

Tessitura Contact Info Data Entry Standards

General information

1. Spell out the full street name. No abbreviations of Street, Avenue, Boulevard, etc.
2. Rather than typing in the city, fill in the ZIP code first and then hit tab and it should automatically enter the city and state that matches that ZIP code.
3. When entering emails for members of the household, it's important to **not** add the email on the general tab of the household. Most people generally have their own emails as opposed to sharing with their partner.

Apartment or Suite

1. Should be at the end of line one. Example: 100 Main Street Apt 1 OR 100 Main Street # 1.
2. Note that if you use the # symbol, there must be a space between the # and the number.

For U-M offices:

Name

Department or Building

Street Address

Ann Arbor, MI 48109-XXXX

For U-M residence halls:

Name

Dormitory (South Quad), _____ House

Street Address (600 East Madison)

Ann Arbor, MI 48109-XXXX

For U-M units:

1. Start with the University of Michigan account (335264).
2. Under the Relationships tab, see if the unit is already affiliated with the main university account. If not, create the account using steps 3-6 and affiliate it to the U-M main account.
3. Number 1 rule, use Aliases! If there are multiple ways they can be searched for – U-M Screen Arts and Cultures could be searched as Screen Arts and Cultures, Dept of Screen Arts and Culture, etc – you can help by adding aliases. Be sure to put the alias in the LAST NAME field when it applies to Organization type accounts.
4. Start the account name with "U-M"
5. Abbreviate Department as "Dept" without punctuation.
6. See above (U-M Offices) for address info

Non U-M colleges/universities:

1. Start by searching for the university or college main account. You'll know because address1 will say FOR ASSOCIATIONS ONLY.
2. Under the Relationships tab for that university/college, see if the unit is already affiliated with the main account. If not, create the account using steps 3-6 and affiliate it to the main account.
3. Start with the name of the college/university and follow it with the department name. For example, EMU Dept of Music or Albion College Theater Dept.
4. Use Aliases! If there are multiple ways they can be searched for – EMU Dept of Music could be searched as Dept of Music, Music Dept, etc – help prevent duplicate accounts by adding aliases. Be sure to put the alias in the LAST NAME field when it applies to Organization type accounts.
5. Abbreviate colleges/universities with their common abbreviations, if possible. WSU, EMU, MSU, CMU. If there is not a common abbreviation – Albion College, Concordia University – then spell out the name.

Tessitura Guide for Managing Contact Info and Marketing Preferences (step by step guide)

Updating Contact Information

Tessitura can be confusing: There are many ways that it will allow you make these changes, but really only a couple of correct methods to do it without overwriting past data. Get in the habit of doing it this way every time.

Unlike addresses, when you edit an email address or phone number, it **OVERWRITES** the prior content and does not save a new version.

FROM WITHIN AN ORDER

You're selling tickets and the patron mentions that their contact information has changed. You can make the fix right there within the order - go into your alt-address "Click-over-Click" box (Ctrl-D) and follow the steps below...

Address

1. Hit the pencil next to their address to edit it.
 - a. The address type should still be "Home"
 - b. Do not edit the phone number - it likely has stayed the same.
 - i. If they don't have a phone number, type in 000-000-0000
 - c. Is it an apartment or dorm? **Format it correctly – see the Data Entry Standards at the top of this document!!**
2. When you hit save, Tessitura will ask if you want to save an inactive original copy of the old address? Say YES!
3. You're done!

Phone Number

1. Hit the pencil next to their address to edit it.
 - a. Don't touch the address, but edit the phone number as needed.
 - b. When you hit save, Tessitura will ask if you want to save an inactive original copy of the old address? Say YES!

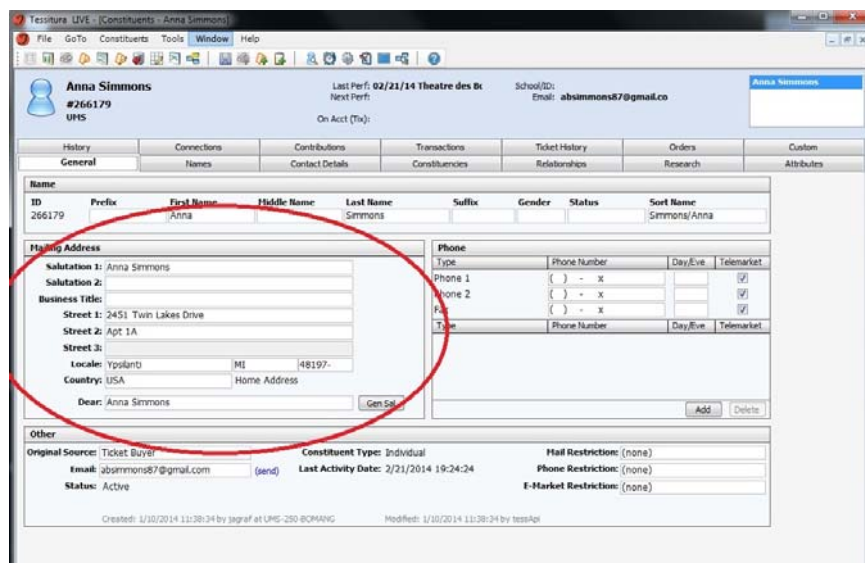
Email Address

1. Go into the email side of the alt-address box and hit “Add” at the bottom left.
 - a. Is it a household? Make sure you add to INITIATOR. A house can’t send emails.
 - b. Check the box for “Primary”
2. Once you’ve added the new email address, open up the old one and check the box for “Inactive”
 - a. If you get an error message, it is possible they have an online login associated with their old email. Hit Ctrl-G to go into their account, go to the Contact Details Tab > Logins Radio Button, and click the pencil next to that login. Check the box to inactivate it. Once that’s done, you can return to the alt-address box and inactivate their old email.

FROM WITHIN AN ACCOUNT

This is more likely if you are doing account clean-up or address update projects. It’s best to do these projects using the constituent records than the order fields, so you can make sure their full account is clean while you’re in there.

1. Go to the Constituent Record
2. It will be tempting to make changes in the General Tab, but you must resist!
3. Instead, go to the Contact Details Tab.



Anna Simmons
 #266179
 UHS

Last Perf: 02/21/14 Theatre des Bx
 Next Perf:
 School/ID:
 Email: absimmons87@gmail.com

On Acct (Tiv):

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

Name	ID	Prefix	First Name	Middle Name	Last Name	Suffix	Gender	Status	Sort Name
	266179		Anna		Simmons				Simmons/Anna

Home Address

Salutation 1: Anna Simmons
 Salutation 2:
 Business Title:
 Street 1: 2451 Twin Lakes Drive
 Street 2: Apt 1A
 Street 3:
 Local: Ypsilanti MI 48197-
 Country: USA Home Address
 Dear: Anna Simmons Gen Sel

Phone

Type	Phone Number	Day/Even	Telemarket
Phone 1	() - x		<input checked="" type="checkbox"/>
Phone 2	() - x		<input checked="" type="checkbox"/>
Phone 3	() - x		<input checked="" type="checkbox"/>
Type	Phone Number	Day/Even	Telemarket

Other

Original Source: Ticket Buyer
 Email: absimmons87@gmail.com (send)
 Status: Active

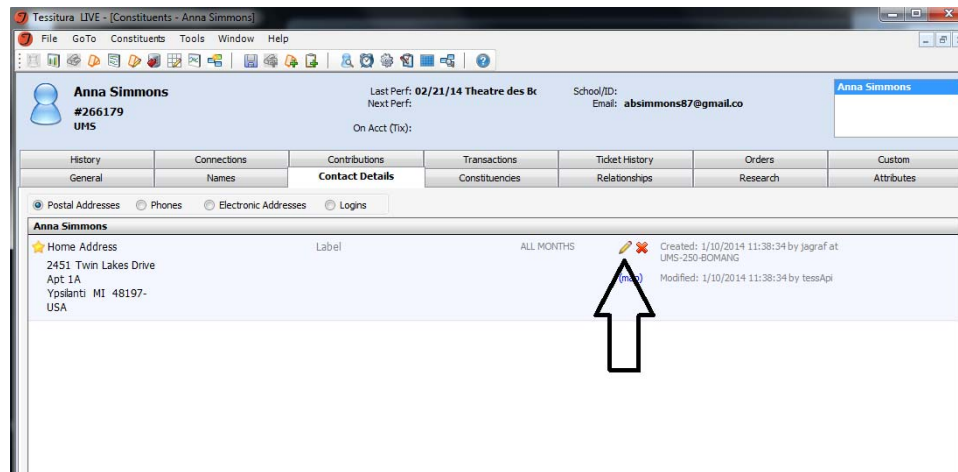
Constituent Type: Individual
 Last Activity Date: 2/21/2014 19:24:24

Mail Restriction: (none)
 Phone Restriction: (none)
 E-Market Restriction: (none)

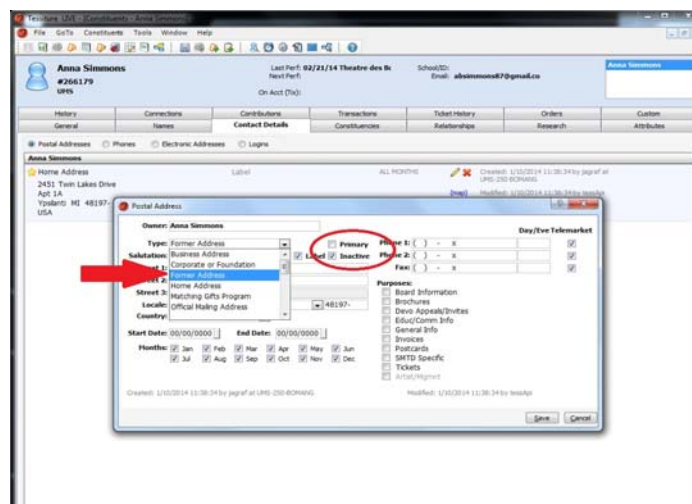
Created: 1/30/2014 11:38:34 by jagraf at UHS-250 BOMANG Modified: 1/30/2014 11:38:34 by tessAp

4. **Editing the phone or mailing address?** Go to the Postal Address radio button and hit the pencil next to the old address to edit it.

- a. The address type should still be “Home”
- b. Make any edits to the address or phone number as needed.
 - i. Do not remove the phone number if it hasn’t changed - this field cannot be blank!
 - ii. If they don’t have a phone number, type in 000-000-0000
- c. Is it an apartment or dorm? **Format it correctly – see the Data Entry Standards at the top of this document!!**

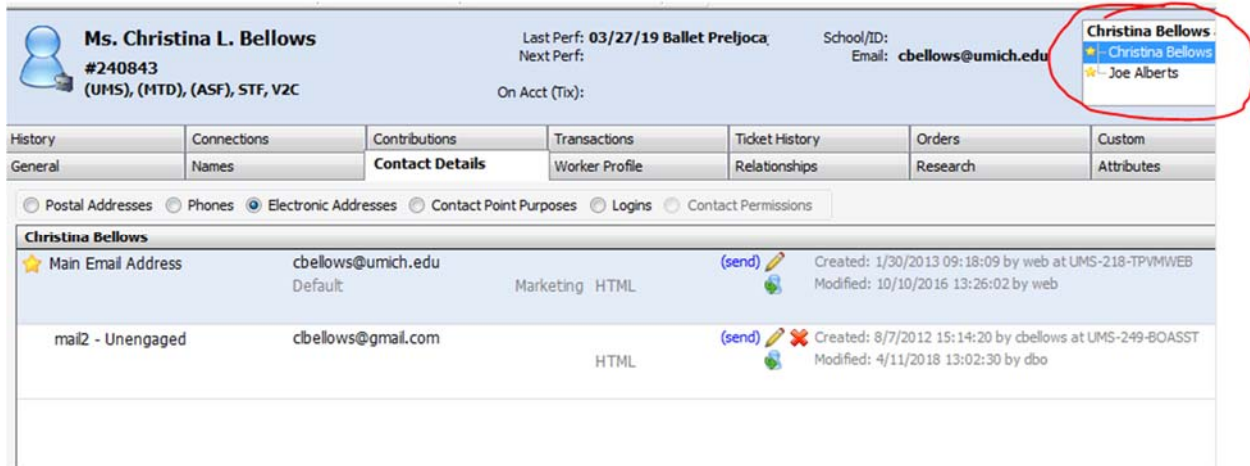


5. When you hit save, Tessitura will ask if you want to save an inactive original copy of the old address? Say YES!



7. **Editing the Email Address?** Go into the Electronic Address radio button and ADD the new email address as primary.

- a. **IMPORTANT:** If you are in a household account, make sure you add the email to the individual. In the upper-right corner, make sure the proper individual is highlighted.



Ms. Christina L. Bellows
#240843
(UMS), (MTD), (ASF), STF, V2C

Last Perf: 03/27/19 Ballet Preljoca
Next Perf:
On Acct (Tix):

School/ID:
Email: cbellows@umich.edu

Christina Bellows
Christina Bellows
Joe Alberts

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

Postal Addresses Phones Electronic Addresses Contact Point Purposes Logins Contact Permissions

Christina Bellows						
★ Main Email Address	cbellows@umich.edu	Default	Marketing HTML	(send)	Created: 1/30/2013 09:18:09 by web at UMS-218-TPVMWEB	Modified: 10/10/2016 13:26:02 by web
mail2 - Unengaged	cbellows@gmail.com		HTML	(send)	Created: 8/7/2012 15:14:20 by cbellows at UMS-249-BOASST	Modified: 4/11/2018 13:02:30 by dbo

- b. Once you've added the new email address, open up the old one and check the box for "Inactive"
 - i. If you get an error message, it is possible they have an online login associated with their old email. Go to the Logins Radio Button, and if the old email is in there click the pencil next to it. Check the box to inactivate it. Once that's done, you can return to the electronic address button and inactivate their old email.

Account Clean-Up

Since you're already in their account updating their info, now is a great time to do any other basic account clean-up, such as...

1. Make sure everything is formatted correctly and looks accurate, such as:
 - a. Capitalize their name and address properly
 - b. Fix any obvious typos
 - c. [Format the address correctly](#)
 - d. Contact Details > Logins
 - i. Make sure that the primary login agrees with the primary email address (in the "electronic addresses" button). If need be, flag the proper email as primary to match the login, but do not edit the login.
 - e. Attributes > Attributes
 - i. If they have an attribute that says "Guest Checkout > Y" it can break their online login. There should be a red X next to it so you can delete it.
 - f. Is their name hyphenated, an obvious nickname, or a multi-part middle/last name? Add aliases to make searching easier!
 - i. For hyphenated or multi-word last names, add an alias for each part of the last name.
 - ii. For nicknames or shortened names, add any alternate spellings
 1. "Beth," "Liz," and "Elizabeth" go hand-in-hand.
 2. All "Roberts" should get a "Bob" nickname, and vice versa.
2. Now that the account is clean, search for dupes:
 - a. Do a constituent search by name, email address, and street address
 - b. If you do find any duplicates, fill out the [merge form](#) (we use a google form to submit merge requests to Sys Admin, who then processes them in Tessitura)
 - c. No dupes? Yay!

Formatting Addresses

For the full info, see the [Data Entry Standards at the top of this document!!](#)

Most common issues that affect us are:

- a. Capitalize street and city names as needed.
- b. Spell out the full street name. No abbreviations for Street, Avenue, Boulevard, Drive, etc.
- c. Apartment or Suite should be at the end of Line One, not on Line Two.
 - i. You can abbreviate Apartment as Apt, Suite as Ste, or use the # logo (no periods, and put a space after the #)

Updating Marketing Preferences

A patron might call asking to stop receiving emails or wanting to get mailings. Some patrons aren't comfortable giving us their contact info within an order unless we assure them we will only contact them for notifications regarding their order. Here's how we manage that info...

Email Preferences

1. All email subscriptions are managed in the patron's account > Custom Tab > Prospect2 button
 - a. As with any other email management in the account, if it is a household, make sure you have the correct spouse selected in the upper-right-corner.
 - b. Some patrons have multiple emails, use the drop down on the Prospect2 menu to choose the email address you'd like to impact.
 - c. Use the "Subscribe" and "Unsubscribe" buttons to choose what lists you would like the patron included on.
 - i. **IMPORTANT: Never subscribe anyone to the Test list. Always subscribe them to the Customer Service list** (unless they are adamant about never receiving any alerts whatsoever)
 1. It is our goal for every patron to at least keep the "Customer Service" list - this is how alerts about their purchased tickets come to them.
 - d. Finally, if you removed them from the email list, it is important to also flag the patron's attributes with this information:
 - i. Go to the Attributes tab > Attributes button and click "Add"
 - ii. There are options in the drop-down for "Contact Restriction - UMS" and "Contact Restriction - SMTD." Choose the one you want.
 - iii. Once the Contact Restriction is added, the second field also becomes a drop-down menu. There are options for Development and Marketing, email and mail. Most likely, you will choose "Mkt - No Email" but you might add multiple rows if you need more options.
 1. NOTE: Try your best NOT to choose the topmost "Do Not Contact" options - these can result in the patron not receiving important notices about their tickets.

Mail Preferences

1. TO REMOVE FROM MAILING LIST...
 - a. In the constituent record, go to the Attributes tab > Attributes button and click “Add”
 - b. There are options in the drop-down for “Contact Restriction - UMS” and “Contact Restriction - SMTD.” Choose the one you want.
 - c. Once the Contact Restriction is added, the second field also becomes a drop-down menu. There are options for Development and Marketing, email and mail. You will likely add multiple rows in order to choose as many of these as you want. You probably want to choose “Mkt - No Mail” and “Dev - No Mail” and you might need to repeat for both UMS and SMTD (4 lines total)
 - i. NOTE: Try your best NOT to choose the topmost “Do Not Contact” options - these can result in the patron not receiving important notices about their tickets.
2. TO ADD TO MAILING LIST...
 - a. In the constituent record, go to the Attributes tab > Interests button.
 - b. Right at the top are the two mailing list interests. Check the box.
 - c. That’s it!
3. TO REQUEST A BROCHURE....



Dorm Addresses

Defunct dorm addresses of students who no longer live there take up a lot of space in Tessitura, and we waste a lot of paper resources advertising to them! Follow these steps to help save the environment from our marketing department!

1. Search for a known dorm address using the “Basic” search mode in Tessitura.
IMPORTANT: For addresses with a cardinal direction in their name, make sure to look up both the abbreviation and the full written out word. S State / South State. You could also use wildcard keys like asterisk.
2. A list of all the students with that address listed should come up.
 - a. They will come up even if the address is inactive or non-primary on their account. For this project, we only care about the people who have it as PRIMARY so only the ones that have this address showing in the search results.
 - b. It’s easiest to sort your search results by Street Address so you are only dealing with the people who have the address you’re fixing.
3. Open their account and go to the order tab...
 - a. If they bought a ticket recently (student sub or A2SF) then we can trust that their address is correct.
 - i. Take a moment to check their contact details tab to make sure their address is Post Office friendly, double check the zip code is correct, and change the address type to "Home Address" if it isn't already.
 - b. If they have NOT bought anything recently, we should assume this is probably last year’s address and we can change it.
 - i. Go to their contact details tab. If they have an alternate address to choose from (such as their permanent parent’s home), make that one primary and change the dorm address to inactive.
 - ii. If they do not have an alternate address, add an “Unknown” address to their account as primary and make the dorm address inactive.
 - c. Leave their account and proceed to the next person.

Have a question or comment regarding account entry that you don't see outlined here? Contact Anna at 615-9579 or asimm@umich.edu. Likewise, if there are a massive number of accounts entered incorrectly when compared to these standards, please let Anna know.