

Detailed Steps for setting up Acknowledgment Merge Letters

This document details a methodology for setting up an automatic gift acknowledgment process. This process allows you to run the gift export in FIMS and create gift acknowledgment letters of various styles based on the individual acknowledgment code on each gift. Once the letters are created, you can run a macro in MS Word to split the letters into individual files and place the letters in either or both the fund and profile folders associated with the gifts. Automating this process will save time and allow you to concentrate on content review instead of spending time on the process!

You might already have successfully completed many of the steps below and thus can swiftly finish the process to complete the automation.

The overall process requires you to test the letter creation in Microsoft Word (MS Word) first before setting up the autolaunch in FIMS. If the letters don't work in MS Word, then having FIMS launch the master letter will fail as well.

This session will cover the following:

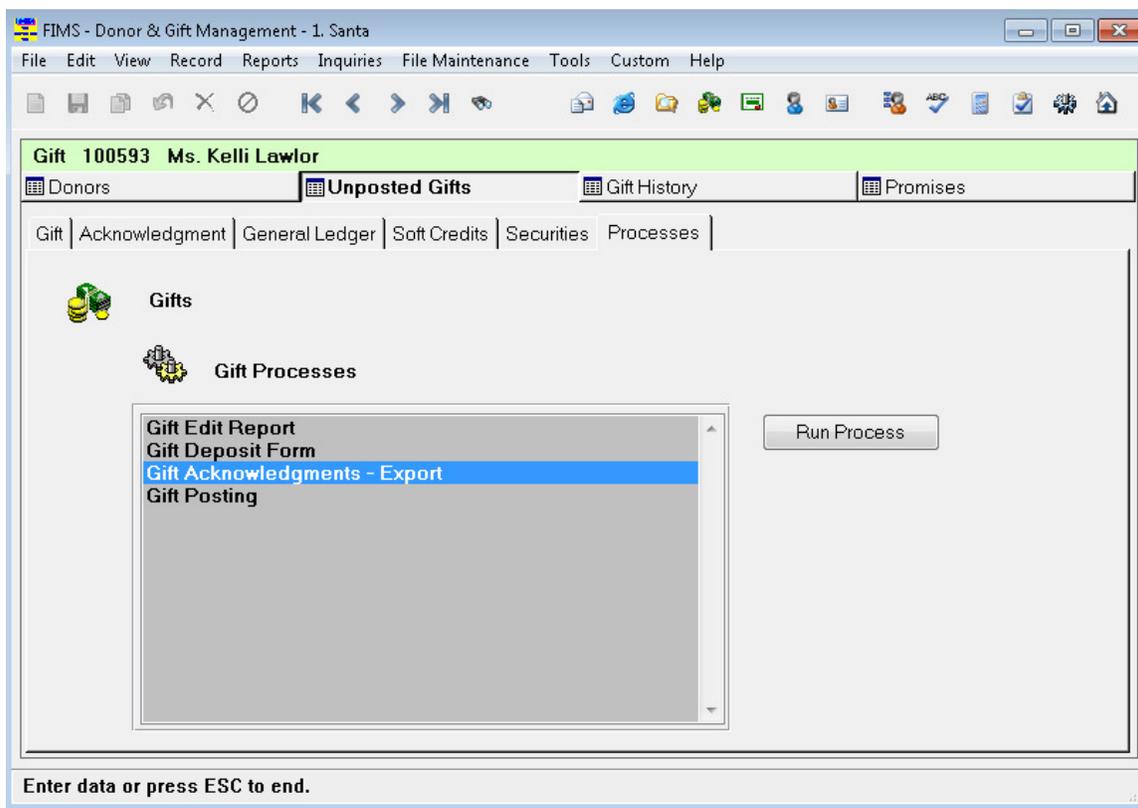
- **FIMS:** Run the Gift Acknowledgment – Export from the Process Tab in Unposted Gifts to create a data file to use for creating the merge letters
- **MS Word:** Using the exported data file, create the acknowledgment letter(s) in Word
- **MS Word:** Test the merge letter(s) against the data export from FIMS
- **MS Word:** Create a master Letter to launch all acknowledgment letters at one time
- **MS Word:** Add the header to the master merge letter
- **FIMS:** Install the macro files in MSWord if necessary using FIMS tool
- **MS Word:** Run the macros to split the letters into the desired Windows folders.
- **FIMS:** Run the export and this time fill in the Autolaunch Document field to test the automatic letter creation

In FIMS: Run the Gift Acknowledgment to create a data file to use for creating the merge letters – Export from the Process Tab in Unposted Gifts

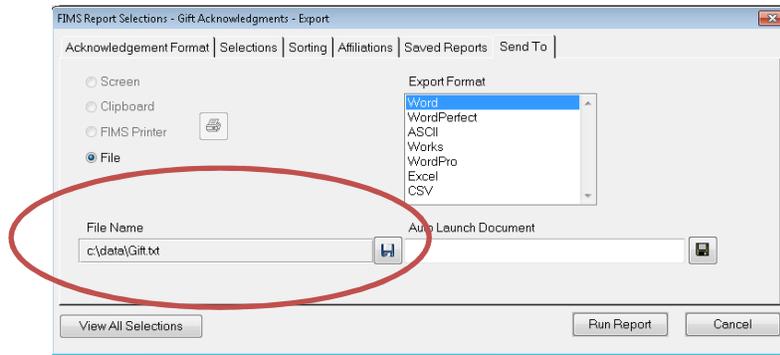
Before you can create a merge letter in MS Word, it is necessary to have a data file available providing the merge field names.

First, run the export you plan on using for your acknowledgment merge letters in FIMS.

Typically, acknowledgment letters are created before gifts are posted and therefore you would probably use the Gift Acknowledgments – Export found on the Processes tab in Unposted Gifts.



If your policy is to post the gifts first, then the Gift History Export (located on the Reports menu) can be used instead. Both exports provide the same fields in the export. This is helpful to remember in case some gifts are posted before you create your letters.



- For now, the Auto Launch Document field is left empty.
- Run the Report to export your data.
- When the export is complete you will see a similar message to this:



Tip: If you need to manipulate the exported data so that various acknowledgment codes or gift values exist, remember that you can run your export from the Test & Learn database as well.

If you do that you can either create new fake gifts with specific criteria or edit posted gifts to have particular values. As you create many different letters to handle different situations, sometimes it is easier to create new gifts in the testing environment than it is to search for gifts that meet your requirements among the historic gifts. When setting up letters for various situations, create a number of test gifts containing all the variations of gift value, specific funds, batch codes, gift types, memorial and honorariums, special project gifts, etc. Then you can have them all exported in the same data file and test your merges without having to wait for a real gift with those requirements to appear.

In MS Word: Using the Exported data file, create the Acknowledgment letter(s) in MS Word

It is not necessary to start your letters from scratch. You can take existing acknowledgment letters and convert them to MS Word merge templates. Here is a sample simple gift acknowledgment letter:

April 29, 2014

Ms. Kathy H. Allard and Mr. John Mathews
North Main Street
Suite 999
Concord, NH 03301-0123

Dear Mr. Mathews and Ms. Allard:

This is to acknowledge your gift in the amount of \$50.00. As you requested, it has been applied to Coolidge Fund for Literacy.

Don't forget the benefactor's appreciation banquet at the Carlton Hotel the first Friday in March. You will be receiving a formal invitation soon, but mark your calendar now.

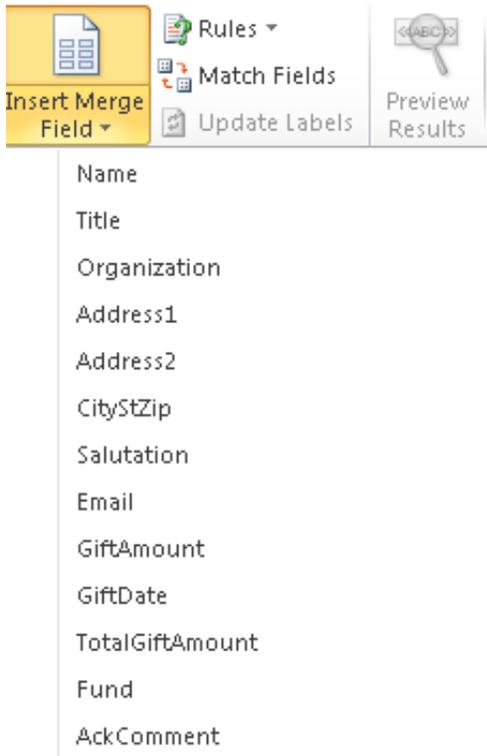
Sincerely,

Mary J Harlan
Executive Director

To turn it into a merge template you follow these steps:

- Open an existing acknowledgment letter in MS Word
- Click the Start Mail Merge button on the Mailings Ribbon. Select Letters
- Next Select Recipients and select Use Existing List.
- Navigate and select the gift.txt file you exported in the first main step.

- Highlight a field value like “North Main Street” and click on Insert Merge Field and select the merge field in the list to replace the existing data with the merge field (Address1). Repeat for all of the fields you wish to turn into merge fields. You might need to insert some fields not currently present in your basic letter. In this instance Organization will need to be added.



- You can review how the final letter will look by clicking on the Preview Results option on the Mailings ribbon.
- When complete, your new merge letter will look something like this:

April 29, 2014

«Name»
«Title»
«Organization»
«Address1»
«Address2»
«CityStZip»

Dear «Salutation» :

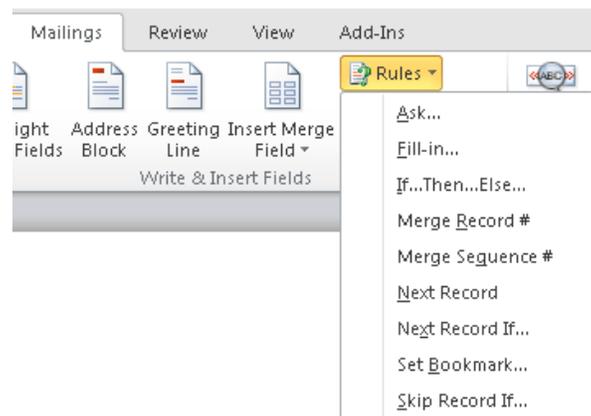
This is to acknowledge your gift in the amount of «GiftAmount». As you requested, it has been applied to «Fund» .

Don't forget the benefactor's appreciation banquet at the Carlton Hotel the first Friday in March. You will be receiving a formal invitation soon, but mark your calendar now.

Sincerely,

Mary J Harlan
Executive Director

- An acknowledgment can be fairly complex and with the use of Rules you can manipulate the content:



The rule most frequently used is the If...Then...Else which allows you to insert words or phrases if certain conditions apply.

For instance you can:

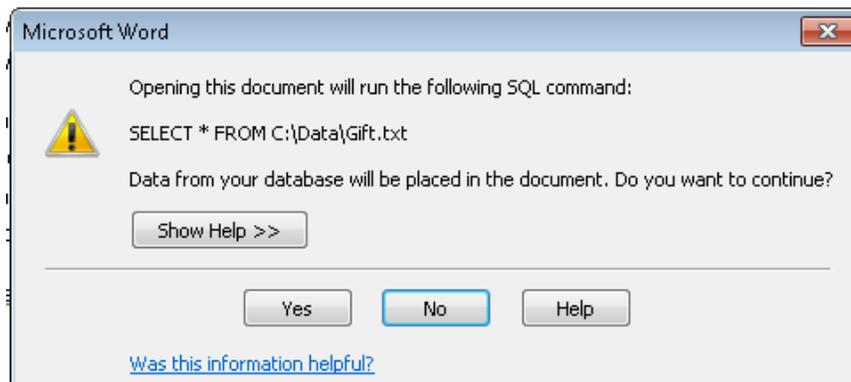
- Include additional text if a gift exceeds a certain dollar amount
- Include a paragraph of information if the gift was given to a certain fund
- Include an invitation to an event if a particular merge field has a certain value
- Include the gift acknowledgment large text block or the gift comment in certain situations

Once your letter is complete, save the letter as a word document (.doc or .docx).

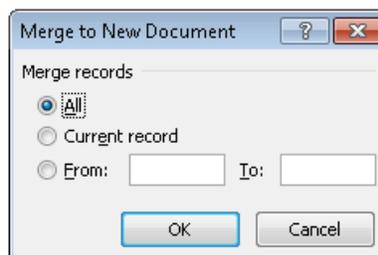
Tip: Solution Article 2796 has some additional information that might be found useful.

In MS Word: Test the merge letter(s) against the data export from FIMS

It is best to test the new letter in the MS Word environment before heading back to FIMS. Close the newly created document and reopen it. You will see a message like this:



- Select > Yes
- Your letter will open.
- If the Mailings ribbon is not open, navigate and select Finish & Merge on the far right.
- This set of options will appear:



If your data file does not contain too many gifts, click ok. If there are many, you might want to try a small sample in case there are problems. You will have to click through many error messages if there is an issue, so it is best to start with fewer records.

Once you have tested a small sample, merge the file again for all the gifts. If you used some conditional logic in your letters, now is a good time to review the results. Remember you can use the Gift History export or exports from the Test and Learn database if you need a wider variety of gifts to work with.

Create a Master Letter to launch all acknowledgment letters at one time

Using IF Then Else statements and the IncludeText field you only need to do one export from FIMS no matter how many different acknowledgment codes are in the exported data.

- Create a main form letter that will contain conditional merging commands (If Then Else statements).
- There will be one command in the main form letter for each different acknowledgment code in FIMS.
- With these commands you are telling MS Word, if the acknowledgment code is “X” then merge the document letter “X.doc”.
- This master letter will create the appropriate letter for each gift depending upon the acknowledgment code of the gift.

You will need the following items before setting up the main form letter:

- An acknowledgment code for each different type of acknowledgment letter you will be writing set up the in Acknowledgment Code table in FIMS and gifts coded with these codes.
- Print a Code Listing Report to have these codes handy.
- Separate working merge document for all the different types of acknowledgment letters set up exactly how you would like them to look including the merge fields.
- Also create a list of the names of these separate documents for easy reference.

Creating the “Main Form Letter”

1. Export all the gifts you need to acknowledge from the Gift Acknowledgment Export in FIMS. Write down the name of the document created as the data file, including the full path (i.e. c:\gift.txt)
2. Open MSWord and a blank document.
3. Go through the regular steps of creating a form letter merge document. Open Data Source and select the data file you exported (i.e. c:\gift.txt).
4. Position your cursor at the very top of the page.
5. Click Alt + F9 to display the field codes
6. Click on the Mailings menu and then the Rules option and choose “Insert Word Field”
7. Choose “If-then-else”
8. Click on Field Name down arrow and choose: AckCode
9. Comparison: Equal to
10. Compare to: put in one of your acknowledgment codes
11. In box labeled “Insert This Text” put xx

Insert Word Field: IF

IF

Field name: AckCode

Comparison: Equal to

Compare to: gen

Insert this text: xx

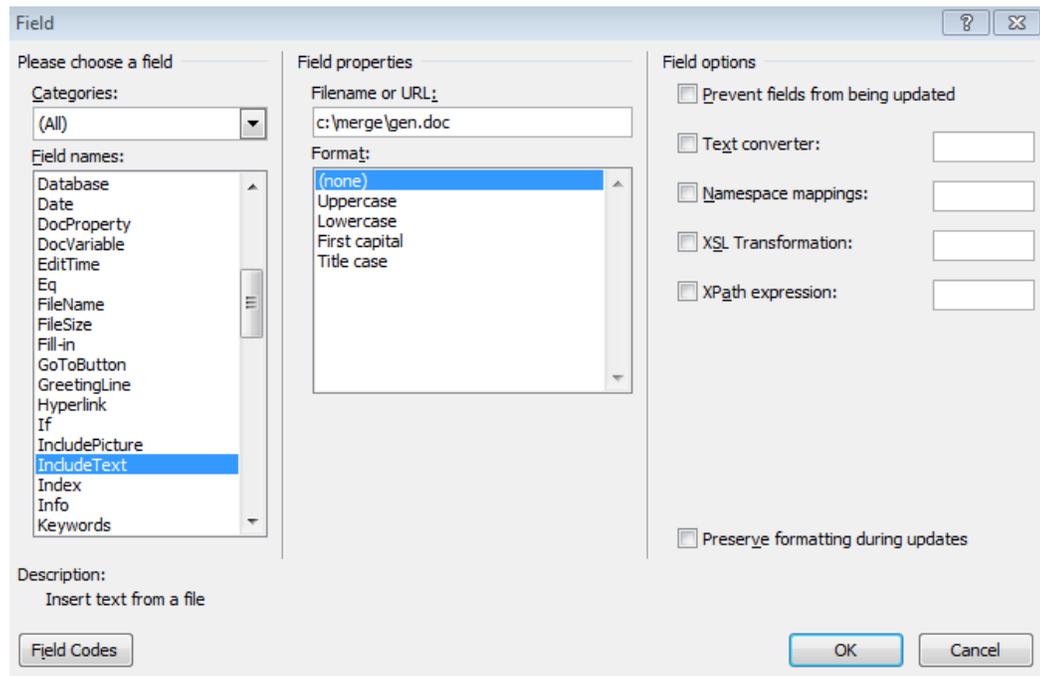
Otherwise insert this text:

OK Cancel

12. Select> OK.

13. Put the cursor between the 2 x's in the document.

14. Click on Insert/Quick Parts/Field – from Field Names select “Include Text”. **Un**check Preserve formatting during updates.



15. Type the path and file name of the document that matches that acknowledgment code.

Note: the main form letter and individual thank you letters need to be in the same directory.

16. Go back to main form letter and carefully delete the x's. Place the cursor at the end of the statement you just entered.

- Repeat steps 6-16 for each acknowledgment code (no returns is sometimes required between the statements).

Note: An alternative to repeating those steps is to copy and paste the first line repeatedly and then carefully edit the acknowledgment code and filename for the various letters.

- Save the Main Form Letter and click on Merge to New Document.
- Review the letters and print.

For streamlining future exporting and merging, set up a default in the Gift Acknowledgments Export with the name of the main merge letter on the Send To Tab in the Auto Launch Document field. After the export runs, MSWord will automatically open, the form letter will open, and the merge will be done all in one step.

The master letter could look something like this:

```
{ IF { MERGEFIELD AckCode } = "gen" { INCLUDETEXT "d:\\merge\\gen.doc" \*  
MERGEFORMAT } "" }  
{ IF { MERGEFIELD AckCode } = "sch" { INCLUDETEXT "d:\\merge\\sch.doc" \*  
MERGEFORMAT } "" }  
{ IF { MERGEFIELD AckCode } = "Sch" { INCLUDETEXT "d:\\merge\\sch.doc" \*  
MERGEFORMAT } "" }  
{ IF { MERGEFIELD AckCode } = "SCH" { INCLUDETEXT "d:\\merge\\sch.doc" \*  
MERGEFORMAT } "" }  
|
```

In this case, it is managing two codes: gen and sch. If the gift record in the export has an ackcode of gen, it will create a letter using the gen.doc template. If it has a code of sch, it will use the sch.doc template. Any other codes found in the exported data will produce blank pages.

If you are editing the IF THEN ELSE lines instead of creating them all via the steps, be sure to use the correct extension on the letter filename. Depending on how recently you created or modified your letters, they might have different extensions (doc vs docx).

Tip: MS Word will compare the ackcode precisely as typed. Thus, you either have to include variations of the code as seen above with “sch” or strictly require consistent code usage. If this becomes a common problem during data entry, you can create a quick data grid to display the ackcode and gift numbers and review them for consistency before processing your letters. Since typing capital letters can be tedious during data entry, having your codes all in lower case is frequently easier to manage. FIMS is case insensitive; MSMS Word is not.

Tip: Solution Article 2797 has some additional information that might be found useful. There are more screenshots so some steps might be easier to follow!

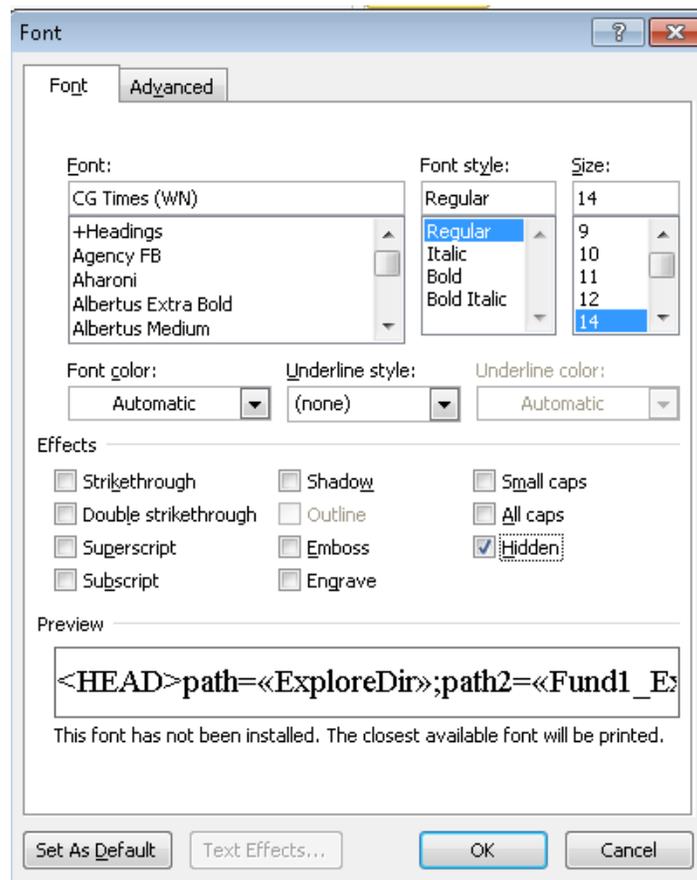
Add the header to the master merge letter

1. Open the main merge document in MS Word and add the following paragraph at the beginning of the letter:

```
<HEAD>path=«ExploreDir»;path2=«Fund1_ExploreDir»;asf=«ASF»;idcode=«IdCode»;giftnum=«GiftNum»;</HEAD>
```

Note: This paragraph includes five merge fields: ExploreDir, Fund1_ExploreDir, ASF, IDCode, and Giftnum.

2. **IMPORTANT:** Do not include any spaces in this paragraph. Do not place the text into the Header or Footer.
3. In order to prevent this initial paragraph from printing, select the paragraph and select Format / Font. In the Font window, select the Hidden checkbox, and then click OK. It might be good to test the macro out with the paragraph visible to start to be sure the correct values are populating the individual letters.



4. At the end of the main merge document enter the following paragraph (and set it as hidden text as well):

<BOTTOM>

5. Save the modified merge documents.

6. Merge your Acknowledgment letters as usual.

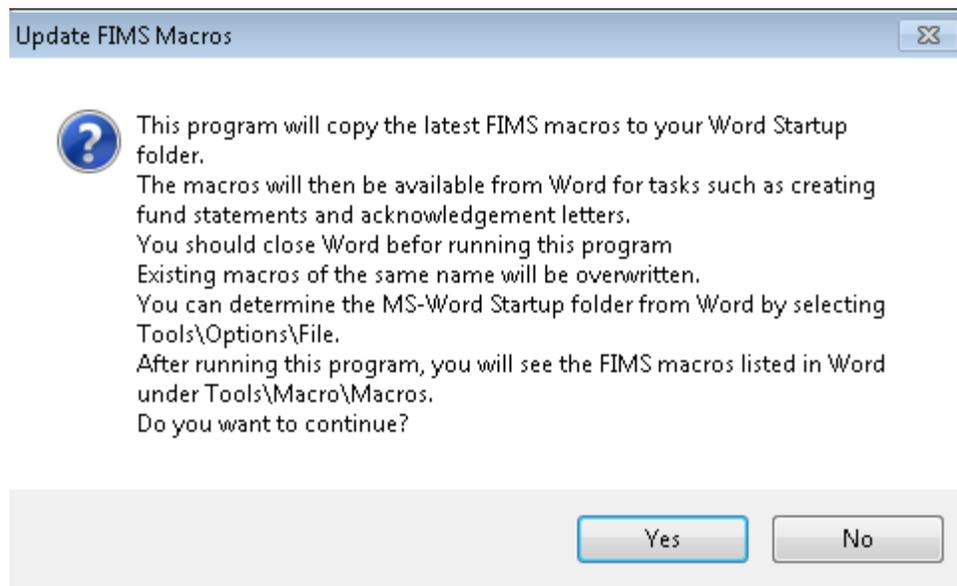
Note: If you need to edit the master letters, you can do so, but do not alter the <HEAD> or <BOTTOM> paragraphs

In FIMS: Install the macro files in MS Word if necessary

- If you haven't installed the FIMS Macros into your installation of MS Word, open FIMS and run:

Tools\System Utilities\Admin Utilities\Update FIMS Macros.

- You will see the following screen.



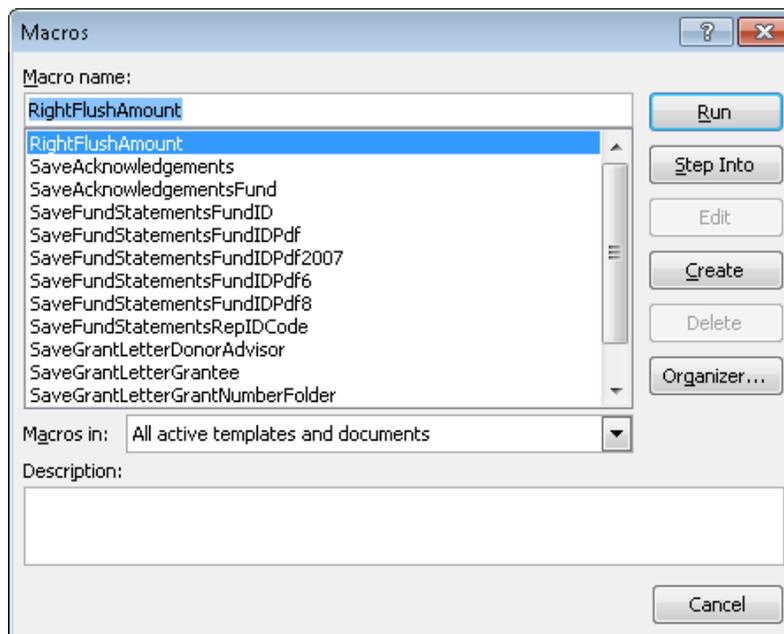
- After closing MS Word as recommended, click Yes and the macros will be copied into your Start-Folder.
- It is necessary to run this tool for each user from their PC.

Note: Running it more than once will not cause harm.

- Once it has been run, start MS Word and go to the Macros item on the View Ribbon:



- Click the arrow, select View macros and you will see the following list of macros:
-

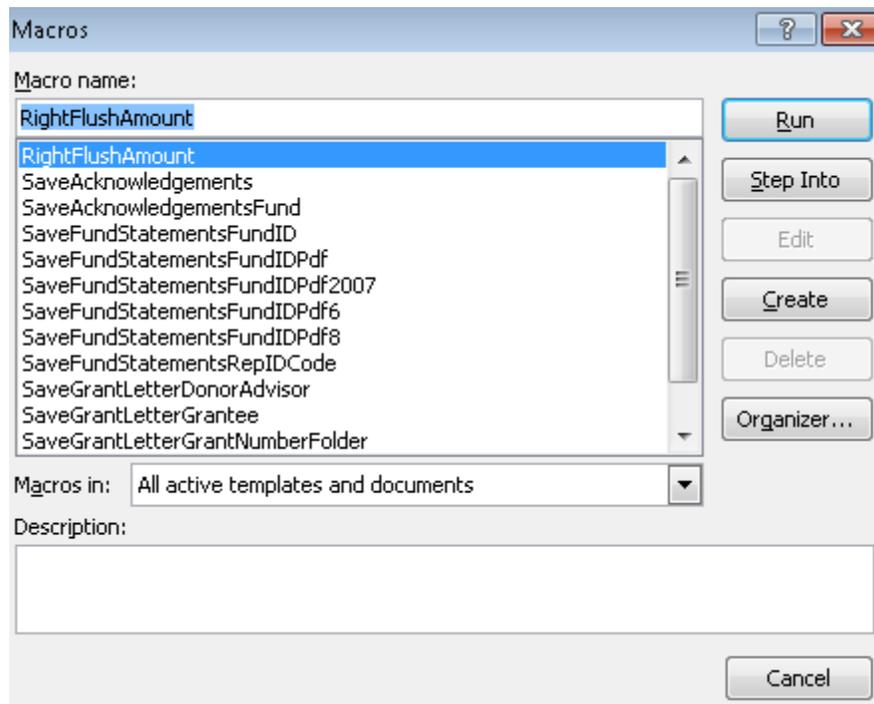


As you can see, there are two macros typically used for Gift Acknowledgments. The first one will save the letter in the donor's Profile Folder, the second will save the letter in the gift's fund folder.

To use the macros you must add a header to your gift letters. This header will contain the information used by the macro to split the document into individual letters, create files and either create or find the appropriate folder to save the letter in.

In MS Word: Run the Macros to split the letters into the desired Windows folders.

To run the desired macro in the merged letters document, click on View / Macros. The Macro Selection window opens. It is good to test this now instead of later.



Do one or both of the following:

- If you want to save the letters to each individual Profile folder, select SaveAcknowledgments.
- If you want to save the letters to each individual Fund folder, select SaveAcknowledgmentsFund.

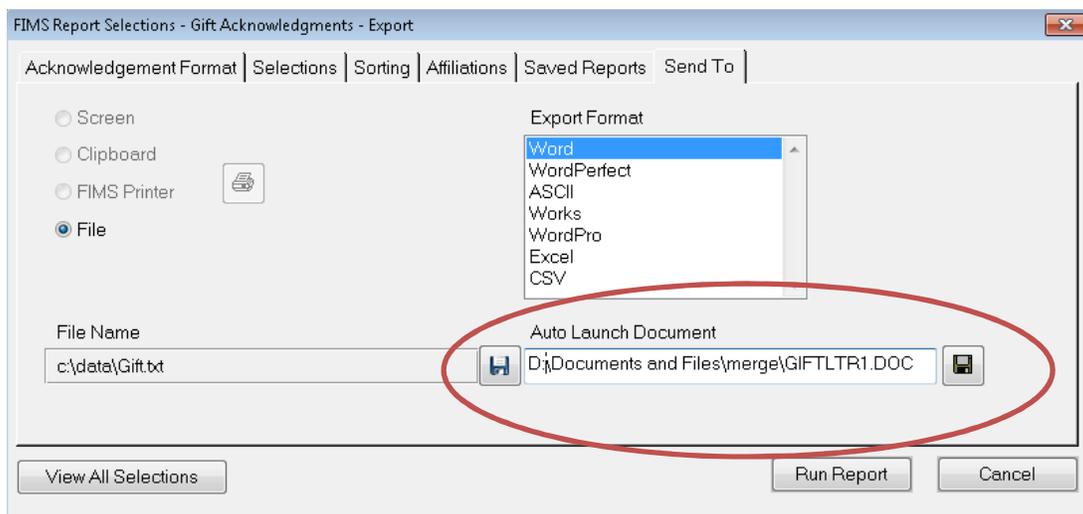
Click Run. One of the following occurs:

- The SaveAcknowledgments macro will test to see that each Donor has a Profile folder, and if not it will create one. Then it will copy each letter to a separate document and save it into the appropriate Profile folder with a file name that combines the Profile Alpha Sort Name with the Gift Number (for example, ABC_Co._179.doc).
- The SaveAcknowledgmentsFund macro will test to see that each Fund has a Fund folder, and if not it will create one. Then it will copy each letter to a separate document and save it into the appropriate Fund folder with a file name that combines the Donor's Profile Alpha Sort Name and ID code with the Gift Number (for example, ABC_Co._1135_179.doc).

Note: You can run both of these macros from the same merged document. Once you finish running the first macro, you can run the second one immediately. You do not need to re-merge the document.

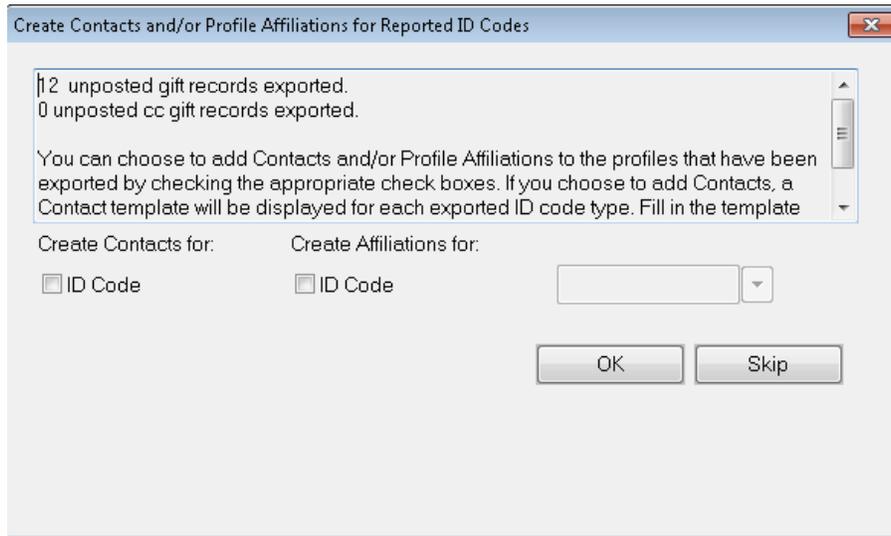
In FIMS: Run the Export and this time fill in the Autolaunch document field to test the autolaunch

- Now that the merge is working in MS Word, it is time to test it auto-launching from within FIMS.
- To do this you will now fill in the Autolaunch document name on the Send to Tab of the export:

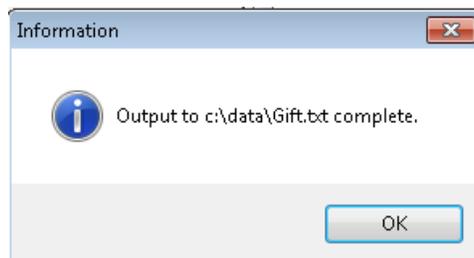


- Before clicking Run Report, make sure the document is closed in MS Word.

- After running the export you will receive a message like this letting you know how many records were exports and/or skipped:



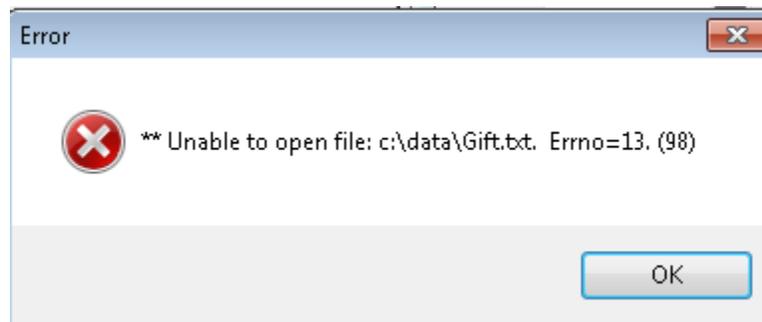
- Then you will receive an export output message:



- Select> OK and MS Word will open and merge the letters.
- You might find it necessary to say ok to the merge. Once you do, the merge template will close and only the final letter file will be open with all of the merged letters.
- At this point you would review the letters, make necessary changes, print them and then run the macro(s) to save them into the appropriate folders.

Misc. Tips and Tricks

If you experience the following error when exporting:



This is typically caused by MS Word merge letter that uses this file as its data source being open on your desktop. Close the document in MS Word and retry the export. Alternately, the problem could be that the file is open in Excel.

Solution article 2731 has information about how to resolve a Word 2013 merge error:

If you have recently upgraded your version of Microsoft Office to 2013, you may receive errors when trying to auto launch documents from FIMS. Typically, these errors are 5677 and 5890. This may not resolve your issue, but it is a common step necessary in order to use Word 2013 in the merge process.

Steps to resolve the auto launch errors:

1. Open Word 2013
2. Click on File > Options
3. In the Options pop-up window, under Start up options, uncheck the "Open e-mail attachments and other un-editable files in reading view" box
4. Close Word and try to export and auto launch your document again

If you want to include Fund specific information in your letters:

- There is only one fund field that exports in the standard gift history export or the gift acknowledgment export and that is the Fund Comment field.
- This field is found on the Fund 2 tab for the fund and is the first radio button labeled "Comments".
- In the export, the column is labeled FundComment1, FundComment2, FundComment3, FundComment4, FundComment5 for each of the 5 possible funds you can have with a gift.
- Typically information about the current projects or the focus of the granting activities of that fund are entered in this field. This field is then included in the gift acknowledgment letter to inform the donor the type of activity their gift might be supporting.

Fund and Profile folder renaming issues:

- If you rename the Fund or Profile folder in Windows Explorer after FIMS creates it, FIMS will not be able to find it when you click on the Fund or Profile folder again. This is because when you first click the folder button for a Profile or Fund, FIMS creates a folder name that is unique to each Fund or Profile that includes things like the Profile Id and Fund Id.

Tip: Some people create sub-folders underneath the main folder for their own organization purposes. If you use one of the FIMS Word macros that automatically saves copies of Gift acknowledgments or Fund Statements into these folders, FIMS will save it to the main folder. Then you can manually move them into any sub-folder you've created.

- For more information on setting up Fund and Profile folders and using FIMS Word macros for electronic document management, see Solutions 220 and 348.

Acknowledgment Codes and ideas for letter creation:

Acknowledgment codes are typically used to identify the type of acknowledgment letter (or method of communication) that will take place between the you and the donor. For example, the following codes might be used for the following purposes:

Emal - the acknowledgment can be done via an email

Phon - the Executive Director will call and thank personally and the receipt letter will follow

Gen - the standard general letter will be sent

Mem- the letter set up to handle the special memorial name fields will be sent

Hon - the letter set up to handle the special honorarium fields will be sent

Stck - The letter that includes stock receipt information is used

Spec - A special letter sent to large donors will be send

Meet - A special letter mentioning their meeting with the Ed will be sent

Ann - a letter thanking them for a contribution to the annual appeal

AnnM - a letter acknowledging receipt of the Annual Dinner donation (non-gift)

AnMS - a letter acknowledging receipt of the Annual Dinner donation and an additional donation (part gift and part non-gift)

- Many letter variations can be created. They can indicate responses that should be made by particular individuals using phone, email or letter. The word documents created can be written to have special language, additional paragraphs, refer to the use of the funds, detail more information about the use or purpose of the gift.
- Foundations might include paragraphs detailing what the fund will be doing with the money- they special project or focus for the year. You might be doing a fund-raiser and need to detail auction items or how much of the "gift" is for a non gift (a book, a ticket, a dinner, golf tournament, etc) and how much is an outright gift. You might need to acknowledge the receipt of a non cash item.
- All of these variations can be included in a letter and can be included based on the type of acknowledgment code you have chosen.

Master Letter issues:

- If you are using a master merge template pulling information based on the ack code, if you do not have ack codes on every single record, there will be blank pages in the merged letters.
- It might be necessary to move the Head and Bottom paragraphs to the individual merge letters if you have difficulty getting the formatting to work properly in the merged letters with those elements on the master letter.

Tip: Use the ack code as the letter name to make letter editing easier. It is far easier to go looking for Gen.doc when you have issues with your general letter that looking for "standard gift letter.doc".