

# Database Management Guide

10/21/2016 eTapestry 7.26.0 Database Management US

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# Management

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You can manage your database preferences, user preferences, and security rights for your **eTapestry** database. You can also customize screens to make them easier to navigate for your needs.

## My Organization Settings

To access your organization's account and establish settings for your database, from **Management**, select **My Organization**.



## Persona

From **Management, My Organization**, select **Persona** to display basic information options for your organization account. These options include your organization's name, address, and country. The specific address fields available vary based on the country you select. Your selections on this page are important because:

- you use organization merge fields in document, envelope, and label correspondences
- the information appears in the postal inquiries footer at the bottom of mass email sent from **eTapestry**.
- your organization name appears in header on PDF reports.
- your organization's country determines the links that appear for postal code and phone number look-up when you enter accounts. It also determines links for the personas page of accounts.

You can also select to participate in the FEP Survey and provide demographic details about your organization. These details include the year the organization was created, the NTEE code, the annual revenue, and the Federal ID Number. When you opt in, information about your organization is used for Benchmark/FEP Reporting. If you opt in, enter your information on the My Organization Personas page in the Demographic Information for Annual FEP (Fundraising Effectiveness Project) Report section.

- **Year** - Select the first year for which will enter the requested information. You can fill in different details for the years from 2004 to present.
- **Affiliations** - Select which affiliations your organization retained during the selected year.
  - AFP (Association of Fundraising Professionals)
  - CASE (Council for Advancement and Support of Education)
  - AHP (Association for Healthcare Philanthropy)
  - ALDE (Association of Lutheran Development Executives)
  - NCDC (National Catholic Development Conference)
  - CRD (Council for Resource Development)
  - Other (please specify)
- **Number of Full-Time Professional Staff** - Enter how many full-time professional staff your organization retained during the selected year.
- **Number of Full-Time Support Staff** - Enter how many full-time support staff your organization retained during the selected year.
- **Number of Full-Time Fundraising Consultants** - Enter how many full-time fundraising consultants your organization retained during the selected year.
- **Number of Volunteer Fundraisers** - Enter how many volunteer fundraisers your organization retained during the selected year.
- **Total Fundraising Expenses/Budget for Year** - Enter the total fundraising expenses your organization incurred during the year or the budget for the year.
- **Comments** - Enter any notes or explanations for AFP to consider regarding the data you enter.

- **"Non Individual" Account Type Value** - AFP wants to analyze the data for Individual donors separately from non-individual donors. This section shows the user defined fields available on your constituent Defined Fields page, enabling you to indicate which user defined value(s) your organization uses in your database to mark accounts as non-individual donors. For example, many organizations use an Account Type field with values called "Business" or "Foundation" to mark when a donor is not an individual.

## Journal

From **Management, My Organization**, select **Journal** to display your organization's account journal. A note displays on the Journal page when the following actions occur in your database.

**Tip:** To help audit activity, each note displays details about the action.

- A mass email is sent.
- Documents or mailing labels are generated for a query of accounts or entries.
- A mass update is performed.
- An import is processed.
- Your organization's persona information is modified.
- Your organization's preferences are modified.
- A user account is granted Administrator rights.
- A user account is deleted.
- Your database exceeds the number of records for your organization's **eTapestry** subscription.
- An **eTapestry** data service has completed.

**Note:** Items in the organization account journal automatically delete after a year. This includes calendar items, contacts, and notes.

## Subscriptions

From **Management, My Organization**, select **Subscriptions** to display **eTapestry** subscription and package information. On the Subscriptions page, the number of accounts your database subscription includes, the number of accounts you currently have, and the number of journal entries for those accounts appears. This page also displays the available **eTapestry** subscriptions and packages and designates which ones are enabled for your organization. Other valuable information also appears such as how many more emails you can send.

## Preferences

From **Management, My Organization**, select **Preferences** to establish database-wide preferences for your organization. These include currency, time zone, fiscal year, and password preferences.

## Preferences

Field	Details
Currency	Select the currency and symbol to be used throughout the database. Changes in currency do not update values in the database, they only update the currency symbol displayed for those values.
Time Zone	Select the time zone for the location where your organization is based. <b>eTapestry</b> uses this time zone to determine when auto-processing should begin. Each user can select a different time zone on the Preferences page of their user account if they are located in a different time zone.
Auto Process Report Email	Enter the email address where you want the auto process report to be sent.
Last month of the fiscal year	Select the last month of your organization's fiscal year. This setting is used to calculate fiscal year information for queries, reports, and in the tiles on the account home page.
Non-Deductible Fields	Select if you want to enable or disable the <b>Non-Deductible</b> field in the gift entry screen. If your organization does not intend to use this field, you can disable it. If there is historical data on this field, that history is preserved even if you disable the field.
Pledge Fields	Select if you want to enable or disable the <b>Pledged Amount</b> field in the gift entry screen. If your organization does not intend to use this field, you can disable it. If there is historical data on this field, that history is preserved even if you disable the field.
Soft Credits	Select if you want to enable or disable the <b>Soft Credit</b> fields on the gift entry screen. If your organization does not intend to use this field, you can disable it. If there is historical data on this field, that history is preserved even if you disable the field. (You can manually delete the historical instances of soft credit.)
Mobile Query Category	Select the query category you want your users to be able to access through <b>eTapestry Mobile</b> .
BBPS UserName	If you use BBPS for transaction processing, enter your user name.
BBPS Password	If you use BBPS for transaction processing, enter your password.

## SEPA Preferences

Field	Details
IBAN	For databases that use Euro as their currency, enter the bank account number for your organization where you want SEPA disbursements.

Field	Details
BIC	For databases that use Euro as their currency, enter the unique identifier for the bank account number for your organization where you want SEPA disbursements.
Cancellation Terms (in days)	For databases that use Euro as their currency, this field indicates how many days before the debit you want to notify the donor. It defaults to 14, but you can enter any length.
Do Not Retry Failed Direct Debits	For databases that use Euro as their currency, select this option if you do not want to attempt to process debits that previously failed.
Direct Debit Non Critical Failure Stop Count	For databases that use Euro as their currency, enter how many additional attempts you want to run if the initial attempt to process the debit fails.
Export Batch Size	For databases that use Euro as their currency, enter the maximum number of transactions you want to be exported into the file. If more than one file is created during the export process, <i>eTapestry</i> will create a zipped archive of the results.

## Password Preferences

Field	Details
Minimum Password Length	The minimum password length in <i>eTapestry</i> is six characters. Enter a greater number in this field if you want to increase the minimum length required for passwords.
Maximum Password Age	Enter the length, in days, that you want passwords to remain valid. Users are prompted to change their passwords at the end of this period.
Minimum Password Age	You can enter a minimum age, in days, for passwords. A good practice is to set this field to 1, to prevent users from changing their passwords several times in one day.
Unique Password History	Unique password history prevents users from re-using passwords. For example, if you set this field to 10, the system prevents users from changing their password to match any of the last 10 passwords they have used.
Require Complex Passwords	Select this option to require passwords to contain at least three of these four types of characters. <ul style="list-style-type: none"><li>• Special characters (asterisks, ampersands, etc.)</li><li>• Numbers</li><li>• Upper-case letters</li><li>• Lower-case letters</li></ul> You can also click <b>Low Security</b> , <b>Medium Security</b> , or <b>High Security</b> to automatically set these options to your chosen level of security.

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## My Mission

Field	Details
Upload a New Logo	To upload an image to display on the Home dashboard for all users, click <b>Choose File</b> .
Logo Name	This read only field displays the file name of the image you upload in the <b>Upload a New Logo</b> field.
Mission Statement	To display a tagline with your logo in the <b>My Mission</b> tile on the Home dashboard, enter it in the box.

## Data Entry Rules

From **Management, My Organization**, select **Data Entry Rules** to select rules for phone numbers, required persona fields, address preferences, and salutations.

### Phone Number Rules

Field	Details
Autoformat US and Canadian Phone Numbers	Select this option if you want US and Canadian phone numbers to be auto formatted. For more information, see <a href="#">Phone Auto-format on page 15</a> .

### Required Persona Rules

Field	Details
Persona fields	Select any persona fields you want to make required when users enter data on the Persona screen of accounts. The address fields available are based on your organization's country.

### Address Rules

Field	Details
Omit [your domestic country] for addresses in [your domestic country] when you use these merge fields	To use the same template and reports for domestic and international mail, but remove your country from the address block when you send mail, select this checkbox. This provides a way for you to combine domestic and international mail, but remove your country from the address block for domestic mail. <b>Note:</b> This only applies when you use the <b>Full Address with Country (Multi Line)</b> and <b>Full Address with Country (Single Line)</b> merge fields.

Field	Details
Enable users to reformat addresses on an account's persona page	<p>To allow users to manually reformat an address on an account's Persona page, select this checkbox. <b>Note:</b> You should only enable this option when you use <b>Personal Fundraising, Custom eCommerce, Cart, or API Activity</b>.</p> <p>To update address in bulk so that they adhere to the standard format for a country, export existing addresses and then map the fields to the new format when you import them back into <b>eTapestry</b>. You may need to manually reformat addresses when fields cannot be mapped on a one-to-one basis.</p>

## Configure Auto-Generated Field Rules based on Name Format

Use these settings to establish the name configurations that **eTapestry** uses as you create an account. For example, when you select Individual for the Name Format on an account, **eTapestry** configures name values based on these settings in the **Sort Name, Account Name, Short Salutation, Long Salutation, and Envelope Salutation** fields as you enter name information in the **First Name, Middle Name, and Last name** fields. When you select "Family" or "Business," the program configures name values based on these settings in the **Sort Name, Short Salutation, Long Salutation, and Envelope Salutation** fields as you enter it in the **Account Name** field. This data entry process helps you enter data faster and provides name consistency.

**Tip:** When you change formats for account names, be aware there is no change to existing account names. Your changes only apply to account names for new accounts.

Field	Details
Individual	<p>The default name configuration to use when an Individual 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 that field and click <b>Continue</b> to return to the Data Entry Rules page.</p> <p>The <b>Salutation</b> fields include options for <b>Friends, Blank, and Custom</b>. To address recipients as "Friends," select <b>Friends</b>. To leave salutation fields empty, select <b>Blank</b>. When you do this, <b>eTapestry</b> 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 <b>Custom</b> and enter your custom salutation to use for all Individual accounts.</p> <p><b>Note:</b> When you select <b>Blank</b> for an Individual salutation, your selection only applies to manual data entry. When an account is created from an online form with <b>Blank</b> selected, salutations generate based on <b>eTapestry's</b> auto-generated formats.</p>

Field	Details
Family or Business	<p>The default name configuration to use when a Family or Business 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 that field and click <b>Continue</b> to return to the Data Entry Rules page.</p> <p>For each field, you can select to use <b>Account Name</b>, <b>Friends</b>, <b>Blank</b>, or <b>Custom</b>. To duplicate the name from the <b>Account Name</b> field into the field, select <b>Account Name</b>. To address recipients as "Friends," select <b>Friends</b>. To leave salutation fields empty, select <b>Blank</b>. When you do this, <i>eTapestry</i> 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 <b>Custom</b> and enter your custom salutation.</p> <p><b>Note:</b> When you select <b>Blank</b> for a Family or Business salutation, your selection only applies to manual data entry. When an account is created from an online form with <b>Blank</b> selected, salutations generate based on <i>eTapestry's</i> auto-generated formats.</p>

## Phone Auto-format

This feature is only applicable for US or Canadian phone numbers. Therefore, auto-formatting is only applied to personas whose country is set to None Selected, United States, or Canada.

Any time a user enters completes the phone fields on the personas page, the following autoformatting rules are applied:

When user enters...	Number format appears as...	Example
Seven digits	XXX-XXXX	1234567 is formatted as 123-4567
Seven digits, followed by 'x' or 'ext' and at least one more digit	XXX-XXXX x. X	1234567x123 or 1234567ext123 is formatted as 123-456 x. 123
Ten digits	(XXX) XXX-XXXX	1234567890 is formatted as (123) 456-7890
Ten digits, followed by 'x' or 'ext' and at least one more digit	(XXX) XXX-XXXX x. X	1234567890x123 or 1234567890ext123 is formatted as (123) 456-7890 x. 123

Other periods, dashes, or spaces that a user manually enters in the phone number are removed when the autoformatting rules are applied. If a user tries to enter a number that cannot be formatted according to these rules, the user must correct the number in order to save the changes.

## eCommerce

From **Management, My Organization**, select **eCommerce** to review your transaction processors. If a transaction processor is not configured for your database, you must configure one before you can

create online forms and accept online donations. When more than one processor exists, **eTapestry** uses your default processor unless you select a different one in preferences for the online form.

Under **Tasks**, select the processor to enable for your organization. Options appear on the right for you to enter applicable information for the processor.

**Tip:** For information about adding the **Blackbaud Merchant Services** (BBMS) processor, refer to [Link your BBMS Account to your eTapestry Database on page 1](#).

Under **Links**, click **Manage IP Address Restrictions** to help prevent credit card fraud by selecting IP address restrictions. When the Manage IP Address Restrictions page appears, under **Settings**, make sure the IP checkbox is selected. We recommend you do this so that **eTapestry** monitors all of your online web pages for possible fraudulent activity. When an IP address submits six failed transactions within the previous hour, **eTapestry** blocks the IP address from submitting again for the next hour. To view restricted IP addresses, under **Tasks**, click **Show Disabled Restrictions**. To manually enable a restricted IP address, click **Disabled** under the applicable IP address.

**Note:** On the Manage IP Address Restrictions page, click **Tasks, New Restriction** to manually restrict an IP address. When the Create Restriction page appears, enter the IP address, comments to provide additional information, and select how long the restriction applies.

## My User Preferences

User preferences allow you to customize the database according to your needs. The User Preferences page includes user name and password, locale and time zone, and interface, navigation, and search preferences.

From **Management**, click **My User** to access your user preferences account. Next, click **Preferences** and the User Preferences page appears.

## User Preferences

Field	Details
Locale	Set the locale to the language where the user is located. This affects the date formatting for the database. For users in English, Dutch, French, Italian, and Spanish speaking countries, the locale also determines the language used in the program. To apply changes to this field, log out and log back into the database after you save them.
Time Zone	The time zone affects the time and date stamps throughout the program and determines how calendar items are displayed. To apply changes to this field, log out and log back into the database after you save them.
Duplicate Check on save	When this option is selected, <b>eTapestry</b> checks for duplicate accounts when you add an account or modify an existing account's Persona page. Potential duplicates are displayed when the user saves changes.



Field	Details
Default Report Delivery	Select the default report format. By default, <i>eTapestry</i> displays report results on screen, but you can choose to default to PDF or Excel format. Regardless of your default, you can change this setting when you run individual reports.
Default Letter Delivery	Select the default format for correspondence. When you create a mailing, <i>eTapestry</i> defaults to PDF format, but you can change the default to Word format. Regardless of your default, you can change this setting when you create individual mailings.
Default Query Persona	Select the default persona to check for matches when you query on fields from an account's persona. This option allows you to further filter the criteria by persona type. Regardless of your default, you can change this setting when you create individual queries. As a reminder, the query results automatically display the Primary persona.

## Security Preferences

Field	Details
Login ID	This field displays the user's login ID. You can change the ID here.
Password and Confirm Password	Enter and confirm the user's password.
Security Question	To select your own security question, click <b>Reset your security question</b> . The <b>Security Question</b> and <b>Answer</b> fields appear.
Security Question and Answer	Select the question you want to answer and enter your answer.
Remove Lock on User Account	After five unsuccessful log in attempts, users are locked out of <i>eTapestry</i> . The lock removes automatically after 60 minutes, but the Administrator can also remove it manually. To remove a user's lock, click this button.

## Interface Preferences

Field	Details
Use Animations	This option allows moving features in <i>eTapestry</i> to have a visual effect. For example, when you scroll down a page with a moving task pane and this option is enabled, you see the task pane move around the screen to the new location. When you disable this option, the task pane jumps to the new location when you finish scrolling.

Field	Details
Task Pane Location	You can select whether you want the Tasks menu on pages to be on the left or right side of the screen.
Use Floating Task Pane	When this option is enabled, the task pane moves down the page as you scroll.
Use Floating Account Menu	When this option is enabled, the account header moves down the page as you scroll.
Show Defined-Field Details By Default	This option indicates if the defined-field details display when a page loads. If you select "Yes," all defined-field details automatically display. If you select "No," all details are hidden. If you select "Auto," <b>eTapestry</b> shows the details in some pages and hides them in others, according to the recommended workflow.
Hide Empty Defined Fields by Default	This option indicates if empty defined fields display when a page loads. If you select "Yes," all empty defined fields automatically display. If you select "No," all defined fields are hidden. If you select "Auto," <b>eTapestry</b> shows empty fields in some pages and hides them in others, according to the recommended workflow.
Default Application Transaction Processor	Select the payment processor you want to use in transactions by default.
Show Country in Address Blocks	When you enable this option, the country code is included in the address block on the Find Account search results screen, the Personas tile on the Home dashboard, and in the account header.

## Navigation Preferences

Field	Details
Use an External Program for Email	When you enable this option, you can send one-off emails from a program outside <b>eTapestry</b> such as <i>Microsoft Outlook</i> .
Pressing Alt+N Opens Fast Navigation	When this option is enabled, you can open the Fast Navigation window when you press Alt+N.

## Search Preferences

Field	Details
Default Search Type	Determines the type of search screen that appears when you click <b>Find an Account</b> from the Accounts tab.
Always select the primary persona if it is found in the search results	When this option is enabled, your searches look for information in the primary persona first.
Use Dynamic Account Search	This option enabled the dynamic search in the <b>Search your database</b> box. Dynamic search displays possible matches as you type.

## Journal Preferences

Field	Details
Default Journal View	Allows you to choose what journal view you want to use throughout the program.
Number to Display Per Journal Page	Determines the number of journal entries that appear in each journal page. You can choose any number between 1 and 100.

## WealthPoint Preferences

If your organization uses **WealthPoint Online**, you can enter your WealthPoint user name and password here. This allows you to perform **WealthPoint** searches via **eTapestry**.

## User Customizations

Each **eTapestry** user can customize certain pages and features to better fit individual needs. These customizations do not impact other users at your organization. This applies to:

- Home page
- Account Home page and account header
- Journal page
- Search results
- **Save And** options

To customize application options that impact all users, refer to [My Organization Settings on page 8](#).

## Custom Home Page

You can customize your Home page to display recently viewed accounts, fundraising performance, favorite reports and queries, and more. When you customize your Home page, your selections save until the next time you log in, but they do not affect other users in your organization.

To customize your Home page, click **Select Tiles and Layout** on the Home page. After you select the layout and tiles you want to appear, click **Save**.

Category	Tile	Details
My Database	My Mission	Shows the image and mission statement you include in the My Mission section of your organization record.
	My Calendar	Shows your personal calendar.
	My Org Calendar	Shows the calendar for your organization.
	Recently Viewed Accounts	Shows the last ten accounts you accessed. You can navigate to the account directly from these links.
	Quick Links	Shows frequently-used areas of the program as well as help resources.
	Recently Viewed Queries and Reports	Shows the last five queries and reports you accessed in the database.
	Favorites	Shows the queries and reports you have marked as favorite.
	Support Resources	Displays links to the Blackbaud Support YouTube channel and the Blackbaud Know How Blog.
Reports	Top Donors	Shows the top five donors for a time period you select on the tile.
	Campaign Performance	Shows performance for a campaign you select on the tile.
	Approach Performance	Shows performance for an approach you select on the tile.
	Fundraiser Performance	Shows performance for an event you select on the tile.
	Recent Gifts	Shows most recent donations for a time period and amount range you select on the tile.
	Goal Performance	Shows specific performance details for a campaign, approach, or fundraiser you specify on the tile.

You can rearrange and delete tiles directly from the Home page. To delete a tile, click the X on the top right corner of it. To move one, click and drag the block on the top right corner of the tile and drop it on the desired location on the page.

## Custom Account Home Page and Header

When you customize the account Home page for one account, all accounts display the new layout. To customize this page, click **Select Tiles and Layout** at the top of the Home page.

Tile	Details
Personas	Shows the contact information from the account's persona page. You can click a persona type in this tile to open that persona.

Title	Details
Picture	You can upload an image to the account's home page on this tile.
Account Giving Summary	Shows the totals pledged, received, and raised for the account in the current calendar and fiscal year, previous calendar and fiscal year, and over the life of the account. Also displays the amount and date for the first, last, and largest transactions on the account.
Account Five Year Summary	Shows the totals pledged, received, and raised for the account for the last five calendar and fiscal years.
Recognition	Shows the account's default recognition information.
Quick Actions	Shows links to perform common actions related to accounts.
Relationships	Shows the existing relationships on the account.
Defined Fields	Shows the current defined-field values from the account's Defined Fields page.
Recent Journal Entries	Shows the fifteen most recent journal entries for the account.
Household Giving Summary	Shows the totals pledged, received, and raised for up to fifteen of the accounts in the household for the current and previous calendar and fiscal years, as well as the lifetime totals. It also displays the date for the first, last, and largest transactions.
Household Five Year Summary	Shows the totals pledged, received, and raised for the last five calendar and fiscal years for up to fifteen of the accounts in the household.
Soft Credit Summary	Shows the soft credit total and number of soft credits on the account for the current calendar and fiscal year, previous calendar and fiscal year, and the account's lifetime.
Custom Tile	Shows custom fields you select. To add a field, click <b>Add Field</b> . You can add more than one custom tile.
Social Media Finder	When you use the Pro package of <b>eTapestry</b> in the United States and Canada, you can select to include this tile to display the account's social network results and related email addresses.

You can also customize the header that appears on the top left of each account. By default, it displays the primary persona's address, phone number, email address, and website.

1. To customize the header, click **Edit Header**.
2. To select the columns to display, click a drop down link.
3. To change the order of the fields, click and drag the field names under **Select Field Order**.
4. To add another row to the header, click **Add Row**.
5. To remove a field, click **X** next to the field name.
6. To save the header display, click **Save And**.

## Custom Journal Page

You can customize the data that appears on the Journal page.

1. To customize the columns that appear, click **Choose columns**.
2. To select the columns to display, select the checkbox next to the column name on the Choose columns to show in the list screen.
3. To remove a column, clear the checkbox next to the column name on the Choose columns to show in the list screen.
4. To save your selections, click **Apply changes**. The Journal page uses the new column display options.
5. To change the order of the columns, click and drag the column names on the Journal page.

To view journal entry details, click the available link in the corresponding column. When you add columns, the new columns do not create a link to the journal entry details. The default columns include the following information.

- **Date** - Displays the journal entry create date.
- **Name** - When you view the journal as a household or split household, this displays the name of the household member.
- **Type** - Displays type of journal entry.
- **Description** - For gifts, pledges, payments, recurring gifts, split transactions, upgraded pledges, and disbursements, this displays the fund for the entry. For soft credits, it shows the soft credit amount. For recurring gift schedules, the installment amount displays. For notes, the first line of text appears. For contacts, the subject appears. For calendar items, the title appears.
- **Received** - Displays the received amount for any transaction entries. When the amount is negative, it appears in parentheses. The column is blank for notes, contacts, and calendar items.
- **Pledged** - Displays the pledged amount for any transaction entries. When the amount is negative, it appears in parentheses. The column is blank for notes, contacts, and calendar items.
- **Attachments** - Displays attachments to the journal entry. Journal entries that allow attachments include gifts, pledges, pledge payments, disbursements, recurring gifts, contacts and notes.

## Custom Save And Options

Throughout *eTapestry*, the option to save your work displays with an option to navigate to another area in the application when you click **Save And**. You can customize the navigation options that appear in the menu beside the **Save And** button. You can also select the option to appear first so it is your default.

1. To edit the navigation options for a specific screen, click the wrench icon next to the **Save And** drop down field. A warning message appears.
2. Click **OK** to confirm that you want to leave the current page without saving. The Add/Remove Options page appears.
3. Select the options to add to the specific **Save And** menu.
4. To change the order of the options, you can drag and drop them. Place the option you use most frequently first.
5. To remove an option, click **X** next to the name.

**Note:** You must include at least one option.

6. To save the options for the specific page, click **Save**.

## User Activity Report

When you use the advanced administration module, you can access user activity information, including date and length of logins and activity performed by each user.

### > See All Users

You can see a list of all active users in your database. From **Management**, click **All Users**. A complete list of users appears, and you can drill down to each user by clicking their user name.

### > Run User Activity Report

The User Activity Report shows login activity as well as accounts and journal entries created and modified by each user during each login session. The report shows activity for the past 30 days for each user.

1. From **Management**, click **User Activity**. The Launch User Activity screen appears.
2. Select a query of users to include. To see all users, select Base - All users in the **Query** section.
3. Select the delivery format and click **Submit**.

## Defined Fields

Defined Fields are fields that your organization can create or edit in the database. These fields are customizable, and they can be set up to appear on every account screen, allowing you to track all of the data that is important to you in each area of an account. After data has been entered in these fields, you can use that data to group accounts together in queries, and then use those queries to run reports or send mass communications.

## System-Defined Fields

System-defined fields are used to record data that the application needs in order to function properly, and as such, they are only partially customizable by users. Unlike user-defined fields, you cannot define where in the database system-defined fields are located, the name or display type for the fields, or what kind of data they can track. However, for most system-defined fields, you can customize what values are available in the field and, for the **Phone Types** field, you can customize the names and add more fields.

### > Edit System-Defined Field Values

While you cannot add or edit system-defined fields, you can add and edit the individual values

associated with most fields.

1. From **Management**, click **System-Defined Fields**. The System-Defined Fields screen appears.
2. Click a field to edit it.
  - To add a value, in the Name field enter the new value and click **Add Value**.
  - To disable a value, click **Enabled** under the value you want to disable.
  - To enable a previously-disabled value, click **Disabled** under the value you want to enable. To see all disabled values, click **Show Disabled Values** under Values.
3. Click **Save and Finish** to save your changes.

### ➤ Add and Rename System-Defined Field Values

We recommend that you review, add, and edit system-defined field values when you first begin using *eTapestry*.

**Note:** You can never delete a value once you save it on a system-defined field. You can, however, add, edit, and disable values.

1. From **Management**, click **System Defined Fields**. The System Defined Fields screen appears.
2. Click the field you want to add a value to or edit.
  - To add a new value, enter the value in the **Name** field and click **Add Value**.
  - To edit an existing value, click the value and edit it in the **Name** field. Click **Update** to save.
3. Click **Save and Finish** to save your changes.

### ➤ Disable/Enable System-Defined Field Values

While you cannot delete system-defined fields, you can disable system-defined values as needed. For example, if your organization decides to temporarily stop accepting a specific credit/debit card, you can disable the value for that credit/debit card. After a value is disabled, it no longer appears in the **Credit/Debit Card Type** menu for users to select on new transactions. If you later begin accepting that credit/debit card type again, you can enable the value to allow users to select that card type again.

1. From **Management**, click **System-Defined Fields**.
2. Click the field for which you want to disable or enable values.
3. To see values that are currently disabled, click **Show Disabled Values** under Values.
4. To disable a value, click **Enabled** underneath the value.
5. To enable a value that has previously been disabled, click **Disabled** underneath the value.
6. Click **Save and Finish** to save your changes.



## List of System-Defined Fields

The following are all the system-defined fields available in **eTapestry**.

System-Defined Field	Details
Contact Method	This field is used on journal contacts to indicate how a particular contact with an account was accomplished. Common contact methods include fax, email, phone call, and letter, though this field is also often used to indicate contacts related to volunteering and events.
Country Codes	This field is used on the Personas screen to indicate the country where an address is located.  <b>eTapestry</b> contains a list of over 230 countries, territories, and colonies in this field, but by default most of them are disabled. You can enable them as necessary.
Credit/Debit Card	This field is used to indicate the credit/debit card type on transactions where the gift type has been set to credit/debit card.
Data Source	This field is used to track the source of data that is not entered into <b>eTapestry</b> manually. This includes data that comes in via eCommerce pages, donor login sites, the API, and via imports. It can be found on the Defined Fields page and on transactions, notes, and contacts in the System Defined-Fields category.  Values are added to this field automatically when accounts or transactions are created/modified through one of the methods listed above. You do not need to edit or update this field as a user.
Log Entry Type	When certain features in the database are used, <b>eTapestry</b> automatically creates a note on the organization account to record the details. This occurs when you generate correspondence, complete imports or mass updates, and make changes to organization preferences or security. This field records the type of change made.  You do not need to edit or update this field as a user.
Persona Types	This field defines the persona types available for data entry. The options are listed at the top of the Personas page.  By default, <b>eTapestry</b> includes the persona types Personal and Business, but you can add more persona types as needed in order to record more types of address data, such as Joint or Seasonal.

Phone Type Code	This field defines which phone type fields appear for data entry on the Persona screen and which of the phone types are used as default. <b>eTapestry</b> includes the types Voice, Mobile, Pager and Fax, with Voice as default.  You can edit or add to these phone type codes or add more phone type codes as needed.
Real Estate	This field defines which real estate types are available on the transaction screen when the gift type is set to real estate. Common real estate types include condominium, land, house, and commercial property.
Security Rights	This field is used when you set up advanced security to define which items in the database are viewable to users.

## User-Defined Fields

User-defined fields are fields that are not included by default in your database but that your organization needs to track additional information not captured in standard fields. You can create as many user-defined fields as you need. User-defined fields can apply to accounts, or to specific transactions like gifts or notes.

**Tip:** For best practice information about user-defined fields, refer to [eTapestry Best Practices: User-Defined Fields](#).

### > Add a user-defined field

1. From **Management**, click **User-Defined Fields**.
2. Like queries, reports, and correspondence templates, defined fields must be placed into categories to help keep your database organized in a meaningful way. **eTapestry** includes only one defined-field category called **Base** by default. However, you can create as many defined-field categories as you need. You can also move fields from one category to another. To create a new category, click **New Category** from the Tasks menu.
3. Once you have chosen the category for your new field, click the category to select it. Click **New Defined Field** under Tasks.
4. On Step 1, complete the following information.
  - On the **Name** field, enter a unique and descriptive name for the field. You can edit the name of the field after you create it.
  - On the **Description** field, it can be helpful to enter a longer description of the field to help other users in your organization when they use the field.
  - On the **Data Type** field, select the type of data you want to track in this field.
    - **Text:** Use this type for fields that will contain letters and numbers. For example, this data type is well-suited for an Account Type field.
    - **Date:** Use this type for fields that contain full dates. Fields with this data type can

only accept dates in the mm/dd/yyyy or dd/mm/yyyy (European locales) format. A common field of this type is Membership Expiration Date.

- **Month, Day (mm/dd):** Use this type for fields that will contain only month and day. Fields with this data type can only accept dates in the mm/dd or dd/mm (European locales) format. Common examples are birthday or other calendar dates where capturing the specific year is not necessary.
- **Number:** Use number for fields that will contain only numbers. Fields with this data type can accept decimal or whole numbers, which can be positive or negative. Number fields cannot accept text. Common examples include Volunteer Hours or Number of Tickets for ticket purchases. You can query on number fields to find all items with numbers within a certain range, and number fields can be totaled in reports and correspondence.
- **Currency:** Use currency for fields that will contain currency amounts. Fields with the currency data type can accept only numbers and will display a currency symbol when the data is saved or displayed in a report. Currency fields cannot accept text. You can query on currency fields to find all items with currency amounts within a certain range, and currency fields can be totaled in reports and correspondence.

You cannot edit the data type on a field once it has been saved. Be sure that you have chosen the correct data type prior to saving the field.

5. To continue to the next step, click **Next**.
6. On Step 2, select where you want the user-defined field to appear.

Normally, you should only select one area of application for each field. If you select more than one application area, updating the field in one location does not update it in any other location.

- **Account Types:** When you select one of these options the defined field appears on the Defined Fields page for the specified account type. Fields with this application should contain data that pertains to the account as a whole and that is unlikely to change much over time or need a historical record of changes. Some examples include Account Type, Gender, Birthdate, and Interests.
- **Journal Types:** When you select one of these options the defined field appears in the defined-field area of the designated journal entry (calendar items, contacts, notes, or transactions). When you select Transactions, the field appears on all transaction types except for soft credits.
- **Other:** When you select Personas the user-defined field appears on the Personas page. A user-defined field should only appear on this page when it contains address-related data that varies from one address to another on the account. For example, you can select to display a National Change of Address (NCOA) user-defined field to track whether an account's address has changed, been standardized, or is invalid.

When you select Relationships the user-defined field appears on the Relationships page. User-defined fields on this page should contain data that is relevant to the relationship itself. For example, you can select to display a Notify user-defined field to identify the account to inform when you receive a tribute donation.

You should not apply a defined field to multiple screens in the database. There are very few exceptions to this rule. In most cases, the data really belongs only in one area of the database. Additionally, when a field is set up to appear in multiple areas, updating the field in one location does *not* update it in any other location.

7. To continue to the next step, click **Next**.
8. On Step 3, select the field attributes.
9. To continue to the next step, click **Next**.
10. On Step 4, select the display type.

Once you save a user-defined field has been saved, you cannot change the display type from a selectable type (selection from a set of values and allow assignment of only one item) to a free-form type (text box and note field), or from a free-form type to a selectable type.

- **Selection from a set of values:** Also referred to as a multi-select field, this type of field appears as a set of checkboxes and allows users to select multiple values on the field. For example, you might create a Volunteer Availability field with the values Day, Evening, and Weekend so a volunteer can indicate that they are available at more than one of those times.
- **Allow assignment of only one item:** Also referred to as a single-select field, this type of field appears as a drop-down menu and allows users to select only one value in the field. For example, you might create an Account Type field with the values Individual, Business, and Foundation. An account can only be one of those three choices, so a single-select field works well.
- **Text Box:** A text box allows the user to type in a single line of data. For example, you might create a field on the Journal Contact screen for Volunteer Hours, where the user could type how much time a volunteer worked during a session. Text box fields must obey the data type. For example, if the data type is set to date, only dates in mm/dd/yyyy format can be entered.
- **Note Field:** A note field allows the user to enter large amounts of data with multiple lines. For example, you might create a field on the constituent's Defined Fields page used to record how the constituent came to be involved with your organization. Because this could have several lines of text, you might use a note box display type for that field. Note fields must obey the data type. For example, if the data type is set to date, only dates in mm/dd/yyyy format can be entered.

11. To continue to the next step, click **Next**.
12. If you use advanced security, in step 5 make any necessary security selections to control which users can see the field.
13. To continue to the next step, click **Next**.
14. On Step 6, you add values to fields of selectable types (selection from a set of values and allow assignment of only one item). If you set the display type to one of the free-form displays, you do not need to create values and can proceed to the Finish step.

A selectable field must have some values listed in it in order to appear on screen for data entry. If you create a selectable field and do not create any values for it, the field will not appear anywhere in the database.

To create a value, type the value name into the **Name** field, enter a Description if you like, and click **Add Value**. Continue adding values following those steps until you have all the values you need for the field. If you make a mistake on a value, click **Delete** underneath the value. Once you save this field, you will not be able to delete any values, although you will be able to rename them or mark them as inactive if needed. To change the order of the values, drag and drop the values from the list to your desired order.

15. To create the field, click **Save and Finish**.

### > Create a tribute type UDF for transactions

For general information about how to add a user-defined field, refer to [Add a user-defined field on page 26](#).

1. From **Management**, click **User-Defined Fields**.
2. Select the **Base** category.
3. Click **New Defined Field** under Tasks.
4. On Step 1, complete the following information.
  - On the **Name** field, enter the name "Tribute Type."
  - On the **Description** field, enter a longer description of the field to help other users in your organization when they use the field.
  - On the **Data Type** field, select **Text**.
5. Click **Next**.
6. On Step 2, select Transactions. This applies the field to journal types that are transactions, so that the field appears on all transaction types except for soft credits.
7. Click **Next**.
8. On Step 3, select the field attributes.
9. Click **Next**.
10. On Step 4, select **Allow assignment of only one item** as the display type.
11. Click **Next**.
12. If you use advanced security, in step 5 make any necessary security selections to control which users can see the field.
13. Click **Next**.
14. Add values such as "In honor of," "In memory of," and "In celebration of."

To create a value, type the value name into the **Name** field, enter a Description if you like, and click **Add Value**. Continue adding values following those steps until you have all the values you need for the field. If you make a mistake on a value, click **Delete** underneath the value. Once you save this field, you will not be able to delete any values, although you will be able to rename them or mark them as inactive if needed. To change the order of the values, drag and drop the values from the list to your desired order.

15. To create the field, click **Save and Finish**.

## Edit a User-Defined Field

You cannot delete user-defined fields, and you cannot edit some aspects of the field after the field is created. However, you can disable defined fields and values, rename defined fields and values, add more values to a field, and move defined-field values from one field to another.

**Tip:** For best practice information about user-defined fields, refer [eTapestry Best Practices: User-Defined Fields](#).

### ➤ Disable/Enable User-Defined Fields and Values

When you disable a defined field or value, it no longer appears on any screens in the database. You cannot create new queries on a field a value that is currently disabled, nor can you add a disabled field or value to a custom report. You can still view disabled fields and values on screens where they already have data stored in them, and queries and reports that had the field or value added to them while it was enabled still use/display the existing data in the field or value. You can also re-enable a field that has been disabled.

1. From **Management**, click **User-Defined Fields**. The Edit User-Defined Field Categories page appears.
2. Click a category to select it. The Edit User-Defined Field Category page appears.
3. On the list of fields in this category, you can see if the field is enabled or disabled. To disable a field, click **Enabled** under the field. The label changes to **Disabled**, and the field appears grayed out.
4. To enable a disabled field, click **Disabled**. To see all disabled fields, click **Show Disabled Fields** under Tasks.

You can also disable and enable values on a multi-select or single-select defined field.

1. From **Management**, click **User-Defined Fields**. The Edit User-Defined Field Categories page appears.
2. Click a category to select it. The Edit User-Defined Field Category page appears.
3. Click the field for which you want to edit values. The Field screen appears.
4. The selection options for the field appear on the list. Under each option, you can see if a value is enabled or disabled. To see disabled values, click **Show Disabled Values** under Values.
5. To disable a value, click **Enabled** under the value. To enable a disabled value, click **Disabled** under the value.
6. Click **Save and Finish** to save your changes.

### ➤ Rename User-Defined Fields and Values

You can rename a user-defined field or any of its values. Renaming a field or value will rename it on every screen - including those screens that already have data in the field or have the value selected.

1. From **Management**, click **User-Defined Fields**. The Edit User-Defined Field Categories page appears.

2. Click on a category to select it. The Edit User-Defined Field Category page appears.
3. Click the field to open it.
4. Navigate to Step 1 in the wizard.
5. In the **Name** field, enter the new name.
6. Click **Save and Finish** to save the new name.

You can also rename values on multi- or single-select fields.

1. From **Management**, click **User-Defined Fields**. The Edit User-Defined Field Categories page appears.
2. Click on a category to select it. The Edit User-Defined Field Category page appears.
3. Click the field to open it. Step 6 on the wizard appears.
4. Click the value you want to open. The value appears on the Edit Value section at the top of the screen.
5. In the **Name** field, enter the new value.
6. Click **Save and Finish** to save the new name.

### ➤ Add Values to an Existing User-Defined Field

You can add more values to a multi- or single-select user defined field at any time.

1. From **Management**, click **User-Defined Fields**. The Edit User-Defined Field Categories page appears.
2. Click on a category to select it. The Edit User-Defined Field Category page appears.
3. Click the field to open it.
4. On the **Name** field, enter the new value.
5. Click **Add Value**.
6. Click **Save and Finish** to save the new value.

### ➤ Move User-Defined Field Values

You can move values from one user-defined field to another. For example, if you have two similar fields, you might decide that you want to consolidate them into one field and move the existing values.

1. From **Management**, click **User-Defined Fields**. The Edit User-Defined Field Categories page appears.
2. Click a category to select it. The Edit User-Defined Field Category page appears.
3. Click the field you want to edit. The Values screen appears.
4. Click **Move Values** under Values. The Move Items screen appears.
5. Under Select Values to Move, check the values you want to move. You can select any number of values you want. Under Move Them to Which Field?, select the existing user-defined field where

you want these values to move.

6. Click **Move** to save your changes.

**Note:** If you move all of the values from a selectable field, that field no longer appears on screen for data entry.

## Defined Field Sets

Defined field sets allow you to create groups of user-defined fields without the need to manually set up each field. Defined field sets are pre-populated according to database management best practices. You can use these sets as they are, or personalize them to better fit the needs of your organization.

### > Add Defined Field Sets

1. From **Management**, click **User-Defined Fields**. The Edit User-Defined Field Categories page appears.
2. Under Defined Field Sets, click **Add Defined-Field Sets**. The Defined Field Sets screen appears.
3. To select a defined field set, click the name of it. A list all defined fields for that set appears.
4. By default, all fields and options are selected for you to import. To exclude a field you do not need, clear its checkbox. When you exclude all options for a field, the field does not create.  
You cannot exclude fields from all sets. For example, you cannot exclude fields from the Volunteer Fields or For Impact Fields defined sets.
5. To add the defined field set, click **Create** under **Tasks** or click **Import**.

## Create UDFs to Track Volunteers

When you track information about your volunteers, you learn more about them and can use this knowledge to build stronger relationships.

**Tip:** We recommend you use the volunteer user-defined field set. For information about how to add a defined field set, refer to [Add Defined Field Sets](#).

Alternatively, you could manually create the recommended fields. If you manually create fields, we recommend you first create a "Volunteer Information" field. Then, add the following fields based on your organization's needs.

- **Volunteer Interest-** Add this as a multi-select field and apply it to the Defined Fields page of a constituent account. For values, enter areas for which your organization has volunteer opportunities, such as music, children, deliveries, etc.
- **Volunteer Skill Level-** Add this as multi or single select field. Its values apply to the Defined Fields page of a constituent account. For values, some organizations use numbers and others use descriptions, such as good or average.
- **Volunteer Availability-** Add this multi-select field and apply it to the Defined Fields page of a



constituent account. For values, consider times of day such as afternoon and morning. You may want a second field to for days, such as M-F and weekend.

- **Volunteer Job/Project/Event**- Add this single select field and apply it to the Defined Fields page of a constituent account. For values, enter the specific events and projects.
- **Volunteer Team**- If your organization use teams, add this single select field and apply it to the Defined Fields page of a constituent account.
- **Volunteer Hours**- - Add this numeric text field and apply it Journal contacts. When you create a report, you can calculate the total hours.
- **Volunteer Contact Method** - Create a contact method to use for volunteer-related journal contact entries. With it, you can create a query to view your volunteer information.

## Create UDFs to Track Grants and Foundations

**Tip:** We recommend you use user-defined field sets to help track grant information. Enable the General Fields and Grant Tracking Fields sets. For information about how to add a defined field set, refer to [Add Defined Field Sets](#).

Alternatively, you can manually create the recommended user-defined fields.

- **Account Type** - Use this to indicate whether an account is an individual, foundation, business, etc.
- **Grant Priority** - Add this field to the Base category. Use this to indicate how important the grant is. Values may include high, low, medium, and other.
- **Grant Status** - Add this field to the Base category. Use this to indicate the status of your grant request. Values may include pending, accepted, or declined.
- **Requested Amount** - Add this currency field to the Base category. For Journal Types, select **Contacts**. This field should be a text box.
- **Amount Awarded** - Add this currency field to the Base category. For Journal Types, select **Contacts**. This field should be a text box.
- **Due Date, Proposal Due Date, Date Report Sent, Date Grant Awarded, Grant Projected Begin, and Grant Projected End.** - Add date fields to the Base category.

You'll also need to set up a system defined field to track the contact method. Add "Grant" as a value for the Contact Method Field. For details, refer to [Add and Rename System-Defined Field Values](#).

## Defined Fields Reports

**eTapestry** includes a User-Defined Fields Report and a System-Defined Fields Report, which allow you to see all the defined fields you currently have enabled.

To run the report user-defined field report, from **Reports**, click **eTapestry Standard Reports**. Under the Defined Fields Reports category, click **User-Defined Fields Report**.

To run the report system-defined field report, from **Reports**, click **eTapestry Standard Reports**. Under the Defined Fields Reports category, click **System-Defined Fields Report**.

## Campaigns, Funds, and Approaches

When you add transactions such as donations, pledged, or recurring gifts to the database, you must specify how you plan to use the revenue received. For example, a constituent may request you use a donation for a specific purpose or perhaps the gift is in response to a solicitation used to raise funds for a specific cause.

Campaigns, funds, and approaches are the way you organize transactions and activity with your constituents to better analyze information in reports and queries and track your success towards specific goals. Before you begin adding transactions to your database, we recommend that you set up a campaign, funds, and approaches structure.

To update designations and goals for your donations, from **Management**, click a donation strategy.

**Tip:** You can also use tiles on your Home dashboard to monitor campaigns, funds and approaches.

### Funds

Funds designate what the purpose of the donation is. A **Fund** is always a required field when you enter a gift. Many organizations create a general fund where unrestricted donations are recorded, and several other funds with specific designations, such as a fund for each event and funds for different projects that you undertake. Each fund may be associated with multiple campaigns and approaches.

If you plan to export your donations to your accounting software, the fund is where you associate a gift with the credit and debit accounts recognized by your accounting package. For each fund that you set up, you can associate only one bank account, one income or revenue account, and one receivables account. So if your accountant needs to allocate some donations to an unrestricted income account and others to a restricted income account, you must create two separate funds.

#### > Add a fund

1. From the **Management**, click **Funds**. The Funds page appears.
2. Under Tasks, click **New Fund**. The New Fund screen appears.
3. In the **Name** field, enter a descriptive name for the fund.
4. In the **Description** field, you can enter a description to better identify the campaign fund.
5. If you intend to export transactions from this fund to your accounting software, enter the appropriate account numbers for this fund in the **Cash Account**, **Receivables Account**, and **Revenue Account** fields.
6. If you intend to use the **Financial Edge** export, enter the project ID in the **Financial Edge Project ID** field.
7. To create the fund, click **Save And**.

#### > Disable a Fund

When you no longer need a fund, you can disable it. When you disable a fund it does not appear on

the menu when you enter a gift, but you retain the gift history to that fund. You cannot delete a fund. To disable a fund, from **Management**, click **Funds**. Under the name of the fund, click the **Enabled** link. The fund disables for your database.

## Campaigns

Campaigns are the overall goal of a fundraising project. They have a defined start and end date, and usually have a monetary goal. Typical campaigns include annual campaigns and capital campaigns. Most organizations do not have many campaigns, and not all gifts have to be tied to a campaign.

The **Campaign** field is not required when you add a gift, although your organization can choose to make it required.

### > Add a Campaign

1. From **Management**, click **Campaigns**. The Campaigns page appears.
2. Under Tasks, click **New Campaign**. The New Campaign screen appears.
3. In the **Name** field, enter a descriptive name for the campaign.
4. In the **Description** field, you can enter a description to better identify the campaign internally.
5. In the **Goal** field, enter the monetary goal for the campaign.
6. In the **Quantity** field, enter the total number of gifts you have set as a goal for this campaign.
7. To create the campaign, click **Save And**.

### > Disable a Campaign

When you no longer need a campaign, you can disable it. When you disable a campaign it does not appear on the menu when you enter a gift, but you retain the gift history to that campaign. You cannot delete a campaign.

To disable a campaign, from **Management**, click **Campaigns**. Under the name of the campaign, click the **Enabled** link. The campaign disables for your database.

### > Require Campaigns

You can make campaigns required so that when your organization enters gifts a campaign must be linked to each gift. To make the **Campaign** field required in gift entry screens, from **Management**, click **Campaigns**. On the Campaigns page, under **Settings**, select **Require Campaign on Transactions**.

## Approaches

Approaches are the means you use to raise money for your organization. They normally track the sources your organization uses to generate gifts and the expenses associated with these sources. They

can include any activity, such as a direct mailing, a phonathon, or a special event. Approaches can help you analyze how different types of asks perform with your constituents.

The **Approach** field is not required when you add a gift, although your organization can choose to make it required. When you know what specific approach generated a gift, we recommend that you track it when you enter that gift.

### > Add an approach

1. From **Management**, click **Approaches**. The Approaches page appears.
2. Under Tasks, click **New Approach**. The New Approach screen appears.
3. In the **Name** field, enter a descriptive name for the approach.
4. In the **Description** field, you can enter a description to better identify the approach internally.
5. In the **Goal** field, enter the monetary goal for the approach.
6. In the **Quantity** field, enter the total number of gifts you have set as a goal for this approach.
7. To create the approach, click **Save And**.

### > Disable an Approach

When you no longer need an approach, you can disable it. When you disable an approach it does not appear on the menu when you enter a gift, but you retain the gift history to that approach. You cannot delete an approach.

To disable or re-enable an approach, from **Management**, click **Approaches**. There is an indicator under the approach name to indicate if it is enabled or disabled. Click it to switch the status of the approach.

### > Require Approaches

You can make approaches required so that when your organization enters gifts an approach must be linked to each gift. To make the **Approach** field required in gift entry screens, from **Management**, click **Approaches**. On the Approaches page, select **Require Approach on Transactions**.

## Import

Import allows you to add a group of records to your database from a file that you prepare to match certain format requirements. You can use import to update contact information for existing accounts or add new accounts with a single gift, recurring gift schedule, note, contact, or declaration. You can also add a gift, contact, or note to existing accounts by account number. For more information about the types of import available, refer to [Import Types on page 37](#).

## Import Types

During the import process, you select the type of information you want to import. The import type determines what information you can load into your database and what fields are required. You cannot change the import type for an existing import, so you must start a new import if you select the wrong import type.

**Note:** You cannot update existing data on gifts with any import type. To update existing information in your database, you must perform a mass update. For more information, refer to [Mass Updates on page 87](#).

### > Account information

This basic import allows you to import new constituent accounts or update information for existing accounts in your database.

When you import accounts, make sure you key on **Account Name** and **Persona Type** to check for duplicate accounts. You should also key on either the **Address** or **Postal Code** field to make sure updates import to the correct existing accounts.

Required Fields	Details
Account Name	This field is required for all name formats. For Individuals, you can select to use auto-generated Data Entry Rules or map this field from your import file.
Country	Select <b>Country</b> on Step 1 of the import process. Country does not need to be a column in your import file, but you should only include addresses from one country in your file.  If you need to import addresses from other countries, create a separate import file and definition for each country.
Last Name (Individuals Only)	When you import accounts with Individual set as the name format, include Last Name as a column in your import file.

Required Fields	Details
Name Format	<p>If you import accounts with the same name format, select a name format on Step 1 of the import process, so you do not have to include it in your import file.</p> <p>If you import accounts with different name formats, include the <b>Name Format</b> field as a column in your import file and specify Individual, Family, or Business for each account.</p>
Persona Type	<p>If you import accounts with the same persona type, you can enter the persona type on Step 2 of the import process.</p> <p>If you leave the <b>Persona Type</b> field blank, the default persona type will be applied to all newly created accounts.</p> <p>If you import accounts with different persona types, include the Persona Type column in your import file and designate the appropriate type for each account.</p>
Sort Name	<p>This field is required for all name formats. For each <b>Sort Name</b> option, you can select to use auto-generated Data Entry Rules or map this field from your import file.</p>

### > Account information by account number

Use this import to update existing accounts using the account number. You must know and include the account number on the source file.

**Note:** To update or edit **Name** or **Salutation** fields for existing accounts, you will need to use another Account Information template since the Account information by account number template does not include these fields.

To see account numbers for a group of accounts, you can add the Account Number column to your query preview and export the results or create a custom report for a query of those accounts.

Required Fields	Details
Account Number	<p>The Account Number column is required in your import file.</p>
Country	<p>Select <b>Country</b> on Step 1 of the import process. Country does not need to be a column in your import file, but you should only include addresses from one country in your file.</p> <p>If you need to import addresses from other countries, create a separate import file and definition for each country.</p>

### > Account information with single gift

Use this import to create one-time gifts for new or existing accounts.

When you import gifts for existing accounts, make sure you key on **Account Name** to check for duplicate accounts by name. You should also key on either the **Address** or **Postal Code** field to make sure gifts import to the correct existing accounts.

Do not use this import to update existing gifts or to import recurring gifts or pledges.

<b>Required Fields</b>	<b>Details</b>
Account Name	This field is required for all name formats. For Individuals, you can select to use auto-generated Data Entry Rules or map this field from your import file.
Country	Select <b>Country</b> on Step 1 of the import process. Country does not need to be a column in your import file, but you should only include addresses from one country in your file.  If you need to import addresses from other countries, create a separate import file and definition for each country.
Date	If you import single gifts with the same date, you can enter it in the <b>Date</b> field on Step 2 of the import process.  If you import single gifts with different dates, you will need to include a Date column in your import file.
Fund	If you import single gifts with the same fund, you can enter it in the <b>Fund</b> field on Step 2 of the import process.  If you import single gifts with different funds, you will need to include the Fund column in your import file.
Last Name (Individuals Only)	When importing Individual accounts, include Last Name as a column in your import file.
Name Format	If your import file includes a group of accounts with only one name format, select a name format on Step 1 of the import process, so you do not have to include it in your import file.  If your import file includes accounts with various name formats, include the <b>Name Format</b> field as a column in your import file and specify Individual, Family, or Business for each account.
Persona Type	If all new accounts in the import file should have the same persona type, you can manually enter the persona type on Step 2 of the import process.  If you leave the <b>Persona Type</b> field blank, the default persona type will be applied to all newly created accounts.  If you import new accounts with various persona types, then include the Persona Type column in your import file and designate the appropriate type for each account.

Required Fields	Details
Received	<p>If you import new gifts with the same received amount, you can enter it in the <b>Received</b> field on Step 2 of the import process.</p> <p>If you import new gifts with different received amounts, you will need to include the Received column in your import file.</p>
Sort Name	<p>This field is required for all name formats. For each <b>Name Format</b> option, you select to use auto-generated Data Entry Rules or map this field from your import file.</p>

### > Account information with single note

Use this import to add new accounts with a journal note.

Required Fields	Details
Account Name	<p>This field is required for all name formats. For Individuals, you can select to use auto-generated Data Entry Rules or map this field from your import file.</p>
Country	<p>Select <b>Country</b> on Step 1 of the import process. Country does not need to be a column in your import file, but you should only include addresses from one country in your file.</p> <p>If you need to import addresses from other countries, create a separate import file and definition for each country.</p>
Date	<p>If you import notes with the same date, you can enter it in the <b>Date</b> field on Step 2 of the import process.</p> <p>If you import notes with different dates, you will need to include a Date column in your import file.</p>
Last Name (Individuals Only)	<p>When importing Individual accounts, include Last Name as a column in your import file.</p>
Name Format	<p>If you import accounts with only one name format, select a name format on Step 1 of the import process, so you do not have to include it in your import file.</p> <p>If you import accounts with various name formats, include the <b>Name Format</b> field as a column in your import file and specify Individual, Family, or Business for each account.</p>

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Required Fields	Details
Note	<p>If you import accounts with the same note, you can enter it in the <b>Note</b> field on Step 2 of the import process.</p> <p>If you import accounts with different notes, you will need to include a Note column in your import file.</p>
Persona Type	<p>If you import accounts with the same persona type, you can enter the persona type on Step 2 of the import process.</p> <p>If you leave the <b>Persona Type</b> field blank, the default persona type will be applied to all newly created accounts.</p> <p>If you import accounts with various persona types, then include the Persona Type column in your import file and designate the appropriate type for each account.</p>
Sort Name	<p>This field is required for all name formats. For each <b>Name Format</b> option, you select to use auto-generated Data Entry Rules or map this field from your import file.</p>

### > Account information with single contact

Use this import to add new accounts with a journal contact item.

Required Fields	Details
Account Name	<p>This field is required for all name formats. For Individuals, you can select to use auto-generated Data Entry Rules or map this field from your import file.</p>
Contact Method	<p>If you import journal contact items with the same contact method, you can enter it in the <b>Contact Method</b> field on Step 2 of the import process.</p> <p>If you import journal contact items with different contact methods, you will need to include a Contact Method column in your import file.</p>
Country	<p>Select <b>Country</b> on Step 1 of the Import process. Country does not need to be a column in your import file, but you should only include addresses from one country in your file.</p> <p>If you need to import addresses from other countries, create a separate import file and definition for each country.</p>

Required Fields	Details
Date	<p>If you import journal contact items with the same date, you can enter it in the <b>Date</b> field on Step 2 of the import process.</p> <p>If you import journal contact items with different dates, you will need to include a Date column in your import file.</p>
Last Name (Individuals Only)	<p>When importing Individual accounts, include Last Name as a column in your import file.</p>
Name Format	<p>If your import file includes a group of accounts with only one name format, select a name format on Step 1 of the import process, so you do not have to include it in your import file.</p> <p>If your import file includes accounts with various name formats, include the <b>Name Format</b> field as a column in your import file and specify Individual, Family, or Business for each account.</p>
Note	<p>If you import journal contact items with the same note, you can enter it in the <b>Note</b> field on Step 2 of the import process.</p> <p>If you import journal contact items with different notes, you will need to include a Note column in your import file.</p>
Persona Type	<p>If all new accounts in the import file should have the same persona type, you can manually enter the persona type on Step 2 of the import process.</p> <p>If you leave the <b>Persona Type</b> field blank, the default persona type will be applied to all newly created accounts.</p> <p>If you import new accounts with various persona types, then include the Persona Type column in your import file and designate the appropriate type for each account.</p>
Sort Name	<p>This field is required for all name formats. For each <b>Name Format</b> option, you select to use auto-generated Data Entry Rules or map this field from your import file.</p>
Subject	<p>If all new accounts in the import file contain the same subject, you can enter the subject on Step 2 of the import process.</p> <p>If you import new accounts with Can be manually typed in on Step 2 of the import process if all new contacts should be set to the same Subject otherwise include this column in your import file.</p>

### ➤ Account information with single declaration

Use this import type to enter new accounts with a Gift Aid declaration. For more information about the United Kingdom's Gift Aid program, see [Gift Aid on page 1](#).

This import type is only available for customers in the United Kingdom who need to import Gift Aid declaration. You must select the United Kingdom as your locale under user preferences in order to see

this import option. For more information about user preferences, see [User Preferences Page on page 1](#).

Required Fields	Details
Account Name	This field is required for all name formats. For Individuals, you can select to use auto-generated Data Entry Rules or map this field from your import file.
Confirmation Date	<p>If you import declarations with the same confirmation date, you can enter it in the <b>Confirmation Date</b> field on Step 2 of the import process.</p> <p>If you import declarations with different confirmation dates, you will need to include a Confirmation Date column in your import file.</p>
Country	<p>Select <b>Country</b> on Step 1 of the import process. The country does not need to be a column in your import file, but only include addresses from one country in your file.</p> <p>If you need to import addresses from other countries, create a separate import file and definition for each country.</p>
Date	<p>If you import new declarations with the same date, you can enter it in the <b>Date</b> field on Step 2 of the import process.</p> <p>If you import new declarations with different dates, you will need to include a Date column in your import file.</p>
Last Name (Individuals Only)	When importing Individual accounts, include Last Name as a column in your import file.
Name Format	<p>If you import accounts with only one name format, select a name format on Step 1 of the import process, so you do not have to include it in your import file.</p> <p>If you import accounts with various name formats, include the <b>Name Format</b> field as a column in your import file and specify Individual, Family, or Business for each account.</p>
Persona Type	<p>If all new accounts in the import file should have the same persona type, you can manually enter the persona type on Step 2 of the import process.</p> <p>If you leave the <b>Persona Type</b> field blank, the default persona type will be applied to all newly created accounts.</p> <p>If you import new accounts with various persona types, then include the Persona Type column in your import file and designate the appropriate type for each account.</p>
Sort Name	This field is required for all name formats. For each <b>Name Format</b> option, you select to use auto-generated Data Entry Rules or map this field from your import file.
Valid From	Can be manually typed in Step 2 of the import process if all new declarations should be set to the same Valid From date, otherwise include this column in your import file.

## ➤ Account information with single recurring gift schedule

Use this import to add accounts with a recurring gift schedule. Recurring gift schedules added through this import default to manual processing, and the first payment is not applied through the import.

Required Fields	Details
Account Name	This field is required for all name formats. For Individuals, you can select to use auto-generated Data Entry Rules or map this field from your import file.
Country	Select <b>Country</b> on Step 1 of the import process. Country does not need to be a column in your import file, but you should only include addresses from one country in your file.  If you need to import addresses from other countries, create a separate import file and definition for each country.
Date	If you import recurring gift schedules with the same date, you can enter it in the <b>Date</b> field on Step 2 of the import process.  If you import recurring gift schedules with different dates, you will need to include a Date column in your import file.
First Installment Date	If you import recurring gift schedules with the same first installment date, you can enter it in the <b>First Installment Date</b> field on Step 2 of the import process.  If you import recurring gift schedules with various first installment dates, you will need to include a First Installment Date column in your import file.
Frequency	If you import recurring gift schedules with the same frequency, you can enter it in the <b>Frequency</b> field on Step 2 of the import process.  If you import recurring gift schedules with different frequencies, you will need to include a Frequency column in your import file.
Fund	If you import recurring gift schedules with the same fund, you can enter it in the <b>Fund</b> field on Step 2 of the import process.  If you import recurring gift schedules with different funds, you will need to include the Fund column in your import file.
Installment Amount	If you import recurring gift schedules with the same installment amount, you can enter it in the <b>Installment Amount</b> field on Step 2 of the import process.  If you import recurring gift schedules with different installment amounts, you will need to include the Installment Amount column in your import file.

Required Fields	Details
Last Name (Individuals Only)	When importing Individual accounts, include Last Name as a column in your import file.
Name Format	<p>If your import file includes a group of accounts with only one name format, select a name format on Step 1 of the import process, so you do not have to include it in your import file.</p> <p>If your import file includes accounts with various name formats, include the <b>Name Format</b> field as a column in your import file and specify Individual, Family, or Business for each account.</p>
Persona Type	<p>If all new accounts in the import file should have the same persona type, you can manually enter the persona type on Step 2 of the import process.</p> <p>If you leave the <b>Persona Type</b> field blank, the default persona type will be applied to all newly created accounts.</p> <p>If you import new accounts with various persona types, then include the Persona Type column in your import file and designate the appropriate type for each account.</p>
Sort Name	This field is required for all name formats. For each <b>Name Format</b> option, you select to use auto-generated Data Entry Rules or map this field from your import file.

### > Single gift by account number

Use this import to add a one-time gift to existing accounts using the account number. You must know and include the account number on the source file. To see account numbers for a group of accounts, you can add the Account Number column to your query preview and export the results or create a custom report for a query of those accounts.

Required Fields	Details
Account Number	The Account Number column is required in your import file.
Date	<p>If you import gifts with the same date, you can enter it in the <b>Date</b> field on Step 2 of the import process.</p> <p>If you import new gifts with different dates, you will need to include a Date column in your import file.</p>
Fund	<p>If you import gifts with the same fund, you can enter it in the <b>Fund</b> field on Step 2 of the import process.</p> <p>If you import gifts with different funds, you will need to include the Fund column in your import file.</p>

Required Fields	Details
Gift Type	<p>If you import gifts with the same gift type, you can enter it in the <b>Gift Type</b> field on Step 2 of the import process.</p> <p>If you import gifts with different funds, you will need to include the Gift Type column in your import file.</p>
Received	<p>If you import gifts with the same received amount, you can enter it in the <b>Received</b> field on Step 2 of the import process.</p> <p>If you import gifts with different received amounts, you will need to include the Received column in your import file.</p>

### > Single note by account number

Use this import to add a journal note to existing accounts using the account number. You must know and include the account number on the source file. To see account numbers for a group of accounts, you can add the Account Number column to your query preview and export the results or create a custom report for a query of those accounts.

Required Fields	Details
Account Number	The Account Number column is required in your import file.
Date	<p>If you import gifts with notes that have the same date, you can enter it in the <b>Date</b> field on Step 2 of the import process.</p> <p>If you import gifts with notes that have different dates, you will need to include a Date column in your import file.</p>
Note	<p>If you import gifts with the same note, you can enter it in the <b>Note</b> field on Step 2 of the import process.</p> <p>If you import gifts with different notes, you will need to include the Note column in your import file.</p>

### > Single contact by account number

Use this import to add a journal contact to existing accounts using the account number. You must know and include the account number on the source file. To see account numbers for a group of accounts, you can add the Account Number column to your query preview and export the results or create a custom report for a query of those accounts.

Required Fields	Details
Account Number	The Account Number column is required in your import file.

Required Fields	Details
Contact Method	<p>If you import contacts set to the same contact method, you can enter it in the <b>Contact Method</b> field on Step 2 of the import process.</p> <p>If you import contacts with different contact methods, you will need to include a Contact Method column in your import file.</p>
Date	<p>If you import contacts with the same date, you can enter it in the <b>Date</b> field on Step 2 of the import process.</p> <p>If you import new contacts with different dates, you will need to include a Date column in your import file.</p>
Note	<p>If you import contacts with the same note, you can enter it in the <b>Note</b> field on Step 2 of the import process.</p> <p>If you import contacts with different notes, you will need to include the Note column in your import file.</p>
Subject	<p>If you import contacts with the same subjects, you can enter it in the <b>Subject</b> field on Step 2 of the import process.</p> <p>If you import contacts with different subjects, you will need to include a Subject column in your import file.</p>

### ➤ Single recurring gift schedule by account number

Use this import to add a recurring gift schedule to existing accounts using the account number. You must know and include the account number on the source file. To see account numbers for a group of accounts, you can add the Account Number column to your query preview and export the results or create a custom report for a query of those accounts.

Recurring gift schedules added through this import default to manual processing, and the first payment is not applied through the import.

Required Fields	Details
Account Number	This field is required for all name formats. For Individuals, you can select to use auto-generated Data Entry Rules or map this field from your import file.

Required Fields	Details
Date	<p>If you import recurring gift schedules with the same dates, you can enter it in the <b>Date</b> field on Step 2 of the import process.</p> <p>If you import recurring gift schedules with different dates, you will need to include a Date column in your import file.</p>
First Installment Date	<p>If you import recurring gift schedules with the same first installment date, you can enter it in the <b>First Installment Date</b> field on Step 2 of the import process.</p> <p>If you import recurring gift schedules with different first installment dates, you will need to include a First Installment Date column in your import file.</p>
Frequency	<p>If you import recurring gift schedules with the same frequency, you can enter it in the <b>Frequency</b> field on Step 2 of the import process.</p> <p>If you import recurring gift schedules with different frequencies, you will need to include a Frequency column in your import file.</p>
Fund	<p>If you import recurring gift schedules with the same fund, you can enter it in the <b>Fund</b> field on Step 2 of the import process.</p> <p>If you import recurring gift schedules with different funds, you will need to include the Fund column in your import file.</p>

### > Update recurring gift schedule

Use this import to update the installment amount for existing recurring gift schedules. You must know and include the journal entry reference number for the recurring gift schedules you want to update.

You can only update recurring gift schedules that are processed manually. Recurring gift schedules that are configured to process automatically cannot be updated via import.

Required Fields	Details
Installment Amount	<p>If you update all existing recurring gift schedules with the same installment amount, you can enter it in the <b>Installment Amount</b> field on Step 2 of the import process.</p> <p>If you update existing recurring gift schedules with different installment amounts, you will need to include an Installment Amount column in your import file.</p>
Journal Entry Ref	<p>The Journal Entry Ref column is required in your import file. To view the journal entry ref for existing recurring gift schedules, you can create a custom report. Under <b>Report Columns</b>, select Journal Fields from the drop down menu and click <b>Entry Ref</b>.</p>



## General Import Setup

Before you begin an import, you must set up your import source file. Refer to this information to set up your file correctly.

### > Import Guidelines

- To import successfully, select a comma separated file (.csv) file. If you have a Microsoft *Excel* file, you can save it as a .csv file in *Excel*.

**eTapestry** does not support the following file types for import.

- DOC
- DOCX
- Files created by Google *Docs*
- Files created by Mac *Sheets*
- ODF
- ODS
- PDF
- XLS - To convert this file type to .csv, open it in *Excel*, and select to save it as a .csv file.
- XLSX - To convert this file type to .csv, open it in *Excel*, and select to save it as a .csv file.
- The file must have no more than 2,000 lines. If you need to import more records, use separate files of 2,000 lines or less and perform separate imports for each file.
- The file must have column headers. **eTapestry** uses the column headers to map columns to fields in the database. Use descriptive column headers to make mapping easier. Never put data that you want to import on the first line of the import source file.
- The file cannot contain blank lines. Any blank lines create an error in the import process.
- To avoid import difficulty, make sure you remove line breaks within the fields or any fields that contain quotes.
- Each import type has a number of required fields and your source file must contain information you can map to required fields. For example, Account Information types require the **Country** field. For more information required fields for import types, refer to [Import Types on page 37](#).
- If you plan to import addresses, make sure that your import file only includes addresses from one country. If you need to import addresses from other countries, create a separate import file and import definition for each country.
- If you plan to import values into fields with fixed values (such as drop down menus or checkboxes), the values in the import source file must match the values in the database exactly. For example, if you import a fund value, the value in your file must match an existing fund in your database. These values are case-sensitive, and it must be spelled exactly the same.
- If you plan to import user-defined values into a multiple selection field, you must delimit them in the import source file. In this case, use a single field for all the values, and separate them with

on of the available characters. You must use the same delimiter throughout your import source file.

- asterisk (\*)
- pipe (|)
- comma (,)
- semicolon (;)
- tilde (~)

### ➤ Step One - Name and Import Type with Name Formats

**Note:** Customer Support is available to troubleshoot and answer specific import questions. To learn the how-to process for imports, it is best to [review the Account Information Import Tutorial](#) and refer to these import procedure steps.

1. From **Management**, click **Import**. The Import Categories page appears.
2. Click a category to select it, or create a new category.
3. Under **Tasks**, click **New Import**. The Import page appears.
4. In the **Name** field, enter a unique name for your import.
5. In the **Description** field, you can enter a description for your import to make it easy to identify.
6. Under **Select the File to Import**, click **Choose File**. To successfully import your data, select a .csv file. Any leading or trailing spaces included in field values in your import file will be excluded once you import the file and will not appear on Step 2 of the import wizard.

**Tip:** You must select a new file or select the same file again each time you run this import.

7. Next, select an import type. Each import type allows you to import different information into your database. You cannot change the import type once you navigate away from this step. For details about import types, refer to [Import Types on page 37](#)
8. When you select 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 Name Format field from your import file to the **eTapestry Name Format** field.

**Tip:** To successfully map your Name Format field to an **eTapestry** Name Format, make sure your .csv file includes a name format column. In this column, identify each row as Individual, Family, or Business. These Name Formats correspond to the **eTapestry** Name Formats.

9. When you select an Account Information import type, the **Country** section appears. In this field, you must select the country for Account Information import types. This selection controls the address fields available to you when you map fields on [Step Two - Map Your Import File with Name Formats on page 51](#).

**Tip:** Remember, your import file can only include addresses from one country. When you need to import addresses from other countries, create a separate import file and import definition for each country.

- Under **Multi select delimiter**, select a delimiter type to separate values in your import file. You use delimiters for multiple values in a single field. For example, a user-defined field for Interest Areas can have more than one value for a single constituent, such as "Environment\*Animals\*Conservation".

You must use the delimiter you select consistently in your source file. The available delimiter options to select are asterisk (\*), pipe (|), comma (,), semicolon (;), and tilde (~).

- Click **Next** to continue to the next step.

## ➤ Step Two - Map Your Import File with Name Formats

**Show Me:** [Review the Account Information Import Tutorial](#)

- On Step 2 of the import wizard, the Map your Import File page appears with multiple sections to help you identify groups of **eTapestry** fields for a particular area in the application.

The fields that appear on the page are determined by the import type you select on Step 1. For example, when you select the Single Gift by Account Number type, gift fields appear. 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.

- To search for potential duplicates based on an **eTapestry** field, select the checkbox for at least one key. For example, to search for duplicates by name, select the checkbox in the **Key** column beside the **Account Name** field. You should also select to key on the **Persona Type** field to make sure future imports for persona information are successful for existing accounts.

**Tip:** You should only map to **Account Number** to select its **Key** checkbox to identify duplicate accounts. You cannot import data into the **eTapestry Account Number** field because the import does not overwrite existing account number IDs and it automatically assigns an ID number for each new account.

On Step 4, you review potential duplicates and indicate how to handle them in the import.

- To map to a field in the import file, click the icon beside the **eTapestry** field in the **Import Data** column. The Select Import Field screen appears with a list of all column titles from your import file. To map the import field to the **eTapestry** field, click the corresponding column title link. The Select Import Field screen closes and you return to the Step 2 page.

**Tip:** As you map fields, you can view a sample of your data to import beside the field. Use this to confirm you are mapping fields correctly. You also review all mapped data on Step 3 of the import wizard.

- You may need to map more than one field from your import file to the same field in **eTapestry**. For example, if you have a column for **First Name** and a column for **Last name** on your source file, you may want to map both columns to the **eTapestry Account Name** field. To do this, click the icon beside the field in the **Import Data** column and select the First Name field, enter a space, and select the Last name field. You can also do this for the

**Sort Name** field. However, map the Last name field first, enter a comma and a space, and then map the First Name field.

- In the **Persona Type** field, you can map a field from your import file. To import the same type for all accounts in the import, manually enter the type in the field in the **Import Data** column.
- Under **All other account fields**, you can remove a field from the page when your import file does not contain data for it. To do this, click the **X** beside the field. This prevents inadvertently mapping data to the field in **eTapestry**.
- After you map all required fields, you can select additional fields to map. To select an additional **eTapestry** field to map to, click **Import Another eTapestry Field**. The Select eTapestry Field screen appears. The list that appears includes all eligible fields for this import type, including user-defined fields.

You can select as many of these fields as you need for your import. After you select the fields, you must map them to a column from your source file. To do this, click the icon beside each field in the **Import Data** column and select the appropriate field.

4. For fields with established name and salutation rules, you can apply the name value configuration you selected for these fields to maintain consistent name data in your database.

**Note:** If the data entry rule for a required field is set to **Blank**, you must provide a value from your import file.

- **Individual Name Format** - In the drop down menus for **Account Name**, **Sort Name**, and **Salutation** fields, you can select to generate name values based on the name and salutation rules your organization has set up in **eTapestry** or generate the name format or salutation according to the import file or custom text you enter in these fields.
  - **Business and Family Name Format** - In the drop down menus for **Sort Name** and **Salutation** fields, you can select to generate name values based on the name and salutation rules your organization has set up in **eTapestry** or generate the name format or salutation according to the import file or custom text you enter in these fields.
5. When you are finished mapping all your data, click **Next** to navigate to step three of the import wizard.

### > Step Three - Preview

On step three of the import wizard, the Preview page appears.

View the exact data that will be mapped to your **eTapestry** database for the first 25 lines of your import. To correct mapping errors, click **Back** to return to step two and re-map your data. Once you preview your data, click **Next** to navigate to step four.

### > Step Four - Possible Duplicates Report

**Note:** If your import file has errors, an error screen appears first. In this case, correct the errors and begin your import again.

1. On step four of the import wizard, the Possible Duplicates Report appears.

The report shows you potential duplicates in your import based on the duplicate key or keys you chose on step two of the import wizard. You decide how to handle each potential conflict.

- **Merge:** This option merges data from your import source file into any fields that do not already contain data in the existing account. No new account is created, and fields that already contain data on the existing account are not affected.
- **Replace:** This option moves all data from your import source file into the fields that you mapped on the existing account, regardless of whether or not those fields already contain data. No new account is created. Empty fields from your import source file do not replace fields with data in the existing account.
- **Create:** This option creates a new account using the data in your import source file. The existing account is not changed.
- **Skip:** This option skips that line on your import source file. The existing account is not changed, and the information on that line is not imported.
- **Trust:** This option only applies to imports that include journal entry information. This option adds only the journal entry information. No new account is created, and the import makes no changes to the existing persona and account data. If you choose this option on an import that does not include journal entry information, it behaves like the skip option.

2. Click **Next** to commit the changes and begin the import.

**Warning:** After you commit your import file, you cannot reverse your import. Be sure that all options are correct and that you are ready to perform the import before you click **Next** on this screen.

## Exports

Exports allow you to create reports in a format that you can use outside **eTapestry**, such as Excel or .csv files. Exports can be useful if you use an external mailing house, or need to synchronize **eTapestry** data with an outside system such as an accounting software package.

**eTapestry** includes standard exports, and you can export any standard or custom report.

**Tip:** Consider creating a folder on your local computer called "**eTapestry** Export Files." When you run an export, download the export file and save it to this folder. In this way, you'll be able to easily find the **eTapestry** files you need when you are ready to merge the data into a third party software program.

## Standard Exports

**eTapestry** provides several predefined exports, which enable you to export data from **eTapestry** to use in another software program. You can also create your own exports based on existing queries.

**Note:** Security queries and codes may restrict you from running some exports or viewing certain information. If you have questions about your security permissions, contact your administrator.

When you launch (or run) an export, you create a merge file that contains the exported data field from **eTapestry**. Save the file to your local drive and merge it with a variety of third-party word processing or spreadsheet applications.

### > Account Exports

Use these exports to export data for third-party accounting software. These exports generate in order by postal code. For more information, refer to [Account Exports on page 55](#).

- Annual Receipt Export
- AddressFinder™ (NCOA®) or Mailhouse Export
- Pledge Reminder Export
- Relationships Export
- Tribute Notification Export
- iCal Export

### > Banking Exports

Use these exports to create files required by different banking systems to process payments. For more information, refer to [Banking Exports on page 58](#).

- SEPA Banking Export

### > Accounting Exports

Use these to export data to your accounting software. These exports generate in order by postal code. For more information, refer to [Accounting Exports on page 59](#).

- Colleague Export
- Evansville Export
- The Financial Edge Export
- ForFUND Export
- FundWare Export
- Intacct Export
- MIP Export
- MYOB Export
- NBA Export
- Norton Export
- QuickBooks Export

**Tip:** For information about how to use the exported data in third-party application, such as Microsoft *Excel*, refer to the help documentation for that software.

## Account Exports

Account exports are standard **eTapestry** exports that provide account information in a format that is ready to use outside in another application for imports. Review this section for information about each standard account export type and the fields each contains.

### > Annual Receipt Export

Use this export to send your constituents a pledge amount statement. This export is also useful for tax purposes.

Name and address	Short salutation	Long salutation	Envelope salutation
Date	Fund	Pledge amount	Amount received
Total for pledged amount	Total for received amount	Non-deductible amount	Total non-deductible amount

### > AddressFinder™ (NCOA®) or Mailhouse Export

Use this export to create and send a data file with fixed length fields to a mailhouse vendor . You can print the file layout or you can import it into your third-party program.

Name	Address 1	Address 2	Address 3
Address 4	City	State	Zip code
Country	Short salutation	Long salutation	Account ID
Sort key			

### > Pledge Reminder Export

This export creates a list of late pledge payments for accounting purposes or you can use the data fields in a pledge reminder to notify constituents of past due pledges.

Pledge	Date	Pledge	Amount
Pledge	Balance	Date of next payment	Amount of next payment
Fund	Long salutation		

### > Relationship Export

Use this export to view relationships between accounts.

Account ID	Account name	Account address block	Account short salutation
Account long salutation	Account phone	Account email	Account note
Account contact name	Account job title	Account envelope salutation	Account sort name
Related name	Related address block	Related short salutation	Related long salutation
Related phone	Related email	Related note	Related contact name
Related job title	Related envelope salutation	Related sort name	Account relationship type
Related relationship type	Relationship start date	Relationship end date	Relationship notes
Relationship matching account	Relationship matching account text		

### > **Tribute Notification Export**

Use this export to track or print a letter that identifies who gave gifts for a tribute account.

Tribute name	Notificant name	Address block for donor	Address block for notificant
Short salutation	Long salutation	Donor name	Pledge date
Fund	Pledged amount	Received amount	Total amount pledged
Total amount received			

### > **AddressFinder™ (NCOA®) or Mailhouse Export**

1. From **Management**, click **Standard Exports**.
2. Under **Account Exports**, click **NCOA Export**. The Launch NCOA Export screen appears.
3. Select the category and query you want to use to run the export.
4. Enter the export criteria based on your *NCOA* or mailhouse setup.
5. Select whether to export all personas or set up a hierarchy that determines which to export.
6. Under Delivery Options, select how you want to receive the export file. You can download it directly to your computer, put it in your *eTapestry* drop box, or receive it by email.
7. When you download the export, save it locally to your computer.
8. Click **Submit**.



### > Relationships Export

1. From **Management**, click **Standard Exports**.
2. Under **Account Exports**, click **NCOA® Export**. The Launch NCOA® Export screen appears.
3. Select the category and query you want to use to run the export.
4. Enter the export criteria based on your NCOA® or mailhouse setup.
5. Select the relationship type.
6. Under Delivery Options, select how you want to receive the export file. You can download it directly to your computer, put it in your **eTapestry** drop box, or receive it by email.
7. When you download the export, save it locally to your computer. .
8. Click **Submit**.

## iCal Export

You can export iCal items so you can then import them to your calendar management software, such as *Microsoft Outlook*. In order to run the iCal export, you must first query the calendar items that you would like to export.

### > Query iCal Items

1. From **Queries**, click **Manage Queries**. The Query Categories page appears.
2. Click on a category to select it, or create a new category.
3. Under Tasks, click **New Query**.
4. In the **Name** field, enter a unique name for your query.
5. Under **Starting Criteria**, select the "Base" category and the query "All Journal Entries - JE."
6. In the **Data Return Type** field, select "Journal Entries."
7. Under **Available Fields**, select "Journal."
8. Click **Journal Entry Types** from the list of available fields.
9. Select the **Calendar Item** checkbox.
10. Under **Available Fields**, select "Journal Created By."
11. Select the **Whoever Runs This Query** checkbox.
12. If you want to limit the dates of the calendar items, under **Available Fields**, select the "Dates" category and click **Journal Entry Date**. Then, under **Criteria**, enter a journal entry date range.
13. Click **Save And**.

### > Run iCal Export

1. From **Management**, click **Standard Exports**.
2. Under Account Exports, click **iCal Export**. The Launch iCal Export screen appears.

3. Select the category and query you want to use to run the export.
4. Under Delivery Options, select how you want to receive the export file. To download it directly to your computer, select "Export File (iCal) - Download." You can also put it in your **eTapestry** drop box, or receive it by email.
5. When you download the export, save it locally to your computer so it is ready for importing.

### > Import Calendar Items to Microsoft Outlook

1. Open *Microsoft Outlook*.
2. In the **File** menu, click **Select Import and Export**. The Import and Export File Wizard appears.
3. Select **Import an iCalendar or vCalendar file (.vcs)** from the list of options and click **Next**.
4. Browse to the exported file and click **OK**. Your exported calendar items are saved to your Outlook Calendar item.

### > Import Calendar Items to Entourage

1. Open *Entourage*.
2. Drag the file from your desktop to *Entourage* in the dock. The calendar items included in your file are now imported into *Entourage*.

## Banking Exports

Banking exports enable you to create files required by different banking systems to process payments.

### > SEPA Banking Export

The SEPA export allows you to create an xml file in a PAIN.008 format. Banks require this format in order to accept SEPA direct debit collections.

**Note:** SEPA is currently available for **eTapestry** users in the Netherlands only.

1. From **Management**, click **SEPA Banking Export**. The **SEPA Banking Export** page appears.
2. For **Export Type**, select whether you want to include Regularly Scheduled Direct Debits and Retries or only Retries.
3. For **Export Method**, select **Standard** to include all eligible gifts. You can also only include gifts from a specific query. To use this option, you must have a query already set up. Select **Custom** and then select a query category and query.
4. Select a **Date Range**. If you select **This Month**, only gifts made in this calendar month are included. If you select **Next Month**, only gifts made in the next calendar month are included. You can also select a custom date range. To use this option, select **Custom** and enter a start and end date.
5. Select one or more **Gift Status** types. To include recurring gifts with no associated payments, select **First and One Off**. To include recurring gifts that have one or more associated payments, select **Recurring**.

6. To generate a final export, under **Export Mode** select **Live**. To generate a test export first, select **Test**.
7. For a live export, enter a **Process Date**. This is the date, in the future, when you expect the bank to process gifts.
8. Click **Next** to preview the report. If the number of gifts and their total value are not what you expect, click **Back** to update the SEPA Export Criteria.
9. Click **Next**. The XML file is created.

## Accounting Exports

If you need to export your data from **eTapestry** to your accounting software, use an *eTapestry* export. For your convenience, **eTapestry** includes predefined exports for some common software programs, including **The Financial Edge**, **FundWare**, and others. For other programs, use **eTapestry**'s Custom Report Writer to create your own export definition. If you create your own export definition, be sure to review the user manual for your accounting software to ensure the import file has the necessary format and content.

Before you set up an accounting export, ensure your *eTapestry* database is set up correctly.

- Set up funds in *eTapestry*. These indicate how a donation will be used. Most funds in *eTapestry* track income, including gifts, pledges, and pledge payments. Based on a fund, donations are credited to specific General Ledger (GL) accounts in your accounting software. Therefore, you enter the appropriate GLaccount numbers when you set up each fund. Your accountant determines which account numbers to use.
- To track expenses in **eTapestry**, your organization may use disbursements. If you want to export disbursements to your accounting software, they cannot be associated with funds that you set up to track income. Instead, set up a set up separate funds for each expense account that will receive exported data. For information about funds, refer to [Funds on page 34](#).
- You may need to set up user-defined fields for exports to some accounting software programs. Because these fields vary, be sure to review the help topics for your specific accounting export.

Identify at least one query to use to select transactions to include in the export file. If you import your data at the end of each work day, consider using the Today query in the Constituent Journal Entry Date category. If you import more frequently, create a query that excludes items that have already been exported. To do this, for exported transactions, mark the Journal Entry Status as "Pending." If you want to use different export options for gifts than for pledges, use different queries for each.

After you create the export file, save it to your computer on your network so you can import it into your accounting system. You can also email the export file to your accountant. To import the transactions, follow the instructions your accounting software provides.

After a transaction is exported, you should mark it as Final. This prevents anyone other than an administrator from modifying it and helps to keep your accounting system and *eTapestry* in sync. To quickly finalize exported transactions, you can run a mass update using the same query that you used to create the export file.

## The Financial Edge Export

You can export transactions from your *eTapestry* database so you can then import them into **The Financial Edge**. For each transaction, the export file includes a credit and debit record. For more information about what the export contains, refer to [The Financial Edge Export File Format on page 62](#).

Before you create an export for **The Financial Edge**, set up funds with the appropriate account numbers and project IDs from your *Financial Edge* system. If you want to associate *eTapestry* transactions with a particular project in **The Financial Edge**, enter a project ID when you set up the fund. For more information about funds, refer to [Funds on page 34](#).

When you are ready to import transactions into the GL, refer to **The Financial Edge's** [Import Guide](#).

### ➤ Run the The Financial Edge export

Before you run the **Financial Edge** Export, you must set up funds to include appropriate cash, revenue, receivables account, and project ID values. Then enter transactions into *eTapestry*.

1. From **Management**, click **Standard Exports**.
2. Under **Accounting Exports**, click **Financial Edge Export**. The Launch **Financial Edge** Export screen appears.

**Note:** If you create a new query, remember that some *eTapestry* transactions should not be imported into your **Financial Edge** database. For example, if you have entered disbursements in *eTapestry* to track expenses, they might not need to be imported into **The Financial Edge**. You can exclude those disbursements from your query.

3. Select the category and query you want to use to run the export.

**Tip:** After you import transactions into **The Financial Edge**, use this same query to finalize journal entries by mass update.

4. Enter a batch number.
5. In the **Journal** field, enter a note, such as "eTapestry."
6. Under Delivery Options, decide what type of file you want and how you want to receive it. You can receive the file as a *Microsoft Excel* (.xls), Comma separated value (.csv), or a Merge (.mrg) file. You download it directly to your computer, put it in your *eTapestry* drop box, or receive it by email.
7. When you download the export, save it locally to your computer so it is ready for importing.

Sample:

Account Number	Date	R	D or C	Debit/Credit Amount	Organization Number	Customer Name	Commas
01-40201	6/4/2014	R	D	100	01	Emily Black	...

**Note:** When you are ready to import transactions into the GL, refer to **The Financial Edge's** [Import Guide](#).

### ➤ Finalize transactions that export to The Financial Edge

After you export transactions from **eTapestry** and import them into **The Financial Edge**, mark them as final in **eTapestry**. This helps you track which transactions have been exported. It also prevents users who are not admins from modifying the transactions, which keeps the data in your databases consistent.

1. From **Management**, click **Mass Updates**.
2. Click **Finalize Journal Entries**.
3. Select the category and query that you used for the export.
4. Click **Next** under Steps.
5. Under Action, select **Finalize**.
6. Click **Next**.
7. Review the query, number of entries to update, and finalize information. To make changes, click **Back**.
8. To run this process, click **Next**.

**Tip:** We recommend that you run this process at the end of the day, when other users are not accessing **eTapestry**. Other users cannot access the records affected by this update until after the process is complete. You can log out of **eTapestry** while the process continues.

## Account Numbers for The Financial Edge

When you create a **Financial Edge** export, the account numbers are based on the fund for that transaction. When you set up a fund in **eTapestry**, you enter account numbers for the **Cash Account**, **Receivables Account**, and **Revenue Account** fields.

The table below shows which account numbers are used for each transaction type in the **Financial Edge** Export.

Transaction Type	Credit to this account	Debit to this account
Gift	Revenue	Cash
Reversed Gift	Cash	Revenue
Pledge	Revenue	Receivables
Reversed Pledge	Receivables	Revenue
Payment	Receivables	Cash
Reversed Payment	Cash	Receivables
Recurring Gift	Revenue	Cash
Reversed Recurring Gift	Cash	Revenue
Disbursement	Cash	Revenue

Transaction Type	Credit to this account	Debit to this account
Reversed Disbursement	Revenue	Cash

## The Financial Edge Export File Format

For each transaction in the query used to run the export, the export file has a credit and debit record. The export also includes the following details for each record.

Column Name	Description
Batch	Shows the batch number that you entered on the Launch page of the export. The batch number is not required to run the export. If you do not know the correct batch number when you run the export from <i>eTapestry</i> , leave the field blank. Before you import the file into <b>The Financial Edge</b> , enter the batch number into the file.
Organization Number	For every row of the export, this is 1. If you are not using the multiple sets of books in your <b>Financial Edge</b> setup, then you may not need this column in order to process your import into <b>The Financial Edge</b> . You can either remove it from export file before you import into <b>The Financial Edge</b> , or leave it unmapped during the import process.
Account Number	For each transaction, it shows the account number (cash, revenue, or receivables) based on the fund, the transaction type, and whether it is the credit or debit record for that transaction.
Date	Shows the journal entry date from each transaction.
Encumbrance Status	For every row, this is "Regular."
Type	Shows whether a record is a credit or debit.
Amount	If the transaction is a gift, gift split, payment, recurring gift, or disbursement, this shows the received amount from the transaction. If the transaction is a pledge or pledge split, this shows the pledged amount.
Journal	Shows what you entered for the journal field when you created the export. This field is not required. If you do not know the correct journal entry when you export from <i>eTapestry</i> , leave the field blank. Before you import the file into <b>The Financial Edge</b> , enter the Journal entry to the file.
Journal Reference	Shows the name of the constituent account, followed by the transaction type. For example, if the account for Melissa Jordan contained a gift, the Journal Reference for that transaction would be Melissa Jordan-Gift.
Project ID	For each transaction, it shows the project ID based on the Fund.
Project Amount	If the transaction is a gift, gift split, payment, recurring gift, or disbursement, this shows the received amount from the transaction. If the transaction is a pledge or pledge split, this shows the pledged amount.

## FundWare Export

You can export transactions from your **eTapestry**, so you can then import them into **FundWare**. In order to run the FundWare export, you must first set up funds with the appropriate account numbers for your GL. For information about funds, refer to [Funds on page 34](#).

### > Run FundWare export

1. From the **Management** tab, click **Standard Exports**.
2. Under **Accounting Exports**, click **FundWare Export**. The Launch FundWare Export screen appears.
3. Select the category and query you want to use to run the export.
4. Enter the export criteria based on your **FundWare** setup.
  - In the **Division** field, enter the two digit number for the division.
  - In the **Journal Name** field, enter the five character name of the Journal to which the entries will be posted.
  - In the **Date** field, enter when transactions are posted. Use MMDDYYYYY format. Do not use hyphens or slashes.
  - In the **File Name** field, enter the five character name of the batch. This appears on the second line of the export.
  - In the **Description** field, enter a description for the batch.
  - If your organization uses reference fields, either enter the values or select to export constituent account names, check names, and transaction dates.

Alternatively, select to export account names, check numbers, or transaction dates.

5. Under Delivery Options, decide what type of file you want and how you want to receive it. You can receive the file as a *Microsoft Excel (.xls)*, Comma separated value (.csv), or a Merge (.mrg) file. You download it directly to your computer, put it in your **eTapestry** drop box, or receive it by email.
6. When you download the export, save it locally to your computer so it is ready for importing.

**Note:** When you are ready to import transactions into the GL, refer to the [FundWare System Administration Guide](#).

## Fundware Export Definition File

Row 1

Item	Description
Division Number	2 Digits
Separator	Comma, Pipe, etc.

Row 2

Item 1	Description
1	-
Journal Name	5 characters
Today's Date	MMDDYYYY
Temporary File Name	

Row 3

Item 1	Description
4	-
Account Number	-
Description	-
Reference 1	UI Notes
Reference 2	UI Notes
Reference 3	UI Notes
Amount	Numeral with 2 decimals

Sample

DIV = ##	SEP = ,	-	-	-	-	-
1	jrn1	06172002	file			
4	revenue#	Memorial	ref1	ref2	ref3	-25.25

## MIP Export

You can export transactions from your **eTapestry**, so you can then import them into MIP. For each transaction, the export file includes a credit and debit record. In order to run the MIP export, you must first set up funds with the appropriate account numbers.

In **eTapestry**, a fund designates the purpose of a donation. MIP uses several splits to categorize each transaction. Your accountant selects the number and types of splits that your organization uses. Your organization may have a MIP split called Fund, but it is not the same as an **eTapestry** fund. Other common names for splits are Project, Cost Center, General Ledger Account, Subaccount, Restriction and Department. For information about **eTapestry** funds, refer to [Funds on page 34](#).

If there are only a few combinations of splits that you use to represent Gifts, Pledges and Payments in MIP, you may want to create separate **eTapestry** funds for each combination. If your data entry personnel have limited accounting knowledge, and you want to minimize the number of fields that must be entered for each donation, consider this approach.



For some organizations, creating a fund for every combination of splits would result in too many funds. In this situation, consider using a user-defined field for one or more splits. For each donation, you enter the fund and user-defined field.

For example, your organization may have a split called Program Code, which it uses to designate which missionary group collected the donation. The donation can be made to one of several General accounts, regardless of which missionary group collected it. Since your organization may work with hundreds of missionary groups, there would be too many combinations of Program Codes and General accounts to create separate funds. For this example, it is better to use a user-defined field for the Program Code and separate funds for each General account.

**eTapestry** provides four user-defined fields which the MIP Export also recognizes: Location, Program, Department and Grant. To simplify data entry, create dropdown list for each field, so your data entry person can quickly select the appropriate value. The values store in an **eTapestry** user-defined field must be identical to the value for the MIP split. Because the MIP values are usually codes, instead of names, it can be difficult for your **eTapestry** data entry person to identify the appropriate value. To help, consider use the code followed by the name or description for the user-defined field; for example, 60-Kenya, or U-Unrestricted. In order for the MIP Definition File to separate the code from the name or description, the code must be first.

**Note:** You cannot rename these four user-defined fields to match the names of your MIP splits. However, you should set up your MIP Definition File to ensure the data is imported to the correct split. For example, data in the Location field can be imported to a Cost Center split in MIP.

## > Run MIP export

1. From the **Management** tab, click **Standard Exports**.
2. Under **Accounting Exports**, click **MIP Export**. The Launch MIP Export screen appears.
3. Select the category and query you want to use to run the export.
4. Enter the export criteria based on your *MIP* setup
  - **Session ID** - In this field, enter up to 12 characters to identify this export. You can create your own unique ID number for each export or simply use the date.
  - **Document Number** - In this field, enter up to 15 characters to define this document. The document number is similar to the concept of a batch.
  - **Description** - In this field, enter up to 60 characters that describes the export.
  - **Effective Date** - In this field, enter the date.
5. Under Delivery Options, select how you want to receive the export file. You can download it directly to your computer, put it in your **eTapestry** drop box, or receive it by email.
6. When you download the export, save it locally to your computer so it is ready for to import into MIP.  
The export file is a Text (.txt) file. To open the file and review it's content, use *Notepad*.
7. Click **Submit**.

**Note:** Before you import transactions into *MIP*, you also need to set up a *MIP* Definition File. For information, refer to [MIP Definition File on page 66](#)

## MIP Definition File

To import transactions into *MIP*, you need to set up a *MIP* Definition File. When you set up the file, you specify the starting position and length of each transaction split that you track in *MIP*. For each split, this information varies based on where you store the matching information in *eTapestry*.

For each transaction in your *eTapestry* query, the *MIP* Export file includes a credit and debit record. The export file is formatted with fixed length fields. The starting position and length for each field appear in the following table.

**MIP Export File Format**

MIP Field Name	Starting Position	Length	<i>eTapestry</i> Data Source
Session Number	1	12	Session ID from Export Launch Page
Document Number	13	15	Document Number from Export Launch Page
Session Description	28	60	Session Description from Export Launch Page
Session Date	88	10	Date from Export Launch Page
Transaction Debit Amount	98	17	Debit amount (blank on Credit line)
Transaction Credit Amount	115	17	Credit amount (blank on Debit line)
Transaction Split(s) from Fund	132	36	From Fund: Credit Account on Credit Line, Debit Account on Debit line
Transaction Date	168	10	Date from <i>eTapestry</i> transaction
Transaction Split(s) from Location	178	10	Location user-defined field
Transaction Split(s) from Program	188	10	Program user-defined field
Transaction Split(s) from Department	198	10	Department user-defined field
Transaction Split(s) from Grant	208	10	Grant user-defined field
Donor Name	218	45	Donor Name
Transaction ID	263	3	Generated during export to mark each donation as a separate <i>MIP</i> transaction

For example, you may have stored three splits in the Account fields on the Fund. The first split is the GL code, which is 6 digits long. The second split is the Cost Center, which is 4 digits long. Third split is the Restriction, which is one digit long. You separated the splits using a dash (-), so that the accounts on the Fund have values such as: 156430-5299-1. The export file will include this entire value starting in position 132. Your *MIP* Definition file would specify that the GL Code starts in position 132 and is 6 characters long, the Cost Center split starts in position 139 and is 4 characters long, and the Restriction split starts in position 144 and is one character long.

Sample:

Session ID	Document Number	Description	Session Date	Amount	GL Number	Location	Program	Department	Grant
session#	session#	description	06172002	25.25	revenue #	UDF	UDF	UDF	UDF

### > Finalize transactions that export to MIP

After you export transactions from **eTapestry** and import them into *MIP*, mark them as final in **eTapestry**. This helps you track which transactions have been exported so that you can avoid creating duplicates in *MIP*. It also prevents users who are not admins from modifying the transactions, which keeps the data in your databases consistent.

1. From **Management**, click **Mass Updates**.
2. Click **Finalize Journal Entries**.
3. Select the category and query that you used for the export.
4. Click **Next** under Steps.
5. Under Action, select **Finalize**.
6. Click **Next**.
7. Review the query, number of entries to update, and finalize information. To make changes, click **Back**.
8. To run this process, click **Next**.

**Tip:** We recommend that you run this process at the end of the day, when other users are not accessing **eTapestry**. Other users cannot access the records affected by this update until after the process is complete. You can log out of **eTapestry** while the process continues.

To remove transactions that have already been exported from your export query, specify that Journal Entry Status should be "Pending." After you finalize a transaction, you'll have the option to reverse it instead of deleting it. When you create a reversal transaction for a constituent, you can then export it to *MIP* to keep **eTapestry** and *MIP* in sync.

## QuickBooks Desktop Export

To take advantage of the *QuickBooks* desktop export, you must first set up your **eTapestry** database to track the information *QuickBooks* requires.

First, set up funds in **eTapestry** to indicate how each gift is used. Refer to [Funds for QuickBooks Desktop on page 68](#).

Then, based on how your *QuickBooks* desktop database is set up, you may need to create one or more user-defined fields. Refer to [User-Defined Fields for QuickBooks Desktop on page 68](#).

## Funds for QuickBooks Desktop

As a general rule, if you do not export items out of **eTapestry**, then you create a fund for each income account that could be associated with transactions tracked in **eTapestry**. If you export items and but do not use **eTapestry** Cart, create a fund for each item. If you track items in the **eTapestry** Cart, you must associate the item with a fund that has the correct income account associated with that item in **QuickBooks** desktop.

Donations made to a fund are credited to specific General Ledger (GL) accounts in **QuickBooks** desktop. Enter the appropriate GL account codes for each of the funds that you have in **eTapestry**. The GL account codes must be spelled identically in **eTapestry** and **QuickBooks** desktop. For information about what GL numbers to include, consult your accountant.

Before you export from **etapestry**, ensure that your **eTapestry** database is set up with correct funds. Different types of donations require different types of accounts on the fund. Your funds in **eTapestry** must match the **QuickBooks®** income accounts that you want to import.

- The fund name must be identical to the income account name from your chart of accounts.
- The cash account for each fund, must be the same as your bank account GL account number for your deposited funds account.
- If you track invoices and payments in **QuickBooks®** desktop, the receivable account must be the same as the accounts receivable account GL account number in **QuickBooks®** in order to export pledges and payments.
- The revenue account must be the same as the income account GL account number in **QuickBooks®** desktop.
- If you use **QuickBooks** Undeposited Funds, then all of your **eTapestry** funds need Undeposited Funds account number in the **Cash Account** field.

When required account fields are missing, donations made to that fund may not appear in the export. You can also include the **Fund Description** field in the export.

For more information about funds, refer to [Funds on page 34](#).

### Required Account Fields

Type	Credit	Debit	Note
Gift	Revenue	Cash	Most organizations export Gift information.
Pledge	Revenue	Receivable	Many organizations do not export pledge information.
Payment	Receivable	Cash	If you plan to export payments but not pledges, you can enter the same account number for receivable as for revenue. In this way, the import treats gifts and payments for the same fund in the same way.

## User-Defined Fields for QuickBooks Desktop

Based on how your **QuickBooks®** database is set up, you may need to create one or more User Defined Fields. For information about how to create user-defined fields, refer to [User-Defined Fields on page](#)

## 26.

- Class and Subclass User-Defined Fields: UDFs "Class", "Subclass 1" and "Subclass 2" enable you to further breakdown the fund field. If you track classes in *QuickBooks* desktop, add your main and subclass values under these user defined fields. These fields must be single-select text defined fields that apply to transactions only. The CLASS column in the export file will contain the concatenated values for Class, Subclass1 and Subclass2.
- Deposit Date User-Defined Field: If you make bank deposits at the end of the week and use the Gift Date to track the date you received a donation, use the "DEPOSIT DATE" UDF to store the date that the donation was deposited in the bank. Use this to ensure that the date on the imported *QuickBooks*® desktop transaction matches the bank deposit date. You must set up DEPOSIT DATE as a DATE defined field to apply to transactions only.
- Deposit ID User-Defined Field: If you make more than one bank deposit in a day, create the "DEPOSIT ID" user-defined field. Use this to separate donations into the same groups as were presented to the bank. You must set up DEPOSIT ID as a text defined field to apply to transactions only.
- Account Type User-Defined Field: If you continue to track Customer information in your accounting software, you may want to use the "ACCOUNT TYPE" user-defined field to store the same information that you would put into the *QuickBooks*® Customer Type field. Some of the customer type values are individual, business, foundation, church. You must set up "ACCOUNT TYPE" as a TEXT defined field to apply to constituents only.

## Run QuickBooks Desktop Export

Once you have GL Accounts on all your funds and transactions ready to export, you are ready to run the *QuickBooks*® desktop export.

### > Run the export

1. From **Management**, click **Standard Exports**. On the *eTapestry* Standard Exports screen, click **QuickBooks Desktop Export** under **Accounting Exports**. On the launch page, select a query. You can use one of the standard queries like one of the Constituent Journal Entry Date queries, or you can create your own Journal Entry query.

**Note:** If you are tracking donations with gift types other than cash and check, you should specify the gift type to be exported in the query. Cash and check donations should be exported together.

2. On the Customer Information tile, select your customer options.
  - Select whether *QuickBooks* desktop should identify constituents by their name or their sort name.
  - Indicate if you want *QuickBooks* desktop to create customer records. If you select "No," *QuickBooks* desktop will put constituents in either the Vendor or the Other Name list, depending on our *QuickBooks* desktop setup.

**Note:** The *QuickBooks* desktop import will register an error if you attempt to add to the Customer list any donor names that are currently stored in your *QuickBooks* desktop database on the Other Names or Vendor lists. The error message will indicate that the import cannot be used to change the type of a name. To correct the problem, you can manually change the name record in your *QuickBooks* desktop database to have the type Customer.

- If you choose to create customer records, indicate whether you want to include optional customer fields. export names and whether you want to create customer records in *QuickBooks* desktop and export optional customer fields. Optional fields include account number, address, voice and mobile numbers, email address, and customer type.
3. In the Transaction Information tile, enter details about how to handle transactions in *QuickBooks* desktop.
- **QuickBooks Desktop Transaction Type** determines whether donations are stored in your *QuickBooks* database as deposits or cash sales.
  - Select **Yes** on the **Export Individual Transactions** field to export each individual **eTapestry** transaction to a separate *QuickBooks* desktop transaction. To group transactions together, select **No**. It is common to import all donations from a single bank deposit together into a single entry in the Cash account, while keeping the detail of each gift in the Income accounts. This option is not available for cash sales, because each donation must be tied to a specific *QuickBooks* desktop customer.
  - If you do not choose to export individual transactions, select the grouping criteria in the **Transaction Grouping** field. The deposit date grouping can be useful to save transactions to deposit once a week. The deposit ID grouping is useful to make more than one deposit on a single day. The credit/debit card type grouping combines donations with the same credit/debit card type and gift date into one *QuickBooks* desktop transaction.
  - To combine all donations associated with the same credit account and CLASS value into a single distribution within a transaction, select Yes on the **Subtotal by GL Account# field**. This option is only available when the **Export Individual Transaction** option is set to **No**. Export files created with this option do not include donor information on the transaction.
1. On the **Credit/Debit Card Payment Method** field, select "Credit/Debit Card" or "Credit/Debit Card Type." When you select "Credit/Debit Card," the words "Credit/Debit Card" appear as the payment method on the *QuickBooks* desktop transaction for a gift or payment that has a "Credit/Debit card" gift type in **eTapestry**. When you select "Credit/Debit Card Type," the credit/debit card type that you select on the gift page is placed in the *QuickBooks* **Payment Method** field.
2. In the **Track Sales Tax** field, select whether you want to include sales tax information on the import.
4. You can customize three fields in your export.
- **Transaction Name:** Select the value to be used to identify transactions in the export.
  - **Transaction Memo:** Select the value to be displayed in the **Memo** field for the transaction line in the input file.

- **Distribution Memo:** Select the value to be displayed in the **Memo** field on each detail line of the import file.
5. Select your delivery options. The **Report Format** field defaults to a .iif file, which is the file format needed to import the data into *QuickBooks* desktop.
  6. Click **Submit** to run the export or **Schedule for Off-Hours** to run it later or to set up a recurring export.

### > Import data to QuickBooks

1. Backup your database. Before you run the *QuickBooks*® Import function, it is a good idea to back up your *QuickBooks*® desktop database. That way, if there is any problem with the import, you can easily restore from the backup to get your accounting system back to the way it was before the import.
2. Import your transactions. After you have run the backup, select the IIF File import option in in the *QuickBooks*® File menu. Select the name of the IIF file to be imported from the displayed list. The import starts immediately after you select the name of the IIF file from the list.
3. Check your work. When the import is complete, check the results to make sure that the imported data matches your expectations. If it does not, you can restore the *QuickBooks*® desktop database to the backup.

**Warning:** To make sure that donations are only recorded once in your accounting package, do not import transactions more than once. To keep track of the donations that have been exported, mark each *eTapestry* record as Final after it has successfully imported into your *QuickBooks*® desktop database. You can do this globally for all donations in your export query. From the Management tab, click **Mass Update**. On the Mass Updates page, click **Finalize Journal Entries** under Update Existing Items and select the same query you used for your export. To remove transactions that have already been exported from your export query, specify that Journal Entry Status should be "Pending."

## Export Deposits into QuickBooks Desktop

Before you export deposits, ensure that your *eTapestry* database is set up with correct funds. Refer to [Funds for QuickBooks Desktop on page 68](#).

Based on how your *QuickBooks*® database is set up, you may need to create one or more User Defined Fields. Refer to [User-Defined Fields for QuickBooks Desktop on page 68](#).

After GL accounts on your funds and transactions ready to export, you are ready to run the *QuickBooks*® desktop export.

1. From **Management**, click **Standard Exports**.
2. Under Accounting Exports, click **Quickbooks Desktop Export**. The launch screen appears.
3. Select the category and query which identifies the transactions in *eTapestry* which should be exported. Consider using a query such as Constituent Journal Entry Date: This Week if you run the export weekly.

**Note:** If you are tracking donations with gift types other than cash and check, specify the gift type to be exported in the query. Cash and check donations should be exported together. This gives you control over the way each gift type is exported.

4. Under **Customer Information**, select whether to export the name or sort name.
5. Select whether to create customer records.

If you create customer records, the top of the export file shows your constituents on the Customer record in your *QuickBooks®* desktop database for each new constituent.

Otherwise, constituents appears in the Vendor or Other Name list, based on your *QuickBooks®* import setup.

**Note:** An error will occur with the *QuickBooks®* import if you attempt to add donor names to the customer list and the names are already stored in your *QuickBooks®* desktop database on the Other Names or Vendor lists. The error indicates that the import can't change the type of a name. To correct the issue, manually change the name record in your *QuickBooks®* desktop database to be the customer type.

6. If you create customer records, select whether to export optional customer fields.  
The optional customer fields include the account number, address, voicemail number, mobile telephone number, email address, and customer types. Select **Yes** to export these fields.
7. Under Transaction information, select **Deposit** for the *QuickBooks®* Transaction Type. This determines how to store donations in your *QuickBooks®* desktop database.
8. Select whether to export individual transactions.
  - **Yes** - Each individual **eTapestry** transaction is exported as a separate *QuickBooks®* transaction.
  - **No** - **eTapestry** transactions can be grouped together. For example you can import all donations from a single bank deposit together into a single entry in the Cash account, and keep the details of each gift in the Income accounts.
9. Select a transaction grouping option.
  - If you deposit all donations from the week on Friday, we recommend you select **Deposit Date**.
  - If you make multiple deposits per day, we recommend you select **Deposit ID**.
  - If you want to combine donations with the same credit/debit card type and gift date into one *QuickBooks®* transaction we recommend you select **Credit/Debit Card Type**.
10. Select whether to create a subtotal by GL account.  
This enables you to combine donations associated with the same credit account and CLASS value into a single distribution within a transaction. Export files created with this option checked will not include any donor information on the transaction. If you want to create a subtotal, you can't export individual transactions.
11. Select a credit/debit card method.
  - **Credit/Debit Card** - The words "Credit/Cebit card" appear as the Payment Method on the *QuickBooks®* transaction for a gift or payment that has the gift type set to "Credit/Debit



Card" in eTapestry.

- **Credit/Debit Card Type** - The credit/debit card type that you selected on the gift page appears in the *QuickBooks®* Payment Method field.
12. Select whether to track sales tax. If you track sales tax in *QuickBooks®* desktop, select **No**.
  13. Under Customizable Fields, select a transaction name.
    - **Account Name** - Select this if you choose to export individual transactions.
    - **Export Date** - Select this if you choose not to group transactions.
  14. Select a transaction memo.
  15. Select a distribution memo.
  16. Select a date format.
  17. Select your delivery options.
  18. Click **Submit** to export the items or click **Schedule for Off-Hours** to run the export later. When the export is complete, the export file will be in the *Intuit®* Interchange Format (IIF).
  19. Save the file. You are ready to import the file into *QuickBooks®* desktop.

**Note:** *QuickBooks®* desktop cannot import from an open file.

20. Before you import data into *QuickBooks®* desktop, backup your *QuickBooks®* desktop database. For more information, refer to your *QuickBooks®* desktop help documentation.
21. To import transactions into *QuickBooks®* desktop, open *QuickBooks®* desktop. Click **File**, **Utilities**, and **Import**. Then select the name of the IIF file. The import begins when you select the file.
22. After the import is complete, verify the results to ensure the imported data matches your expectations. If it doesn't you can use the backup to restore the *QuickBooks®* desktop database to its previous state while you adjust the export process.
23. After the donations are successfully imported into *QuickBooks®* desktop database, mark each **eTapestry** record as Final to help avoid duplicates. This ensures that donations from **eTapestry** are only recorded one time in your accounting package. To finalize the journal entries, run a mass update using your export query.

To remove transactions that have already been exported from your export query, specify that Journal Entry Status is "Pending". This enables you to reverse a finalized transaction instead of deleting it. When you create a reversal transaction for that constituent you can then include it in your next *QuickBooks®* desktop export to keep the two systems in sync.

## Export Items on Sales Receipts into QuickBooks Desktop

Before you export deposits, ensure that your **eTapestry** database is set up with correct funds. Refer to [Funds for QuickBooks Desktop on page 68](#).

Based on how your *QuickBooks®* desktop database is set up, you may need to create one or more user-defined fields. Refer to [User-Defined Fields for QuickBooks Desktop on page 68](#).

1. From **Management**, click **Standard Exports**.
2. Under **Accounting Exports**, click **QuickBooks Desktop Export**. The launch screen appears.
3. Select the category and query which identifies the transactions in **eTapestry** which should be exported. Consider using a query such as Constituent Journal Entry Date: This Week if you run the export weekly.

**Note:** If you are tracking donations with gift types other than cash and check, specify the gift type to be exported in the query. Cash and check donations should be exported together. This gives you control over the way each gift type is exported.

4. Under **Customer Information**, select whether to export the name or sort name.
5. Select whether to create customer records.

If you create customer records, the top of the export file shows your constituents on the Customer record in your *QuickBooks®* desktop database for each new constituent.

Otherwise, constituents appears in the Vendor or Other Name list, based on your *QuickBooks®* desktop import setup.

**Note:** An error will occur with the *QuickBooks®* desktop import if you attempt to add donor names to the customer list and the names are already stored in your *QuickBooks®* desktop database on the Other Names or Vendor lists. The error indicates that the import can't change the type of a name. To correct the issue, manually change the name record in your *QuickBooks®* desktop database to be the customer type.

6. If you create customer records, select whether to export optional customer fields.  
The optional customer fields include the account number, address, voice mail number, mobile telephone number, email address, and customer types. Select **Yes** to export these fields.
7. Under Transaction information, select **Cash Sale** for the *QuickBooks®* Transaction Type. This determines how to store donations in your *QuickBooks®* desktop database.

**Note:** Many of the other transaction information fields will be complete for you when you choose select **Cash Sale**.

8. Select to export individual transactions.
9. Select a transaction grouping option.
  - If you deposit all donations from the week on Friday, we recommend you select **Deposit Date**.
  - If you make multiple deposits per day, we recommend you select **Deposit ID**.
  - If you want to combine donations with the same credit/debit card type and gift date into one *QuickBooks®* transaction we recommend you select **Credit/Debit Card Type**.

10. Select whether to create a subtotal by GL account.

This enables you to combine donations associated with the same credit account and CLASS value into a single distribution within a transaction. Export files created with this option checked will not include any donor information on the transaction. If you want to create a subtotal, you can't export individual transactions.

11. Select a credit/debit card method.

- **Credit/Debit Card** - The words "Credit/Debit Card" appear as the Payment Method on the *QuickBooks*® transaction for a gift or payment that has the gift type set to "Credit/Debit card" in eTapestry.
  - **Credit/Debit Card Type** - The credit/debit card type that you selected on the gift page appears in the *QuickBooks*® Payment Method field.
12. Select whether to track sales tax.
  13. For Export General Journal Items to Undeposited funds, select **No**.
  14. Do not track sales tax.
  15. Under Customizable Fields, select a **Account Name** as the transaction name.
  16. Select a transaction memo.
  17. Select a distribution memo.
  18. Select a date format.
  19. Select your delivery options.
  20. Click **Submit** to export the items or click **Schedule for Off-Hours** to run the export later. When the export is complete, the export file will be in the *Intuit*® Interchange Format (IIF).
  21. Save the file. You are ready to import the file into *QuickBooks*® desktop.  
**Note:** *QuickBooks*® cannot import from an open file.
  22. To modify the export file, use spreadsheet software (such as *Microsoft Excel*) to open the IIF file. Save the file. For Save as type, select Text type and ensure that the file name ends with suffix "IIF" (for example: eTapestryExport2-18-14.iif). Confirm that you want to keep the file in the same format. Close the file. You are ready to import the file into *QuickBooks*® desktop.
  23. Before you import data into *QuickBooks*® desktop, backup your *QuickBooks*® desktop database. For more information, refer to your *QuickBooks*® help documentation.
  24. To import transactions into *QuickBooks*® desktop, open *QuickBooks*® desktop. Click **File**, **Utilities**, and **Import**. Then select the name of the IIF file. The import begins when you select the file.
  25. After the import is complete, verify the results to ensure the imported data matches your expectations. If it doesn't you can use the backup to restore the *QuickBooks*® desktop database to its previous state while you adjust the export process.
  26. After the donations are successfully imported into *QuickBooks*® desktop database, mark each **eTapestry** record as Final to help avoid duplicates. This ensures that donations from **eTapestry** are only recorded one time in your accounting package. To finalize the journal entries, run a mass update using your export query.
  27. To remove transactions that have already been exported from your export query, specify that Journal Entry Status is "Pending". This enables you to reverse a finalized transaction instead of deleting it. When you create a reversal transaction for that constituent you can then include it in your next *QuickBooks*® desktop export to keep the two systems in sync.

## Export Payments into QuickBooks Desktop as Payments

Before you export deposits, ensure that your **eTapestry** database is set up with correct funds. Refer to [Funds for QuickBooks Desktop on page 68](#).

Then create a query to identify the transactions in **eTapestry** which should be exported. Limit the transactions to Journal Entry Type Pledge. For example, you may want to only export pledge transactions for the previous week which were not finalized.

1. From the **Management**, click **eTapestry Standard Exports**.
2. Under **Accounting Exports**, select **Quickbooks Desktop Export**. The Launch Quickbooks Desktop Export page appears.
3. Select the category and query which identifies the transactions in **eTapestry** which should be exported.
4. Under **Customer Information**, select whether to export the name or sort name.
5. Select to create customer records.
6. Select whether to export optional customer fields.
7. Under Transaction information, select **Cash Sale** for the *QuickBooks®* Transaction Type.
8. Select whether to export individual transactions.
9. Select a transaction grouping option.
10. Select whether to create a subtotal by GL account.
11. Select a credit/debit card method.
12. Select whether to track sales tax.
13. Under Customizable Fields, select a transaction name.
14. Select a transaction memo.
15. Select a distribution memo, such as Export Date.
16. Select a date format.
17. Select your delivery options.
18. Click **Submit** to export the items or click **Schedule for Off-Hours** to run the export later. When the export is complete, the export file will be in the *Intuit®* Interchange Format (IIF).
19. Save the file.
20. To modify the export file, use spreadsheet software (such as Microsoft Excel) to open the IIF file.
21. Change every instance of the phrase "CASH SALE" to "PAYMENT." This appears in the TRNSTYPE column. Consider using a "Find and replace" feature to identify every instance and make mass changes.
22. Save the file. For Save as type, select Text type and ensure that the file name ends with suffix "IIF" (for example: eTapestryExport2-18-14.iif).
23. Confirm that you want to keep the file in the same format.
24. Close the file. You are ready to import the file into *QuickBooks®* desktop.

**Note:** The Payment record will be stored in your *QuickBooks®* desktop database as a single amount, so the Items will not appear on the Payment record. You must manually associate the Payment with the correct Invoice after your data has been imported. If your *QuickBooks®* desktop preferences are set to collect sales tax, this work-around will not succeed.

## Export Pledges into QuickBooks Desktop as Invoices

Before you export deposits, ensure that your *eTapestry* database is set up with correct funds. Refer to [Funds for QuickBooks Desktop on page 68](#).

Then create a query to identify the transactions in *eTapestry* which should be exported. Limit the transactions to Journal Entry Type Pledge. For example, you may want to only export pledge transactions for the previous week which were not finalized. Refer to [Queries](#).

1. From the **Management**, click **eTapestry Standard Exports**.
2. Under **Accounting Exports**, select **Quickbooks Desktop Export**. The Launch QuickBooks Desktop Export page appears.
3. Select the category and query which identifies the transactions in *eTapestry* which should be exported.
4. Under **Customer Information**, select whether to export the name or sort name.
5. Select to create customer records.
6. Select whether to export optional customer fields.
7. Under Transaction information, select **Cash Sale** for the *QuickBooks®* Transaction Type.
8. Select whether to export individual transactions.
9. Select a transaction grouping option.
10. Select whether to create a subtotal by GL account.
11. Select a credit/debit card method.
12. Select whether to track sales tax.
13. Under Customizable Fields, select a transaction name.
14. Select a transaction memo.
15. Select a distribution memo.
16. Select a date format.
17. Select your delivery options.
18. Click **Submit** to export the items or click **Schedule for Off-Hours** to run the export later. When the export is complete, the export file will be in the *Intuit®* Interchange Format (IIF).
19. Save the file.
20. To modify the export file, use spreadsheet software (such as *Microsoft Excel*) to open the IIF file.
21. Change every instance of the phrase "CASH SALE" to "INVOICE." This appears in the TRNSTYPE column. Consider using a "Find and replace" feature to identify every instance and make mass

changes.

22. Save the file. For Save as type, select Text type and ensure that the file name ends with suffix ".iif" (for example: eTapestryExport2-18-14.iif).
23. Confirm that you want to keep the file in the same format.
24. Close the file. You are ready to import the file into *QuickBooks®* desktop.

## Optional Customer Section for QuickBooks Desktop

This is indicated by the record starting with "!CUST" and listing Customer keyword headings.

<b>QuickBooks Keyword</b>	<b>eTapestry Source</b>
NAME	Account Name or Sort Name (client selected)
NOTE	Account number (optional)
BADDR1	Account Address (line 1) (optional)
BADDR2	Account Address (line 2) (optional)
BADDR3	Account City (optional)
BADDR4	Account State / Province (optional)
BADDR5	Account Postal Code (optional)
PHONE1	Voice (optional)
PHONE2	Mobile (optional)
EMAIL	Email (optional)

## Transaction Section for QuickBooks Desktop

Transaction Heading:

Line 1: "!TRNS" record containing transaction keyword headings

Line 3: "!ENDTRNS" record

Transaction Line:

<b>QuickBooks Keyword</b>	<b>eTapestry Source</b>
TRNSTYPE	<i>QuickBooks®</i> Transaction Type value selected on export launch page.
DATE	If Transaction Grouping is set to Deposit Date or Deposit ID, Transaction Date is set to Deposit Date. Otherwise, the Transaction Date is set to Gift Date. If Deposit Date is missing, Transaction Date defaults to Gift Date.
NAME	Transaction Name value selected on export launch page.

<b>QuickBooks Keyword</b>	<b>eTapestry Source</b>
---------------------------	-------------------------

AMOUNT	Journal Entry amount – see table below for sign based on Journal Entry Type
ACCNT TRNS	account associated with Fund: determined by transaction type as described in table above. Since this is required, items must be grouped by TRNS account.
CLASS	Appears on TRNS record only when exporting individual transactions.
MEMO	Transaction Memo value selected on export launch page.

Distribution Line:

<b>QuickBooks Keyword</b>	<b>eTapestry Source</b>
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TRNSTYPE	<i>QuickBooks®</i> Transaction Type value selected on export launch page.
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If Transaction Grouping is set to Deposit Date or Deposit ID, Transaction Date is set to Deposit Date. Otherwise, the Transaction Date is set to Gift Date. If Deposit Date is missing, Transaction Date defaults to Gift Date.

NAME	Account name
AMOUNT	Journal Entry amount – see table below for sign based on Journal Entry Type
ACCNT SPL	account associated with Fund: determined by transaction type as described in table above.
CLASS	Class. Subclass1 and Subclass2 UDFs, concatenated as Class:Subclass1:Subclass2.
MEMO	Distribution Memo value selected on export launch page.
PAYMETH	Depends on Gift Type – see table above.
DOCNUM	When Gift Type = 'Check', Check Number. When Gift Type = 'Credit/Debit Card', credit/debit card type. Else blank
SPLID	Required in header – value will be blank.

## Undeposited Funds Option for QuickBooks Desktop

Column headings for transactions

<b>Quickbooks Name</b>	<b>eTapestry Name</b>
------------------------	-----------------------

TRNSTYPE	Transaction Type
----------	------------------

Quickbooks Name	eTapestry Name
GENERAL JOURNAL	Gift, Pledge, Payment, Disbursement
ACCNT	General Ledger Number From Fund
AMOUNT	Amount of Transaction (Debits are +, Credits are -)

Column headings for distribution lines

Quickbooks Name	eTapestry Name
SPLID	Distribution Line Identification Number
TRNSTYPE	Transaction Type
DATE	Transaction Date in mm/dd/yyyy Format
ACCNT	Income or Expense Account
NAME	Account Name
AMOUNT	Distribution Amount
DOCNUM	Transaction Number
MEMO	Journal Note

Optional fields

Quickbooks Name	eTapestry Name
ADDR1	Account Address 1
ADDR2	Account Address 2
ADDR3	Account Address 3 - City
ADDR4	Account Address 4 - State
ADDR5	Account Address 5 - Postal Code
PAYMETH	Gift Type

Sample

SPLID	TRNSTYPE	DATE	ACCNT	AMOUNT	PAYMETH	DOCNUM	MEMO	NAME	ADDR1	ADDR2	ADDR3	ADDR4	ADDR5
blank	General Journal	6/17/2002	revenue#	-25.25	Cash	blank	journal_note	John Doe	1234 Fake St.	Apartment#	Made Up	IN	46060

## MYOB Export

The *MYOB* export allows you to synchronize data between your *eTapestry* database and your *MYOB* accounting software.



## Colleague Export

	<b>Field Name</b>	<b>Position</b>	<b>Length</b>	<b>eTapestry Field Name</b>
1	Source Code	1-2	2	FR
2	GL Account Number	3-28	25	GI Account
3	Debit Amount	28-43	15	-
4	Credit Amount	43-58	15	-
5	Description	58-88	30	Account Name
6	Reference Number	88-98	10	Object Reference
7	Transaction Date	98-108	10	Accounting Export Run Date
8	Account ID	108-118	10	eTap ID
9	Term	118-125	7	-
10	Project Number	125-140	15	-

Sample:

<b>Source Code</b>	<b>GL Account Number</b>	<b>Debit Amount</b>	<b>Debit Amount</b>	<b>Description</b>	<b>Reference Number</b>	<b>Transaction Date</b>	<b>Account ID</b>	<b>Term</b>	<b>Project Number</b>
FR	30010132	-	1000	Emily Black	0102	9/25/2006	eTap ID	-	-

## Intacct Export

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

Definition File:

	<b>Description</b>	<b>Field Length</b>	<b>eTapestry Field Name</b>
1	Description	80	User Defined At Run Time
2	Journal	4	User Defined At Run Time
3	Date	-	User Defined At Run Time
4	Line_no	-	Starts At One And Increments By One
5	Acct_no	-	General Ledger Number
6	Location_id	-	Location (Transaction user-defined field)
7	Dept_id	-	Department (Transaction user-defined field)

	Description	Field Length	eTapestry Field Name
8	Document	-	Check Number
9	Memo	500	Journal Note
10	Debit	-	Debit Amount (Blank if a Credit Line)
11	Credit	-	Credit Amount (Blank if a Debit Line)
12	None	-	Transaction Date

Sample:

Description	Journal 2	Date	Line Number	Account Number	Location_ID	Dept_ID	Document	Memo	Debit	Credit	Etap-Date
description	1234	01/01/2002	1	Cash101	Cambridge	Business	5678	note	200.00	-	12/31/2001

## Funds for Intacct Exports

As a general rule, if you do not export items out of **eTapestry**, then you create a fund for each income account that you can associate with transactions tracked in **eTapestry**. Donations made to a fund are credited to specific General Ledger (GL) accounts and you must enter the appropriate GL account codes for each fund in **eTapestry**. For information about what GL numbers to include, consult your accountant.

Before you export from **etapestry**, make sure that your **eTapestry** database is set up with correct funds. Different types of donations require different types of accounts on the fund. Your funds in **eTapestry** must match the income accounts that you want to import.

- The fund name must be identical to the income account name from your chart of accounts.
- The cash account for each fund, must be the same as your bank account GL account number for your deposited funds account.
- If you track invoices and payments in Intacct, the receivable account must be the same as the accounts receivable account GL account number in Intacct in order to export pledges and payments.
- The revenue account must be the same as the income account GL account number.
- All **eTapestry** funds need Undeposited Funds account number in the **Cash Account** field.

When required account fields are missing, donations made to that fund may not appear in the export. You can also include the **Fund Description** field in the export.

For more information about funds, refer to [Funds on page 34](#).

### Required Account Fields

Type	Credit	Debit	Note
Gift	Revenue	Cash	Most organizations export Gift information.
Pledge	Revenue	Receivable	Many organizations do not export pledge information.

### Required Account Fields

Payment Receivable Cash	If you plan to export payments but not pledges, you can enter the same account number for receivable as for revenue. In this way, the import treats gifts and payments for the same fund in the same way.
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#### > Run Intacct export

1. From the **Management**, click **Standard Exports**.
2. Under **Accounting Exports**, click **Intacct Export**. The Launch Intacct Export screen appears.
3. Select the category and query you want to use to run the export.
4. Enter the export criteria based on your *Intacct* setup
  - **Journal**- In this field, enter a number for the journal you want to export.
  - **Description** - In this field, enter up to 60 characters that describes the journal.
  - **Batch Date** - In this field, enter the date for which you want to generate the report.
5. Under Delivery Options, select how you want to receive the export file. You can download it directly to your computer, put it in your *eTapestry* drop box, or receive it by email.
6. When you download the export, save it locally to your computer so it is ready for to import into Intacct.
 

The export file is a comma separated value (.csv) file. To open the file and review it's content, use Microsoft *Excel*.
7. Click **Submit**.

## NBA Export

Definition file:

NBA Field Name	Field Length	Field Description
Transaction Type	2	Gift Type
Organization Number	3	UI Option
Date	10	Date (mm/dd/yyyy)
Receipt Number	12	Receipt Number
Gift Type	2	Journal UDF
Tribute Code	2	Journal UDF
General Ledger Account Code	27	-
Amount Debited/Credited	16	-
Account Name	42	-

NBA Field Name	Field Length	Field Description
City	30	From Primary Persona
State	2	From Primary Persona
Postal Code	10	From Primary Persona
Transaction	-	User Login Name

## ForFUND Export

Definition file:

	Field Name	Type	Length	eTapestry Field
1	TR_ACCT	Char	19	GL Number, 16 characters
2	TR_JVNO	Char	7	Journal Entry Number
3	TR_JVDATE	Numeric	8	Journal Transaction Date
4	TR_MO	Numeric	2	Fiscal Period (1-13)
5	TR_YR	Numeric	4	Fiscal Year
6	TR_MAMT	Numeric	12 - 2 decimals	Transaction Amount (+ are debits, - are credits)
7	TR_JVTOTAL	Numeric	14 - 2 decimals	Sum of All JE Transaction (Must Equal Zero to Post)
8	TR_REF2	Char	10	Reference Field (Misc.)
9	TR_DESC	Char	30	User Description of Transaction

Sample:

TR_ACCT	TR_JVNO	TR_JVDATE	TR_MO	TR_YR	TR_MAMT	TR_JVTOTAL	TR_REF2	TR_DESC
revenue#	blank	06172002	blank	blank	-2525	000	ref	description

## General Ledger Codes

To use accounting reports, you must setup the Cash Account, Receivables Accounts, and Revenue Account for each fund in your **eTapestry** database.

- Cash Account - Enter the general ledger cash account number for the fund.
- Receivable Account - Enter the general ledger receivables account number for debits to the fund.
- Revenue Account - Enter the general ledger revenue account number for the fund.

After you complete the fields, click **Save**. You are ready to use the funds with accounting exports to sync **eTapestry** information with your other accounting software.

Field	Description
Cash Account	<ul style="list-style-type: none"> <li>This is money in the bank.</li> <li>This is an asset account.</li> <li>This is a balance sheet account - debit side of the ledger.</li> <li>The corresponding credit is Accounts Receivable.</li> </ul>
Receivables Account	<ul style="list-style-type: none"> <li>This is money owed to you but not received yet. This is an asset account.</li> <li>This is a balance sheet account.</li> <li>This is the debit side of the ledger.</li> <li>The corresponding credit is Sales.</li> </ul>
Revenue Account	<ul style="list-style-type: none"> <li>This is sales .</li> <li>This is a revenue account (vs expense) - is an income statement account.</li> <li>This is the credit side of the ledger.</li> <li>The corresponding debit is Accounts Receivable.</li> </ul>

When you enter transactions, they correspond to the GL as follows:

Transaction	Debits	Credits
Pledge	Receivables	Revenue
Reversed Pledge	Revenue	Receivables
Pledge Payment	Cash	Receivables
Reversed Pledge Payment	Receivables	Cash
Gift	Cash	Revenue
Reversed Gift	Revenue	Cash
Disbursements	Revenue	Cash
Reversed Disbursements	Cash	Revenue
Uncollectibles	Revenue	Receivables
Reversed Uncollectibles	Receivables	Revenue

## Export Options

In order to use data from an **eTapestry** report in another program (such as Microsoft *Excel*) you must export it. You can export any standard, custom, or relationship report.

**Note:** Some standard exports enable you to use export file formats that differ from those described below.

You can choose to export a report from the report's launch screen or from on-screen report results.

- From the report launch screen select a report format option other than **Display Results on Screen**.
- From the report's on-screen results page, select **Export** from the export format menu.

When you export data, you select what type of file you want to receive.

- **PDF** - Use this format to view data which you do not want to edit or merge into other documents. You cannot edit or modify PDF files that have been generated by *eTapestry*.

This format is useful for presenting data for board meetings or peer review. To view the export, you need Adobe® Reader® or a similar program. The first page of the PDF shows your organization name, the report name, column headers, and totals. The headers also appear at the top of all subsequent pages. Each line of the report appears exactly like the onscreen display, with the same selected grouping and total lines as well as alternating background shades used to distinguish lines. At the bottom of each page, the date and time the report was run, the user who ran it, the report name, the query category and name, the total number of records, and the page number appear.

If the report contains more than 5000 lines the report is divided into multiple, smaller PDF files so that your computer can display the files faster. If your report is split, you will receive a ZIP archive file containing all of the generated PDFs (regardless of whether you select to Archive in Zip File).

If the report contains many columns, the PDF may be unable to display them. The exact number varies based on the specific columns included in the report. If you export a report and the PDF does not show one or more columns, try using an Excel/.mrg file or HTML option instead of a PDF file. Alternatively, you could run two reports with half the columns per report.

- **Excel or CSV** - Use either of these file types to edit data in *Microsoft Excel* or other spreadsheet software. You can use these files to merge data into letters or mailing labels in *Microsoft Word*. Additionally, you can use *Notepad* and *Wordpad* to edit CSV (comma separated value) files.

From your User Preferences page, you can select to use one of these file types as your default export extension. Some users find the .xlsx export extension enables *Microsoft Excel* software to more easily recognize and open the file. Other users prefer the .csv export extension because it may enable *Microsoft Word* to more easily recognize the file for merging purposes.

- **HTML** - Consider using this option if your report contains too many columns for a PDF, but you still want an easy-to-read format. The report information appears in a separate browser window. To save the HTML to your local computer, click **File** and then click **Save Page As**. For **Save as Type**, select **Web Page - Complete**. The HTML is saved to your computer and you can use an internet browser to open it.

When you export data, you select to receive a PDF or .xlsx/.csv file, you also choose how you want to receive the file.

- **Download** - The report is generated and downloaded from the browser screen. If you navigate away before the download is complete, you will not receive the file and you'll need to regenerate the report. We do not recommend this option for large reports because you would have to wait longer for the report to generate and download.
- **Email** - The report is generated. When the report is complete, you receive an email which

includes the file as an attachment. While the report is generating, you can navigate to other pages, enter data, or even log out of **eTapestry**. When you receive the email, open the attached file and save it to your local computer.

When you select to receive the file by email, you then enter one or more email addresses and a subject for the email. If your accounts primary persona has an email address, you can also select to receive the file by email when you export a report from the report display screen.

**Tip:** For faster downloads, we recommend you use the **Archive in Zip File** option for large reports. This compresses the report and saves it inside a zipped file, to decrease the file size. To open the file, use a program like WinZip to extract the report from the zipped file.

- **Drop Box** - The report is generated. When the report is complete, the file is placed in your **eTapestry** drop box. While the report is generating, you can navigate to other pages, enter data, or even log out of **eTapestry**. We recommend this option for large reports, especially if your email server does not accept large attachments.

## Mass Updates

From **Management**, use Mass Updates to add or update the same information to accounts in bulk. On the Mass Updates page, two groups of Mass Updates appear for **Update Existing Items** and **Create New Items**.

Use the types under **Update Existing Items** to update data in fields for existing accounts, personas, transactions, notes, contacts, journal entries, and write off pledges. For example, you can add assign or remove a mailing status from a query of accounts.

Use the types under **Create New Items** to add new items to your database for relationships, notes, contacts, pledge payments, and gifts in recurring schedules. For example, you can add multiple relationships for a single account.

### > Mass Update for Existing Items

You can use mass update to update existing items. This includes accounts, personas, transactions, notes, contacts, finalized journal entries, and write-off pledges.

1. From **Management**, click **Mass Update**. The Mass Update page appears.
2. Under **Update Existing Items**, select an item to update. The Mass Assign Values page appears.
3. Under **Select Query**, select the category and query that groups the items to update. For more information about queries, refer to [Query](#).
4. If **Update Type** appears for your mass update, select whether to assign a value to all items in the query or to remove a specific value from the items.

When you select to remove information, the value removes from the items in the query. However the item remains in the database.

5. If **Action** appears for your mass update, select whether or not to finalize journal entries or to allow future edits to them. For .write off pledges, select whether to write off the pledge and include a date or remove write offs from the pledges.
6. Select values for user-defined fields that correspond to the type of mass update.

7. Click **Next**. A preview appears.
8. Verify the changes. You can also view a report of the items that will be updated.
9. Click **Next**. A confirmation message appears.
10. To confirm, click **Yes**. When the mass update completes, a message appears to inform you the items have been updated. If you navigate away from the screen or log out before the update completes, the items update but the message does not appear.

### > Mass Update for Create New Items

Use mass update to add new items to your database for relationships, notes, contacts, pledge payments, and gifts in recurring schedules.

1. From **Management**, click **Mass Update**. The Mass Updates page appears.
2. Under **Create New Items**, select an item to create. The Mass Assign page appears.
3. Under **Select Query**, select the category and query that groups the items to create.
4. After you select a query, the options that appear on this page vary depending on mass update type you are creating.

**Create New Relationships** - Use this type to add multiple relationships for a single account. On this page, click the **Select Related Account** link beside the **Related Account** field. The Find an Account screen appears for you to select the account you want to relate all accounts to in the query. Under **Navigation**, click **Next**. On Step 2: Details, enter the relationship information, such as the type, roles, and household information.

**Create New Notes** - Use this type to add the same journal note information to multiple accounts. On this page, select whether the note is final, enter the date and note text, and select user-defined fields.

**Create New Contacts** - Use this type to add the same journal contact information to multiple accounts. For example, add contacts after you send mail to track accounts included in the mailing. On this page, select whether the journal contact is final, enter a date, contact method, subject, note, and select user-defined fields.

**Create New Scheduled Payments** - Use this type to add pledge payments to multiple pledge schedules with payments on the same date. For example, if your organization's pledge schedules are always set up on a monthly frequency with payments scheduled on the first of the month, use this mass update to update the pledge schedules with a payment. On this page, enter the scheduled payment date, select whether the payment is final, the actual payment date, whether to copy the pledge letter, enter a note, and select user-defined fields.

**Create New Scheduled Recurring Gifts** - Use this type to add recurring gifts to multiple recurring gift schedules with gifts on the same date. For example, if your organization accepts payroll deductions and sets them up as recurring gift schedules, use this mass update to update payroll deduction schedules after each pay period. On this page, enter the scheduled gift date, select whether the gift is final, enter the actual gift date and a note, and select user-defined fields.

5. Under **Navigation**, click **Next**. A preview appears.
6. Verify the changes. You can also view a report of the items to create.



7. Click **Next**. A confirmation message appears.
8. To confirm, click **Yes**. When the mass update completes, a message appears to inform you the items have been updated. If you navigate away from the screen or log out before the update completes, the items update but the message does not appear.

## Security

It is important that your organization establishes a consistent and thorough approach to security throughout **eTapestry**. Based on your security needs, you need to restrict who can perform specific tasks and optionally, decide whether you want to restrict access to account and gift information.

In **eTapestry**, you can set up basic security or advanced security. Basic security is available to all **eTapestry** customers and provides a way for you to limit who has access to areas of the application and who can perform specific tasks, such as view, create, and run a mass update. If you use the Advanced Security module, you can limit constituent and journal data that users view. For example, you can keep your major donor's contact information and gift information private from a group of **eTapestry** users.

Other examples of basic and advanced security include the following.

- Use basic security to enable data entry for a group of volunteers. To prevent them from viewing past donations, you must apply advanced security.
- Use basic security to grant account record access to users at your chapter offices. To prevent them from viewing records outside of their area, you must apply advanced security.

For more information about basic security, refer to [Basic Security on page 89](#). For more information about advanced security, refer to [Advanced Security on page 90](#).

**Tip:** We recommend you create a document to address your organization's security policy and save it from the **Help, User Manual** shared location in **eTapestry**.

## Basic Security

Basic security in **eTapestry** is assigned by accounts and security groups.

1. Create an account.
2. When you create the account, assign the User role to it. To apply security in eTapestry, users must have this role to include them in a security group.
3. From **Management**, create security groups. These groups assign permissions for the users in the group.

For example, you create a new account for a new employee, Mark Smith. Mark is going to complete data entry tasks in **eTapestry**. As you create the account, you select the User role for his record. The Default security group, which appears automatically in your database, grants data entry permissions for accounts, gift entry, and other general data entry areas to records with the User role. When you save Mark's record, the application automatically includes him in the Default security group. If Mark's job responsibilities change to include additional tasks and processes in **eTapestry**, you can include him in another security group that grants additional permissions to more areas in the application.

Basic security is available to all **eTapestry** customers. When you first begin to define security for the application, we recommend you keep it simple. For example, create a security group to assign volunteers data entry rights. You can add additional groups as you identify a need for them.

**Note:** Basic security does not limit access to account or gift data. For example, you cannot use basic security to prevent access to a major donor's contact and gift information. To do this, you must use the Advanced Security module. For more information, refer to [Advanced Security on page 90](#).

## Advanced Security

Use the Advanced Security module when your organization needs additional control over the data that users can view, add, edit, and delete. This module provides the following additional security features.

- Restrict contact and gift information.
- Limit access to certain accounts or journal entries.
- Restrict chapter offices so users in each office only view their local data.
- Prevent users from viewing, querying, or reporting on certain accounts or gift information.
- Prevent users from updating certain accounts or gift information.
- Prevent users from viewing and updating certain defined fields and their values.

To establish advanced security, use security queries or security codes. For most organizations, it is best to use security queries. Like basic security, you then use security groups to grant or deny data to users in the group.

**Tip:** When you use advanced security, the permissions also apply to data in outputs for reports and exports. **eTapestry** applies permissions before running queries to generate the correct report and export information.

## Advanced Security Queries

You can create security queries to limit user access by granting or denying rights to accounts and journal entries for a security group. For example, you want to restrict a certain group of users from viewing, editing, or deleting any transactions. You can create a security query that returns all transactions and then use that query to deny users in the security group the ability to read or update transactions in the query. Later, if you decide to also deny rights to contacts from journal entries, you can update the query to include all contacts.

You can also use advanced security to limit account access to records in certain states. After you create the query that returns these accounts, you use it in a security group to apply the permission to users in the group.

### > Create a security query

**Tip:** We recommend creating security queries to apply advanced security. For best practice information about queries, refer to [eTapestry Best Practices: Query 101](#).

1. From **Queries**, select the **eTapestry Security** category. The Edit Query Category screen appears.
2. Under **Tasks**, select **New Query**.
3. Enter a name, such as Financial Information.
4. To hide this query from other users in your organization, select **Private**.
5. To prevent other users in your organization from editing this query, but allow them to view and select it, select **Read Only**.
6. In the **Query Type** field, select **Change Query Type** to change the query to be dynamic or static. Dynamic queries reflect updated data every time you run them or use them to send communications or run reports. Results for static queries are not updated when data changes in the database.
7. Under **Starting Criteria**, select the eTapestry Security query category and the All Entries query.

**Note:** You must base a query you create in the eTapestry Security category on an existing query from this same category. You cannot select a query from another category as the starting point.

8. Under **Results**, select the appropriate option depending on the type of results you want in the **Data Return Type** field. To see results related to accounts, such as if you are querying on individuals, select Accounts. If your query is looking for gifts, select Journal Entries. For more information about data return types, see [Data Return Types](#).
9. Under **Criteria Matching**, select whether you want all criteria to be matched in the results or if you want to include every result in the query that matches at least one of your criteria.
10. The **Which persona should be checked for matches** field is relevant if your criteria is related to persona fields such as address information. Select whether you want to look for matches to your criteria in all persona types, only the primary persona, or only one persona type.

**Note:** As a reminder, the query results automatically display the primary persona.

11. Select the criteria for your query. For example, select Journal in the drop down field, and then select **Journal Entry Types**. Continue to select all data entry types that apply for the permission you want to grant or deny. For more information, see [Query Criteria](#).
12. Click **Save And** to save the query and navigate to the page selected in the drop down field.

After you create the security group, you need to assign permissions to users in the query. First, open the applicable security group from **Management, Security Groups**. When you use the Advanced Security module, a section appears on the Security Group page with the columns **Permission, Query, Grant, and Deny**. Under **Permission**, four rows appear to apply the security query to the advanced security right. These rows are **Account Read Query, Account Update Query, Journal Entry Read Query, and Journal Entry Update Query**. For the applicable data permission row, select the security query in the drop down field and then select whether you want to grant or deny the permission to users in the group.

For example, to deny volunteers access to your Board Member account information, create a security query to group the Board Member accounts. Next, open the applicable security group for volunteers. For the **Account Read Query** and **Account Update Query** rows, select the security query and then select **Deny** for both rows. This prevents each user in the group from viewing Board Member account data on records and in query and report outputs.

## Advanced Security Codes

When security queries do not segment your data enough to apply advanced security, you can use security codes to limit users access. You can apply these individually to an account record or journal entry after you add the code as a system defined **Security Rights** field value. You can also use security codes to limit users access to specific funds, campaigns, approaches, relationships, and user-defined fields.

To apply security codes so that only authorized users view the data, make sure to add the security code as you enter the data on the account record. When a user, who is in a security group with security code permissions, enters data, *eTapestry* automatically defaults the security code for the data. For example, when a user is part of the volunteer security group, the selected security codes from the security group default automatically for new funds, campaigns, approaches, relationships, and user-defined fields.

**Tip:** You can use security codes to grant or deny account and journal information. However, we recommend you use security queries to limit this data. Use security codes only when you need to limit data funds, campaigns, approaches, relationships, and user-defined fields.

### > Create a security code

1. From **Management**, click **System Defined Fields**. The System Defined Fields page appears.
2. Click **Security Rights**. The Field: Security Rights page appears.
3. To add a new value, enter the name and then click **Add Value**.

To edit an existing value, click the security code name. Under **Edit Value**, update the information and click **Update**.

4. To save the security code, click **Save and Finish**.

**Note:** After you save the security code, it appears as checkbox under **System Defined Fields, Security Rights** where it appears throughout *eTapestry*. For example, if your organization has chapters, and you enter "Chapter A" in the **Name** field when you create the code, a **Chapter A** checkbox appears as you enter data for accounts, journal entries, relationships, funds, campaigns, approaches, and user-defined fields. In addition, the checkbox also appears in security groups.

5. To save the security code, click **Save and Finish**.

Like other defined field values, you cannot delete a security rights field after you save it. However, you can disable it.

After you create security codes, you individually assign the code to data on account records that need it. When you select the checkbox for the security code in a security group, users in that group can view, query, or report on the data.

**Note:** A user can also view, query, or report on the data when there are no assigned security codes. To prevent a user from viewing the information, make sure you select the checkbox for a *different* security code.

- To assign a security code to an account, open the account record and click **Defined Fields**. Under **System Defined Fields**, click **Security Rights** and select the code to apply.
- To assign a security code to a relationship, open the relationship. Under **System Defined Fields**, **Security Rights** and select the code to apply.
- You can also assign a security code to funds, campaigns, and approaches. From **Management**, select **Funds**, **Campaigns**, or **Approaches**. On the page that appears, click the fund, campaign, or approach to apply the security code. Under **System Defined Fields**, click **Security Rights** to select the code. To save your changes, click **Save and Finish**.
- To assign a security code to user-defined fields, select **Management**, **User Defined Fields**. Click the category where the field is stored and then click the field name. On **Step 5 Security**, under **Security Rights**, select the code to apply. Next, click **Save and Finish**.

After you create security codes, select the codes in a security group to grant access to this data for users in the group. To do this, go to **Management**, **Security Groups**. After you open the applicable security group, select the security code checkboxes under **System Defined Fields**, **Security Rights**. To save your changes, click **Save and Finish**. For more information about how to edit a security group, refer to [Create a security group on page 94](#).

## Security Groups

**Tip:** For best practice information about users and security groups, refer to [eTapestry Best Practices: Users and Security Groups 101](#).

**eTapestry** allows Administrator users to set up various security groups with rights to perform certain actions in the database. Once a security group has been created, the Administrator can assign users to the group to grant specific rights to each assigned user. For example, the Administrator creates a group with limited data entry and reporting rights, and then assigns all volunteers to that group. Likewise, the Administrator can create a group that has data entry and reporting rights, but does not have rights to update the database's defined field structure, and then assigns all users who enter gifts to that group.

When you create a security group, you select security options to specify what users can view, create, edit, and delete in **eTapestry**. For example, you can set up rights so that a user can view information, but cannot change it. You can also determine the days and times the users can access **eTapestry**, and grant access to tiles for the Home and account home pages. When you use the Advanced Security module, you can also select a query to assign account and journal data permissions to filter the records and gift data that users can access.

By default, two security groups appear for you automatically in **eTapestry**. The Admin group provides full rights to access any area of the application. This group must always contain at least one user to make sure at least one has full Administrator rights. The Default group provides data entry rights. However, it does not provide rights to advanced features, such as **Mass Email** and **User Rights Admin**. You cannot edit or delete the Admin and Default security groups, but you can copy them to use as a starting point for a new group.

**Tip:** New users are automatically in the Default security group. When a user is cloned from another user, the cloned user is automatically in the same security group as the original user.

### > Create a security group

1. From **Management**, select **Security Groups**.
2. Under **Tasks**, click **New Security Group**.
3. In the **Name** and **Description** fields, enter information that uniquely identifies the security group to other users.
4. Under **Allowed Access Time**, establish the times during the day when users can access **eTapestry**. After you select the correct time zone for the users, select the checkbox under each hour of the day when they can log into the application.
5. Under **Permission Types**, select the checkbox in the row for each field to allow users to read, update, create, or delete the information in the database.
  - **Read:** Users can view the existing information.
  - **Create:** Users can add new the information.
  - **Update:** Users can change the existing information. If the **Read** checkbox is clear when you select **Update**, it selects automatically because users inherit the right to read data they can change.
  - **Delete:** Users can remove the information.

When you select a checkbox and it is followed by dashes, the user inherits both rights. Review the following examples to understand how selecting or clearing a checkbox can automatically grant or deny other permissions when a dash appears.

Permission Type	Read	Update	Create	Delete
Constituent	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
User	-	-	<input type="checkbox"/>	<input type="checkbox"/>
Tribute	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Team	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Account</b>				
Persona	<input checked="" type="checkbox"/>	-	-	-
Relationship	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	<input checked="" type="checkbox"/>
Account Giving Summary	<input checked="" type="checkbox"/>	-	-	-
Account Settings	<input checked="" type="checkbox"/>	-	-	-
User Defined Value	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	-

- **User:** Users can read and update, but cannot create or delete.

**Note:** User permissions begin with dashes in the first two columns which grants read and update rights. To grant create and delete, you must manually select the checkboxes.

- **Persona:** When **Read** is selected, users automatically inherit update, create, and delete rights. If you clear this checkbox, users do not have rights to the persona.

**Note:** When you deny **Read** rights, users continue to view the data in some areas, such as the account header and in queries. To prevent this, implement the Advanced Security module. For more information, refer to [Advanced Security on page 90](#).

- **Relationship:** When the **Update** checkbox is clear, users can read and delete relationships, but cannot update or create them. The dash in the **Create** column means this right is automatically inherited by your **Update** checkbox selection. For example, if you select the **Update** checkbox, you grant update *and* create rights.
6. When you assign rights for the **User Rights Admin** permission, make sure you are aware of what each right grants the ability to do.

**Read:**

- View the list of approaches, campaigns, funds, letters, relationship types, and sticky note types in the defined field management area.
- Use Defined Field Sets to create user defined fields.
- Edit other user account preferences.
- View the Rights page of other user accounts.
- View security groups.

**Update:**

- Add and edit approaches, campaigns, funds, letters, relationship types, and sticky note types.
- Use the Getting Started Wizard.
- Edit or delete read only items.
- Use Defined Field Sets to create user-defined fields.
- Clone users.
- Edit security queries.

**Read and Update:**

- Edit other user's Rights.
- Update security groups.

**Note:** If you select **Read** or **Read and Update** rights for the **User Rights Admin** permission and apply advanced security to security queries, the **Read** and **Update** rights are granted instead of the security query permissions.

- Use the User Activity Report from **Management, User Activity**.
7. If you use the Advanced Security module, a section appears with **Permission, Query, Grant**, and **Deny** columns. To apply a security query to one of the account or journal permissions, click the drop down in the field to select the query. Next, select **Grant** to provide access to the data in the query or **Deny** to prevent access to it. For more information about security queries, refer to [Advanced Security Queries on page 90](#).

When you enable security codes, **System Defined Fields, Security Rights** also appears if you use the Advanced Security module. To provide users in the security group with access to data that

uses the security code, select its checkbox. For more information about security codes, refer to [Advanced Security Codes on page 92](#).

8. Under **Home Tiles**, you can grant access to any Home page tiles.
9. Under **Home Page Tiles**, you can grant access to any tile for account home pages.
10. To save the security group, under **Tasks**, click **Save**.

## Getting Started Wizard

The Getting Started Wizard help you set up your *eTapestry* database when you first begin to use the program. If you contract consulting services to help you set up your database or used Import, many of the steps in the wizard may already be completed. You can still use this tool to help you understand the basic database setup.

To access the Getting Started Wizard, from **Management**, click **Getting Started Wizard**. On the page that appears, under **Wizard Preference**, the **Show Wizard every time I login** option allows you to view the Wizard each time you log in. To prevent the Wizard from appearing every time you log in, clear the checkbox.

### ➤ Getting Started Wizard steps

1. The Welcome step provides information about the Getting Started Wizard. To continue, click **Next**.
2. For the My Organization step, enter information about your organization.
  - **Information** - This shows your organization's name, address, web page, and other contact information based on your online form. You can update this information as necessary. To continue, click **Next**.
  - **Settings** - This page enables you to opt in to the FEP Report, identify your initiation year, NTEE code, last month of your fiscal year, time zone, and type of currency used. To continue, click **Next**.
  - **Mission** - Personalize your database. Upload your logo and enter a mission statement to appear on your welcome page. To continue, click **Next**.
  - **Password Preferences** - Select a security option. Although you can choose a low, medium, or high security level, we recommend you use the high security level for maximum protection.

Or, set up your own password requirements. These preference affect all of your database users. At a minimum, passwords must contain at least 6 characters. They cannot contain the login ID, the word "password," identical values (such as "111111"), or consecutive values (such as "123456").

- **Minimum Password Length** - Passwords must contain at least this many characters.
- **Maximum Password Age** - Users must change their passwords after this many days.
- **Minimum Password Age** - User cannot change their passwords until this many days



have passed.

- **Unique Password History** - When a user changes their password, the new password cannot match any passwords within the history. Determine how many passwords the history should include.
- **Require Complex Passwords**: This forces users to create passwords that contain at least 3 of the following: upper case letters, lower case letters, numbers, and special characters.

To continue, click **Next**.

3. For the Users step, set up who can use your database. **Existing Users** shows your current users, their names, login IDs, emails, and whether or not they have full Administrator rights.

To add a new user, under **Add New Users**, enter the user's name, create a login ID, enter an email address, and select whether the user should have full Administrator rights. To add another user, click **Add Additional Line**. After you enter users, click **Save New Users**. *eTapestry* sends an email of login information to each user.

To continue, click **Next**.

4. For the Defined Field Sets step, you can create recommended defined fields. Select the field set that best describes your organization, such as Arts, Education, or Health Care. Under **Help**, click the **View Importable Fields** link beside the field to view a list of fields for each set.

To continue, click **Next**.

5. For the Transaction Fields step, enter funds, campaigns, approaches, or letters that are specific to your organization and view the current ones. To add additional fields, click **Add Additional Line**.

To receive a weekly email about your funds, campaigns, and approaches, select **Send Report** and enter your email address.

To continue, click **Next**.

6. For the Other Fields step, add other necessary fields, including persona types, country codes, phone types, contact methods, credit/debit card types, and relationship types.

- **Persona Types** - View current persona types. To add one, enter a name under **Add New Persona Types**. To add another, click **Add Additional Line**.
- **Country Codes** - View your enabled and disabled country codes. To add or remove countries, click **Enable** or **Disable**.
- **Phone Types** - View current phone types. To add one, enter a name under **Add New Phone Types**. To add another, click **Add Additional Line**.
- **Contact Methods** - View current contact methods. To add one, enter a name under **Add New Contact Methods**. To add another, click **Add Additional Line**.
- **Credit/Debit Card Types** - View current credit/debit card types. To add one, enter a name under **Add New Credit/Debit Card Types**. To add another, click **Add Additional Line**.
- **Relationship Types** - You'll use relationship types to track how constituent accounts are

connected. To add one, such as employer/employee or parent/child, enter the role for each constituent. To add another relationship type, click **Add Additional Line**.

To continue, click **Next**.

7. The Summary steps displays the wizard pages you visited. Pages you skipped appear in red. To go back to a previous page, click a summary link. When you are done, click **Save And**.

## Social Media Finder Service

**Show Me:** Watch a video about the [Social Media Finder Service](#) and [review the graphical overview](#) to learn more.

Use the Social Media Finder service to find and track social media network accounts associated with your **eTapestry** accounts. This information helps determine how to provide the most impact for your social marketing efforts.

**Tip:** System Administrators that use the Pro package of **eTapestry** in the United States and Canada can take advantage of this service two times per year. For all other countries, you must obtain a subscription so System Administrators can use the Social Media Finder service two times per year. For questions about the Pro package of **eTapestry** and **eTapestry** subscriptions, please contact your Account Manager or send an email to [eTapClientAccountExecs@blackbaud.com](mailto:eTapClientAccountExecs@blackbaud.com).

Social Media Finder uses email addresses to find social media data. This data appears under **Social Media Finder** on the account Home page.

**Jane Doe**  
123 Main Street, Charleston, SC 29492, United States

[Home](#) | [Personas](#) | [Relationships](#) | [Journal](#) | [Other](#) | [Defined Fields](#) | [Edit Header](#)

**Picture** ✚ ✕

No Photo Available Update Delete

**Recognition** ✚ ✕

Not Applicable For This Role

**Social Media Finder** ✚ ✕

**Personal Persona** updated on 3/19/2015

Email  
jane@doe.net

Social Network Results

[in http://www.linkedin.com/in/jane](http://www.linkedin.com/in/jane)  
[f http://www.facebook.com/jane](http://www.facebook.com/jane)  
[t http://twitter.com/jane](http://twitter.com/jane)

**Quick Actions** ✚ ✕

[Create Custom Account Query for jason boche](#)  
[Check for Possible Duplicates](#)  
[Generate Account Summary Report](#)

**Note:** It is possible for social media networks to adjust or remove some social media services due to privacy changes and API restrictions, For example, as a social media service increases in popularity, so does the value of their data as a revenue source. Some services choose to maintain a very open API, like Twitter. However, others can decide to restrict access to data in their API at any time. When they do, this may cause incorrect matches for **eTapestry** account users and their social media profiles. For example, Facebook uses the first and last name for an email address to match accounts when you run Social Media Finder service. When your run the service, it is important to remember this possibility.

You use the links on the page to view the account user's profile and to contact the user directly on the social media channel.

When a persona has more than five email addresses, the Social Media Finder service only scans the first five email addresses. When a scanned email address does not return a constituent's known social network account, privacy settings for the network profile likely prevent the service from identifying it. It is also possible the constituent is not using the scanned email address for the network account. To

access a constituent's social network profile, click the link on their Account page. You may need to log in to the social network to view the profile.

The Social Media Finder service scans the email addresses in your database for the follow social networks.

- Facebook
- Google Plus
- Instagram
- LinkedIn
- Pinterest
- Quora
- Slideshare
- Twitter
- YouTube

## Social Media Finder Use Cases

While social media is a newer field of information, there is a lot you can do with the data that the Social Media Finder service returns. Use these ideas to leverage social media information to the benefit of your organization.

- Use the social media accounts to get to know and connect with your constituents.
- Use social media links to open profiles and verify information about your accounts including occupation, employer, interests, and affiliations.
- Use social media data to determine the social media networks you should invest your time in developing a strong message and network for your organization. You can identify people on social media to promote your cause. For example, when you are having an event, you can research and provide your event coordinator a list of accounts so he or she can invite them to the event. Well connected individuals can help promote the event and increase awareness.

### > Schedule and run the Social Media Finder service

**Tip:** System Administrators that use the Essentials or Pro package of **eTapestry** in the United States and Canada can take advantage of this service two times per year. For questions about the Essentials and Pro packages of **eTapestry** and **eTapestry** subscriptions, please contact your Account Manager or send an email to [eTapClientAccountExecs@blackbaud.com](mailto:eTapClientAccountExecs@blackbaud.com).

1. From **Management**, click **Social Media Finder**. The Scheduling your service page appears.
2. In the **Category** and **Query** fields, select the query of accounts for the service to run and return social media account networks for your accounts based on email addresses.
3. Select whether to run the process for **Primary personas only** or **All personas** in your database.

**Note:** The Social Media Finder service does not analyze accounts without an email address.

4. Enter a date to run the process. The service begins at the earliest time possible on that date. For

example, if you schedule it for June 26, 2014 it starts at 12:00AM that day.

5. In the last field on the page, enter each recipient email address at your organization who should receive a summary of the results when the Social Media Finder service completes. If you enter multiple email addresses, use commas to separate them.
6. To save the schedule and run it on the designated date, click **Schedule**.
  - When the process is complete, the email recipients receive a summary email message that includes the number of emails scanned and the number of identified social profiles. **eTapestry** also creates a journal note for your organization's account that includes a summary of the service run.
  - The social media network data for each account appears under **Social Media Finder** on the Home page of the account. To access a social network profile, click the link on the page. You may need to log in to the social network to view the profile. Based on privacy settings, you may also need permission from the account user to view personal content.
  - When a persona has more than five email addresses, the Social Media Finder service only scans the first five email addresses. When a scanned email address does not return a constituent's known social network account, privacy settings for the network profile likely prevent the service from identifying it. It is also possible the constituent is not using the scanned email address for the network account.
  - You can query on social media data to analyze relevant social media information for your organization. **eTapestry** generates a query for each social network type identified during your Social Media Finder service run. For example, if your account users only use Facebook, LinkedIn, and YouTube, a query generates for each social network. A query for a social network type does not generate until it is linked to an email address in your database during the run. Also, each query contains its corresponding social network field. For example, the Facebook query contains the **Facebook** field. To view the social network queries in your database, view the new **Social Media Finder** query category from **Queries, Manage Queries**.
  - You can create a custom report to analyze relevant social media information for your organization. The social network types identified during your Social Media Finder service run appear as available fields you can report on under the **Account Fields** category. For example, if your account users only use Facebook and LinkedIn, the **Social Media - Facebook** and **Social Media - LinkedIn** fields now appear. The field for a social network type does not appear until it is linked to an email address in your database during the run.
  - Social Media Finder information appears on the Social tab of the Data Health Scorecard. The data on this tab includes the number of email accounts analyzed when the Social Media Finder service last ran and the number of email addresses from personas that link to social media network accounts. It also includes a graph of the four most popular social networks your accounts use and helpful links to queries for social media data.

**Note:** To edit schedule information, return to this page and click **Edit**. To prevent the schedule from running the service, you can also return to this page and click **Cancel**.

# Wealth Rating

**Show Me:** [Watch a video](#) about the Wealth Rating service to learn more.






Use the wealth rating service to view wealth information for an account—including their overall wealth rating and the date the service was last run—from **Target Analytics**, a division of Blackbaud Inc.

**Tip:** System Administrator users can limit or give rights to users to view wealth ratings data. From **Management, Security Groups**, select the security group of the user whose rights you want to edit. Under **Wealth Ratings**, select or clear the **Read** checkbox.

**Target Analytics** screens your individuals and prospects located in the United States based on public assets, including:

- High-confidence real estate ownership, based on their name and address
- Private company information, based on their reported ownership percentage
- High-confidence public company insider holdings and options

Then, **Target Analytics** ranks your individuals and prospects on their wealth data up to five stars. The higher the wealth rating, the higher the stars. With this information, you can determine where to focus your fundraising energies and who to ask for larger gifts. For example, we recommend you assign your four- and five-star constituents to an attentive fundraiser with more care and interaction than other donors.

-  — A five-star constituent has public assets greater than \$25,000,000 USD.
-  — A four-star constituent has public assets between \$10,000,000 and \$25,000,000 USD.
-  — A three-star constituent has public assets between \$1,000,000 and \$10,000,000 USD.
-  — A two-star constituent has public assets between \$500,000 and \$1,000,000 USD.
-  — A one-star constituent has public assets up to \$500,000 USD.

If **Target Analytics** cannot accurately identify a constituent or screen their wealth, they appear with No rating.

This data appears on the Data Health Scorecard as well as the **Wealth Rating** tile on the account Home page. You can also query and report on wealth data to analyze relevant information for your organization.

## > Schedule and run the wealth rating service

**Warning:** Only System Administrator users can schedule the Wealth Rating service.

1. From **Management**, click **Wealth Rating**. The Scheduling your service page appears.
2. In the **Query Category** and **Query Name** fields, select the query of accounts for the service to

run and return wealth rating information for your accounts.

**Note:** System Administrators who use the Essentials or Pro package of **eTapestry** in the United States can take advantage of this new service two times per year. For questions about the Essentials and Pro packages of **eTapestry** and **eTapestry** subscriptions, please contact your Account Manager or send an email to [eTapClientAccountExecs@blackbaud.com](mailto:eTapClientAccountExecs@blackbaud.com).

3. Enter a date to run the process. The service begins at the earliest possible time on that date. For example, if you schedule it for June 26, the process starts at 12:00AM that day.
4. In the last field on the page, enter each recipient email address at your organization who should receive a summary of the results when the wealth rating service completes. If you enter multiple email addresses, use commas to separate them.
5. To save the schedule and run it on the designated date, click **Schedule**.

- Only accounts with the role of Constituent will be included during the wealth rating service run.
- The wealth rating service processes only the primary persona on all accounts in the query.
- When the process is complete, the email recipients receive a summary email message that includes the date the service was run, the query you selected, the number of accounts that correspond to each overall wealth rating score, and the number of accounts processed. **eTapestry** also creates a journal note for your organization's account that includes a summary of the service run.

When an extended period of time has passed since you last ran the service, information appears to remind you to run the service again. To schedule your next service, click the **Go to Wealth Ratings** link on the page.

After you run the service, the information updates, and the scorecard includes the accounts analyzed by the service and their overall wealth rating. It also includes helpful links to queries for wealth rating data.

- The Wealth Rating Data Health Score displays on the Home page when you open **eTapestry**. The information that appears in this section varies depending on your wealth rating data's current state. For example, basic wealth rating information displays with a link to learn more details about the service before you run it for the first time.
- To group **eTapestry** accounts together with the same overall wealth rating, **eTapestry** generates a query for each ratings level. For example, if the wealth rating service returns accounts with a three-star rating, you can generate a query to find accounts with an overall rating of three stars.

To view the wealth rating queries in your database, view the Wealth Ratings query category from **Queries, Manage Queries**.

When you create a query for wealth ratings, under **Available Fields**, select Wealth Rating Stars under the Account category. Under **Criteria**, a checkbox appears next to each overall wealth rating, No rating, and Unprocessed. Select which criteria you want to apply to your query.

- You can create a custom report to analyze relevant wealth rating information for your organization. The wealth rating scores identified during your wealth rating service run appear as available fields you can report on under the **Account Fields** category.

- Wealth rating information appears on the Wealth tab of the Data Health Scorecard. On the this tab, you can view wealth information for an account—including their overall wealth rating and the date the service was last run—from **Target Analytics**, a division of Blackbaud Inc.

For more information about the Data Health Scorecard, refer to [Data Health Scorecard](#).

**Tip:** To edit schedule information, return to this page and click **Edit**. To prevent this schedule from running the service, you can also return to this page and click **Cancel**.

## *eTapestry* and *everydayhero* Integration

**Note:** As of the 7.26.0 release, *everydayhero* integration is only available to customers in the United States and Ireland.

*everydayhero* is a peer-to-peer online giving solution that allows your organization to build online fundraising campaigns as part of your existing websites or as a stand-alone fundraising site.

**Show Me:** [Watch a video](#) about the *everydayhero* integration with *eTapestry* to learn more

With the *everydayhero* integration with *eTapestry*, you can import constituent, participation, and gift information from *everydayhero* to update your database. Constituent records are updated with the information that comes from *everydayhero*, and new accounts are created if necessary. When you import gifts from *everydayhero*, you can create queries and reports of the information imported.

## Sign up for *everydayhero*

Before you can begin to transfer information from *everydayhero* into *eTapestry*, you must sign up with *everydayhero*.

### > Sign up for *everydayhero*

1. From **Management**, select **Integrations**.
2. On the Integrations page, click **Sign up here** in the *everydayhero* integration tile. The *everydayhero* home page opens in your browser.
3. Click **SIGN UP**. The sign up page appears.
4. Fill in the form with your organization's information and select to create your *everydayhero* account with Facebook or email.

### > Sign up for *everydayhero*

1. From **Management**, select **Integrations**.
2. On the Integrations page, click **Sign up here** in the *everydayhero* integration tile. The *everydayhero* home page opens in your browser.
3. Click **SIGN UP**. The sign up page appears.



4. Fill in the form with your organization's information and select to create your **everydayhero** account with Facebook or email.

## Access the API token for the **everydayhero** integration

When you sign up with **everydayhero**, you receive an **eTapestry** API key. You can then use the API key to establish a connection between **everydayhero** and **eTapestry**.

### > Access the API token for the **everydayhero** integration

1. After you have created your **everydayhero** account, sign in to your account.
2. From your **everydayhero** dashboard, select the Settings tab and click **Integrations**. The Integrations page appears.
3. On the Integrations page, under **eTapestry**, select **Copy** to copy the API token to your clipboard. For more information about where to enter your API token, see [Enter basic settings on page 105](#).

## Enter basic settings

On the Basic Settings tab of the **everydayhero** integration wizard, enter your API key to set up a connection between **everydayhero** and your **eTapestry** database.

### > Enter basic settings

1. From **Management**, select **Integrations**.
2. On the Integrations page, in the **everydayhero integration** tile, select **Set Up**. The Set up **everydayhero** integration screen appears.

The screenshot shows a dialog box titled "Set up everydayhero integration" with a close button (X) in the top right corner. Below the title bar are four tabs: "1. Basic settings" (highlighted in green), "2. Map campaigns", "3. Select historical data", and "4. Finish".

Under the "Basic settings" tab, there are two input fields:

- The first field is labeled "API Key \*" and is currently empty.
- The second field is labeled "Send data import notifications to: \*" with a sub-note "Use commas to separate multiple email addresses." below it. This field is also empty.

At the bottom of the dialog box, there are four buttons: "Previous" (disabled), "Next" (active), "Save and Close", and "Cancel".

3. On the Basic settings tab, enter your API Key in the field. For more information about how to retrieve your API key, see [Sign up for everydayhero on page 104](#).
4. In the last field, enter each recipient email address at your organization who should receive a notification when the import completes. If you enter multiple email addresses, use commas or semi-colons to separate them.
5. Click **Next** to go to the next step or **Save and Close** to save your choices and come back to the page later. To return to the previous step, click **Previous**.

## Map campaigns

**everydayhero** campaigns are brought into your **eTapestry** database as **eTapestry** Fundraisers with the Source of **everydayhero**. Once you enter basic settings, you will need to map revenue from **everydayhero** campaigns to an **eTapestry** fund, campaign, and approach.

In **eTapestry**, funds, campaigns, and approaches are the way you organize transactions and activity with your constituents to better analyze information in reports and queries and track your success towards specific goals.

On the Map campaigns tab of the Set up **everydayhero** integration screen, you can select a default fund, campaign, or approach from the drop down menus.

### Set up everydayhero integration ✕

1. Basic settings   **2. Map campaigns**   3. Select historical data   4. Finish

Choose a default Fund, Campaign and Approach for revenue import from *everydayhero* campaigns

Default *eTapestry* Fund \*

(None Selected) ▼

Default *eTapestry* Campaign

(None Selected) ▼

Default *eTapestry* Approach

(None Selected) ▼

Previous   **Next**   Save and Close   Cancel

**Note: Default eTapestry Fund** is a required field. A fund is always a required field when you enter a gift.

Click **Next** to go to the next step or **Save and Close** to save your choices and come back to the page later. To return to the previous step, click **Previous**.

## Import historical data

On the Select historical data tab of the Set up *everydayhero* integration screen, select how you want to import previous *everydayhero* data into *eTapestry*. This data will be imported during the first nightly import you schedule.

Set up everydayhero integration

1. Basic settings 2. Map campaigns 3. Select historical data 4. Finish

Choose the historical data to import from *everydayhero* \*

No historical data

All historical data

Historical data created since

Once you start import, this historical data setting can not be changed.

Previous Next Save and Close Cancel

### ➤ Select historical data to import

**Note:** Once your import begins, these settings cannot be edited.

1. If you do not want to import data from previous *everydayhero* campaigns, select **No historical data**.
2. To import all data from previous *everydayhero* campaigns, select **All historical data**.
3. To import data from previous *everydayhero* campaigns starting with a specific date, select **Historical data created since** and select the date.
4. Click **Next** to go to the next step or **Save and Close** to save your choices and come back to the page later. To return to the previous step, click **Previous**.

## Finish your integration setup

On the Finish tab of the Set up *everydayhero* integration screen, select when you want to import your *everydayhero* data into *eTapestry*.

If you select to schedule your imports now, your *everydayhero* data will import nightly beginning on the date shown.

If you select to schedule your import at a future date, you can return to this step after you finalize your import settings.

Click **Finish** or **Save and Close** to begin to the import or to save your choices and come back to the page later. To return to the previous step, click **Previous**.

## Edit the *everydayhero* import settings

everydayhero Integration

Edit Settings Edit Mappings Pause Integration

Successfully connected

First nightly import scheduled: 9/1/2016

If something goes wrong, email notifications will be sent to:  
alps@blackbaud.com

[everydayhero/eTapestry integration user guide](#)

Don't have *everydayhero*? [Sign up here](#)

Once you have completed the steps to set up your *everydayhero* integration with *eTapestry*, the **everydayhero integration** tile now displays details about the import, such as the date and time your import is scheduled for and who will be sent notifications when your import is complete.

To edit the settings of your integration, click **Edit settings** from the **everydayhero integration** tile. To pause the integration until a later time, click **Pause integration**.

If you want to import your *everydayhero* data outside of scheduled runs, you can select **import now** next to the date of your next scheduled import. A warning screen appears to notify you that the import is an intensive process. Select **Confirm** to begin importing your *everydayhero* data.

## Field mapping between *everydayhero* and *eTapestry*

After you complete the integration set up, information from *everydayhero* is imported into your *eTapestry* database.

## Account Fields

When you import account data from *everydayhero* into your *eTapestry* database, accounts can be created or participation and transaction information updated if the account already exists in your database.

If the account does not exist in your database, then two different types of accounts can be created for you: fundraiser accounts and donor accounts.

Fundraiser accounts are created for users who create a Hero page in **everydayhero**. Donor accounts are created for those who donate to your organization. To distinguish between the two account types, **eTapestry** adds a user-defined field, **Account UDF (EDH Account Type)**, to the account.

To search for existing Fundraiser accounts in your database, **eTapestry** checks **everydayhero** ID numbers, name, address, then email. To check for existing donor accounts, **eTapestry** checks by name, address, then email.

If you delete an account in **eTapestry** that was imported through the **everydayhero** integration, it will not be imported the next time you run the integration since the integration will only import new data.

If the account being imported is an organization instead of an individual, then the name of the organization will appear as the account name, and the name format will be set to Business.

This table describes where account information imported from **everydayhero** appears in **eTapestry**.

## > Account Fields

<b>everydayhero Field</b>	<b>eTapestry Field</b>
Address	Address, Address Line 1
Address Line 2	Address Line 2
Birthday	Account UDF (Date of Birth)
City/Suburb/Town	City
Country	Country
Email	Email
Further Communication Opt-In	Account UDF (EDH Communication Preferences)
Postcode/Zip Code	Postal Code
State/County/City	State/Province
First Name	First Name
Last Name	Last Name
Phone	Persona Default Phone
Organization Name	Organization Account Name
Supporter ID	Account UDF (EDH Account Id)

## Fundraiser Fields

On the Fundraisers page, you can view and edit data about Fundraisers in your database.

**Note:** For users who have integrated their *everydayhero* account with *eTapestry*, but do not have a subscription to Personal Fundraising, you will not be able to create a new Fundraiser in *eTapestry*. New Fundraisers can only be added through the import process when you import campaign data into your *eTapestry* database.

To edit Fundraiser information imported from *everydayhero*, select the name of the Fundraiser you wish to edit on the Fundraisers page. You can edit information in the **Date**, **Name**, **Goal**, **Status** and **Description** fields. For more information, see [Personal Fundraising on page 113](#).

## > Fundraiser Fields

Campaign Description	Note
Campaign Name	Name
Campaign Start Date	Date
Campaign State	Status

## Journal Fields

The *everydayhero* integration imports new journal entries such as transactions and participation journal entries. However, if you delete a journal entry in *eTapestry* that was imported through the *everydayhero* integration, it will not be imported the next time you run the integration since the integration will only import new data.

### Transaction Fields

Transactions that have been received online, such as through the Hero page, are automatically imported into *eTapestry* when you schedule your *everydayhero* nightly import.

To import offline transactions, such as donations received through cash or check, see [Offline Transactions on page 113](#).

This table describes where transaction information imported from *everydayhero* appears in *eTapestry*.

## > Transaction Fields

### **everydayhero Field**

Donation Amount, Uplift/Cover  
Donation Date  
Donation ID  
Donor Message  
Donation Payment Instrument  
Donation Received at (Date)  
Donation Receipt Number  
Donation Type  
Is Recurring Gift?  
Supporter

### **eTapestry Field**

Transaction Received Amount  
Transaction Date  
Transaction UDF (EDH Transaction ID)  
Transaction Fundraiser Donation Message  
Gift Type  
Transaction UDF (EDH Date Gift Received)  
Transaction Receipt Number  
Transaction UDF (EDH Transaction Type)  
Transaction UDF (EDH Recurring Gift)  
Soft Credit

### **Participation Journal Entry Fields**

You can use participation journal entries to track information about which accounts participate in your Fundraisers. A participation journal entry is automatically created for each Hero constituent imported from **everydayhero** into your database. You can also manually add participation entries to the account's journal.

This table describes where participation information imported from **everydayhero** appears in **eTapestry**.

## > Participation Journal Entry Fields

### **everydayhero Field**

Page Id  
Page Created Date  
Page Name  
Page Goal  
Page URL  
Campaign  
Team Position  
Team Name  
Team Page URL

### **eTapestry Field**

Participation UDF (EDH Page Id)  
Date  
Display Name  
Participant Goal  
Participation UDF (EDH Page URL)  
Fundraiser  
Participation UDF (EDH Team Position)  
Participation UDF (EDH Team Name)  
Participation UDF (EDH Team URL)



## Offline Transactions

Information about offline donations, such as cash and checks transactions, does not automatically import along with your online donations. However, you can manually add these gifts directly to your **eTapestry** database.

### > Add offline *everydayhero* transactions to **eTapestry**

1. From the donor's account Home page, click **Journal**. The Journal page appears.
2. Click **Add**. The Add Journal Entry screen appears.
3. Select **Gift/Pledge**. The New Gift/Pledge screen appears.
4. Under **Gift Types**, select **Check** or **Cash** for your offline donation. Enter applicable details about the gift.
5. If the donation was given in sponsorship of a participant or **everydayhero** Hero, under **Tribute, Soft Credit, Matching Gift Receipts**, click the magnifying glass under **Soft Credit**. The Find an Account page appears. Search for the account of the participant or Hero. When you locate the correct account in your search results, click the account to select it.

If the account for the soft credit recipient does not exist in your database, you can click **Add Account** to add a new account. Click **Save** to save the new account or select the existing account in the search results.

6. Complete the gift details. For more information about the items on this screen, refer to [Add a Gift Screen](#).
7. Click **Save And** to save the gift to the fundraiser's account.

## Personal Fundraising

After you run the **everydayhero** integration to import your data, you will now have access to a limited version of the Personal Fundraising module in **eTapestry** in order to view, query, and report on fundraiser data imported from **everydayhero**.

**Warning:** If you do not have a Personal Fundraising subscription, or if your subscription has lapsed, you will not be able to create or edit fundraiser information with the Source of **eTapestry**. You will only be able to edit fundraiser information imported from **everydayhero**.

### > Fundraisers Page

From **Management, Fundraisers**, you can view data about Fundraisers in your database on the Fundraisers page.

For users who have integrated their **everydayhero** account with **eTapestry**, but do not have a subscription to Personal Fundraising, you will not be able to create a new Fundraiser in **eTapestry**.

New Fundraisers can only be added through the import process when you import campaign data into your **eTapestry** database.

To edit Fundraiser information imported from **everydayhero**, select the name of the Fundraiser you wish to edit on the Fundraisers page. You can edit information in the **Date, Name, Goal, Status** and **Description** fields.

The date of your Fundraiser is determined by the date you enter in the **Start On** field for the campaign in **everydayhero**. Dates for ongoing campaigns without start dates will be determined by the date the campaign was created in **everydayhero**.

If the name of a campaign from **everydayhero** imported into your database matches an existing **eTapestry** Fundraiser, the date of the campaign will be added to the Fundraiser name. If that naming combination is not unique, a number will be added to the end of the name until a unique name is found.

When you import a campaign with the status of Expired or Deactivated from **everydayhero, eTapestry** sets the status of the Fundraiser to Disabled. All other campaigns will be imported as Fundraisers marked as Active. After the initial import, **eTapestry** cannot change the status of Fundraiser, even if you edit the campaign status in **everydayhero**. However, you can manually edit the status of a Fundraiser on its Fundraiser page.

To set a goal for a Fundraiser, you must edit the **Goal** field in **eTapestry**. You cannot import goal amounts from **everydayhero**. Goals allow you to track the progress of a Fundraiser if you utilize the standard fundraising reports in **eTapestry**.

### > Participation Journal Entries

You can use participation journal entries to track information about which accounts participate in your Fundraisers. A participation entry is automatically created for each constituent and team account imported from **everydayhero** into your database. You can also manually add participation entries to the account's journal. For more information, see [Participation Journal Entries](#).

### > Query and Query Preview

From the drop menu under **Browse Fields**, select Defined Fields. You can query on fundraising data using the **Fundraisers** field to locate either transactions or participation entries for a specific fundraiser.

You can select User Defined Fields - Participation from the drop down menu to select Participation user-defined fields for query.

Under Journal Fields in the drop down menu, you can also select **Participation** within the Journal Entry Types category to query for Participation journal entry types.

When previewing a query, select the Fundraiser column to include the name of the Fundraiser in your preview results.

### > Standard Reports

Three standard reports can help you monitor personal fundraisers that constituents do on behalf of

your organization.

- [Fundraiser Activity Summary](#)
- [Fundraiser Summary](#)
- [Fundraiser Analysis](#)

## > Communications Fields

Data merge tags enable you to merge data from specific fields in accounts or journal entries into documents or emails. When you generate letters or emails, the tag is replaced with the specific data from each entry in your query. The following Personal Fundraising fields now appear as data merge tag options for Communications layouts:

- **Fundraiser**
- **Fundraiser Donation Message**
- **Fundraiser Total Raised**
- **Fundraiser Total Received**
- **Fundraiser Total Pledged**
- **Goal**
- **Participant Display Name**

These fields are also available when you build a custom report to group data. To add these fields to a custom report, select Journal Fields from the **Browse Fields** drop down menu under **Report Columns**.

For more information about adding merge tags to Communications layouts, see [TinyMCE HTML Editor](#).

## > Transaction Pages

When you integrate **everydayhero** with your database, the Fundraiser drop down menu appears on the Transaction page so you can indicate which Fundraiser is associated with your transaction. The drop down menu will not appear on transactions where a soft credit has been selected.

## > User Defined Fields

To track additional information not captured in standard fields, you can use **everydayhero** user-defined fields. These fields can apply to accounts or to specific transactions.

From **Management**, select **User Defined Fields** under **Database Management**. Select the **everydayhero** category.

**Warning:** You can use these fields as they are, or personalize them to better fit the needs of your organization. However, we suggest that you do not re-name any user-defined fields created during the **everydayhero** import process. When you re-name the user-defined field, **eTapestry** creates a new field to store the information which can duplicate data and complicate your data tracking.

## > Mass Updates

After you integrate **everydayhero** with your database, the Fundraiser drop down will appear under

**Transaction Values** when running a mass update to Transaction Values.

## Multiple Participation Journal Entries

When you import **everydayhero** data, you may have Heroes that have created multiple Hero pages that are linked to a single campaign.

Only one participation journal entry per account can be created for each Fundraiser when the Fundraiser is created in **eTapestry**. You will not be able to select a Fundraiser on a participation journal entry if you have already selected that Fundraiser on another participation journal entry for the same account.

However, if you have integrated **everydayhero** with your database, then Fundraisers created through the **everydayhero** import can support multiple participation journal entries for each account.

### > Participation Journal Entry Page

On the Participation Journal Entry page, the **Fundraiser** drop down shows all active Fundraisers, even if the account already has a participation journal entry linked to the Fundraiser imported from **everydayhero**.

You can also save a participation journal entry for an account that already has a participation journal entry for the same Fundraiser if the Fundraiser originated from **everydayhero**.

### > Fundraiser Summary Report

When you run the Fundraiser Summary Report, accounts with multiple participation journal entries on a single **everydayhero** Fundraiser will be listed for each participation journal entry in the report.

The **Display Name** field is included in this report so you can distinguish between accounts with multiple fundraisers.

If the gift associated with the Fundraiser imported from **everydayhero** is an offline gift, or a gift of cash or check, then "(Offline)" will appear in the Role column. For more information about offline gifts, see [Offline Transactions on page 113](#).

To see donation information for individuals, click on the account name when the Account role is Participation. For Team accounts, click on the account name to view team participation summary information. On the detail report, click on the individual names to view their information.

## Relationship Types

You can manage the relationship types used with your accounts. For example, your organization can track familial pairs such as "parent" and "child." You may want to be specific, such as "husband" and "wife," or generic, such as "spouse" and "spouse." The more you know about your supporters and their

personal networks, the more information you'll have to strengthen their relationship with your organization. Therefore, track any relationship that has value to you. This may include "friend," as well as "employer" and "employee" relationships. For example, a friend could help you secure a major gift and an employer might match gifts.

To set up relationship types, click **Management, Relationship Types**.

- To add a relationship type, click **New Relationship Type** under **Tasks**. Enter a role for each side of the relationship, such as "Employer" and "Employee." Click **Save And**.
- To reorder the relationship types, select a pair and drag and drop it to the preferred location.
- If you no longer use a relationship type, you can disable it. If you need it later, just enable it again.

When you learn about an individual's relationships, add the information to the account. For details, refer to [Add a Relationship](#).