

V16 OVERVIEW FOR FUNDRAISERS



MEAGHAN METKE

Product Analyst, Tessitura Network



Agenda

- Memberships & Benefits
- Charitable Tax Receipts
- Data Analysis Tools
- Resources
- Q&A

Memberships & Benefits

NEW & IMPROVED



Membership Overview



Benefits



Pricing rules



Taxes



Reporting &
Analytics



Easy Renewals &
Upgrades



And more...

tessituranetwork.com/v16

Benefit Overview



Tickets



Premiums



Invitations



Discounts



Donor Listing



And more...

tessituranetwork.com/v16

Constituent Membership History

TESSITURA | CONSTITUENT # 1006 JOHN AND CHERYL OSBORN HOUSEHOLD : MEMBERSHIP HISTORY Test

System [Icons]

Mr. John and Cheryl Osborn | #1006 [Profile Icon]

BRD, DN [Icons]

Membership History

		ORGANIZATION	LEVEL	START DATE	EXPIRATION DATE	STATUS	TREND	VALUE	PAID AMOUNT
JOHN AND CHERYL OSBORN HOUSEHOLD									
		Friends of Autumn Ridge	Ruby	09/15/2023	09/30/2024	Active	Same	\$0.00	\$0.00
		Fixed Price Memberships	\$100 Family	07/01/2019	06/30/2020	Inactive	New	\$0.00	\$0.00
		Friends of Autumn Ridge	Ruby	05/01/2012	04/30/2013	Pledge Cancelled	New	\$1,200.00	\$100.00
JOHN OSBORN									
		Friends of Autumn Ridge	Emerald	07/27/2020	07/31/2021	Inactive	New	\$500.00	\$500.00
CHERYL OSBORN									
		Friends of Autumn Ridge	Sapphire	07/27/2020	07/31/2021	Inactive	New	\$250.00	\$250.00

Editing Membership: Ruby, 05/01/2012 - 04/30/2013
OWNED BY: JOHN AND CHERYL OSBORN HOUSEHOLD

ORGANIZATION: Friends of Autumn Ridge LEVEL *: Ruby

STATUS: Inactive ORIGINATING PERIOD *: Not a Member TREND *: New

START DATE *: 05/01/2012 EXPIRATION DATE *: 04/30/2013 INCEPTION DATE: 05/01/2012

VALUE: \$1,200.00 CONTRIBUTION AMOUNT: \$1,200.00 PAID AMOUNT: \$100.00

FROM ID: [] FROM: [] DECLINE BENEFITS

NOTES

CONTRIBUTIONS **BENEFITS** AUDIT LOG

CAMPAIGN	FUND	DATE	VALUE	CONTRIBUTION AMOUNT	PAID AMOUNT	PRICING RULE
2014 AF Individual	Ind General	05/31/2012 12:02 PM	\$1,200.00	\$1,200.00	\$100.00	

Constituent Benefit History

TESSITURA | CONSTITUENT # 1006 JOHN AND CHERYL OSBORN HOUSEHOLD: BENEFITS HISTORY | Test | System

Mr. John and Cheryl Osborn | #1006

BRD, DN

START DATE → END DATE BENEFITS MEMBERSHIP RECORD MEMBERSHIP ORG. SEARCH CLEAR

BENEFIT	RECORDED DATE	EVENT DATE/TIME	EVENT	ORDER NO.	SCAN	MEMBERSHIP RECORD	CONTEXT	TOTAL USED	ADULT	CHILD	OTHER
20% Off QA588	09/15/2023	03/10/2031 8:00 PM	QA588	1651		09/30/2024, Ruby	Order		1	1	
Migrated N-Scan Benefit	07/27/2020	03/14/2031 8:00 PM	.SMP	1167		04/30/2013, Ruby	Order				1
20% Off QA588	07/24/2020	10/15/2023 9:48 AM	Admission	1145		04/30/2013, Ruby	Order				
20% Off QA588	07/24/2020	10/15/2023 9:48 AM	Admission	1142		04/30/2013, Ruby	Order				
Migrated N-Scan Benefit	05/31/2018	12/08/2019 8:00 PM	Amahl and the Night Visitors	371		04/30/2013, Ruby	Order		1	1	

SHOWING 1 TO 5 OF 5 ENTRIES

Redeem Benefits Automatically

Order Details | Product Catalog | Seat Map | QuickSale | Payment History | Order History

Mr. Deborah Janie Frost
 #113
 DN

Memb Level: **Emerald**
 Last Contrib: **07/21/22 \$500.00**
 Ind General
 12 Month Giving:

Next Perf:
 Email: **webman@msn.com**
 On Account:

Owner: 113 | Source: 20 | Solicitor: Admin | Delivery: Hold at Box Office | Hold Until: 02/28/2031
 Order #: 1760 | Date: 10/06/2023 | MOS: Management | Channel: Box Office | Pmt Schedule: No
 Initiator: | Category: (none) | Alt Address: No

Notes: Booking

Your member benefit had been automatically applied. [Close](#)

Line Items		Sub Line Items		Fees		Contributions		Memberships		Custom Data			
Pkg Code	Perf Code	Description	Product Date	Price Type	Zone	Pur	Pur Amt	Ret	Ret Amt	Std	AU	SR	Source
****	QA588	QA588	Mon, 3/10/2031 8:00 PM	Stan	FORCH	2	112.00	0	0.00	2			20

Member Benefits Online

Logged in as: customer@email.com

Promo Code

Account Section

- [Digital Content](#)
- [Giving History](#)
- Membership Overview
- [My Interests !](#)
- [Upcoming Events](#)
- [Update My Account](#)

Membership Overview

Your memberships are listed below by their expiration date.

Constituent Number:
#4240

Fixed Price Memberships Individual Member

Member since 30 Sep 2022
Membership expires on 30 Sep 2023

Your membership will expire soon. In order to retain your membership benefits, please renew your membership today.

Individual Member Membership Benefits

Your membership benefits, if any, are listed below.

Individual Member - Order Limit 4
You and three guests can enjoy this benefit!
4 available for each order.

Charitable Tax Receipts

NEW FEATURE!!



Charitable Tax Receipt Overview



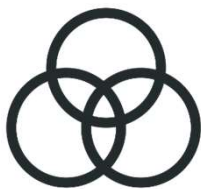
Auditable
Receipt #



Received
Payments



Calendar/Tax
Year



Group
Gifts



Tax Receipt
PDF



Secure
Copy



Charitable Tax Receipt Feature Summary

- New sample HTML templates for the cover letter/email body and PDF tax receipt attachment
- New constituent pages to review, reprint/re-email and void tax receipts
- New maintenance tool to bulk generate, regenerate, or void receipts
- Three new reports to output receipt information

HTML Templates

Emailed Tax Receipt


Your Charitable Tax Receipt is Attached


 devtest@gapps.tessituranetworkdev.com
To  Meaghan Metke



2/10/2023

 This sender devtest@gapps.tessituranetworkdev.com is from outside your organization.

 If there are problems with how this message is displayed, click here to view it in a web browser.

 1_904_79.pdf
72 KB



Autumn Ridge Cultural Center

Dear Mr. Jeanne Peter,

Thank you for your support this year of the Autumn Ridge Performing Arts Center. 100% of your donation supports our not-for-profit mission of being accessible and affordable to all audiences and producing stories that endure, from classic plays to timeless musicals to exciting new works.

For your tax records, your tax receipt for the 2023 calendar year is attached to this email.

Giving, of course, is much more than tax savings. As you consider the many organizations that need your support, please remember Autumn Ridge and the vital role we play in producing world-class theatre with the power to inspire, enrich, and educate our lives.

Charitable Tax Receipt
1 / 1 | 100% |  

Autumn Ridge Cultural Center

123 Summer Ridge Way
Toronto, ON M5H 4G1
Registration No.: 123456789RR0001
Issued Location: Toronto

Personal Information:
Mr. Jeanne Peter
126 Clock Tower Pl San Jose 95113
USA
mmetke@tessituranetwork.com

Constituent Id: 904
Tax Receipt No: 79
Calendar Year: 2023
Issued Date: Feb 10, 2023

Contributions			
Description	Date	Amount	Eligible Amount
Wax Museum Membership	3/27/2023	\$100.00	\$90.00
Total Contributions:			\$90.00

Annabel Moneymaker

Annabel Moneymaker
Director of Giving

Printed Tax Receipt

Charitable Tax Receipt

1 / 2 | - 100% + | [Zoom In] [Zoom Out]

1

2

Autumn Ridge Cultural Center

Dear Mr. Matthew Fanter,

Thank you for your support this year of the Autumn Ridge Performing Arts Center. 100% of your donation supports our not-for-profit mission of being accessible and affordable to all audiences and producing stories that endure, from classic plays to timeless musicals to exciting new works.

For your tax records, your tax receipt for the 2023 calendar year is attached to this email.

Giving, of course, is much more than tax savings. As you consider the many organizations that need your support, please remember Autumn Ridge and the vital role we play in producing world-class theatre with the power to inspire, enrich, and educate our lives.

On behalf of the entire Autumn Ridge community, thank you.

Marisa Perry
Director, Applications Services

Personal Information:
Mr. Matthew Fanter
6240 Descanso Ave Nashville 37209
USA
happy@lycos.com

Constituent Id: 87
Tax Receipt No: 6

Viewing Charitable Tax Receipts

Constituent Tax Receipts

EXPAND ALL | COLLAPSE ALL

- Overview
- + Contact
- + Names
- + About
- + Engagement
- Fundraising
 - Contributions
 - Tax Receipts**
 - Fundraising Events
 - Planned Giving
 - Philanthropy
 - Assets
 - Research
- + Memberships
- + Plans
- + Orders and Tickets
- + Resource Scheduling
- + Audits

Mr. Roney Edsel Beikman | #111

DN

START DATE [] → END DATE [] TAX YEAR [] SEARCH CLEAR

Contribution Ref. No. TAX RECEIPT TEMPLATE REPRINTS ONLY All Receipts

	REPRINT	VOIDED	TAX RECEIPT NO.	SUPERSEDED BY	TAX RECEIPT TEMPLATE	TOTAL DEDUCTIBLE AMT.	GENERATED DATE
MR. RONEY EDSSEL BEIKMAN							
	✓	✓	3	4	Example Charitable Tax Receipt	\$85.00	07/11/2023
			4		Example Charitable Tax Receipt	\$85.00	07/11/2023
	✓		5		Example Charitable Tax Receipt	\$85.00	07/11/2023

Account Section

[Digital Content](#)

[Giving History](#)

[Interests](#)

[Memberships](#)

[Upcoming Events](#)

[Update Account](#)

[Tax Receipts](#)

Tax Receipts

All generated charitable tax receipts are listed below by the date on which the receipt was generated, separated into tax years. Please note that you may have charitable contributions that do not yet have a tax receipt.

View Receipts from Tax Year:

Tax Year	Tax Organization	Receipt Number	Receipt Total	
2021	Tax Org A	54321	\$100.00	View Receipt
2021	Tax Org A	54303	\$100.00	View Receipt
2020	Tax Org B	51003	\$100.00	View Receipt
2019	Tax Org A	41024	\$100.00	View Receipt

Charitable Tax Receipt Maintenance

ADD PARAMETER SET

ACTIVE ONLY

EXPAND ALL COLLAPSE ALL

Generate

- Annual pledge paymen... ★
- Gala Receipts ★
- Monthly ad hoc contri... ★

Regenerate

- Weekly re-email ★
- Weekly re-print ★

Void

- Meaghan's bad receipt... ★

Charitable Tax Receipt Set: Monthly ad hoc contributions

INACTIVE

DESCRIPTION * Monthly ad hoc contributions CONTROL GROUP * (Default Control Group) x v

SET TYPE * Generate x v DELIVERY METHOD * Email x v

Configuration Parameters: These values will determine the information that is displayed on the tax receipt.

COVER LETTER * Example Charitable Tax Receipt Cover Letter x v TAX RECEIPT TEMPLATE * Example Charitable Tax Receipt x v

TAX ORGANIZATION * Summer Ridge Cultural Center x v CALENDAR YEAR * 2023

SALUTATION TYPE * Default x v CONTACT POINT PURPOSE

Filter Parameters: These values will determine which constituents and payments are available for a tax receipt.

CONSTITUENT LIST

PAYMENT START DATE * 01/01/2023 → PAYMENT END DATE * 12/31/2023

MIN. CUMULATIVE GIVING TOTAL MAX. CUMULATIVE GIVING TOTAL

CONSTITUENT TYPE CONTRIBUTION TYPE CAMPAIGN

FUND DESIGNATION APPEAL

MEMBERSHIP ORGANIZATION MEMBERSHIP LEVEL

CANCEL DELETE DUPLICATE SAVE POPULATE

[← BACK TO ORG 1 SET](#)



Charitable Tax Receipt Set: Org 1 set PILOT

⚠ Contact Points are missing for one or more receipts. Receipts cannot be generated until this is corrected

TAX ORGANIZATION: Summer Ridge Cultural Center
TAX YEAR: 2023
COVER LETTER: Example Charitable Tax Receipt Cover Letter
TAX RECEIPT TEMPLATE: Example Charitable Tax Receipt

SHOW ONLY SELECTED ROWS SHOW ONLY ROWS WITH MISSING ADDRESS SHOW ONLY ROWS WITH MISSING EMAIL

SHOW BY OVERWRITTEN STATUS (all) ▾

<input checked="" type="checkbox"/>	↳	RECEIPT NO. --	ID --	SALUTATION	TOTAL CONTRIBUTION AMT --	TOTAL DEDUCTIBLE AMT --	TOTAL NON-DEDUCTIBLE AMT --	EMAIL
<input checked="" type="checkbox"/>	↳		70135	Luisa Dani	\$100.00	\$90.00	\$10.00	luisaariella@hotmail.com
<input checked="" type="checkbox"/>	↳		70163	Ms. Eva Moore	\$33.00	\$33.00	\$0.00	⚠ No email found
<input checked="" type="checkbox"/>	↳		70164	Ms. Eva Moore	\$47.00	\$47.00	\$0.00	⚠ No email found
<input checked="" type="checkbox"/>	↳		70262	Org 1 P. Schedule	\$600.00	\$550.00	\$50.00	Org 1plpmtscho@provider.com

CANCEL

SAVE TEMPORARY RESULTS

GENERATE

ADD PARAMETER SET

ACTIVE ONLY

EXPAND ALL COLLAPSE ALL ★

Generate

- Annual pledge paymen... ★
- Gala Receipts ★
- Monthly ad hoc contri... ★

Regenerate

- Weekly re-email ★
- Weekly re-print ★

Void

- Meaghan's bad receipt... ★

Data Analysis Tools

NEW & IMPROVED



New Tools: Favorites & Parameter Sets

TESSITURA REPORTS AND UTILITIES System (System Administrator)

ADD REPORT

ALL REPORTS

ACTIVE ONLY

GROUP BY CATEGORY

Search

EXPAND ALL COLLAPSE ALL

- Campaign and Appeal
 - Appeal Response
 - Campaign Revenue Re...
- Customer Service
 - Customer Service Issue...
- Development
 - Cumulative Giving Sum...
 - New Contributions Repo...
 - New Membership Repo...
- Finance
 - Batch Payment Total Li...
 - Gift Aid Claims
 - Pledge Balance Detail
- Labels and Letters
 - Print Acknowledgemen...
- Membership
 - Membership Benefit O...

All Reports

ALL PARAMETER SETS ALL SCHEDULED REPORT RESULTS ALL REPORT SCHEDULES ALL QUEUED REPORTS

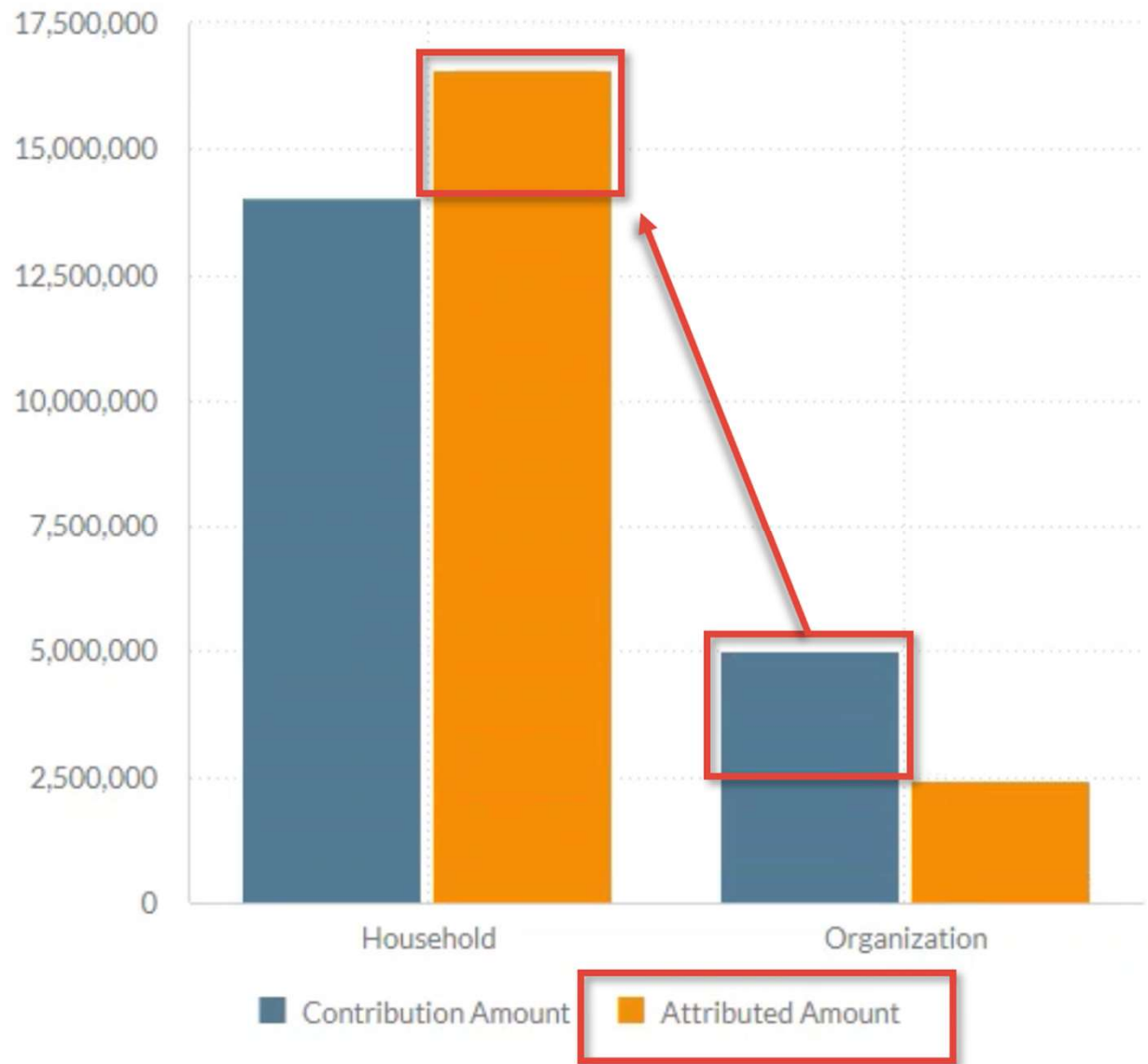
Search By Parameter Set Search By Report Name SEARCH CLEAR REFRESH

				PARAMETER SET NAME	REPORT NAME	REPORT CATEGORY	USER	LAST RUN DATE
				DEV - Board Seating Status	Package Seating Report	Ticketing Subscription	Admin	
				DEV - Email Tax Receipts - Annual	Email Acknowledgement Letters	Labels and Letters	wMMetke	06/27/2022 10:09 AM
				DEV - Print Tax Receipts - Annual	Print Acknowledgement Letters	Labels and Letters	wMMetke	07/11/2022 9:24 AM
				FIN - Facility Fees this month	Fees by Performance	Ticketing Box Office	Admin	
				FOH - Held Seats report	Hold Code Listing	Ticketing Box Office	Admin	
				FOH - Seating issues	Customer Service Statistics	Customer Service	Admin	07/11/2022 10:21 AM
				GS - Student group attendance list	Single Sale Order Listing	Ticketing Box Office	Admin	
				MEM - Friends of AR Membership Renewal	Membership Renewal Notices	Renewal Notices and Bills	Admin	

SHOWING 1 TO 12 OF 12 ENTRIES

Soft Credits in Analytics

Soft Credits in Analytics



Contributions: Owner Type

- Owner without Creditee
- Owner with Creditee
- Creditee

Constituent Display Name	Constituent ID	Contribution ID	Type Group	Creditee Type	Owner Type	Total Amount	Total Credit Amount	Total Attributed Amount
Andrea Jackson	38427	60134	Individual	Matching Gift	Creditee	0	750	750
		60135	Individual	(none)	Owner without Creditee	750	0	750
Andrea Jackson Total						750	750	1,500
Bank Of Montreal	38415	60134	Organization	(none)	Owner with Creditee	750	0	0
Grand Total						1,500	750	1,500

Contributions: Owner Type

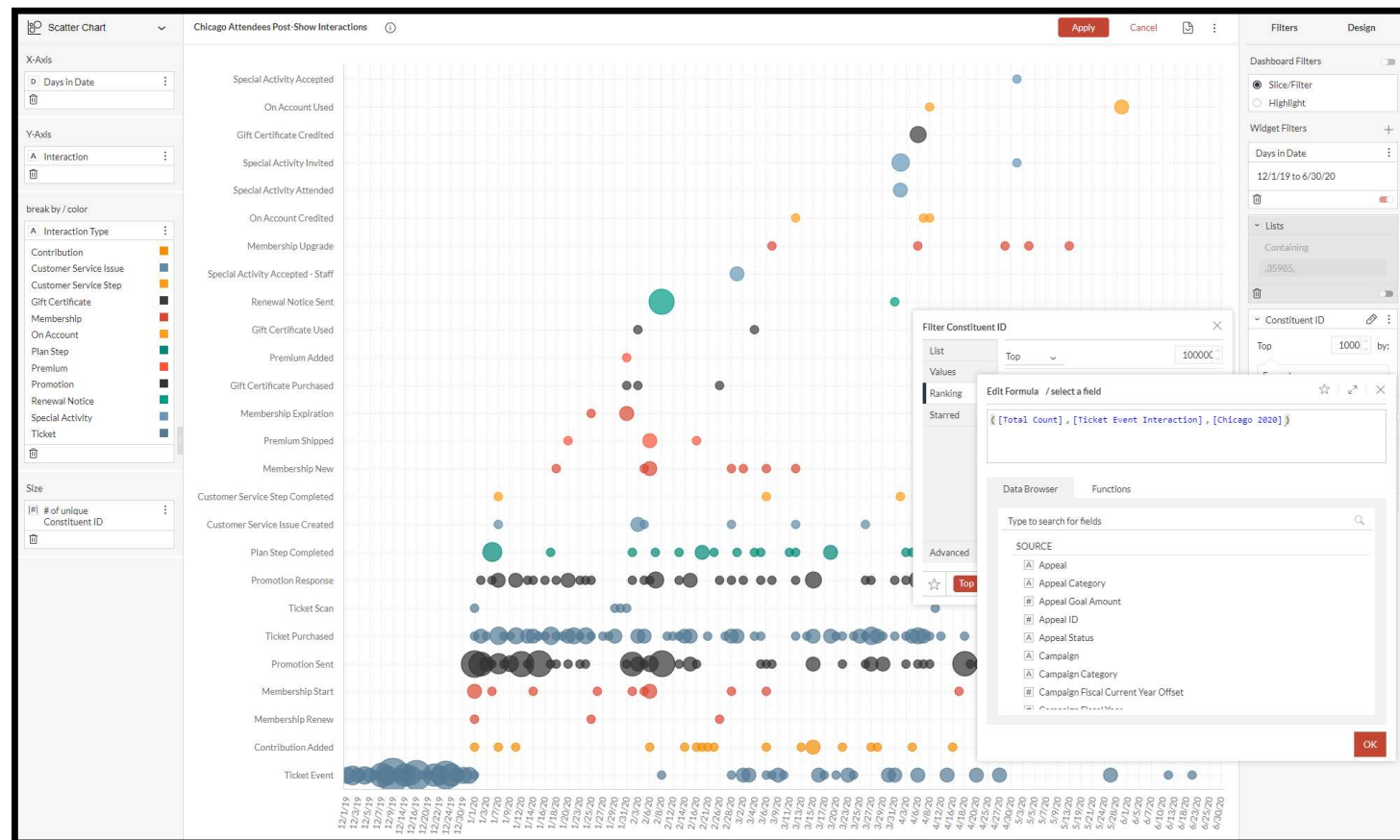
- Owner without Creditee
- Owner with Creditee
- Creditee

Constituent Display Name	Constituent ID	Contribution ID	Type Group	Creditee Type	Owner Type	Total Amount	Total Credit Amount	Total Attributed Amount
Andrea Jackson	38427	60134	Individual	Matching Gift	Creditee	0	750	750
		60135	Individual	(none)	Owner without Creditee	750	0	750
Andrea Jackson Total						750	750	1,500
Bank Of Montreal	38415	60134	Organization	(none)	Owner with Creditee	750	0	0
Grand Total						1,500	750	1,500

Interactions in Analytics

Interactions after a performance

Constituents holding tickets to Chicago and their interactions in the six months since attending



But wait, there's
more!

- New membership benefit reports
- New membership & benefit list criteria and output elements
- New pre-built analytics dashboards
- New Analytics features
 - AI driven exploration paths
 - Trend line analysis
 - Predictive forecasting

Resources



V16 Resources: Explore, Learn, Prepare



Questions about upgrading:
hello@tessituranetwork.com



Product Feedback
product@tessituranetwork.com



Product webinars
tessituranetwork.com/Webinars



v16 Hub
tessituranetwork.com/v16

V16 upgrade overview

In This Playlist



v16 Upgrade Overview

35 MIN

- What to do now
- What to plan for
- Website considerations
- Integrations
- Device compatibility
- What to do next
- Upgrade process steps
- Review of high-level steps
- Resources

<https://www.tessituranetwork.com/Items/Videos/Webinars/2023/v16-Upgrade-Overview>

Q&A



Questions about upgrading:
hello@tessituranetwork.com



Product Feedback
product@tessituranetwork.com



Product webinars
tessituranetwork.com/Webinars



v16 Hub
tessituranetwork.com/v16