please contact us
www.OmaticSoftware.com | (888) OMATIC-ME | info@OmaticSoftware.com

