



Unlock your data with Word – *Workshop* *Mail Merge Examples/Exercises*

Generic Instructions

The exercises below will use each iMIS module with Letter Merge enabled.

TIPS:

- It is always easier to create a template from an individual's record.
- Create a master template that you can do a save as. This way the master template can have your organisations specific formatting.
- Use this switch to specify the display of a numeric result, including the number of decimal places and the use of currency symbols.
 - 0 - (zero) Indicates the number of decimal places to display
 - # - Indicates the number of spaces to display
 - \$ - Indicates to include the specified character in the result
 - . - (decimal point) Indicates the decimal point position
 - , - (comma, digit grouping symbol) Indicates where to separates a series of three digits
 - *For example*, if the Annual Review merge field has a value of 100, changing the field to
`{MERGEFIELD "Name_DemoANNUAL_REVIEW \##$,0.00}`
displays \$100.00 for the result.
- Use the following to convert check boxes to Yes or No
 - { IF {MERGEFIELD Checkbox } = "0" "No" "Yes" }

Exercise 1: Creating a basic Mail Merge Template in Customers

Exercise 2: Adding criteria for records Company based on address

Exercise 3: Simple Mail Merge - All Members

Exercise 4: Event Mail to Registrants for Event

Exercise 5: Event Badge report template

**Exercise 1: Creating a basic Mail Merge Template in Customers**

In this exercise we will create a basic mail merge template.

TIP:

- 1 Go to Customers and find ID 101 (Doug Hunt)
- 2 Choose the letters tab from the history tabs and select new letter button
- 3 Choose the new option.
- 4 In the report title enter a name for this letter template (This is the name that will be seen on screen by users)
- 5 In the Report File field, enter a file name for this letter template (This will be the physical file name)
- 6 Click OK
- 7 Add fields from iMIS as required E.G. Name.FULL_NAME, Name_Address.FULL_ADDRESS

«Name_AddressCRRT»

«NameFULL_NAME»

«Name_AddressFULL_ADDRESS»

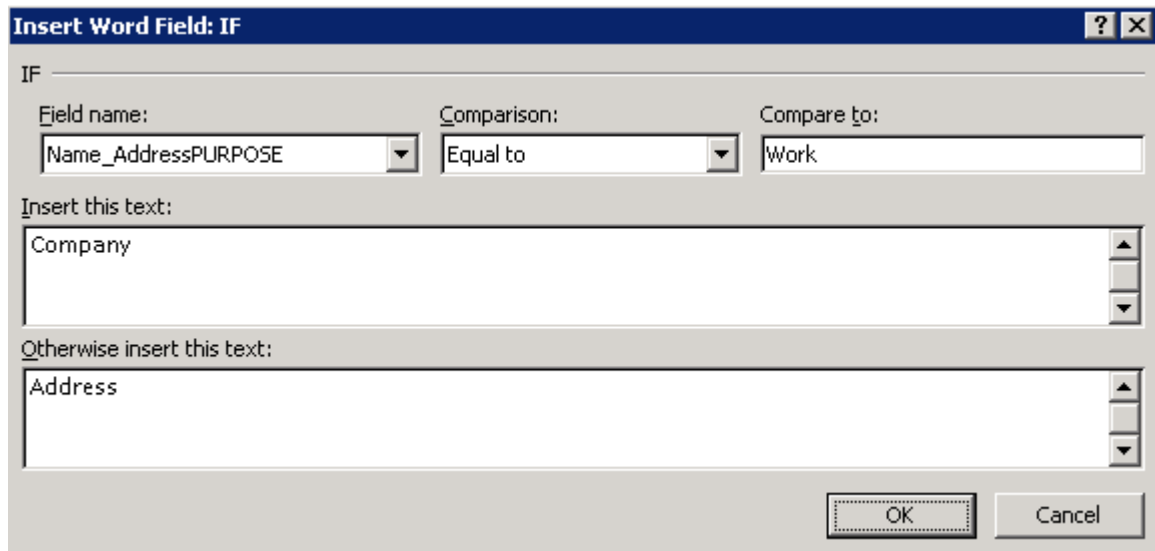
- 8 Add text of your letter
- 9 Save the letter
- 10 Exit from Word



Exercise 2: Adding criteria for records - Company based on address

In this exercise we will add an if else statement to show company when the address has a work purpose.

- 1 Select new letter button from ID 101's record
- 2 Select the Setup button
- 3 Expand the Name_Address table
- 4 Add the Purpose as one of the selected fields
- 5 Click save
- 6 Choose the new option.
- 7 In the report title enter a name for this letter template (This is the name that will be seen on screen by users)
- 8 In the Report File field, enter a file name for this letter template (This will be the physical file name)
- 9 Click OK
- 10 Add the Name.FULL_NAME field to the template
- 11 From the rules option select If...Else...Then... and complete the following
 - a) Select Name_Address.PURPOSE in the field Name drop down
 - b) Comparison is "Equal to"
 - c) Compare to is "Work"
 - d) Enter Company in the "Insert this text" option (We will update this afterwards)
 - e) Enter Address in the "Otherwise Insert this text" option (We will update this afterwards)



- f) Click OK
- 12 Highlight the address block and right click and select toggles field codes
- 13 Highlight the company in quotes and insert the Name.COMPANY and enter a carriage return and then add Name_Address.FULL_ADDRESS. (You may need right click and toggle back to the filed codes)
- 14 Highlight the Address in quotes and add the Name_Address.FULL_ADDRESS field



{ MERGEFIELD Name_AddressCRRT }

{ MERGEFIELD NameFULL_NAME }

{ IF { MERGEFIELD Name_AddressPURPOSE } = "Work" { MERGEFIELD NameCOMPANY }

{ MERGEFIELD Name_AddressFULL_ADDRESS } { MERGEFIELD Name_AddressFULL_ADDRESS } }

15 Save the letter

16 Exit from Word



Exercise 3: Simple Mail Merge - All Members

In this exercise we will take the template from exercise 1 or 2 and complete a merge for all members.

- 1 From the customers task list, select Generate reports
- 2 From the Report Types list, select Letters
- 3 Click Letter System
- 4 Select letter template we created in exercise 1 or 2
- 5 Un tick the create activity option
- 6 Select specific types and enter M and click ok
- 7 Select merge and finish to merge all records into your letter



Exercise 4: Event Mail to Registrants for Event

In this exercise we will create a basic event registration confirmation.

- 1 From the events task list, select Generate reports
- 2 Click Letter System
- 3 Choose the new option.
- 4 In the report title enter a name for this letter template (This is the name that will be seen on screen by users)
- 5 In the Report File field, enter a file name for this letter template (This will be the physical file name)
- 6 Click OK
- 7 Add fields from iMIS as required E.G. Orders.FULL_NAME, Orders.FULL_ADDRESS
- 8 Save the letter
- 9 Exit from Word

Registration Confirmation

«OrdersFULL_NAME»
«OrdersFULL_ADDRESS»

Thank you for your registration for «Meet_MasterTITLE»,
«Meet_MasterBEGIN_DATE».

Total registration fees \$«OrdersTOTAL_CHARGES»
Paid «OrdersTOTAL_PAYMENTS»

Balance due «OrdersBALANCE»

Please make payment of any balance by one month before the meeting date.

«Meet_MasterNOTES»


We are looking forward to seeing you there!



Exercise 5: Event Badge report Template

In this exercise we will create a badge report template for an event.

TIPS:

-  If adding in images make sure that these are of a reasonable size.

- 1 From the events task list, select Generate reports
- 2 Click Letter System
- 3 Choose the new option.
- 4 In the report title enter a name for this letter template (This is the name that will be seen on screen by users)
- 5 In the Report File field, enter a file name for this letter template (This will be the physical file name)
- 6 Click OK
- 7 Select Labels.... from the Start Mail Merge menu option
- 8 Select Avery A4/A5 from the Label Vendors
- 9 Select L7418 label and click ok
- 10 Insert word Merge fields as required an complete formatting

«OrdersFULL_NAME»

«OrdersTITLE»

«OrdersCOMPANY»

- 11 Select the Update Labels field
- 12 Save the letter
- 13 Exit from Word



Exercise 6: Event Mail Merge

In this exercise we will create a badge report template for an event.

- 1 From the events task list, select Generate reports
- 2 Choose the letters tab from the history tabs and select new letter button
- 3 Click Letter System
- 4 Select letter template we created in exercise 4 or 5
- 5 Un tick the create activity option
- 6 Select specific an event
- 7 Select merge and finish to merge all records into your letter



Unlock your data with Excel – *Workshop* *Pivot Table Examples/Exercises*

Generic Instructions

The exercises below will use a limited number of tables however will provide you with the opportunity to explore the options within Pivot Tables.

Exercise 2: Active Customers by State

Exercise 2: Current Customers and outstanding Subs Fees

Exercise 3: Top 10 Customers by Total Spent (orders, dues, gifts etc)

Exercise 4: Donations by Appeal/Quarter

Exercise 5: Count of Applications/Calls/Other Activity type by Month/Year

Exercise 6: Orders by Product Category/State/Year

Exercise 7: Events Pivot - Registrations by Class/Company/Table Number

Generic Instructions

1. Open Excel
2. Choose "Data>>From Other Sources>>MS Query>>" from the Excel menu. Please note that this menu item may differ between MS Excel XP/2003/2007.
3. The MS Query ODBC connection window should appear. If this window does not appear, you may not have MS Query installed. It does not install by default with MS Office. Please seek normal IT support for to get this installed from the MS Office CDs for your office version.
4. Select the *iMIS* ODBC connection as configured on your workstation.
5. There will be an opportunity to use a wizard for the query or go directly the MS Query designer. Tick or un-tick the "Use the Query Wizard" checkbox to choose the method for query. If you are choosing data from a number of tables, MS Query may not be able to automatically determine the linking of tables and will require you to enter MS Query directly to make these links. **Press OK.**
6. MS Query will prompt for a user name and password. If you have "sa" access to the SQL database, enter SA and the SA Password as required. You have been provided with another SQL user name and password (read only) - if so, enter these and **Press OK.**
7. At this point the MS Query wizard will open the MS Query Wizard if you have selected that method. If the tickbox for the wizard was unselected, a list of tables will appear in MS Query designer window.
8. Follow the prompts for the Wizard to choose the fields, sort, and criteria within the normal MS Query wizard or use the designer to make your field selection.
9. Once data is selected with criteria etc, press the Return Data button to return to Excel and the Pivot Table wizard.

**Exercise 1: Active Customers by State/Customer Type**

This pivot is a simple one table query with regularly used fields from the Name table.

- 8** Refer Generic Instructions
- 9** Select the Name Table
- 10** Select fields as required for the specific Pivot. Fields should include:
 - ú ID, FULL_NAME, COMPANY, MEMBER_TYPE, CATEGORY, STATUS, STATE_PROVINCE, CHAPTER, PAID_THRU, JOIN_DATE.
- 11** Return data to Excel Pivot wizard.
- 12** Click Next
- 13** Click the Layout button to configure the Pivot Table
- 14** Drag the fields to appropriate sections for the pivot
 - ú ID to Data area (count summary)
 - ú STATUS to the Page area - Choose A for Active
 - ú STATE_PROVINCE to the Row area
 - ú MEMBER_TYPE to the Column area.
- 15** *Click Ok* to close the Layout option
- 16** *Click Finish* to return to Excel
- 17** Your Pivot table will be returned to Excel
- 18** To create a chart off this table - click chart wizard button on the Pivot Table toolbar and a chart will be created. This chart is directly linked to the Pivot Table and as such will change when page and other filters on the pivot are altered on the table/chart.

Notes



Exercise 2: Current Customers and outstanding Subs Fees

This pivot requires 2-3 tables with linking based on ID and selection criteria for members only.

- 1 Refer generic instructions
- 2 Use Name, Subscriptions tables and optionally the Name_Fin table
- 3 Link tables using ID
- 4 Criteria - only members - use the Name.MEMBER_RECORD field = 0
- 5 Select fields as required for the specific Pivot. Fields should include:
 - ú ID, FULL_NAME, COMPANY, MEMBER_TYPE, CATEGORY, STATUS, CHAPTER, PAID_THRU, JOIN_DATE, Name.WORK_PHONE, Subscriptions.PRODUCT_CODE, Subscriptions.BALANCE, Subscriptions.BILL_AMOUNT, Subscriptions.PAYMENTS, Subscriptions.BILL_DATE
 - ú Optionally use the Name_Fin.RENEWED_THRU_DATE to confirm the date billed to.
- 6 Return data to Excel Pivot wizard.
- 7 Click Next
- 8 Click the Layout button to configure the Pivot Table
- 9 Drag the fields to appropriate sections for the pivot
 - ú BALANCE to Data area (SUM summary)
 - ú STATUS to the Page area - Choose A for Active
 - ú CATEGORY to the Row area
 - ú MEMBER_TYPE to the Column area.
- 10 **Click Ok** to close the Layout option
- 11 **Click Finish** to return to Excel
- 12 Your Pivot table will be returned to Excel

Notes

**Exercise 3: Top 10 Customers by Total Spent (orders, dues, gifts etc)**

This pivot requires 2 tables with linking based on ID and selection criteria for members only.

- 1 Refer generic instructions
- 2 Use Name, Activity tables
- 3 Link tables using ID
- 4 Criteria - only activities with AMOUNT <> 0. Note that MEETING Activities will not be included if events are not closed.
- 5 Select fields as required for the specific Pivot. Fields should include:
 - ú ID, FULL_NAME, COMPANY, MEMBER_TYPE, CATEGORY, STATUS, CHAPTER, PAID_THRU, JOIN_DATE, Name.MEMBER_RECORD, Name.WORK_PHONE, Activity.TRANSACTION_DATE, Activity.ACTIVITY_TYPE, Activity.PRODUCT_CODE, Activity.DESCRPTION, Activity.AMOUNT
- 6 Return data to Excel Pivot wizard.
- 7 Click Next
- 8 **Click Finish** to return to Excel
- 9 Drag the fields to appropriate sections for the pivot
 - ú BALANCE to Data area (SUM summary)
 - ú STATUS, MEMBER_RECORD to the Page area - Choose A for Active
 - ú COMPANY, FULL_NAME to the Row area
- 10 Your Pivot data will be displayed in Excel
- 11 You now need to set the Top 10 requirement
 - ú Right-Click the COMPANY Title field and choose Field Setting
 - ú Click the Advanced button
 - ú Click the Top10 AutoShow and choose the BALANCE to summarise and the number or top records you want - 10.
- 12 Your Top10 Data will display. You can also turn off the subtotalling by Company if you wish by changing the field setting on COMPANY to None for subtotals.

Notes



Exercise 4: Donations by Appeal/Quarter

This pivot requires 2-3 tables with linking based on ID and selection. The use of the Trans table is an option as it may provide some fields not available in Activity. Use of the Trans table will require additional criteria to ensure there information is not duplicated due to credit/debit Trans lines. This example will not include fundraising event money.

- 1 Refer generic instructions
- 2 Use Name, Activity
- 3 Link tables using ID
- 4 Criteria
 - ú ACTIVITY_TYPE = 'GIFT'. Other activity types may be included for pledges/requests as required)
 - ú TRANSACTION_DATE > a specific date. The reason for this is to ensure there are no erroneous nulls or other in this field. This will allow the use of the Pivot Table group (by year/month) option.
- 5 Select fields as required for the specific Pivot. Fields should include:
 - ú ID, FULL_NAME, COMPANY, MEMBER_TYPE, CATEGORY, STATUS, JOIN_DATE, Name.STATE_PROVINCE, Name.WORK_PHONE, Activity.TRANSACTION_DATE, Activity.PRODUCT_CODE, Activity.DESCRPTION, Activity.AMOUNT, Activity.SOURCE_CODE, Activity.CAMPAIGN_CODE, Activity.ORG_CODE
- 6 Return data to Excel Pivot wizard.
- 7 Click Next
- 8 **Click Finish** to return to Excel
- 9 Drag the fields to appropriate sections for the pivot
 - ú AMOUNT to Data area (SUM summary)
 - ú STATUS, MEMBER_TYPE, STATE_PROVINCE to the Page area
 - ú TRANSACTION_DATE to the Row area
 - ú APPEAL to the Column area
- 10 Your Pivot data will be displayed in Excel
- 11 You now need to group the Transaction Date by Years and Months (and Quarters if you wish)
 - ú Right-Click the TRANSACTION_DATE Title field and choose Group and Show Detail>>Group
 - ú The resulting option window will allow you to select between dates and choose the breakdown for the grouping.
 - ú Choose the groups Years and Months. Just click the options in turn to highlight.
 - ú **Click OK**
- 12 The pivot table will now split the TRANSACTION_DATE field into two parts - Months and Years. You can double click the column titles to rename the headings. You can move these around the pivot individually to change the look of the pivot table.

Notes



Exercise 5: Count of Applications/Calls/Other Activity type by Month/Year

This pivot requires 2 tables with linking based on ID and selection.

- 1 Refer generic instructions
- 2 Use Name, Activity
- 3 Link tables using ID
- 4 Criteria - this will depend on your requirement for filtering out specific customer records. For the purpose of this example - leave all records in the results and use the Page/Pivot function to filter.
- 5 Select fields as required for the specific Pivot. Fields should include:
 - ú ID, FULL_NAME, COMPANY, MEMBER_TYPE, CATEGORY, STATUS, JOIN_DATE, Name.STATE_PROVINCE, Name.WORK_PHONE, Name.MEMBER_RECORDS, Activity.ACTIVITY_TYPE, Activity.TRANSACTION_DATE, Activity.PRODUCT_CODE, Activity.DESCRPTION, Activity.AMOUNT, Activity.SOURCE_CODE, Activity.CAMPAIGN_CODE, Activity.ORG_CODE
- 6 Return data to Excel Pivot wizard.
- 7 Click Next
- 8 **Click Finish** to return to Excel
- 9 Drag the fields to appropriate sections for the pivot
 - ú ID to Data area (count summary)
 - ú STATUS, MEMBER_TYPE, STATE_PROVINCE to the Page area - choose the type or status or region combination for reporting.
 - ú TRANSACTION_DATE to the Row area
 - ú ACTIVITY_TYPE to the Column area
- 10 Your Pivot data will be displayed in Excel
- 11 You now need to group the Transaction Date by Years and Months (and Quarters if you wish)
 - ú Right-Click the TRANSACTION_DATE Title field and choose Group and Show Detail>>Group
 - ú The resulting option window will allow you to select between dates and choose the breakdown for the grouping.
 - ú Choose the groups Years and Months. Just click the options in turn to highlight.
 - ú **Click OK**
- 12 The pivot table will now split the TRANSACTION_DATE field into two parts - Months and Years. You can double click the column titles to rename the headings. You can move these around the pivot individually to change the look of the pivot table.

Notes


Exercise 6: Orders by Product Category/State/Year

This pivot requires 4 tables with linking based on various fields between tables.

- 1 Refer generic instructions
- 2 Use Name, Orders, Order_Lines, Product
- 3 Link tables
 - ú Name.ID to Orders.BT_ID;
 - ú Orders.ORDER_NUMBER to Order_Lines.ORDER_NUMBER;
 - ú Order_Lines.PRODUCT_CODE to Product.PRODUCT_CODE
- 4 Criteria - Orders.SOURCE_SYSTEM = 'ORDER'
- 5 Select fields as required for the specific Pivot. Fields should include:
 - ú ID, FULL_NAME, COMPANY, MEMBER_TYPE, CATEGORY, STATUS, JOIN_DATE, Name.STATE_PROVINCE, Name.WORK_PHONE, Orders.ORDER_TYPE, Orders.ORDER_DATE, Orders.EXTENDED_AMOUNT, Order_Lines.DESCRPTION, Product.QUANTITY_ORDERED, Product.CATEGORY
- 6 Return data to Excel Pivot wizard.
- 7 Click Next
- 8 **Click Finish** to return to Excel
- 9 Drag the fields to appropriate sections for the pivot
 - ú EXTENDED_AMOUNT to Data area (SUM summary)
 - ú PRODUCT_CATEGORY to the Page area - choose the type for reporting.
 - ú ORDER_DATE to the Row area
 - ú STATE_PROVINCE to the Column area
- 10 Your Pivot data will be displayed in Excel
- 11 You now need to group the Transaction Date by Years and Months (and Quarters if you wish)
 - ú Right-Click the TRANSACTION_DATE Title field and choose Group and Show Detail>>Group
 - ú The resulting option window will allow you to select between dates and choose the breakdown for the grouping.
 - ú Choose the groups Years.
 - ú **Click OK**

Notes


Exercise 7: Events Pivot - Registrations by Class/Company/Table Number

This pivot requires 4 tables with linking based on various fields between tables.

- 1 Refer generic instructions
- 2 Use Meet_Master, Meet_Reg_Class, Order_Meet, Orders
- 3 Link tables
 - ú Order_Meet.MEETING to Meet_Master.MEETING;
 - ú Order_Meet.ORDER_NUMBER to Orders.ORDER_NUMBER;
 - ú Order_Meet.REGISTRANT_CLASS to Meet_Reg_Class.REGISTRANT_CLASS
- 4 Criteria - You may add criteria to restrict to specific meetings/events or do this within the Pivot/Page selection.
- 5 Select fields as required for the specific Pivot. Fields should include:
 - ú Orders.ORDER_DATE, Orders.ORDER_NUMBER, Orders.TOTAL_CHARGES, Orders.TOTAL_PAYMENTS, Orders.BALANCE, Orders.FIRST_NAME, Orders.LAST_NAME, Orders.COMPANY, Meet_Reg_Class.DESCRPTION, Order_Meet.UF_6 AS 'Table Number', Order_Meet.UF_1 AS 'Smoker', Meet_Master.MEETING, Meet_Master.TITLE, Year(BEGIN_DATE) [Rename as 'Meeting Begin Year'], Month(BEGIN_DATE) [Rename field as 'Meeting Begin Month']
 - ú The above option assumes that UF_1 on the user defined order fields is configured as Smoker tickbox and that UF_6 is configured as the Event Table Number allocated to the registrant.
 - ú Year(Field Name) and Month(Field Name) are used in this example for practise for when the date is unable to be grouped by Pivot Table options.
- 6 Return data to Excel Pivot wizard.
- 7 Click Next
- 8 Click the Layout button to configure the Pivot Table
- 9 Drag the fields to appropriate sections for the pivot
 - ú ORDER_NUMBER to Data area (COUNT summary)
 - ú TITLE (event title) to the Page area - choose the event title required for reporting.
 - ú Table Number, COMPANY to the Row area
- 10 **Click Ok** to close the Layout option
- 11 **Click Finish** to return to Excel
- 12 Your Pivot table will be returned to Excel

Notes
