

# **Members360° Word Mail Merge Reports**

---

**Based on the ASPOSE® report system**

**How to create your own customized and formatted reports in  
Microsoft Word and use them with your Members360° database**

**Last updated June 19, 2007**

<b>Overview: Creating custom reports.....</b>	<b>3</b>
<b>Section 1: Using the pre-built Word templates.....</b>	<b>3</b>
Step 1: Create a report .....	3
Step 2: Name the report.....	3
Step 3: Choose a smart group.....	3
Step 4: Choose the Word Mail Merge report format.....	4
Step 5: Choose a sort order .....	5
Step 6: Save/view the report .....	6
<b>Section 2: Making simple formatting changes to a pre-built template.....</b>	<b>6</b>
Step 1: Download the source template .....	7
Step 2: Customize the formatting .....	8
Step 3: Re-upload the template.....	9
<b>Section 3: Adding new profile fields to a report template.....</b>	<b>10</b>
Step 1: Download the merge field definitions .....	10
Step 2: Turn on the Mail Merge toolbar .....	11
Step 3: Open the Merge Fields file .....	11
Step 4: Add new fields .....	12
Step 5: Save and upload your template.....	14
<b>Section 4: History-type fields and advanced techniques .....</b>	<b>15</b>
Adding "History-type" fields .....	15
Creating a repeating row .....	21
Creating multi-column reports.....	22
Formatting date fields .....	22
Conditional display of fields and text .....	23
<b>Appendix: Grouped reports .....</b>	<b>26</b>

# Overview: Creating custom reports

---

If you want to create reports, form letters, mailing labels, name badges, certificates, printer-friendly member profiles, or any other sort of printable report, you will want to use the built-in Word Mail Merge reporting system in Members360°. Using this system, you can use our library of Word-based report formats as a starting point for building your own customized reports.

The basic process follows anywhere from 2 to 4 steps:

1. Find a pre-built format that most closely matches what you want to create
2. Download the template and make formatting changes
3. Add your own fields to the template (optional)
4. Add history fields and use advanced field techniques (optional)

Each of these steps is broken down in detail in the sections that follow.

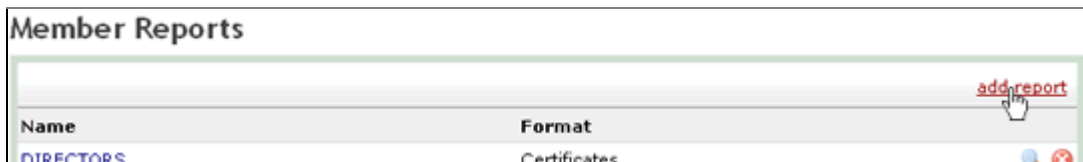
## Section 1: Using the pre-built Word templates

---

Members360° contains several pre-made Word format reports. To get started, you'll want to find the format that most closely matches the format and data you want. This section will show you how to do that.

### Step 1: Create a report

To begin using the built-in Word templates, navigate to **Members** > **Reports**. Then click the [add report](#) link on the right.



### Step 2: Name the report

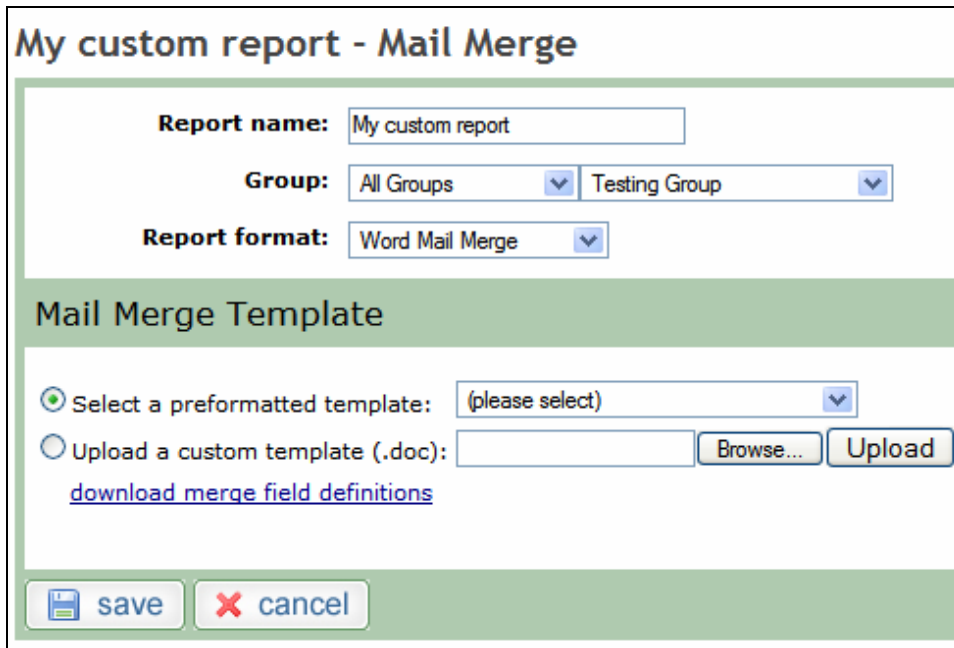
Type in a name for your report. You can change this later. The name should show the purpose or title of the report, such as **Active Member Roster** or **New Member Certificate**.

### Step 3: Choose a smart group

Next, choose any **Smart Group** you wish. For testing purposes, try to choose a group with a small number of members, but one that will contain the types of people you wish to report on. (That is, do not choose a group containing only organizations if you are creating a report that includes first and last name.) See the **Smart Groups** documentation in the Members360° help system for details.

## Step 4: Choose the Word Mail Merge report format

Underneath, for **Report Format**, choose **Word Mail Merge** as the format, and the page will refresh as shown below.



**My custom report - Mail Merge**

**Report name:**

**Group:**

**Report format:**

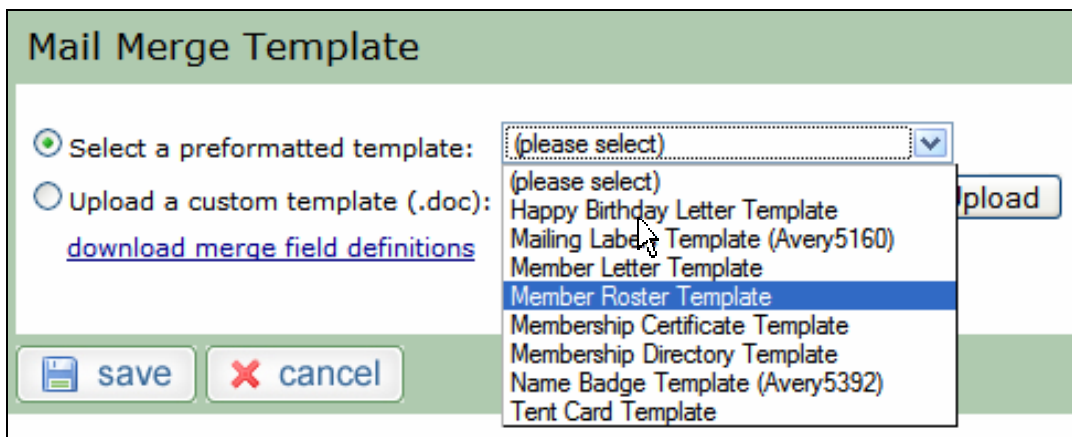
**Mail Merge Template**

Select a preformatted template:

Upload a custom template (.doc):

[download merge field definitions](#)

From here, you can choose from any of the preformatted templates included within Members360°, as shown below.



**Mail Merge Template**

Select a preformatted template:

Upload a custom template (.doc):

[download merge field definitions](#)

- (please select)
- Happy Birthday Letter Template
- Mailing Label Template (Avery5160)
- Member Letter Template
- Member Roster Template**
- Membership Certificate Template
- Membership Directory Template
- Name Badge Template (Avery5392)
- Tert Card Template

You can use any of these templates you like as they currently exist, although you'll probably want to customize them as shown in the next section. For now, let's explore using one of the pre-built templates as is – we'll use the **Member Roster Template** as our example.

When you choose the **Member Roster Template** from the list, the screen refreshes again and shows you all the fields used by this template. This will happen regardless of which template you choose. Also, the fields are all auto-matched to the corresponding fields in Members360°.

Please review your template's merge codes and sort order:

Merge Field	Data	Sort Direction
Person Last Name	Person: Last Name	↑
Person First Name	Person: First Name	↑
Membership Primary ContactOrganization	Membership: Primary Contact/Organization	↑
Address Street Address 1	Address: Street Address 1	↑
Address Street Address 2	Address: Street Address 2	↑

You will probably **not** want to change the mapping of any of these fields, unless it is to choose different address fields. If you want the report to use different fields, it is probably best to customize the report as described later in section 3.

### Step 5: Choose a sort order

The report results will be sorted in the order shown on this screen. In this example, the results will be sorted by last name primarily, by first name secondarily, and so on. You can change this order if you want by simply dragging and dropping the fields. Move your mouse anywhere over the field to drag it.

For example, if you want your report to sort by the organization name, then the last name, just drag the **Membership: Primary Contact/Organization** field to the first place in the list, as shown below.

Merge Field	Data	Sort Direction
Membership Primary ContactOrganization	Membership: Primary Contact/Organization	↑
Person Last Name	Person: Last Name	↑
Person First Name	Person: First Name	↑
Address Street Address 1	Address: Street Address 1	↑



**TIP**  
 Drag rows up or down to change the sort order used in the merged report. Click the arrow to the right to switch between ascending and descending sort for a field.


By default, the sort fields will sort alphabetically/ascending. If you want one of the fields to sort by reverse alphabetical/descending order (for example, sorting by the most recent date or a Z-A sort of companies), click the ↑ icon (ascending) to change it to ↓ (descending).

The example below will sort by primary organization (Z-A), then last name (A-Z), then first name (A-Z), and so on.

Merge Field	Data	Sort Direction
Membership Primary ContactOrganization	Membership: Primary Contact/Organization	↓
Person Last Name	Person: Last Name	↑
Person First Name	Person: First Name	↑

## Step 6: Save/view the report

When you're finished making any changes to the field mapping or the sort order, make sure you have named your report in the **Report Name** field at the top. Then you can either save it using the  button or view it using the  button. Saving the report will allow you to download and view it later; viewing the report lets you preview it before saving.

When you click , the report will download to your computer, and you can open and view it in Microsoft Word. A sample is shown below.

Member Roster				
Monday, October 30, 2006				
Last Name	First Name	Organization	Address	Phone
Aardvark	Andy	Affiniscape	333 African Lane Africa, TX 76543	(555) 555-5555
Abbott	Costello		222 Main Street Austin, TX 78701	(444) 555-1212
Ackerman	Barney	XYZ Corporation	8101 Old Way Peoria, IL 43210	

You can feel free to reformat or alter the report in Word any way you wish (but to make permanent changes, you'll want to customize the template itself, as described below). You can also download a new version at any time, or change the Smart Group used by the report.

## Section 2: Making simple formatting changes to a pre-built template

---

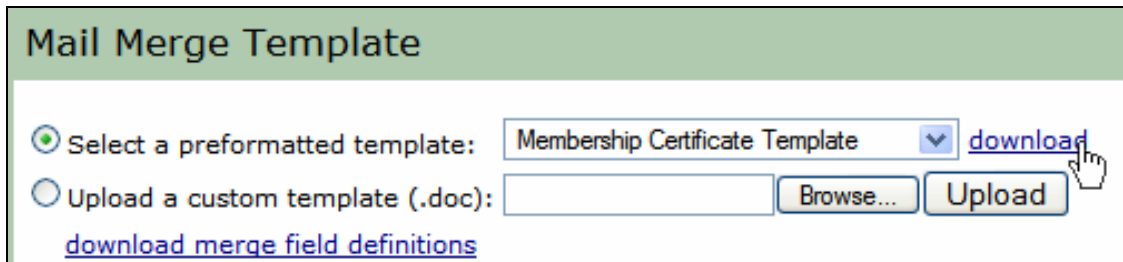
The true power and flexibility of the Word Mail Merge functionality is the ability to download, alter, and re-upload templates. You can change fonts, layout, and formatting, and you can even add and remove fields.

This section will concentrate on changing the look and feel of an existing template without adding any new fields, which is as simple as using Word. The next section will tell you what to do if you wish to add new fields.

It is possible to create a brand-new document from scratch; however, it will normally be easier to find the report that's closest to what you want, download it, and make alterations to it.

## Step 1: Download the source template

From section 1 of these instructions, you have already chosen the preformatted template that best matches the report you'd like to use. Now, click the [download](#) link next to it. This will download the "source" file used to create the report. We will pick the **Membership Certificate Template** as our example.

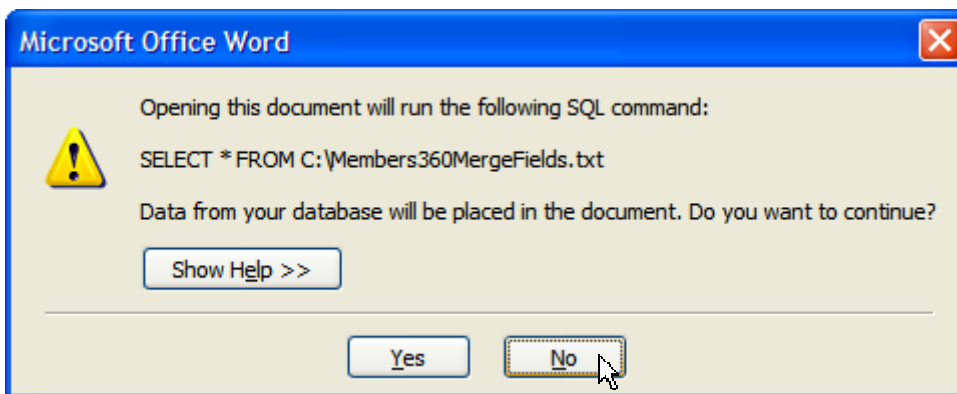


The screenshot shows a window titled "Mail Merge Template". It contains two radio button options. The first option, "Select a preformatted template:", is selected and has a dropdown menu showing "Membership Certificate Template" and a "download" link. The second option, "Upload a custom template (.doc):", is unselected and has a "Browse..." button and an "Upload" button. Below the options is a link: "download merge field definitions".

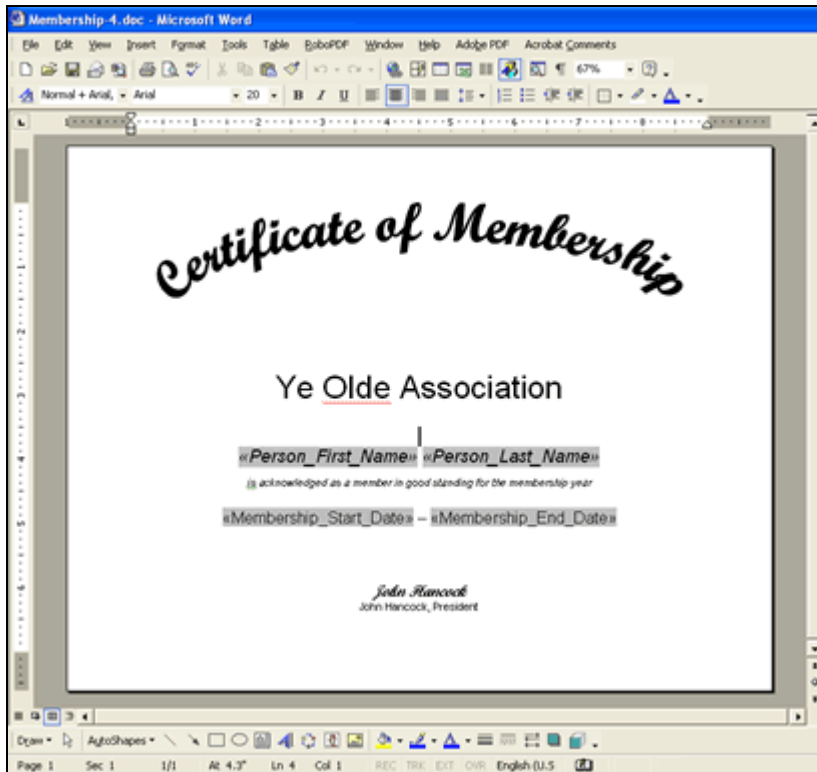
Save this template on your computer, such as on your desktop. Then open it in Word.

### If you are prompted for the data source file

With certain templates, you may get a dialog box like the one below, indicating that the document is looking for a database file. Choose **No** to continue. Section 3 will show you how to include new merge fields in the report, if you choose to.



At this point, your source document will open. The Certificate template source document is shown below.



## Step 2: Customize the formatting

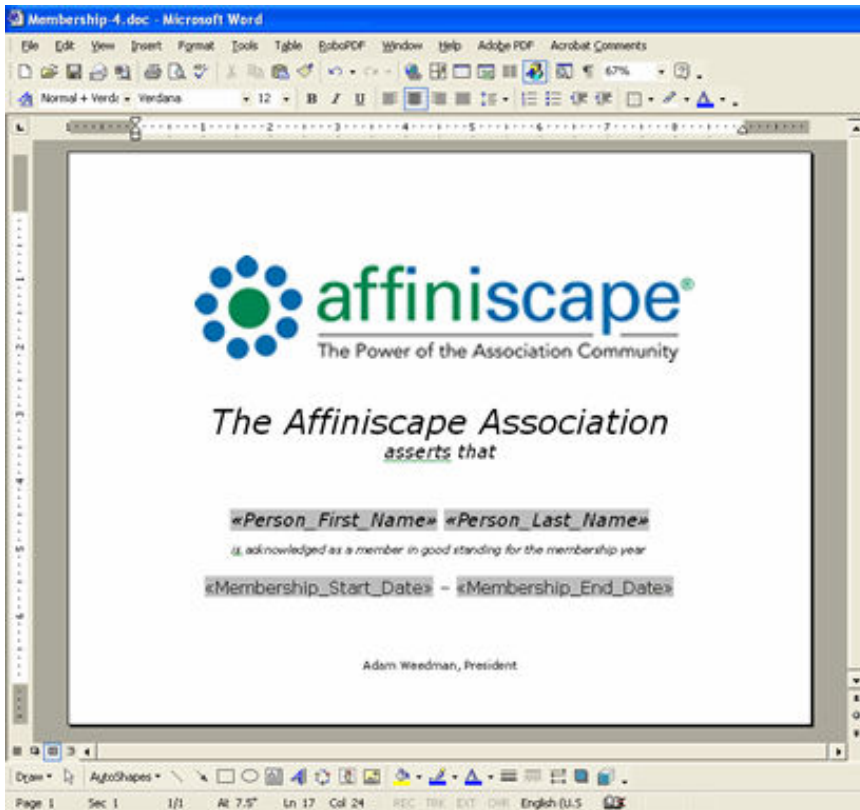
Now that you have the source document open in Word, you can start changing it. You have a whole lot of freedom in terms of formatting, style, and non-field elements. For example, in the Certificate template, you can:

- change the fonts
- add a logo
- replace text
- change the document setup or margins
- delete existing merge fields that you don't need

These are just a few suggestions; you can change anything you like. Don't directly edit the fields (which are the areas with a grey background, such as <<Person\_First\_Name>>), although you can change the font or other formatting options for them.

(Keep in mind that, if you're printing your report on stationery, you can account for the stationery when laying out your report. Just leave blank areas where you want elements of the stationery to show through.)

As an example of reformatting, let's replace the "Certificate of Membership" word art with a logo, change the name and position of the "Ye Olde Association" text, get rid of the phony signature, and change the name of the president. We'll also change the format of all text (including the name and date merge fields) to Verdana. All this would be done with standard Word formatting tools.

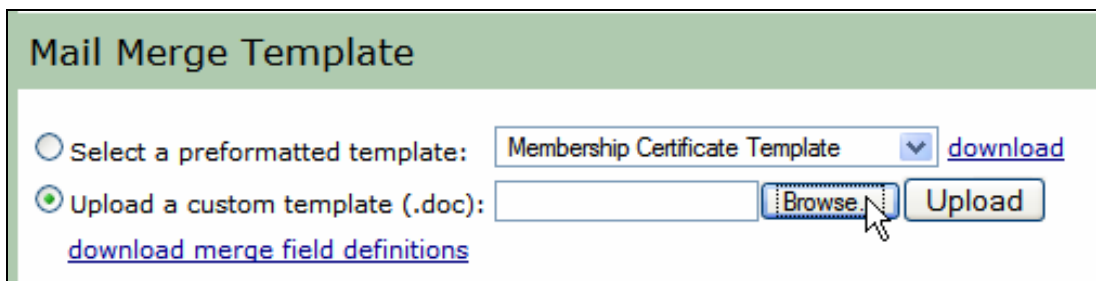


When you are finished, **remember to save the Word document on your computer!** That will prepare you to re-upload it in the next step. We suggest that you use "Save As..." and give the changed file a new name, in case you want to go back to your previous version later.

### Step 3: Re-upload the template

Once you have made the desired changes to the formatting, and you have saved the changes, you simply need to upload the template into Members360°. To do so, first close the Word document. (If you don't, you may get an error when you attempt to upload it.)

Next, choose **Upload a custom template** on your New Report page, and click the **Browse...** button.





Find the newly saved Word file on your computer, select it, and then click **Upload** on the Members360° screen.

### Mail Merge Template

Select a preformatted template:
 Membership Certificate Template
download

Upload a custom template (.doc):
 C:\Documents and Settir
Browse...
Upload

[download merge field definitions](#)

You can now preview the report by clicking  (which will generate the merged Word report using your chosen Smart Group) and save the report by clicking .

## Section 3: Adding new profile fields to a report template

---

Now that you know the basics on reformatting a Word report, you are now ready to take the next step and add new fields to your report. You can add practically any field from a member's Members360° profile into a report (with a few exceptions, such as Password).

If you wish to add fields such as History, Membership Period, Participation, and Accounting (information that resides in the "bottom half" of a member profile in Members360°), see section 4 below.

### Step 1: Download the merge field definitions

The first thing you'll need to do is download the merge field definitions. You can do this using the link on the **Mail Merge** page, as shown. (This link is available regardless of whether you're currently using a built-in template or a customized template.)

### Mail Merge Template

Select a preformatted template:
 (please select)
download

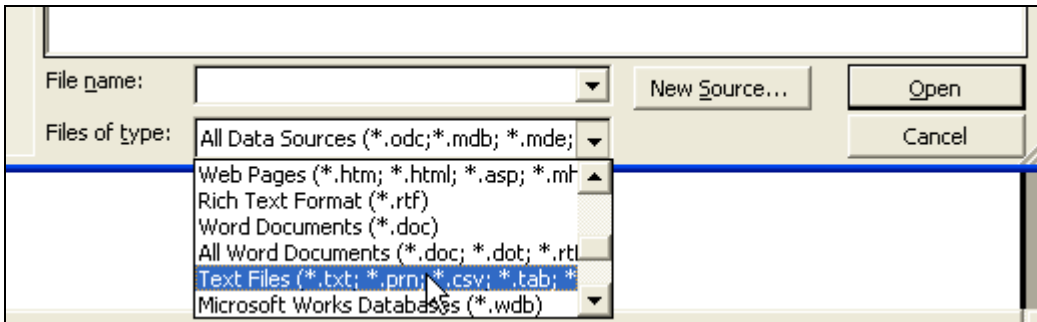
Upload a custom template (.doc):
 
Browse...
Upload

[download merge field definitions](#)
[download current template - Membership Directo](#)

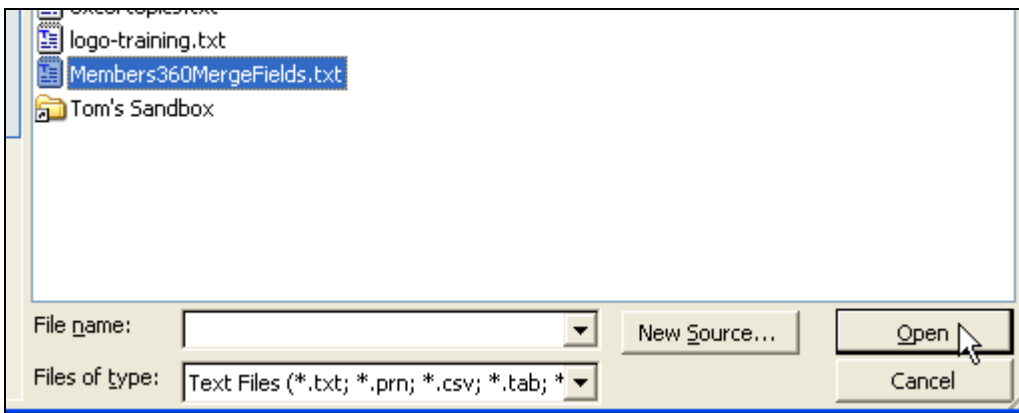
When you click this link, your browser should prompt you to open or save a text file called **Members360MergeFields.txt**. **Make sure you save the file**, perhaps to your My Documents folder. You will use it later in this process.

**NOTE:** You only need to download this file one time. Then you can use it as often as you like when customizing reports. If you create new Members360° fields, you'll probably want to download a new version so you can use your new fields in future reports.

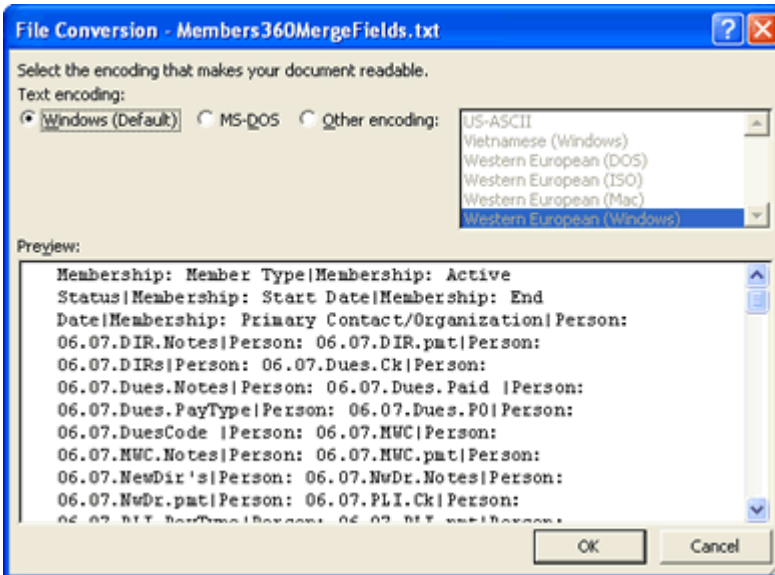




Once you locate the **Members360MergeFields.txt** file, choose it and click **Open**.



If you get a screen asking about encoding, just leave it as the default and click **OK**.

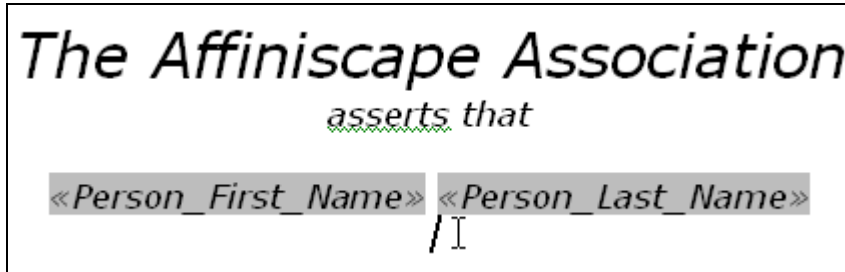



#### Step 4: Add new fields

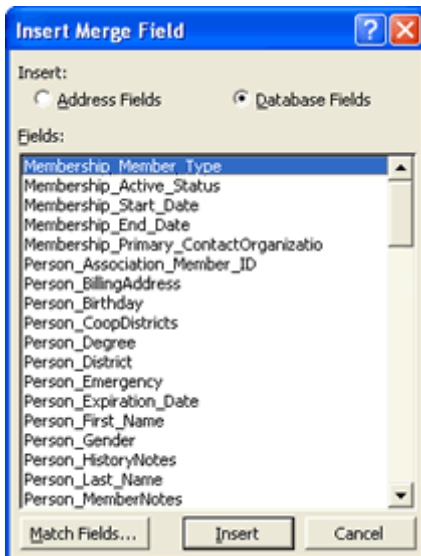
The real fun is adding new fields to your form. Let's say, for example, that you want to add the person's primary organization and member type to their certificate. You will need to add those two fields to the report and lay them out in the manner you like. We'll add the primary

organization in a separate line under the name, and we'll add the member type as part of the sentence under the name.

To add a new field, first click in your document where you'd like to add the field. In our case, we'll create a new line under the First and Last name.



Next, click the **Insert Merge Fields**  button. This will pull up a list of all your available Members360° fields as shown.



Choose the field you wish to add, and click **Insert** at the bottom. Then click **Close** to view the results. Notice that the field name will start with the general type, such as Membership or Person. In our case, we'll add the **Membership\_Primary\_ContactOrganization** field, which represents the primary contact or organization for the member. The results are shown below.



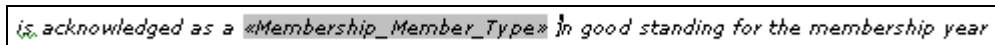
If you wish, you can interpose text with merge fields. For example, you may want to add the word "of" in front of the Primary Organization, so that it says something like "Sally Jones of

ABC Enterprises" on the certificate. To add text, just click before or after the field and type whatever you would like, as in the sample below.



The only problem with the above scenario is that, if the person does not have a primary organization, you'll have the word "of" by itself! We'll look at a way to address that situation in section 3 below.

As another example, let's say you wanted to replace the word "member" in the sentence below the name with the actual member type. No problem! Just delete the word "member" and insert the **Membership\_Member\_Type** field in its place, as shown below.



Again, you need to think about the interaction between your field and the text around it. Notice that we added a space both before and after the field, so that it will be properly spaced. Also, what happens if a member type starts with a vowel, such as "Associate"? The certificate would then say "as a Associate" which would look bad. You could resolve that putting "a/an" on your report. Or, if you are a stickler for formatting, you could have two different versions of the report, one with "a" and one with "an", and use two different Smart Groups with it, one which only includes member types starting with a consonant and one that only includes member types starting with a vowel. If you are creative and think ahead, you can really make your reports perfect, and very professional!

(If you are familiar with advanced Mail Merge concepts, please note that If...Then... fields are not currently supported by Members360°.)

Finally, note that you can easily remove a field you don't want. To do so, simply highlight and delete the field. This is identical to deleting text you don't want.

## Step 5: Save and upload your template

When you are finished making formatting and field changes to your report, you need to upload it back to Members360° exactly as described in the previous section.

First, remember to close your Word document! Next, choose **Upload a custom template** on your New Report page, and click the **Browse...** button.

Mail Merge Template

Select a preformatted template: Membership Certificate Template

Upload a custom template (.doc):

[download merge field definitions](#)

Find the newly saved Word file on your computer, select it, and then click **Upload** on the Members360° screen.

**Mail Merge Template**

Select a preformatted template: Membership Certificate Template [download](#)

Upload a custom template (.doc): C:\Documents and Settir [Browse...](#) [Upload](#)

[download merge field definitions](#)

You can now preview the report by clicking **print** (which will generate the merged Word report using your chosen Smart Group) and save the report by clicking **save**.

## Section 4: History-type fields and advanced techniques

---

So you've learned the basics, but you need more? There's a ton of additional functionality and customization you can take advantage of, if you're willing to dive in! Need to design for a custom label or name badge format? No problem! Need to design a three-column report? You can do it! Want to conditionally add text around fields? You got it!

Before going any further, please be advised that this functionality is not for the faint of heart, especially if you've not used Word Mail Merge to a great degree before. However, if you're willing to be adventuresome and go step-by-step, you can tap into some extreme flexibility in designing reports.

### Adding "History-type" fields

Almost all the information listed in the "bottom half" of a member record in 360 can be included for that member on a report.

History			
<a href="#">Membership</a> <a href="#">Participation</a> <a href="#">Events</a> <a href="#">Certifications</a> <a href="#">Forms/Surveys</a> <a href="#">Accounting</a> <a href="#">Relationships</a>			
show: <input type="text" value="All"/>			
Date	Type	Detail	Creation
6/8/07 4:19 PM	Participation	Added to as Member with a Start Date of 06/06/2007 and an End Date of 06/14/2007.	Automated
6/8/07 4:18 PM	Participation	Added to as Chief Water Fetcher with no Start Date and no End Date.	Automated
6/8/07 4:18 PM	Membership	Updated membership entry from member type Contact to member type Contact, from start date 6/1/2007 t... <a href="#">[click for more]</a>	Automated
6/8/07 4:18 PM	Membership	Updated membership entry from member type Contact to member type Contact, from start date 1/1/2000 t... <a href="#">[click for more]</a>	Automated
6/8/07 3:26 PM	Membership	Updated membership entry from member type Contact to member type Contact, from start date 6/30/2007 ... <a href="#">[click for more]</a>	Automated

1 to 5 of 26 show  per page

This includes the following types of fields:

- History fields (date and type of history note, history note details, etc.)
- Membership history fields (start/end date and membership type for each membership period the member has)
- Participation fields (groups the member is part of, along with group/participation types and start/end dates)
- Event and form history (events registered/attended, forms filled out, dates, etc.)
- Certification history (certifications achieved/in progress, dates, classes taken, etc.)
- Accounting history (including most line item fields and open/total/balance fields)
- Relationships (lists related members and types of relationship)

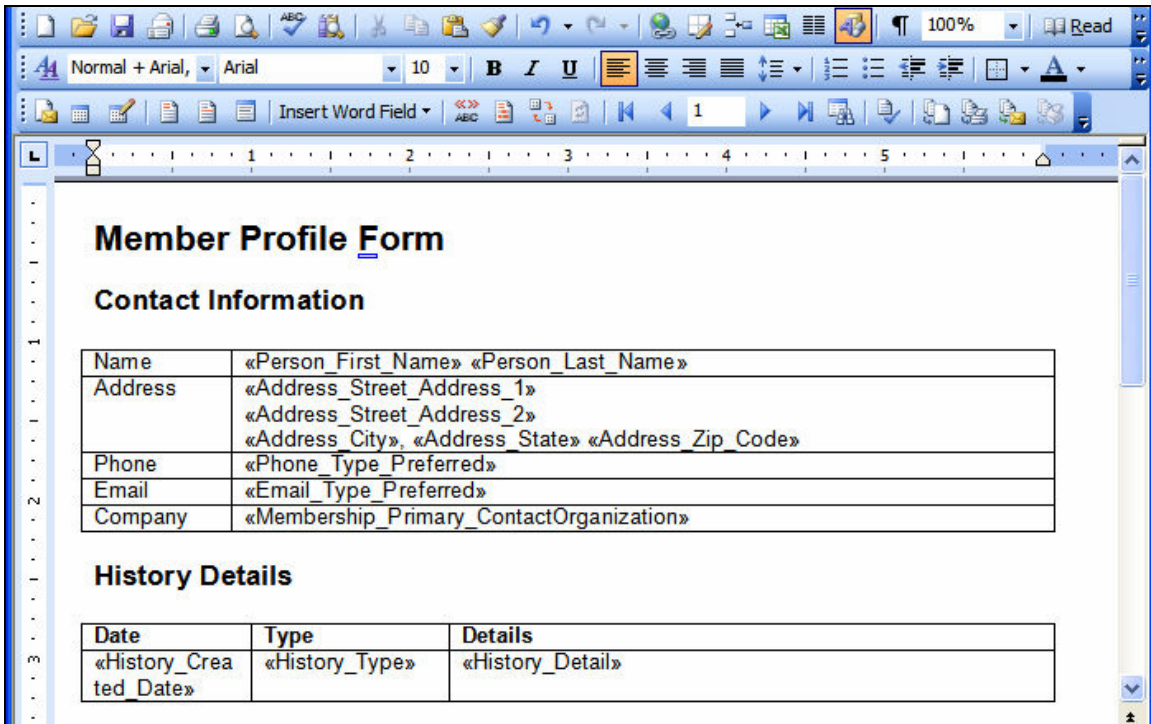
The easiest way to add history is to find a report that already uses history and copy/paste the desired fields. However, the following instructions will show you how to add history fields from scratch.

### Step 1: Add the desired history fields

The first step is the easiest. Just choose the history fields you wish to add, and put them on the form. Two important points about this:

1. Only add one type of history field (History, Membership, etc.) at a time.
2. Keep the fields close to each other, as you'll have to wrap some fields around all of them to make them work.

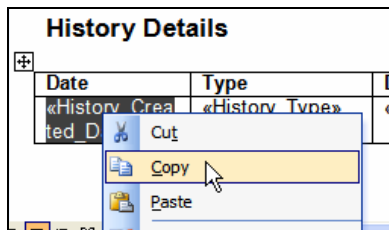
In the example below, we're adding some history fields to a member profile report. Notice that, in the History Details section at the bottom, we've added three different history fields (Created Date, History Type, and History Detail).



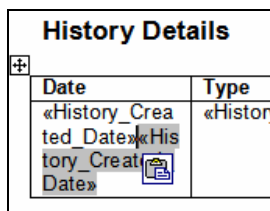
## Step 2: Add Table Start/End tags around the fields

In order for Members360° to recognize the history-type merge fields properly, and to allow it to repeat the block of fields for each item linked to the member, you need to add TableStart and TableEnd tags to your document. This is the trickiest part (and the biggest reason to start with an existing example if possible!), so go slow and double-check yourself frequently.

1. Highlight and copy your first history field.

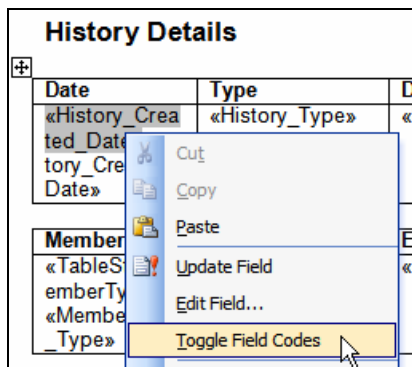


2. Paste the copied field right in front of the original field. This will basically "double" the field.

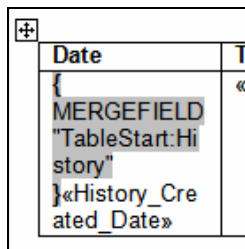


3. Change the text of this first field to «TableStart:History», where you substitute your field type for the word *History* according to the following list. (Pay close attention to the fact that in some cases there's a final S, and in some cases there's not. Also, do **NOT** put a space between the colon and the history type!)

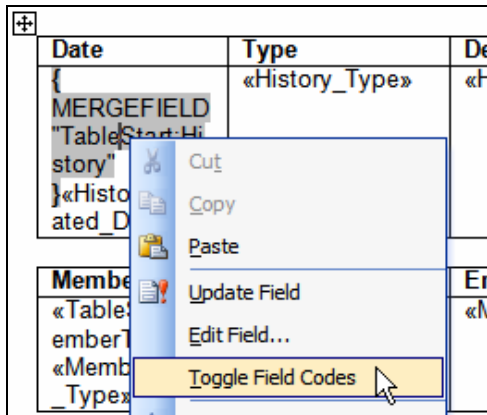
- History fields: «TableStart:History»
  - Membership fields: «TableStart:MemberTypes»
  - Group participation fields: «TableStart:Groups»
  - Event fields: «TableStart:Events»
  - Certification fields: «TableStart:Certifications»
  - Form submission history fields: «TableStart:Forms»
  - Accounting fields: «TableStart:AR»
  - Relationship field: «TableStart:Relationships»
4. Right-click the field and choose **Toggle Field Codes**.



5. You will see the field name again when you switch to viewing the field code. It will look something like { MERGEFIELD "History\_Created\_Date" }. Change the part in quotes to match what you entered in step 3 (in our example, TableStart:History). (Be careful not to add a space anywhere within the quotes.)



- Right-click the field again, and again choose **Toggle Field Codes**.



- Copy the TableStart tag you just created, and paste it after the last history field you added.

Date	Type	Details
«TableStart:History»«History_Created_Date»	«History_Type»	«History_Detail»«TableStart:History»

- Change the wording of the newly pasted field from TableStart to TableEnd, as demonstrated below.

Details
«History_Detail»«TableEnd:History»

- Right-click this field, choose **Toggle Field Codes**, and change it from TableStart to TableEnd in the field code as well.

Details
«History_Detail»{ MERGEFIELD "TableEnd:History" }

- Finally, right-click the field again and choose Toggle Field Codes again. The finished result will look something like this.

Date	Type	Details
«TableStart:History»«History_Created_Date»	«History_Type»	«History_Detail»«TableEnd:History»

Whew! Now you see why it's easier to copy/paste from an existing report, rather than manually creating the TableStart/End tags yourself. Regardless, as long as you have the tags defined, you can have as many fields **of that type** between the TableStart and TableEnd tags

as you wish. What's more, when you run the report, Word will create a new line, or row, for each matching history item. An example of such a report follows.

Member Profile Form		
Contact Information		
+		
Name	Tom Bisciglia	
Address	6200 Bridgepoint Pkwy Bldg 4, Suite 550 Austin, TX 78730	
Phone	(512) 366-7100	
Email	tom@affiniscape.com	
Company	Affiniscape	
-		
History Details		
Date	Type	Details
6/8/2007 4:19:02 PM	Participation	Added to Board of Directors as Member with a Start Date of 06/06/2007 and an End Date of 06/14/2007.
6/8/2007 4:18:49 PM	Participation	Added to Membership Committee as Chief Water Fetcher with no Start Date and no End Date.
6/8/2007 4:18:27 PM	Membership	Updated membership entry from member type Contact to member type Contact, from start date 6/1/2007 to start date 6/1/2006 and from end date 5/30/2008 to end date 5/30/2007.
6/8/2007 4:18:17 PM	Membership	Updated membership entry from member type Contact to member type Contact, from start date 1/1/2000 to start date 1/1/2000 and from end date 5/30/2007 to end date 5/30/2007.

### Step 3: Add range restrictions to history blocks if desired

If you don't want to get every single matching item for a member, but rather only want certain matching items, you can add range restrictions. For example, you may want only Communication history items, or a certificate for only a specific certification or course, or only events where the member actually attended. For these kinds of reports, you can add range restrictions to the Table Start and End tags. Here's how to do it:

1. Find the TableStart tag for the history items in question.
2. Right-click the TableStart tag and choose **Toggle Field Codes**.
3. After the name of the field type (History, Forms, etc.), add the following items: the field by which you want to restrict, the beginning of the restrict range, and the end of the restrict range. A few examples follow.

- If you want only History items of type Communication, you would use the following TableStart tag:

«TableStart:"History,History\_Type,Communication,Communication"»

- If you want only event attendance for events whose names start with "Continuing Education", you could use the following TableStart tag:

«TableStart:"Events,Event\_Name,Continuing Education,Continuing F"»

(Note: We used "Continuing F" as the end of the range because, alphabetically, that will probably only include events whose names start with "Continuing

Education". Technically, if you had an event called "Continuing Engineering," it would be included too, so an even safer ending range would be "Continuing Educatio" since "o" is after "n" in the alphabet.)

Play around with the filters and see what you can achieve.

## Creating a repeating row

One of the most basic things you'll need to do is to create a row of information that repeats on a page for each member in your report. This is a must for something like a roster or directory.

The manner by which you create a repeating row is demonstrated in most of the prebuilt reports, with the exception of full-page reports like the certificates or the letter. Let's take a look at one – the Member Roster – to see how repeating rows are achieved. Take a look at a sample of the finished report, and you'll see how there's a top header and a single header row, followed by a repeating row for each member.

Member Roster				
Monday, October 30, 2006				
Last Name	First Name	Organization	Address	Phone
Aardvark	Andy	Affiniscape	333 African Lane Africa, TX 76543	(555) 555-5555
Abbott	Costello		222 Main Street Austin, TX 78701	(444) 555-1212
Ackerman	Barney	XYZ Corporation	8101 Old Way Peoria, IL 43210	

You can look at it on your own by downloading the **Member Roster Template** using the technique described in the previous section.

Look at the Member Roster Template, and if you look close, you'll see a couple fields that don't correspond to anything in the Members360° database. Those fields are **<<TableStart: Suppliers>>** and **<<TableEnd: Suppliers>>**. Each is shown separately below, and each has been bolded to help you see it easily.

Last Name	First Name	Orga
<b>&lt;&lt;TableStart:Suppliers&gt;&gt;</b> «Person_Last_Name»	«Person_First_Name»	«Member Organization»

Member Type	Status
Preferred	«Membership_Member_Type»
	«Membership_Active_Status» <b>&lt;&lt;TableEnd:Suppliers&gt;&gt;</b>

These special fields define a repeating row. Basically, the system will repeat this row as often as possible on each page. Any data that is not contained within these fields is only printed once per page, which is why the column headings only show up one time.

Also, the word **Suppliers** in the field name is arbitrary. You can use any label you want, as long as you use the same label for both the starting and ending fields. That is, you could use **<<TableStart: MyBigToe>>** and **<<TableEnd: MyBigToe>>** if you want. These fields are not shown in the eventual report; they work behind the scenes to define a repeated row.

If you need to create fields like these yourself, you can actually follow the instructions above for creating the TableStart/End tags related to history items. The difference here is that the word after TableStart is arbitrary, as long as it matches the name after TableEnd. Just make

sure you use the Toggle Field Codes technique to change the field code (in addition to changing the field name).

## Creating multi-column reports

Multi-column reports are relatively simple to create. There are two basic kinds of columns you can create:

- Table columns, useful for repeating rows of information
- Newspaper-style columns, where a column goes from the top to the bottom and then starts again at the next column over

We have good examples of each kind of column-based report you can use as a starting point. For table columns, try the **Member Roster** report, which has several columns of information. You can add and remove columns and reformat the report as desired.

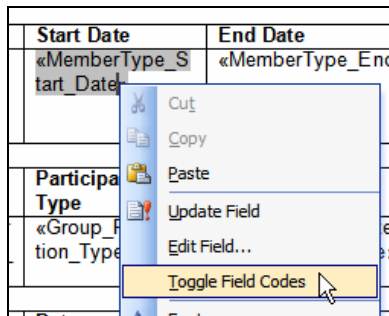
For newspaper-style columns, try the **Member Directory** report. We do some clever stuff here to repeat information down the column and then have it repeat, so again, start with what we provide and modify as desired.

## Formatting date fields

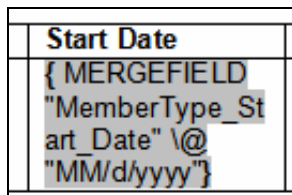
A lot of the date fields you add to your reports will have a rather "ugly" format by default – something like 2007-03-06 04:12:36. That's because Members360° uses standard database date format, which is great for querying but bad for reporting.

If you wish to use a nicer-looking date formats, such as "January 1, 2007" or "5/1/2008" or even "March 2009", you can add formatting to your date field. Here's how:

1. Right-click the date field in question and choose **Toggle Field Codes**.



2. After the field name, type `\@ "MM/d/yyyy"` where you substitute your formatting of choice in the parentheses. You can use any of the following codes to construct your ideal date/time format.



- yyyy: Four-digit year

- yy: Two-digit year
- MMMM: Full name of month
- MMM: 3-letter abbreviation of month
- MM: Two-digit month number (including leading zero if applicable)
- M: Month number with no leading zero
- dddd: Complete name of day
- ddd: 3-letter abbreviation of day
- dd: Two-digit day number (including leading zero if applicable)
- d: Day number with no leading zero
- HH: 24-hour hour number with leading zero
- H: 24-hour hour number with no leading zero
- hh: 12-hour hour number with leading zero
- h: 12-hour hour number with no leading zero
- mm: Minutes with leading zero
- m: Minutes with no leading zero
- ss: Seconds with leading zero
- s: Seconds with no leading zero
- am/pm: AM or PM as appropriate

Examples (all applied to a date of August 6<sup>th</sup>, 2007 at 8:15 in the morning):

- /@ "MMMM yyyy" (August 2007)
- /@ "dddd, MMMM d, yyyy" (Monday, August 6, 2007)
- /@ "MM/dd/yy" (08/06/07)
- /@ "d/M/yyyy" (6/8/2007 – international date style)
- /@ "yyyy-MM-dd" (2007-08-06)
- /@ "MMM d yyyy at h:mm am/pm" (Aug 8 2007 at 8:15 AM)

3. Save the report and re-upload it to Members360° to test out the format and ensure it works.

## **Conditional display of fields and text**

It is possible to make text that displays only if a field is non-blank. These techniques can keep you from having "holes" or strange wording on your report when someone has a blank in a certain field.

### **Hiding text before/after a field if the field is blank**

Let's say you want to include the middle name of a member in a mailing label. You would normally add the following merge fields:

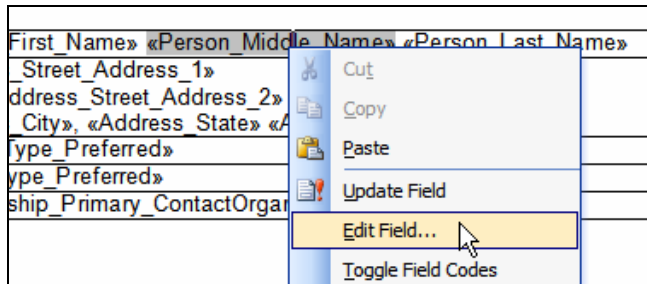
«Person\_First\_Name» «Person\_Middle\_Name» «Person\_Last\_Name»

The problem is, for people with no first name, you get an extra space, like this:

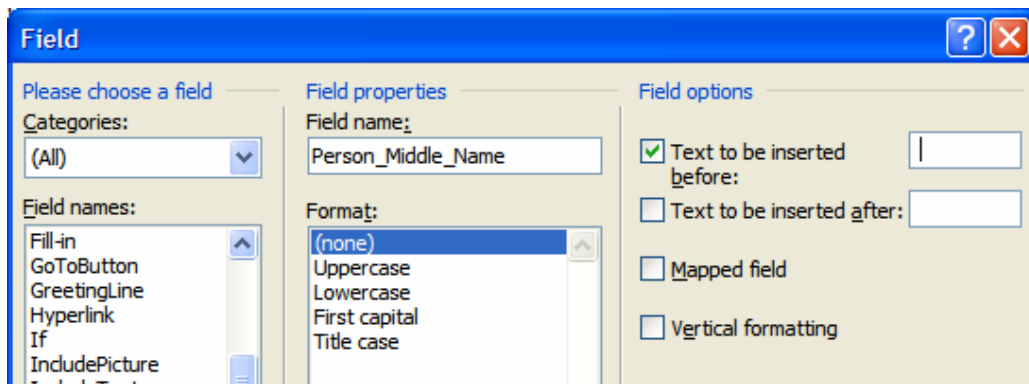
**Tom Bisciglia** (rather than **Tom Bisciglia**)

While not a tragedy, this doesn't look too professional. A better bet is to add the space conditionally – that is, only if the person has a middle name. Here's how:

1. Right-click the field and choose **Edit Field**.



2. On the right, check off either Text to be inserted before or Text to be inserted after as appropriate. In our case, we could choose either, since the conditional space can go on either side of the middle name. Then type the text to be inserted – in our case, a space.



3. Click **OK** and remove any unnecessary space or wording from the document. You'll see the conditional text showing as part of the gray highlight when you click the field.

Now, the name fields will display correctly whether or not a middle name is included. That is, **Thomas J. Bisciglia** will display correctly as will **Thomas Bisciglia** (since the space before J. is only included when the J. itself is included).

Note that you can also do this with text, such as labels or other text. For example, let's say you wish to have a form letter that says "Our records indicate that you work at XYZ Company." It might be awkward for the form letter to say "Our records indicate that you work at ." if the person has no primary organization. So instead, you could add **Our records indicate that you work at** as the text to be inserted before the Primary Org field, and **.** as the text to be inserted after. That way, the entire sentence only appears if the person has a Primary Organization.

## Field codes and hiding an entire line if it's blank

This same technique can be used to make an entire line disappear if the field is blank. This is very handy, for example, with fields like Address Line 2, which you normally wish to suppress when blank (rather than having a blank row).

To accomplish this, you need to use field codes. When you add conditional text after a field (such as adding the text " type" after a Member Type field) using the technique shown above, Word uses a field code called /f to accomplish it, like this:

```
{ MERGEFIELD Membership_Member_Type /f " type" }
```

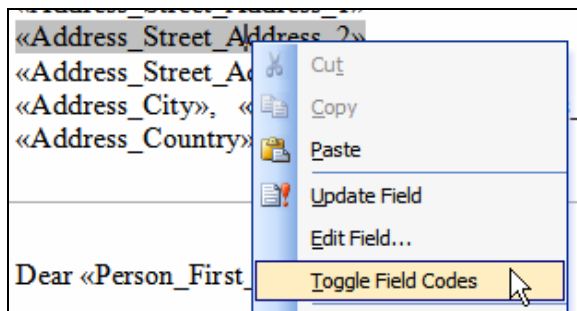
You can use this /f code to conditionally add a blank line after a field, so that the blank line only shows if the field has data. For Address Line 2, this would look like:

```
{ MERGEFIELD "Address_Street_Address_2" \f "  
" }
```

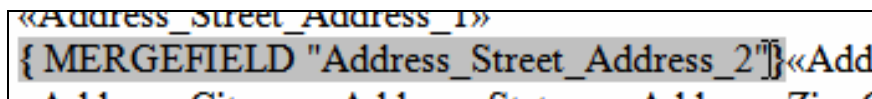
Notice that, after the /f, there is a set of quotes, then a new line, then the matching set of quotes.

To make one of your fields hide the entire line when blank, follow these steps:

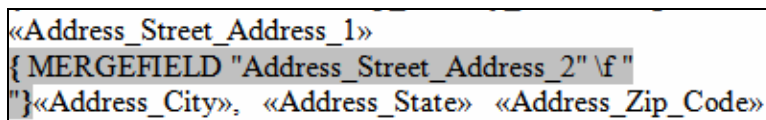
1. Right-click the field and choose **Toggle Field Codes**.



2. In the field code, click just after the name of the field. (If the field name is in quotes, click just after the quotes.)



3. Type a space, then /f, then another space, then quotation marks, then press <Enter>, and finally another set of quotation marks.



That's it! Now, the field in question (in our example, Address Line 2) will only include a carriage return if non-blank. If a person doesn't have a second address line, the carriage return will be suppressed too, and there won't be a hole in the report for that member.

## Appendix: Grouped reports

---

Currently, Members360° Word Mail Merge reports do not have the ability to include arbitrary grouping levels. That is, you could not create a report of companies and related members automatically:

ABC Company

Jed Smith, jed.smith@email.com  
Felicia Rodriguez, f.rodriguez@whatever.com  
Jay Gambini, j.gambini@something.com

XYZ Company

Norris Jones, n.jones@mymail.com  
Heather Poulis, heather.poulis@anything.com

etc.

You could, however, create a report that lists the primary org and then specific member information, and sort it by org; the only difference is that it would repeat the company name for each member, like:

ABC Company

Jed Smith, jed.smith@email.com

ABC Company

Felicia Rodriguez, f.rodriguez@whatever.com

ABC Company

Jay Gambini, j.gambini@something.com

XYZ Company

Norris Jones, n.jones@mymail.com

XYZ Company

Heather Poulis, heather.poulis@anything.com