

**TESSITURA
EUROPEAN
CONFERENCE**

DUBLIN 2016





- **PRESENTER**

Kerry Reeve : Tessitura Network

QUICK AND EASY ACKNOWLEDGEMENTS

It Never Hurts to Say Thank You

Share your favourite
content and photos!

#TECDublin16





**GOAL:
REDUCE
ACKNOWLEDGEMENT
PROCESSING TIME!**

Why do Acks have to take so long?

- I have to save to Excel and create a new merge each time!
- I have to reformat things in Excel, like dates, because Tessitura pulls them out wrong!
- I have to manually tweak each letter to get the content right!

Are you
Sure?

Quick and Easy Acknowledgements

- Mail merge template
- Switches and field codes
 - Date formatting
 - Numeric formatting
 - Formulas
 - Text formatting
 - Conditional formatting
- Advanced acknowledgement rules



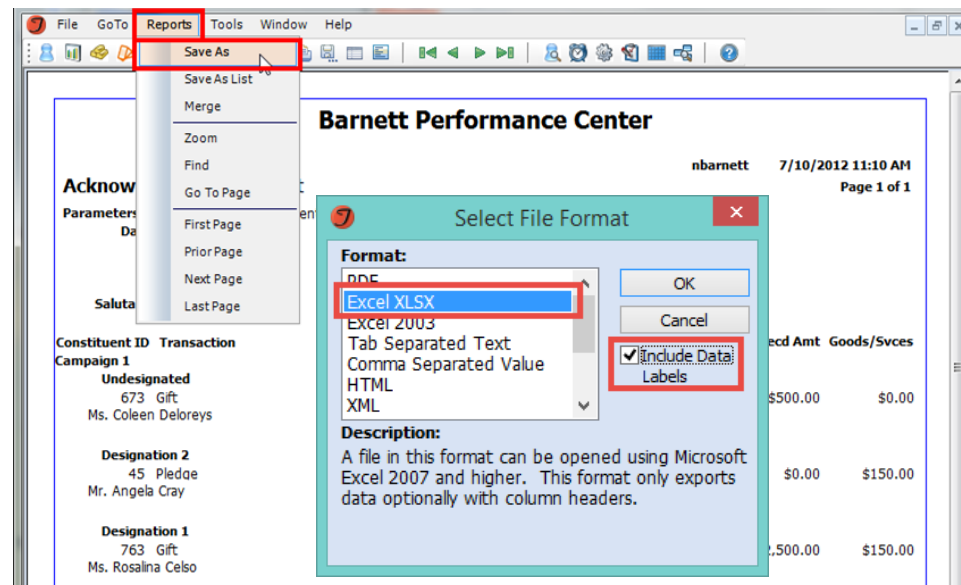
**MAIL MERGE
TEMPLATES &
MERGING FROM
TESSITURA**

Create a mail merge template that you can reuse.

Merge your letters from Tessitura, you don't have to save to Excel.

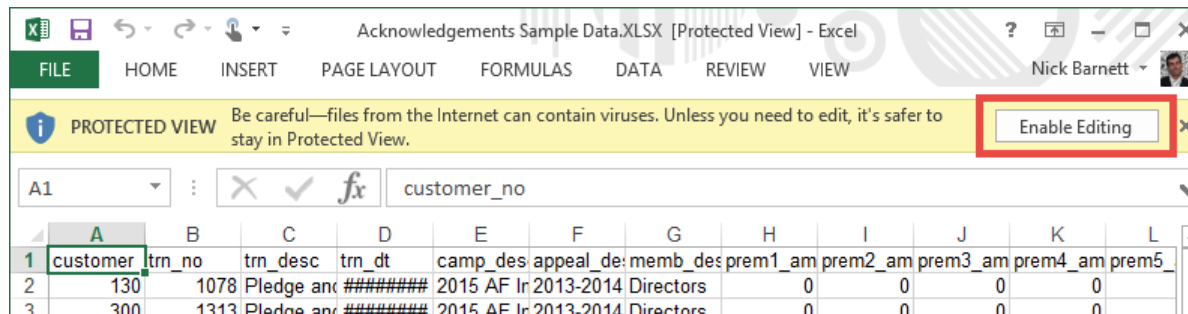
Building a mail merge template

Run Print Ack Letters, save to Excel (*include data labels*)



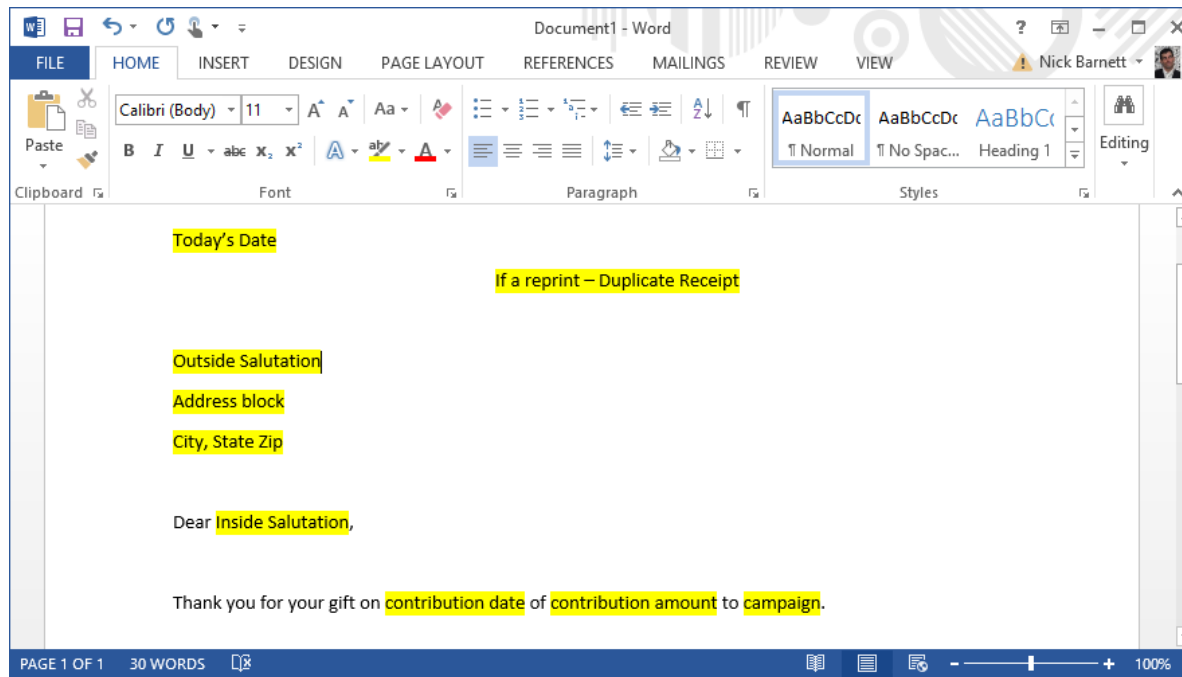
Mail merge warning!!

Excel files in Protected Mode? Enable editing. Excel file must be editable to be used in a Word Merge document.



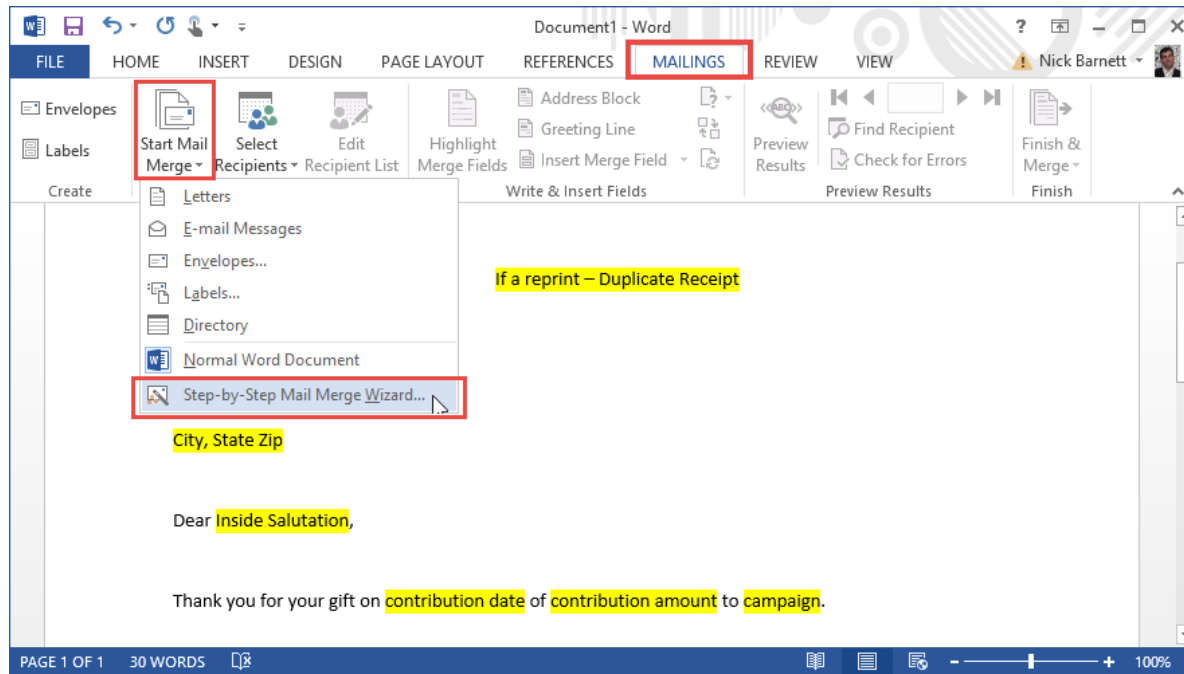
Building a mail merge template

Compose letter, indicate merge fields



Building a mail merge template

Select Step by Step Wizard



Building a mail merge template

Follow the Wizard through Step 4

1. Select document type: Letter
2. Use the current document
3. Browse to select an existing list (select your Excel file from the Ack report)
4. Insert merge fields where indicated



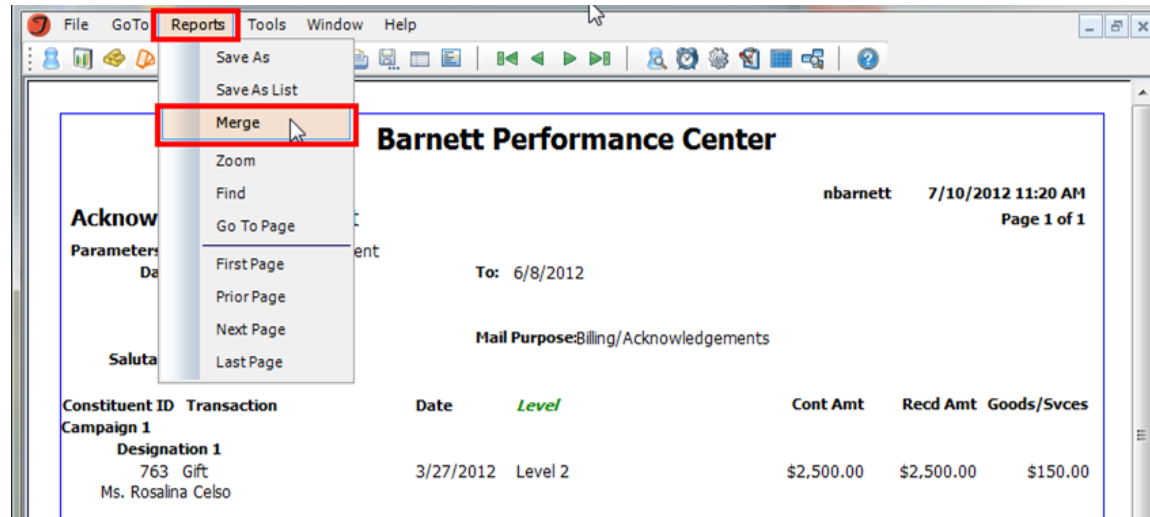
Building a mail merge template

Save the document after placing your merge fields – and never have to do any of this ever again!



Building a mail merge template

Run the Print Ack Letters report, merge into your template





MICROSOFT SWITCHES AND FIELD CODES

Switches and Field Codes

- Within a merge field, you can dictate formatting changes
- If you make these changes in your template, you only have to do it once (instead of every time you merge)

Switches and Field Codes

- Press ALT+F9 to expose the underlying merge field text and to add in formatting

```
{ MERGEFIELD expr_dt \@ "dd/MM/yyyy" }
```

Switches and Field Codes

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- Normal merge field:

```
«expr_dt»
```

- Merge detail revealed with ALT+F9:

```
{ MERGEFIELD expr_dt }
```

- Merge field edited with formatting switch:

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{ MERGEFIELD expr_dt \@ "dd/MM/yyyy" }
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This is the
Switch!

Date Formatting

- Issue: Dates in Tessitura include a time stamp (e.g., **30/06/2016 14:09:123**), which you don't want to include in your letters
- Issue: You want to format dates formally (e.g., **30 June 2016**) and you are editing the format in Excel before merging

Date Formatting: \@

\@ “d/m/yyyy”

30/6/2016

```
{ MERGEFIELD expr_dt \@ "d/m/yyyy" }
```

\@ “dd/MM/yyyy”

30/06/2016

```
{ MERGEFIELD expr_dt \@ "dd/MM/yyyy" }
```

\@ “dd MMMM yyyy”

30 June 2016

```
{ MERGEFIELD expr_dt \@ "dd MMMM yyyy" }
```

Numeric Formatting

- Issue: For money, the decimal doesn't merge when the amount is a whole number (e.g., 100 instead of 100.00)
- Issue: For large values, a comma doesn't merge (e.g., 1000 instead of 1,000)

Numeric Formatting: \#

\# “£#,##0.00” £1,000.00

```
{ MERGEFIELD cont_amt \# “£#,##0.00” }
```

Formula Formatting

- Issue: You want to display the **tax deductible value** of a contribution, but the *non-tax deductible value* is part of the data set

Text Formatting

- Issue: The **case** used in Tessitura isn't always the that wanted in our letters
 - We use caps, but the merge is mid sentence
 - We use all lower case, but the merge should be in title case
 - We use all lower case, but the merge is at the start of a sentence

Text Formatting: *

*** LOWER**

lower case

```
{ MERGEFIELD trn_desc \* LOWER }
```

*** CAPS**

Title Case

```
{ MERGEFIELD trn_desc \* CAPS }
```

*** FIRSTCAP**

Sentence case

```
{ MERGEFIELD trn_desc \* FIRSTCAP }
```

Conditional Formatting

- **Issue:** The **text required depends** on what the value in the data set is
 - If decline benefits, display “you have declined benefits and this gift is fully tax deductible”
 - If duplicate receipt, display “Duplicate Receipt Copy”

Conditional Formatting: If

IF Mfield=X “Display” “” Display

```
{ IF { MERGEFIELD duplicate_of } <> 0 "Duplicate Receipt Copy" "" }
```

If this is
true...

...then
display this...

...if not,
display this.

Conditional Formatting

- Issue: The text required depends on what the value in the data set is
 - I want to display member benefits based on the person's level
 - I want to display specific text based on the fund donated towards
 - I don't want a million letter types, but I want a million different letters

Conditional Formatting: Include Text

INCLUDETEXT "c:\\filename.docx"

```
{INCLUDETEXT "C:\\Acks\\{MERGEFIELD fund_desc }.docx" \* MERGEFORMAT }
```

You can merge text from another document

Use your Ack merge field to determine which file you want to pull the text from

Just name your files based on your data

Bar and QR Codes

- Issue: We need to print Bar or QR codes so we can scan our members in

Bar and QR Codes

MERGEBARCODE Mfield CodeType

{ MERGEBARCODE customer_no Code128}



{ MERGEBARCODE customer_no QR}





ADVANCED ACKNOWLEDGEMENT RULES

Tessitura Acknowledgement Rules

- Although the goal is to minimise the number of Ack types and rules, sometimes having a few can actually save you time
- The rules can account for some things that the data set cannot

NRR Contributions

- **Issue:** Membership NRR information is not included in data set, but is needed for your acknowledgements (e.g., new member welcome packets, renewal packets, etc.)
- **Solution:** Have different letter types and use NRR Status rules

Transaction Types

- **Issue: Confusion around the Transaction Types**

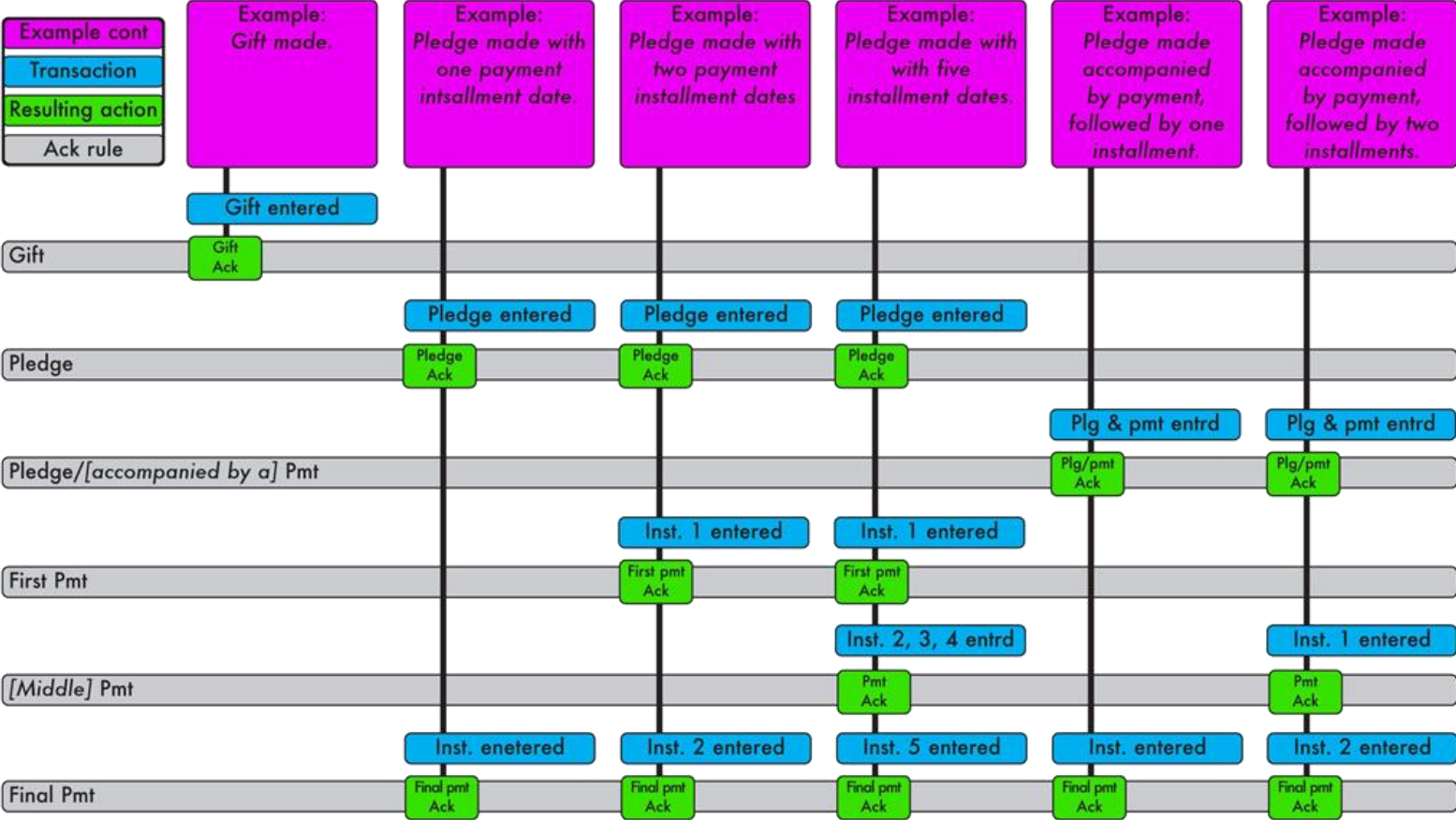
Transaction Types

- **Gift:** New contribution paid in full at the time of entry
- **Pledge:** New contribution where no payment is made at the time of entry
- **Pldge/Pmt:** New contribution where partial payment is made at the time of entry, leaving partial payment still due

Transaction Types

- **First Pmt:** The first payment towards an existing pledge where no £ have yet been received
- **Pmt:** Any payment between the first payment and the final payment on an existing pledge
- **Final Pmt:** The payment that completes the balance on an existing pledge.

If a different acknowledgment format is setup for each transaction in Acknowledgment Rules, the following contribution examples will prompt the following letters.



Additional Reference Materials

TessituraNetwork.com → Learning & Resources:

- Documentation & Help System
 - Acknowledgements
- Recorded Webinars and T-Casts
 - Acknowledgements
 - Merging Tessitura Data

Microsoft Format Field Codes

<https://support.office.com/en-us/article/Insert-and-format-field-codes-in-Word-2010-7E9EA3B4-83EC-4203-9E66-4EFC027F2CF3>

QUESTIONS?



“There is man in his entirety, blaming his shoe when his foot is guilty.”

Samuel Beckett, *Waiting for Godot*

WHAT'S NEXT?



BREAK 11.00-11.15

Hogan Foyer / Level 6 Foyer

BREAKOUT SESSION FIVE
11.15-12.15