eTapestry New Features Guide

07/30/2015 eTapestry 7.16 eTapestry New Features US

©2015 Blackbaud, Inc. This publication, or any part thereof, may not be reproduced or transmitted in any form or by any means, electronic, or mechanical, including photocopying, recording, storage in an information retrieval system, or otherwise, without the prior written permission of Blackbaud, Inc.

The information in this manual has been carefully checked and is believed to be accurate. Blackbaud, Inc., assumes no responsibility for any inaccuracies, errors, or omissions in this manual. In no event will Blackbaud, Inc., be liable for direct, indirect, special, incidental, or consequential damages resulting from any defect or omission in this manual, even if advised of the possibility of damages.

In the interest of continuing product development, Blackbaud, Inc., reserves the right to make improvements in this manual and the products it describes at any time, without notice or obligation.

All Blackbaud product names appearing herein are trademarks or registered trademarks of Blackbaud, Inc.

All other products and company names mentioned herein are trademarks of their respective holder.

eTapestry New Features-2015

Contents

7.16.0 NEW FEATURES 1
Internet Explorer 9 ..... **1**
DIY Forms and Personal Fundraising **1**
Name Formats **1**
Additional Use Cases 2
Account Record Data Entry 2
Where Do the New Name Fields Appear? 6
My Organization - Data Entry Rules Page **10**
Security for the Data Entry Rules Page 12
Intacct Export Fields **13**

7.16.0 New Features

Internet Explorer 9 ..... **1**

DIY Forms and Personal Fundraising **1**

Name Formats **1**

My Organization - Data Entry Rules Page **10**

Intacct Export Fields **13**

This guide lists new features available in the ***eTapestry*** 7.16.0, released on August 2, 2015.

Internet Explorer 9

To support timely releases with complete functionality testing required for browsers, *Internet Explorer 9* is no longer supported.

Note: When you use non-supported browsers, you can still log in and use the program and online forms, but some features may not render correctly.

DIY Forms and Personal Fundraising

The following social media websites no longer appear on online forms, such as Do-It-Yourself (DIY) forms and Personal Fundraising web pages.

- Digg
- MySpace
- Delicious

Name Formats

Note: If you are a new ***eTapestry*** customer as of the 7.15.0 and 7.16.0 releases, the Name Format enhancement and its corresponding features are currently enabled and the conversion tool does not apply to you. We recommend you continue to review this section, along with the remainder of the 7.16.0 *New Features Guide*, to make sure you are completely aware of all changes for this release.

If you are an existing customer prior to the 7.15.0 release, the Name Format enhancement and its corresponding features become available to you during a phased roll out for all remaining ***eTapestry*** customers. This begins

when 7.16.0 releases on August 2, 2015 and culminates in Fall 2015. Prior to your organization's implementation, you will receive notification within your ***eTapestry*** application with more information about how to prepare for the enhancements.

After your organization has been upgraded to 7.16.0, your account data entry and processes throughout ***eTapestry*** change in multiple ways that benefit your organization. For example, when you create an account, you now select whether the Name Format is for an Individual, Family, or Business. When you select Individual, you enter name information in separate fields for **Title**, **First Name**, **Middle Name**, **Last Name**, and **Suffix**. When you previously entered information in the single **Name** field, it is likely you did not always have enough flexibility for processing needs.

Additional Use Cases

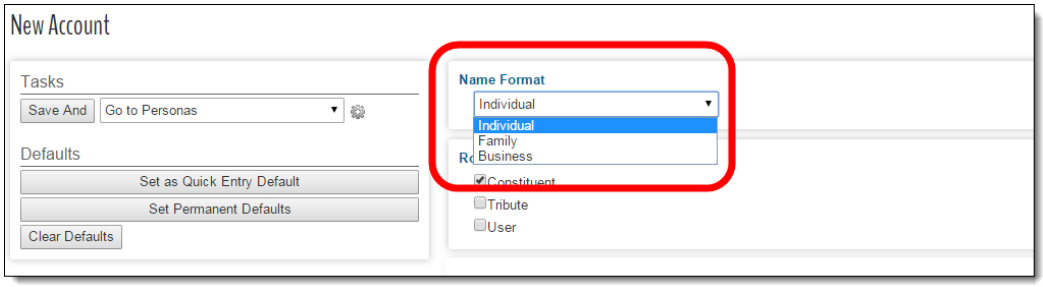
In addition to improving best practices and establishing data entry consistency for your users, these name features benefit your organization in the following ways.

- The user interface includes enhanced usability
- You can now create reports with **First Name** and **Last Name** information in separate columns
- Salutations are consistent for improved correspondence
- Individual name fields interact better with third party integrations. For example, match rates improve when you use analytics such as AddressFinder (NCOA).
- International name improvements

To avoid Name Format mismatches and conflicts, your System Administrator should complete the new Name Format and Salutation Standards Conversion Tool as soon as possible. This tool converts your existing account data to a Name Format and also splits individual names. After the conversion is complete, your existing data is consistent with new data in 7.16.0 and you can take full advantage of all Name Format new features throughout ***eTapestry***. For full details about this tool, refer to Name Format and Salutation Standards Conversion Tool Guide.

Account Record Data Entry

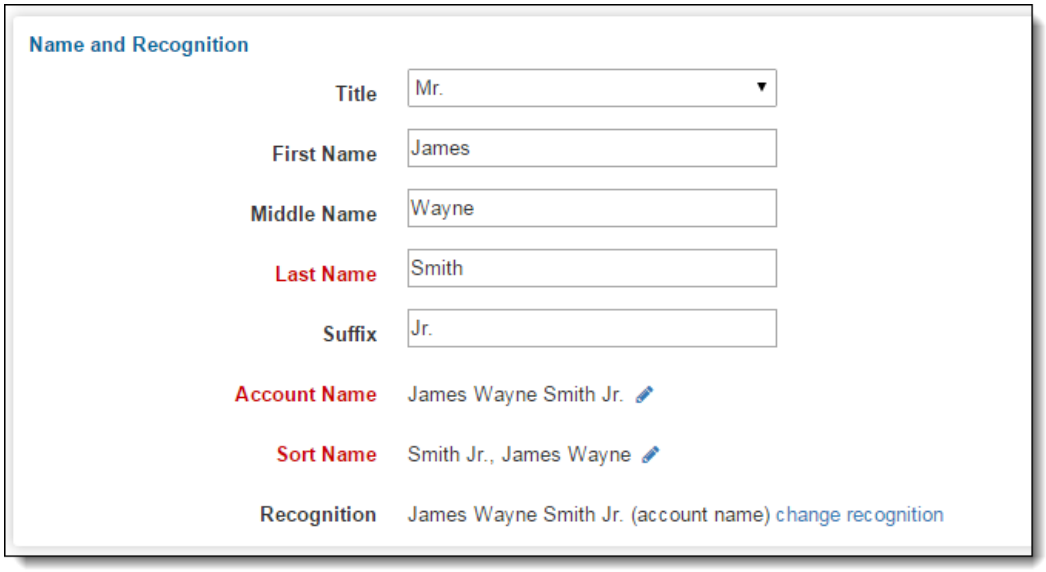
The new **Name Format** section now appears at the top of the page when you add an account. In the drop down field, select whether the record is for an Individual, Family, or Business.



- **Individual:** For example, Jane Johnson Smith or Joseph Michael Smith.
- **Family:** For example, The Smith Family or Jane and James Smith.
- **Business:** For example, AAA Concrete.

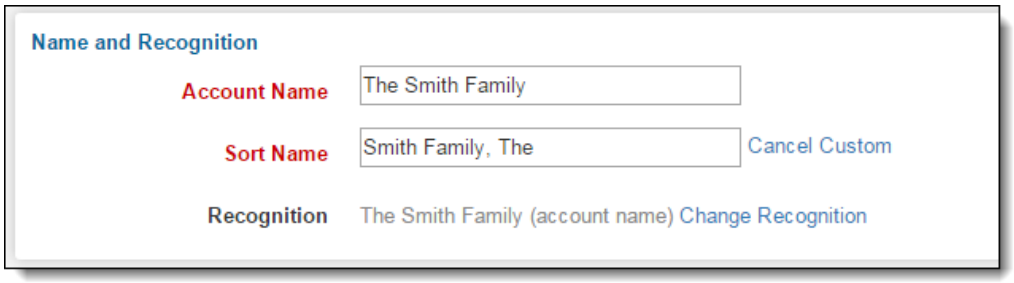
Your selection determines the fields that appear in the **Name and Recognition** section. For example, when you select "Individual," the **First Name** and **Last Name** fields appear. The complete list of individual fields that appear are:

- **Title**
- **First Name**
- **Middle Name**
- **Last Name**
- **Suffix**
- **Account Name**
- **Sort Name**
- **Recognition**



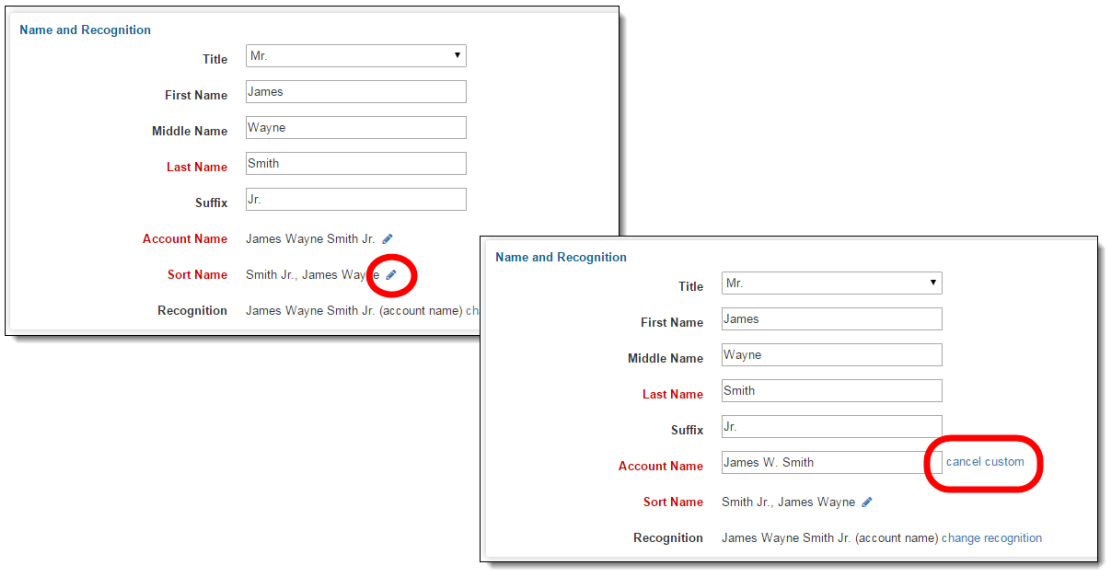
Note: The **Name** field updates to the **Account Name** field for each Name Format on account records. There is no change in functionality for the field. You continue to use it to display the name in the header on the account record and you can also continue to use it for processes such as reports and correspondence templates. For additional flexibility, the **Title**, **First Name**, **Middle Name**, **Last Name**, and **Suffix** fields now appear in these processes so you can improve name information for accounts with the Individual Name Format. For example, you can include these fields to separate first and last name in report columns.

When you select "Family" or "Business," only the **Account Name**, **Sort Name**, and **Recognition** fields appear.



When you select Individual for the Name Format, ***eTapestry*** configures name values in the **Account Name**, **Sort Name**, **Recognition**, **Short Salutation**, **Long Salutation**, and **Envelope Salutation** fields as you enter name information in the **First Name**, **Middle Name**, **Last Name**, and **Suffix** fields. When you select Family or Business, the program configures name values in the **Sort Name**, **Recognition**, **Short Salutation**, **Long Salutation**, and **Envelope Salutation** fields as you enter it in the **Account Name** field. These name values are based on the auto-generated configurations you now select from **Management**, **My Organization**, **Data Entry Rules**. This data entry process helps you enter data faster and provides name consistency, but you can change the data to enter custom information. For more information about these configurations, refer to My Organization - Data Entry Rules Page on page 10.

To edit a default name in the **Account Name** and **Sort Name** fields, click the pencil beside the field and enter the name in the text field that appears. When you do this, ***eTapestry*** no longer attempts to automatically populate these fields for an account. To remove the custom entry and return to the default name, click **Cancel Custom** beside the field. The original default name appears in the field.



Tip: When you include "The" as a part of a family or business name, ***eTapestry*** automatically sorts by the last name. The application ignores "The" and places the word at the end of the name in lists. For example, if you enter "The Smith Family" in the **Account Name** field, the name appears in the S sort name section as "Smith Family, The" in lists. *New eTapestry Users: This is a change from the 7.15.0 release.*

In the **Recognition** field, click **Change Recognition** to select the recognition type. The Change Recognition Type screen then appears for you to select one of four options. On this screen, select the type that applies to the constituent's name request for recognitions such as donor walls, donor kiosks, events, or the Annual Report for Board Members. These types have been replaced with new type names. There is no change in functionality for

these types; this has been done to help you more easily identify the purpose of the recognition type.

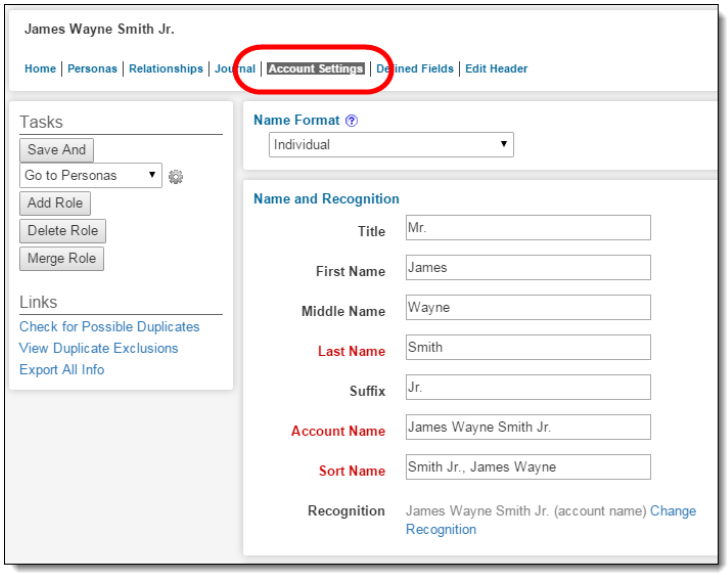
Note: The **Recognition** field now only appears when you select the **Constituent** role for the account. *New eTapestry Users: This is a change from the 7.15.0 release.*

- "Constituent Name" is now "Use Account Name"
- "Don't Recognize" is now "No Recognition"
- "Anonymous" (no change)
- "Use Recognition Name" is now "Custom"

Tip: These recognition type updates also appear when you query on account information.

Account Settings Page

To provide a more descriptive name that makes it easier to identify the purpose of the page, the Other page has been renamed to the Account Settings page. *New eTapestry Users: This is a change from the 7.15.0 release.*



When you edit name and recognition information on this page, the **Name Format** section appears at the top of the page so you can change it to an Individual, Family, or Business. Under **Name and Recognition**, the fields appear when you created the account also appear on the page. However, when you edit the **First Name**, **Middle Name**, and **Last Name** fields on this page, ***eTapestry*** does not automatically configure name values in the **Account Name**, **Sort Name**, and **Recognition** fields as it does when you add an account. It also does not display the pencil icon and **Cancel Custom** link beside the **Account Name** and **Sort Name** fields. To edit name values in these fields, you must manually enter the information.

New Gift/Pledge Page

When you add a new gift or pledge, the Recognition Information section includes types that have been renamed. There is no change in functionality for these types; this has been done to help you more easily identify the purpose of the recognition type.

- "Use Donor Recognition Name" is now "Use Account Recognition Setting"
- "Don't Recognize" is now "No Recognition"

The Anonymous and Use Transaction Recognition Name types remain the same.

Tip: These recognition type updates also appear when you query on transaction information.

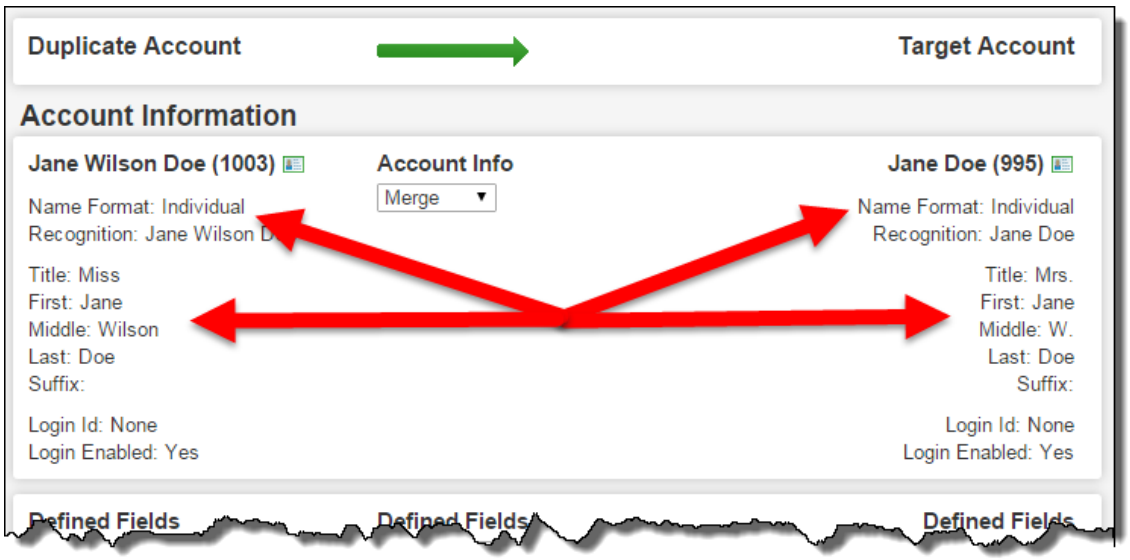
Where Do the New Name Fields Appear?

The new **Title**, **First Name**, **Middle Name**, **Last Name**, and **Suffix** fields appear throughout ***eTapestry*** so you can take advantage of the flexibility the separate name fields provide throughout the program in various processes. Review this section for more details about these enhancements.

Check for Possible Duplicates

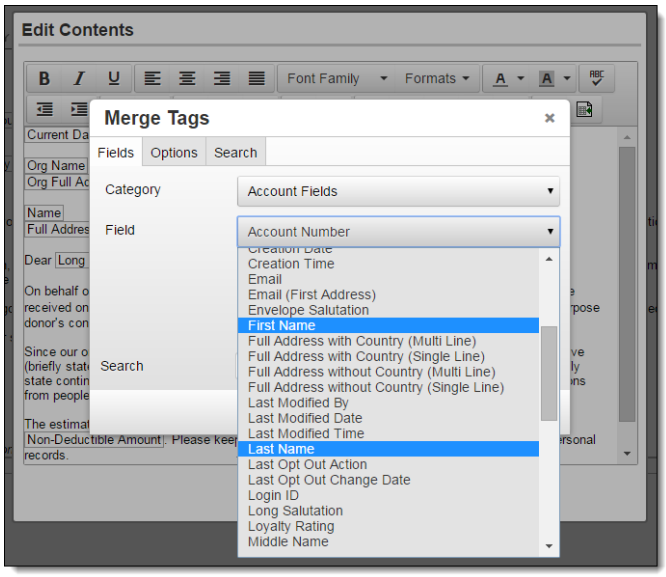
The **Name** field has been renamed to **Account Name** and the search continues to use values in this field to identify possible duplicates for individual, family, and business accounts.

The Merge page now displays the **Name Format** for the duplicate and target accounts. Under **Account Information**, when you click **Show More Detail**, individual name information also displays in the new name fields.



Correspondence

The **Name** field has been renamed to **Account Name** and you can continue to use this merge field in your correspondence templates. When you create or edit a correspondence template, the **Name Format**, **Title**, **First Name**, **Middle Name**, **Last Name**, and **Suffix** merge fields are available under the **Account Fields** category on the TinyMCE HTML editor. When you use the individual name fields, you take advantage of providing consistent salutations for all recipients.



These individual name fields also appear for the "Entry List" Letter Widget on the TinyMCE HTML editor.

Online Forms

The **Suffix** field is now available on DIY forms for all ***eTapestry*** customers. To view the field on an existing DIY form, you must republish it. *New eTapestry Users: This is a change from the 7.15.0 release.*

However, the **Suffix** field does not appear on the eStore (Cart) or Personal Fundraising forms in this release. If a website visitor enters a suffix in the **Last Name** field on these forms, it saves as part of the **Last Name** field on the account.

When a website visitor submits an online form, duplicate checking is now based on the first name and last name, in addition to street address and email address.

DIY Forms. When a website visitor submits an online form, all new account records are created with an Individual Name Format. Name information in the **Title**, **First Name**, **Middle Name**, **Last Name**, and **Suffix** fields on the form download to the corresponding fields on the account record. Salutations automatically generate for Individual accounts based on configurations you select on the Data Entry Rules page from **Management**, **My Organization**, **Data Entry Rules**. If your organization selects **Blank** for this configuration, salutations generate based on ***eTapestry's*** auto-generated formats.

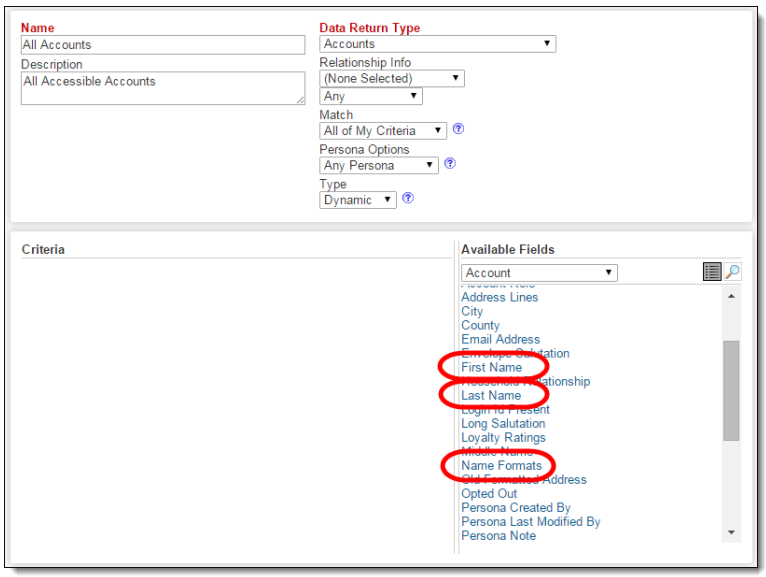
eStore (Cart). When a website visitor submits a Cart transaction on a web page, salutations automatically generate for Individual accounts based on configurations you select on the Data Entry Rules page from **Management**, **My Organization**, **Data Entry Rules**. If your organization selects **Blank** for this configuration, salutations generate based on ***eTapestry's*** auto-generated formats.

Personal Fundraising. When a website visitor enters a team on a Personal Fundraising web page, the program creates an account record with a Family Name Format and name values appear in the **Account Name** field. When a website visitor does not join a team , the program creates an account record with an Individual Name Format. Salutations automatically generate for Individual and Family accounts based on configurations you select on the Data Entry Rules page from **Management**, **My Organization**, **Data Entry Rules**. If your organization selects **Blank** for this configuration, salutations generate based on ***eTapestry's*** auto-generated formats.

Tip: For information about the new Data Entry Rules page, refer to My Organization - Data Entry Rules Page on page 10.

Query

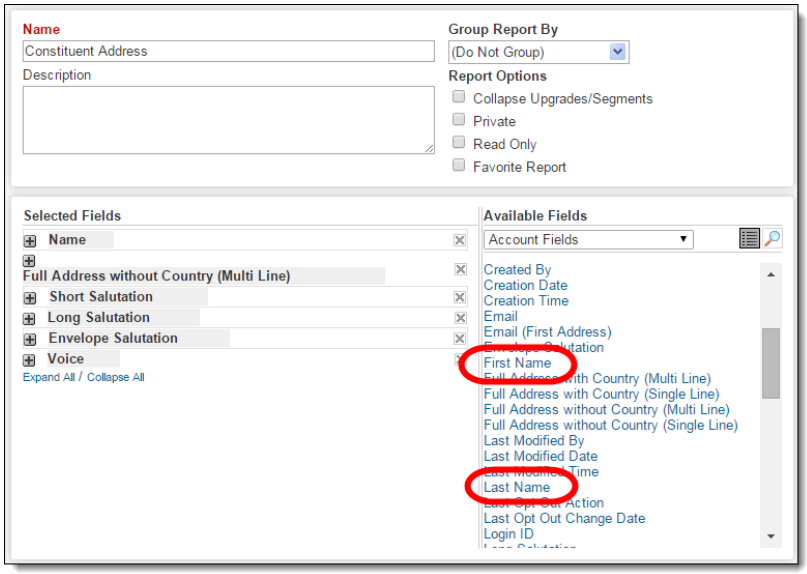
The **Name** field has been renamed to **Account Name** and you can continue to query on this field. However, you can now select to additionally include or replace the field with the individual name fields. When you create or edit a query, **Name Format**, **Title**, **First Name**, **Middle Name**, **Last Name**, and **Suffix** are available fields for you to filter and display under the **Account** category.



Custom Reports

The **Name** field has been renamed to **Account Name** and you can continue to use this field in your custom reports. However, you can now select to additionally include or replace the field with the individual name fields. When you use the individual name fields for your custom reports, you can list the information in separate columns.

When you create or edit a custom report, **Name Format**, **Title**, **First Name**, **Middle Name**, **Last Name**, and **Suffix** are available fields for you to report on under the **Account Fields** category.



Note: eTapestry Standard Reports do not include the individual name fields.

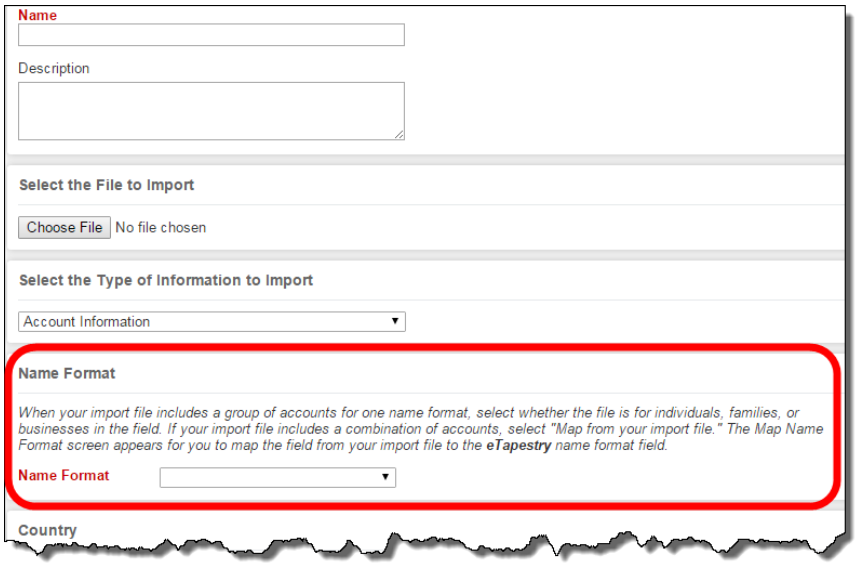
Import

Show Me: Review the New Account Information Import Walkthrough

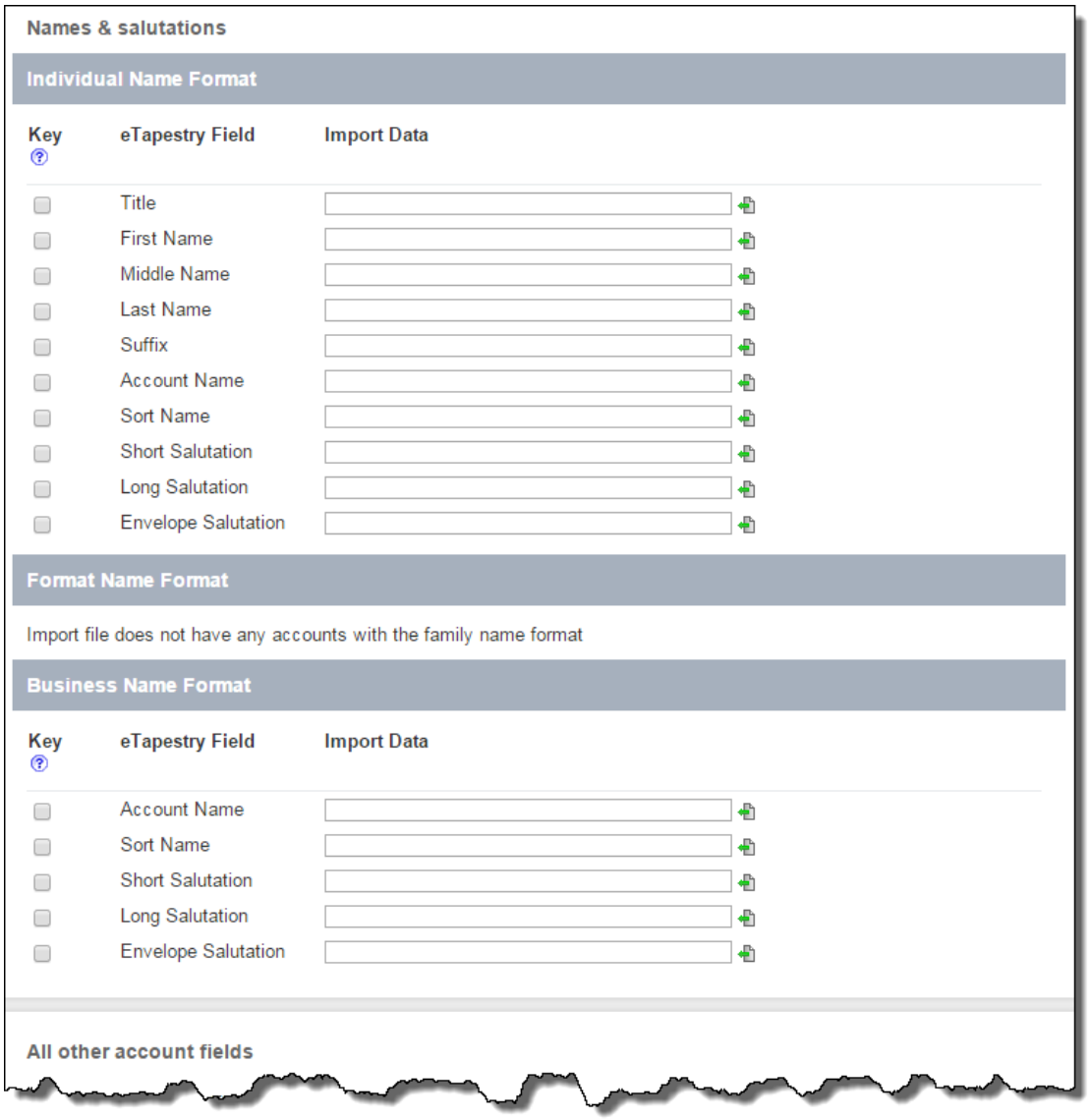
The Step 1: Name and Import Type page for an existing import has been re-arranged so the **Name Format** section appears immediately after you select a file to import. After it, the **Country** section now appears just before **Previously Imported Fields**. The last section on the page continues to be **Multi Select Delimiter**.

Step 1: Name and Import Type: When you create an Account Information import type, the **Name Format** section appears. In the **Name Format** field, select whether the file is for individuals, families, or businesses in the field when your import file includes a group of accounts for one name format. If your import file includes a combination of accounts, select "Map from your import file." The Map Name Format screen appears for you to map the field from your import file to the ***eTapestry*** **Name Format** field.

Tip: To successfully map your Name Format field to an ***eTapestry*** Name Format, your .csv file must include a Name Format column. In this column, you need to identify each row as Individual, Family, or Business to correspond to the the ***eTapestry*** Name Formats.



Step 2: Map Your Import File: When you select an Account Information type, additional sections appear for individual, family, and business account fields in addition to the **All other account fields** section.



API

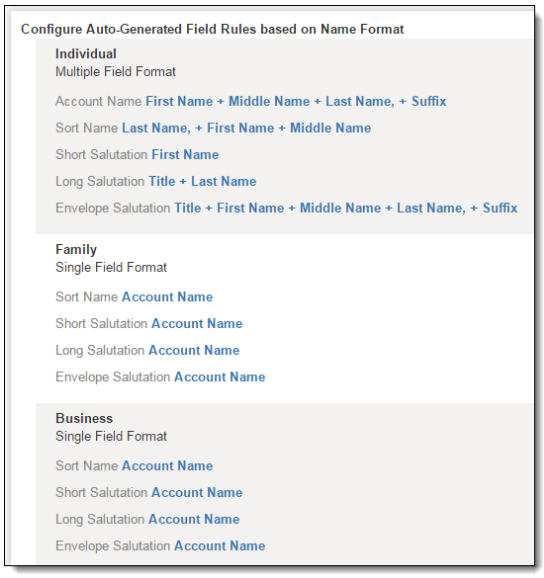
A new version of the API exists for you to use for **Name Format** options and its corresponding features. In addition, this API includes international addresses fields. To use this API, complete the API registration form to create a sandbox database and refer to the API documentation for Name Formats, name information, and addresses.

My Organization - Data Entry Rules Page

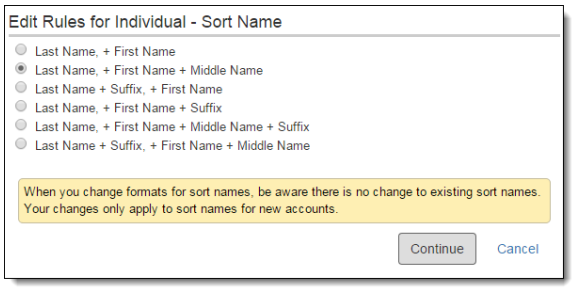
To improve usability when you establish settings for your organization, the Data Entry Rules page now exists for you to select data entry rules for phone numbers, required persona fields, address preferences, and salutations. When you view this new page, existing settings appear first for **Phone Number Rules**, **Required Persona Fields**, and **Address Preferences**. Previously, these settings existed on the Preferences page.

Tip: My Organization options for **Preferences**, **SEPA Preferences**, **Password Preferences**, and **My Mission** continue to appear on the Preferences page.

After the existing settings, the new **Configure Auto-generated Field Rules based on Name Format** section appears for you to establish consistent name configuration and salutations for Individual, Family, and Business Name Formats.

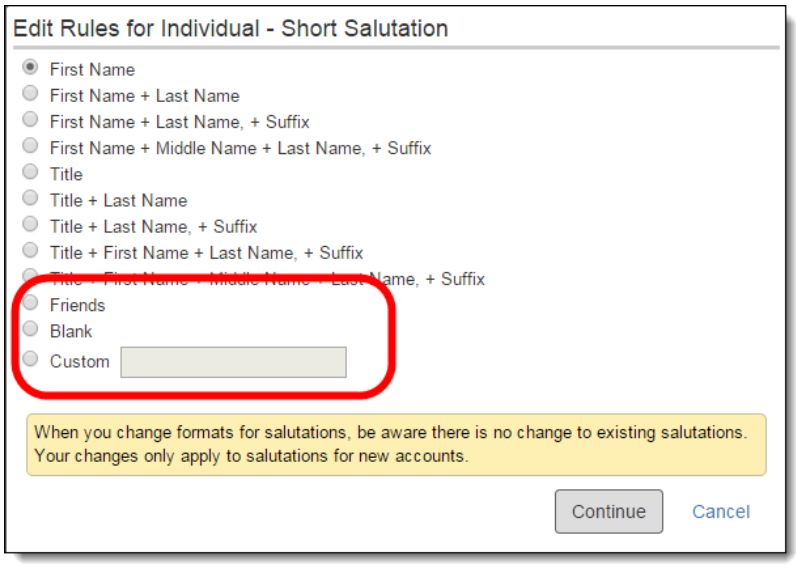


The default name configuration to use when an account is created appears as a link. To change the default configuration for a field, select the link. The Edit Rules screen appears.



Select the configuration you want to use for the field and click **Continue** to return to the Data Entry Rules page.

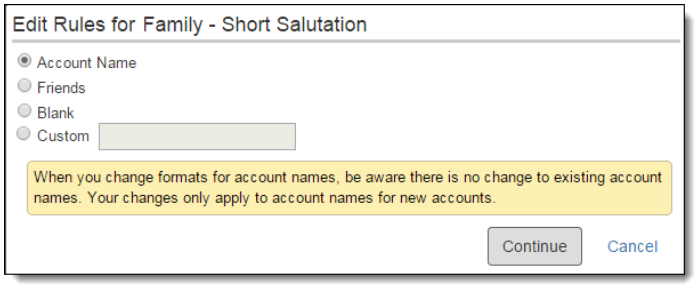
The Individual **Salutation** fields include options for **Friends**, **Blank**, and **Custom**.



To address recipients as "Friends," select **Friends**. To leave salutation fields empty, select **Blank**. When you do this, ***eTapestry*** does not populate the field with name values and you can enter any salutation in the field. To use another general term (for example, one that is similar to Friends) as a salutation, select **Custom** and enter your custom salutation to use for all Individual accounts.

Note: When you select **Blank** for an Individual or Family salutation, your selection only applies to manual data entry. When an Individual or Family account is created from an online form with **Blank** selected, salutations generate based on ***eTapestry's*** auto-generated formats. When you select a configuration other than **Blank** on the Edit Rules screen, Individual and Family accounts created from online forms generate salutations based on your selected configuration.

For each Family and Business field, you can select to use **Account Name** or **Blank**.



To duplicate the name value from the **Account Name** field into the field, select **Account Name**. To address recipients as "Friends," select **Friends**. To leave salutation fields empty, select **Blank**. When you do this, ***eTapestry*** does not populate the field with name values and you can enter any salutation in the field. To use another general term (for example, one that is similar to Friends) as a salutation, select **Custom** and enter your custom salutation.

Note: As a result of the new **Blank** option for salutations, the **Disable Sort Name Autocomplete** checkbox has been removed on the Preferences page from **Management**, **My User**.

Security for the Data Entry Rules Page

When you assign rights on the Security Group page, the **Preferences** group has been updated. Under **Organization Information**, **Preferences and Data Entry Rules** now appears for you to assign the same rights to

users for both pages. During the 7.16.0 upgrade, users automatically inherit the same rights to the Data Entry Rules page that exist for them on the Preferences page.

Intacct Export Fields

When you generate the Intacct Export, ***eTapestry*** now has the ability to export data in the Location_ID and Dept_ID columns for transaction user-defined text fields called "Location" and "Department." If these exact user-defined fields do not exist in your database, make sure you create them to successfully export this data. For information about how to create a user-defined field, refer to Add a user-defined field.

Data from ***eTapestry*** fields must match fields in *Intacct*. For information about importing data in to *Intacct*, refer to *Intacct* documentation.

Tip: In previous versions of ***eTapestry***, the Location_ID and Dept_ID columns only contained blank values.