blackbaud

General Features Guide

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Get Started

This section covers the basics to help you get started with eTapestry. To review a list of terms for eTapestry, refer to the Glossary.

eTapestry Mobile

To use eTapestry on your smart phone or tablet, access the mobile friendly version. After you log in to eTapestry, click the eTapestry Mobile link in the bottom left corner.

Log In To eTapestry Mobile

Note: The mobile site is subject to the same concurrent user subscriptions as the standard database.

To access eTapestry Mobile, go to https://sna.etapestry.com/prod/Login.jsp on your mobile device. From here, you can enter your legacy eTapestry login ID, or you can link your login to your Blackbaud ID.

Link your Blackbaud ID to your eTapestry database

1. If you are not signed into your Blackbaud ID, from the eTapestry mobile log in page, select Sign in with Blackbaud ID. You will be directed to the Blackbaud ID login page to enter your credentials or create a new Blackbaud ID.

   Note: If you are already logged into your Blackbaud ID when you visit the eTapestry login page, simply select Continue to eTapestry to begin linking your accounts.
2. Once you have signed in with your existing credentials or created a new Blackbaud ID, the page appears for you to enter your eTapestry credentials and link your accounts.
3. On this page, enter your eTapestry login ID and password and select Sign in.Your eTapestry credentials need to be valid and not already associated with a Blackbaud ID in order to link accounts.
4. The Confirm account link page appears. Your eTapestry and Blackbaud ID should both appear.
5. Select Confirm to link your accounts and sign in to your database.

This will be the last time you will need to enter your eTapestry credentials. From now on, you will enter your Blackbaud ID to access your eTapestry database.

If you do not wish to connect your account to your Blackbaud ID at this time, you can select Sign in using your eTapestry credentials and log in to your account with your eTapestry login ID and password. This option will remain available to you for now. However, in the future, you will only

be allowed to sign into eTapestry through your Blackbaud ID, so we recommend you link your accounts as soon as possible.

eTapestry Mobile Home Dashboard

The first screen you view after you log in is the Home dashboard. From here, you can find an account, add and edit accounts, view and edit account journals, view defined fields, or run a report.

Note: Home dashboard reports in eTapestry Mobile correspond to the same Home page reports in eTapestry.

Find Account in eTapestry Mobile

The Find Account feature works like the standard eTapestry Quick Find feature. eTapestry Mobile Find Account uses the following fields to search for your results.

- Name
- Address
- City
- Zip code
- Phone Number Fields
- Short Salutation
- Long Salutation
- Envelope Salutation

If you know a constituent, tribute, or user's account number, enter a "/", followed by the number to view the Home page for that account. For example enter "/12". To view the search results with that account's information, enter, "//" followed by the number. For example, enter "//12".

You can also perform wildcard searches. Enter a question mark (?) into a search term to represent an unknown letter, or an asterisk (*) to represent multiple unknown letters. You cannot begin a word with an asterisk or use more than one wildcard in a search.

Search results display the account name, address, and the account role (for example, constituent, user, tribute, or team).

Account Navigation in eTapestry Mobile

When you select your account, you view a list of all the account's personas. Addresses can be mapped using Google Maps that you open on your device. When you select an email address, eTapestry Mobile opens a new message to that address in your device's email application. When you select a telephone number, your device initiates a telephone call.

To edit an existing persona, click the persona name.

Add Accounts and Edit Personas in eTapestry Mobile

From either the Home dashboard or Search Results pages, click Add an Account. While all enabled persona types are available, the number of fields is scaled down for ease of use when you create a new account. You can access other phone types and the web page when you edit the persona after you create the account. All persona and constituent defined fields are available if they are marked as required or to be displayed in eTapestry Mobile.

To edit a persona, click the name of the persona type to open and edit.

Journal in eTapestry Mobile

From an account, you can access the Journal page. You can also add contacts, notes, calendar items, gift, pledges, and pledge payments. All items in the journal are editable except for soft credits.

Note: If you have a merchant account setup in eTapestry, you can process credit/debit card and virtual checks (EFTs) directly from the gift-entry page in eTapestry Mobile. Once you pick one of these payment methods, fill in the information and take note of the options under Processing Fields. The default value is "Do Not Process," but you can select the name of the processor you wish to use. The transaction processes using the processor you selected when the entry is saved.

Relationships and Photos in eTapestry Mobile

From the Account page, you can view the existing relationships and modify the account photo.

Note: Not all mobile browsers allow access to the device's file directory.

Defined Fields in eTapestry Mobile

You can view defined fields in eTapestry Mobile that have been configured for the mobile application. To enable a field for eTapestry Mobile, open eTapestry. From Management, User Defined Fields, go to Step 3: Field Attributes. Under Field Attributes, select Would you like this field be visible in eTapestry Mobile.

Run a Report in eTapestry Mobile

Seven reports appear in eTapestry Mobile. To run a report, pick a query of accounts or journal items. The queries available are from a single category defined in eTapestry (by default, it is the Base category). To modify the available query category in eTapestry Mobile, open eTapestry.

From Management, My Organization, select the Preferences tab. Under Preferences, select the category to use in Mobile Query Category field.

Tip: If you want queries available from more than one category in eTapestry Mobile, create a query alias in eTapestry. From Queries, create a new query. Under Starting Criteria, select the category and query you want to establish as an alias. In the Data Return Type field, select the same type as the query in your starting criteria. Then, save the query without criteria.

Fast Navigation

Looking for a shortcut? Below the navigation bar, first click any empty place on the screen. To open the Fast Navigation screen using your keyboard, press **ALT** and **N**. Type a command, then press **ENTER**, and eTapestry takes you to the area of that matched that command.

Note: You can only access areas for which you have security rights.

All commands are single compound words and do not include spaces, such as "userdefinedfields." If you include spaces when you type the command, eTapestry removes them for you.

However, when you use search and find commands, the spaces will not be removed. For example, if you type "find john smith", eTapestry searches for "john smith," not "johnsmith."

You can also type the first few letters of a command instead of the full command. For example, if you type "use," eTapestry takes you to the user-defined fields page. If more multiple commands start with the letters you typed, such as myuser, myorg, and mydropbox, and you typed "my" then fast navigation takes you to the first command listed in the table of commands that starts with "my" (in this case "myuser").

Tip: To use fast navigation, your internet browser must allow scripted windows. If you use *Internet Explorer* and it has block this type of window, a message appears in the URL bar. Click the message and then select Temporarily Allow Scripted Windows. To permanently enable Fast Navigation in *Internet Explorer*, from your browser's Tools menu, select Internet options, the Security tab, and then Custom level. In the Settings window, locate the Scripting section. Under Allow websites to prompt for information using scripted windows, select Enable and then click OK. Confirm the change and click OK.

Some commands can be used from anywhere in the database. Others can only be used from an existing account (such as "AddGift").

These general commands can be used from any location in the database.

Command	Goes to
welcome	Home dashboard page

Command	Goes to
reports	Report and Export Categories page
queries, query	Query Categories page
document, documents, thankyou, communication, emails, massemail, receipt	Communication Categories page
imports, advancedimport, advimport	Import Categories page
userdefinedfields, udfs	User Defined Field Categories page
funds	Funds page
campaigns	Campaigns page
approaches	Approaches page
letters	Letters page
quickgiftentry, quick, qge	Quick Gift Entry page
massupdates, updates	Mass Updates page
myuser	your user account's Home page
myorganization, organization	the org account's Persona page
mydropbox, dropbox	your user's Drop Box
myscheduleditems, scheduleditems	Scheduled Items page
securitygroups	Security Groups page
cart	Cart page
personalfundraising,fundraisers, events	Fundraisers page
advfind, advancedfind	Advanced Find page
standardreports, specialreports	eTapestry Standard Reports page
standardexports, specialexports	eTapestry Standard Exports page
duplicatereport	Duplicate Report Launch page
addaccount, account	Add Account
logout	Logs you out of eTapestry
find..., search...	Uses Quick Find to search for whatever text was typed in after find or search
/[account number]	This opens the Home page of account with the corresponding

Command	Goes to
	account number.
//[account number]	Uses Quick Find to locate the corresponding account number and opens the search results page.
help	Opens the WikiHelp window with the Main page of Help displayed

When you have an account record open, you can use these account-specific commands.

Command	Goes to
home, homepage	account's Home page
personas	account's Personas page
relationships	account's Relationships page
journal	account's Journal page
accountsettings, other	account's Account Settings page
definedfields	account's Defined Fields page
addgifts, addpledges	New Gift/Pledge screen
addpayments	If account has open pledge, this opens a Payment screen for that pledge. If account has multiple open pledges, this opens the screen that lists out those pledges and asks you to choose pledge to which the payment should be applied. If account has no open pledges, this opens a page that indicates no open pledges, and provides links to Add Gift/Pledge or Go to Journal.
addsplitgifts	New Split Transaction screen
addnotes	New Note screen
addcontacts	New Contact screen
addcalendaritem	New Calendar Item screen
addrelationships	Relationship add screen

Categories

To keep your database organized, create categories for storing items, including query definitions, custom reports definitions, relationship filters, communication templates, import templates, user-defined fields, and cart items.

- To add a category from an area that uses categories, click New Category under Tasks. Enter a name and description to indicate the type of items to store in the category. For

some areas, you can mark a category as private. Then click Save Category. Your category appears in a list.

- To edit a category, click its name. You can also move and copy items from one category to another.
- To create a new item within a category, click the category name. Then click New [Item] under Tasks. Or, from the category list, click New [Item] under the category name.
- To delete a category, click Delete next to the category name. If a category contains items, you cannot delete it.
- To delete an item, open the category, locate the item, and click Delete. From the categories list, you can also click the "+" beside a category name to view the items, locate the item, and click Delete.
- To reorder categories or items, select a Sort By option at the top of the page or drag and drop to manually place them into the preferred order. To save the new order, click Save Category Order under Tasks. The new order appears for every user in your database.
- To copy an item within a query, open the category, locate the item, and click Copy. From the categories list, you can also click the "+" beside a category name, locate the item, and click Copy. Enter a category for the copy. Then enter a new name for the copy. Click Copy to save the new version of the item.

  Tip: Consider using copies in areas when you work with queries, reports, exports, and communications. This way, you can make edits to the copied item while preserving the originals.

- To move an item from one category to another, open the category, locate the item, and click Move. From the categories list, you can also click the "+" beside a category name to view the items, locate the item, and click Move. Then select a category and click Move to save the new location.

  To move multiple items, open the category and click Move under Tasks. Then select the items to move, select a category, and click Move to save the new location.
- To quickly find for a category or item, use the search box to enter a search term.
- To quickly find for a category or item, use the search box to enter a search term. You can search by more than just names, including descriptions, data created, and date last used.
- To change how much information appears in the list, use the Show More Detail and Show Less Detail options under Tasks.

Note: Although you can create as many categories and items as necessary, it may take longer to load pages with many items. To reduce loading time when an area has more than 1000 items, eTapestry only displays the category information. It does not display information about the items in the categories. To access information about the items, open the category.

Accounts

Accounts are constituent, user, tribute, and team records in eTapestry who support your organization by contributing time, money, and resources. Account records help you maintain information on all aspects of fundraising, such as personal contact information, communication records, and gifts. They also provide quick and easy access to the resources you need to complete many tasks throughout eTapestry.

Note: Constituents are individual, family, and business account records.

Find Accounts

You can find accounts in the database using the search bar, quick find search, or advanced find search. Search results list in order of how strongly they match your search criteria. More weight is awarded to matches in certain fields than others. For example, a match in the Account Name field is more than a match in the Address field.

After you find an account, there are a few ways to open it.

- To go to the Home page on the account, click the account name.
- To open a particular persona on the account, click the persona.
- To send an email to the first email address on the persona, click the email address.
- To open the account's most recent journal entry, click the link in the Last Entry column.
- To add a journal entry to the account, click the ellipses button in the left column. Next, click Journal. The Journal page for the account appears. From the Add menu, select the journal entry type you want to create for your information.

Account Search Shortcuts

eTapestry search accepts wildcards, accents, and other special characters to help filter and find search results.

Wildcard Search

To perform a wildcard search, use an asterisk in the middle of a search word or number. You can also use an asterisk after three or more letters or numbers to search for results with a particular beginning. For example, you can enter "Ja*on" to return "Jason", "Jameson", or "Jackson."

Tip: The asterisk replaces any number of characters between the first and last letters in the search. To search for one missing character, use a question mark (?) instead. For example, you can enter "Ja?on" to return "Jason", "Jalon", or "Jamon."

Accent Character Search

You can search for accounts containing accent characters with or without diacritical marks to return results. For example, you can search for "Celiné" or "Celine" to return "Celiné" or you can enter "Brontë" or "Bronte" to return "Brontë."

Account Number Search

To search for accounts by account number, use the search bar, quick find search, or the Account Name field for the advanced find search.

- To go directly to the Home page of the account, enter a single forward slash (/) before the account number and click Find.
- To view the account in the search results, enter two forward slashes (//) before the account number and click Find.

Search Bar

The search bar appears at the top of eTapestry on the left side of every page for you to quickly search for an account from any location in the application. In this field, enter your criteria, and click the magnifying glass to view the search results.

Quick Find

To access quick find, go to Accounts, Find an Account. The Find an Account page appears and defaults to the Quick Find tab. This search uses the following to match your search criteria and find results.

- Account Name
- Address
- City
- Street Name
- Building Number
- Apartment Number
- Zip code
- Phone Number Fields
- Short Salutation
- Long Salutation
- Envelope Salutation
- Email Address

To perform the search and display results, click Find.

- To only display results that match all search criteria exactly, click Exact Match.
- To limit your search to specific account roles, select or clear the role checkboxes, such as Constituent or User.
- Under the number of accounts found, when the account does not appear in the results, and you are certain it does not exist in your database, click Add an Account to create a new record for the individual or organization.
- To create a custom query of your search results, click Create Custom Account Query. The Create a custom query screen appears. In the Query Category field, select a category for the query. In the Query Name field, enter its name. To save the custom query, click Create.
- To customize the columns that display for the results, select Choose columns. The Choose columns to show in the list screen displays. You can search for a column or select a column category in the All categories drop down menu, such as Account Fields or Persona Fields, to narrow the list of column options to display. Select the checkbox by the column name you want to appear and click Apply changes. To change the order of the columns on the results grid, select a column header and drag it. After you add or remove columns or change column order, you can click Restore Defaults to return default column settings.

Advanced Find

Use the advanced find search to perform a more refined search. For example, you can search for criteria in specific fields or user-defined fields, and you can also limit your search to a group of accounts in a query.

Perform an advanced search

1. From Accounts, click Find an Account. The Find an Account page appears.
2. Select the Advanced Find tab.
3. In the fields that appear, enter your search criteria.

   Note: An account must meet all search criteria you enter in each field to appear in your search results. Accounts that meet one of your criteria, but not all, do not appear.
4. In the Query Category and Query Name fields, select a category and name to search for an account within a query.
5. To include user-defined fields in your search, click User Defined Fields. Only UDFs that have been designated as searchable for advanced find appear.
6. To perform the search and display results, click Find.

a. To only display results that match all search criteria exactly, click Exact Match.
b. To remove the criteria you entered for the search, click Clear Form. This does not perform a new search. It only removes your criteria from the page.
c. When the account does not appear in the results, and you are certain it does not exist in your database, click Add an account to create a new record for the individual or organization.
d. To limit your search to specific account roles, select or clear the role checkboxes, such as Constituent or User.
e. Under the number of accounts found, to create a custom query of your search results, click Create Custom Account Query. The Create a custom query screen appears. In the Query Category field, select a category for the query. In the Query Name field, enter its name. To save the custom query, click Create.
f. To customize the columns that display for the results, select Choose columns. The Choose columns to show in the list screen displays. You can search for a column or select a column category in the All categories drop down menu, such as Account Fields or Persona Fields, to narrow the list of column options to display. Select the checkbox by the column name you want to appear and click Apply changes. To change the order of the columns on the results grid, select a column header and drag it. After you add or remove columns or change column order, you can click Restore Defaults to return default column settings.

Stop Words and Special Characters

eTapestry does not accept search criteria that only contain certain stop words or miscellaneous characters for particular fields when you search for an account or run a query.

The following words will be excluded as stop words in the Persona Address field.

Avenue	Ave	Blvd
Boulevard	Box	Cir
Court	Ct	Drive
Dr	Lane	Ln
Loop	Lp	Pl
Place	PO	POB
Pt	Rd	Road
Route	Rr	Rte

Rural	Sq	St
Ste	Street	Suit
Trl	Way	Wy

The following words will be excluded as stop words in the Account Names and Constituent Recognition Name fields. Additionally, these stop words will be applied to persona salutation fields when you search for an account using the search bar or Quick Find.

DDS	Dr	Drs
Esq	II	III
IV	Inc	Jr
LLC	MD	Miss
Mr	Mrs	Ms
of	Pastor	PhD
Prof	Professor	Rabbi
Rev	Sr	The

The following words will be excluded as stop words in the Note fields for personas, journal entries, gift types, and recurring schedule gift types.

A	An	And
Are	As	At
Be	But	By
For	If	In
Into	Is	It
No	Not	Of
On	Or	Such
That	The	Their
Then	There	These
They	This	To
Was	Will	With

Special characters, or any character that is not a letter or number, will not return results if they are the only values included in the search criteria. For example, if you search for an account and enter "@" in the search bar, your search does not return results.

Add account with Name Formats

Watch a video on how to add an account in eTapestry.

1. From Accounts, click Add an Account. The New Account page appears.
2. Under Roles, select a role or roles for the account. You can create an account with multiple roles. The roles are as follows.
   - Constituent: Any individual or organization in your database.
   - Tribute: An account for someone in whose name or honor donations are made. For example, an account for a deceased person whose family has requested donation in their honor.
   - User: A member of your organization who uses your eTapestry database and needs login credentials.
   - Team: A team of fundraisers for your organization.
3. Under Name and Recognition, in the Name Format field, select whether the record is for an Individual, Family, or Business.
   - Individual: For example, Jane Johnson Smith or Joseph Michael Smith.
   - Family: For example, The Smith Family, Jane and Joseph Smith, or Jane Higgins and Joseph Smith. For more information about Family accounts, refer to Family and Couple Accounts on page 28.
   - Business: For example, AAA Concrete.
4. Enter name information for the account. The name fields that appear are based on the selection you made in the Name Format field. For example, when you select "Individual," the Title and Suffix fields appear. These fields do not appear when you select "Family" or "Business" because this information does not apply to those accounts. When you select "Family" or "Business," only the Account Name and Sort Name fields appear.

   Tip: To edit name and recognition information for an existing account, click Account Settings on the account record.

   a. In the Title field, enter a title for the individual account, such as Mr., Mrs., or Miss.

      For common title and salutation best practices, refer to Titles and Salutations on page 29.

   b. In the First Name, Middle Name, and Last name fields, enter the individual's full name information.

   c. In the Suffix field, enter a suffix for the individual account, such as Sr. or Jr.

      Tip: When you select Individual for the Name Format, eTapestry configures name values in the Account Name, Sort Name, Recognition, Short Salutation, Long

Salutation, and Envelope Salutation fields as you enter name information in the First Name, Middle Name, and Last name fields. When you select Family or Business, the program configures name values in the Sort Name, Recognition, Short Salutation, Long Salutation, and Envelope Salutation fields as you enter it in the Account Name field. These name values are based on the auto-generated configurations you select from Management, My Organization, Data Entry Rules. For more information, refer to Data Entry Rules on page 1. This data entry process helps you enter data faster and provides name consistency, but you can change the data to enter custom information.

d. In the Account Name field, enter the name for the family or organization. For example, enter "The Doe Family" or enter "The Coca Cola Company" for an organization.

   For individuals, you can leave the default name or click the pencil icon to enter a custom name to appear for pages and processes that use the Account Name field throughout eTapestry. For example, this field is used to display the name in the header on the account record and you can include it in exports, reports, and communication templates.

e. In the Sort Name field, you can leave the default name or click the pencil icon to enter a custom sort name to use when eTapestry uses alphabetical sort order for processes such as queries and reports. For example, John Doe's name appears as "Doe, John" in this field, the program always sorts John's name in the D section for "Doe."

Tip: If you enter custom names in the Account Name and Sort Name fields, but want to return to the default names, click Cancel Custom beside the field. The original default name appears with the pencil icon again for you to enter a different custom name if necessary.

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

f. In the Recognition field, click Change Recognition to select the recognition type. When you do this, the Change Recognition Type screen appears for you to select one of four options. On this screen, select the type that applies to the constituent's name request for recognitions such as donor walls, donor kiosks, events, or the Annual Report for Board Members.

Note: This field only appears when you select the Constituent role for the account. Also, recognition types are eTapestry system options, and you cannot add additional types or edit and delete existing types.

- Use Account Name: Use this default option to duplicate the name from the Account Name field into the Recognition field.
- No Recognition: When a constituent does not want to be recognized and you need to exclude he or she from Recognition Reports, select this option. When you do this, "{OMIT}" appears when you include the Recognition column in a custom report.
- Anonymous: When a constituent does not want their name to appear on recognition displays such as a donor wall, select this option. When you do this, their name is replaced with "Anonymous" on recognition displays, in Recognition Reports, and in the Recognition column in a custom report.
- Custom: When a constituent requests a unique name to appear on your recognition displays, select this option and enter the custom name to appear in the field below it. For example, you can select this when a constituent requests their nickname to appear on recognition displays.

5. If this is a User role, complete the User section that appears.
   a. In the Login Id field, enter an ID for the user to access your eTapestry database. This login ID must be unique from all other eTapestry logins.
   b. In the Password and Confirm Password fields, enter the default password for this user. Users will be prompted to update their password the first time they log in.
   c. To expire this user's login rights after a specific date, enter the expiration date in the Login Enabled Until field.
   d. In the Time Zone field, select the user's local time zone. This field defaults to the database time zone.

Note: All new user accounts are automatically placed in the Default security group. To assign users to another security group, go to Management, Security Groups. For more information, see Security.

6. Under Persona, select the primary persona for this account. The primary persona is used when you send communication or contact the constituent.
   a. Enter the contact information for the persona.
   b. In the Short Salutation, Long Salutation, and Envelope Salutation fields, enter how you want to address the constituent for informal communication, formal communication, and for mailing envelopes. For example, enter "John" in the Short Salutation field, "Mr. Smith" in the Long Salutation field, and "Mr. John Smith" in the Envelope Salutation field.

      You use Salutation fields as merge fields when you create communications for mail, email, and newsletters. To make sure data is consistent in your communications for constituents, make sure you enter the data according to your organization's data entry best practices.

For accounts that use the Business Name Format, you can use the Salutation fields to enter business contact information. For example, enter "John" in the Short Salutation field, "Mr. Smith" in the Long Salutation field, and "Mr. John Smith" in the Envelope Salutation field. To prevent the program from defaulting salutation values based on the business value you enter in the Account Name field, set the business salutation defaults to Blank on the auto-generated configurations rules from Management, My Organization, Data Entry Rules. For more information, refer to Data Entry Rules on page 1.

7. Under User Defined Fields, enter additional information about the account. These fields are defined by your organization, and they are role-specific. Only user-defined fields for the account role you chose appear here. For more information about user-defined fields see User-Defined Fields.
8. To save and create the account, click Save And.

Family and Couple Accounts

When you create accounts for families and couples, you can manage them in different ways. For example, you can create separate accounts for each individual in a household and link them using a relationship. You can also create one account for the family or couple. The right approach depends on your organization's interaction with each individual.

Tip: To maximize the health of your data, we recommend you create an account for each individual in a household when possible. This helps decrease potential mistakes for processes such as sending communication with an incorrect short salutation or an incorrect name. This also helps improve data health services such as NCOA address processing.

Review the following scenarios to help determine when your organization should create a separate account for each individual in a household or should create one account for the family or couple.

- Both individuals are active with your organization, but in separate ways:

  OR

  Couple donates together, but only one individual is active with your organization:
  - Add an account for each individual in the household and link them together with Relationships. When you create a relationship, under Household Relationship, select Primary for one individual. For example, you have separate accounts for a husband, wife, and child. You select the husband as Primary when you add a relationship between the husband and wife, so make sure to select the husband as Primary when linking him to the child in a relationship. Enter a Joint persona for the primary individual, in addition to the personal or business persona. The Joint persona reflects

the family or couple; not individual information.

Tip: When you want to send communication to a family or household, you omit secondary individuals from a query using the data return type Head of Household Accounts to make sure the communication sends one time to the entire house.

- Couple donates together and both individuals are not active with your organization:
  - Add one account for the household using the Family Name Format. The personas reflect the family or couple; not individual information. The defined fields you select also apply to the family or couple.

Tip: When you create an account with the Family Name Format, it is important to consider whether or not the individuals have the potential to become active with your organization. If it is possible, we recommend you create an account for each individual instead of one account. This helps to avoid complexities that occur when separating one account into multiple accounts.

Titles and Salutations

It is best to have a consistent way to enter names in eTapestry fields such as Account Name, Sort Name, Short Salutation, Long Salutation, and Envelope Salutation and in any user-defined fields such as Job Title or Company. While most organizations find their own preference for setting up titles and salutations, here are some common best practices that apply to most scenarios.

Tip: Use auto-generated configurations based on Name Format settings you select from Management, My Organization, Data Entry Rules to establish the name values that eTapestry defaults as you create an account. For more information, refer to Data Entry Rules on page 1.

Individual at Non-Business Address

Field	Form	Example 1	Example 2	Example 3
Account Name	First + Middle or Maiden + Last + Suffix	Robert M. Smith	Larry & Nancy Davis	Frances Miller Thompson
Short Salutation	Nickname or First	Bob	Larry & Nancy	Fran
Long Salutation	Prefix + Last	Mr. Smith	Mr. & Mrs. Davis	Mrs. Thompson
Envelope Salutation	Prefix + First + Middle or Maiden + Last + Suffix	Mr. Robert M. Smith	Mr. & Mrs. Larry Davis	Mrs. Frances Miller Thompson

Field	Form	Example 1	Example 2	Example 3
Company				
Job Title				

Individual at Business Address

Field	Form	Example 1	Example 2	Example 3
Account Name	First + Middle or Maiden + Last + Suffix	Kevin L. Williams	Mary Ann Taylor	Frances Miller Thompson
Short Salutation	Nickname or First	Kevin	Mary Ann	Fran
Long Salutation	Prefix + Last	Dr. Williams	Mrs. Taylor	Mrs. Thompson
Envelope Salutation	Prefix + First + Middle or Maiden + Last + Suffix	Dr. Kevin L. Willams	Mrs. Mary Ann Taylor	Mrs. Frances Miller Thompson
Company	Business Name	University of Illinois	Greenwood Insurance	Greenwood Insurance
Job Title	Job Title	Director of Admissions		

Business without a Contact Name

Field	Form	Example 1	Example 2
Account Name	Name of Business	Microsoft, Inc.	Eastside Christian Center
Short Salutation	Friends	Friends	Friends
Long Salutation	Friends	Friends	Friends
Envelope Salutation			
Company	Name of Business	Microsoft, Inc.	Eastside Christian Center
Job Title			

Note: Your organization may select to use a different general term instead of "Friends."

Business with Contact Name

Field	Form	Example 1	Example 2
Account Name	Name of Business	Microsoft, Inc.	United Life Foundation
Short Salutation	Nickname or First	Bill	John
Long Salutation	Prefix + Last	Mr. Gates	Mr. Henry
Envelope Salutation	Prefix + First + Middle + Last + Suffix	Mr. William Gates	Mr. John A. Henry Sr.
Company	Name of Business	Microsoft, Inc.	United Life Foundation
Job Title	Job Title	President	Office Manager

Set New Account Defaults

After an event or campaign, new constituents tend to share biographical information. For example, everyone lives in the same city or state, or you want to assign the same defined field to all accounts. To speed up data entry, you can set defaults on the New Account screen for the current session or you can set them as the permanent default.

- To set defaults for the current session, enter the data you want to set as default for new accounts, and click Set as Quick Entry Default. Your quick entry defaults persist on all New Account pages during your current eTapestry session. When you log out of the application, the account defaults no longer apply.
- To set defaults that remain in place after your session, enter the data you want to set as default and click Set Permanent Defaults.

  To clear all permanent and temporary defaults, click Clear Defaults.

Linked Account Roles

When a constituent has more than one role, eTapestry creates individual accounts for each role and links them. For example, a constituent is also a staff member at your organization. This individual has a constituent account and a user account. eTapestry links these two accounts if you create them simultaneously when you add the account. When you update information on one of the account roles, the changes carry over to the linked roles.

Add a linked role to an existing account

1. From an account, click Account Settings. The Account Settings page appears. Under Roles, you view the existing roles for the account.
2. Under Tasks, click Add Role. The Add Account Role page appears.
3. Select the role or roles you want to assign to the account. If you add a new user role, complete the user role fields. For more information about these fields, see Add account with Name Formats on page 25.
4. To add the new role and link it to the existing account, click Save.

Note: All new user accounts are automatically in the Default security group. To reassign users to another security group, go to Management, Security Groups. For more information, see Security.

Account Record

You track all information about your constituents on their account, including contact details, relationships, transactions, and event attendance. The account Home page displays a general overview of the account record. You cannot enter or edit data on this page, but you can click Select Tiles and Layout to change the information that appears.

The account header, that appears on the top left of an account record, displays basic data about the account. To customize this information, click Edit Header.

Tip: To quickly add gift, note, and contacts for an account, you can select the icons in the header.

Account Roles

There are three types of accounts, or account roles, in eTapestry. Each has different capabilities in the database and can be used according to the following guidelines.

- Constituent: A constituent account is used for people or organizations that make donations, are potential donors, volunteer, or are contacts for your organization. Constituent accounts are the only account type for which you can record financial transactions. The majority of accounts in your database will be constituent accounts.
- User: User accounts are for those individuals in your organization that need a login ID and password for your eTapestry database. User accounts can log into the database to view, edit, add, and delete information. You cannot enter financial information on a user account.

- Tribute: Tribute accounts are accounts for whom donations are made in honor, in memory, or in celebration. The account is usually set up in the name of the individual being honored or memorialized. While financial data cannot be entered directly on these accounts, donations made on constituent accounts can be linked to tribute accounts, allowing you to accurately record the amounts donated in honor or memory of a specific individual and generate tribute notification letters. For information about tributes, refer to Tributes on page 96.
    - Team: Team accounts display when your organization subscribes to the Personal Fundraising module.

Note: Some individuals affiliated with your organization may fit into more than one of these categories. For example, a constituent is also a staff member at your organization. This individual has a constituent account and a user account. eTapestry links these two accounts if you create them simultaneously when you add the account.

Personas Page

The Personas page contains all contact information for the account, such as address, phone number, email, opt out status, and salutation information. You can enter multiple persona types for each account. For example, you can add a personal address with a personal persona type that is different than the business address for the business persona.

Each account requires a primary persona. For most accounts, this is the personal type. The primary persona is the default used in tasks such as reports and emails. However, you can manually select a different persona to use when you create these tasks.

To change the primary persona for an account, access the Personas page. In the Persona field, select the type to make primary. When the Make Primary checkbox appears, select it. To save the changes, click Save And. The new primary persona appears in the account header.

Note: To delete a persona that is marked primary, you must first assign a different persona as primary. Then, you can delete the persona from the account record.

Copy and move a persona

You can copy and move information from one persona to another for an account.

Note: You can only move data to a persona type that does not have existing data. In the Persona field at the top of the page, empty persona types display without an asterisk.

1. In the Persona field at the top of the page, select the persona type that includes the information you want to copy or move.

2. At the bottom of the page, scroll to the Copy and Move buttons. In the field beside these buttons, select the persona type to copy or move the information to from the drop down.

   To copy the data to the target persona type, click Copy. To move the data to the target persona type and delete it from the current one, click Move. A confirmation message appears.
3. Click OK.

Manage seasonal personas

If an account has a seasonal residence, consider creating a seasonal persona so that you can contact the account properly throughout the year. Persona types are system-defined fields. For information about how to add a system-defined field, refer to Add and Rename System-Defined Field Values.

1. After you create a seasonal persona type, you can add seasonal personas to accounts. From the Personas page on an account, select the seasonal persona type.

   Note: The seasonal persona should not be the primary persona.
2. Enter contact information such as a seasonal address and phone number.
3. Enter the dates for which the seasonal persona is in effect. The dates are recurring. You do not need to update them each year.
4. Click Save And. The new seasonal persona can be used the account in reports and communication.

When you create reports and send communication, you indicate the personas to use. To respect seasonal addresses, we recommend you select to use a persona hierarchy. When you use a hierarchy, you set up an order of persona types. For each account, eTapestry uses the information associated with the highest applicable persona.

For example, make the seasonal persona the highest persona in the hierarchy. For the second highest persona, use the primary personal persona.

- If you send communications while the seasonal persona is in effect, then the communication is sent based on the contact information for the seasonal persona.
- If you send communications when the seasonal persona is not in effect, then the communication is sent based on the contact information for the primary personal persona.
- If you send communications and the account does not have a seasonal persona, then the communication is sent based on the primary personal persona.

Persona Fields

In addition to the system-defined fields in the below grid, eTapestry includes a default user-defined field for Company and Job Title on the Persona screen. Use these fields to track an individual's employee information for business personas. Your System Administrator can edit or

disable these two fields according to your organization's needs. Because these are persona user-defined fields, a new instance of the field appears for each persona type. For more information about user-defined fields, refer to User-Defined Fields.

Field	Details
Persona	Use this field to select the type of address/contact information you are recording. Persona types are configured by your database administrator. Common examples include personal, business, seasonal, and joint.
In effect from/to	Use these fields to designate dates during which the contact information is valid for the account. This is most commonly used for seasonal addresses. If this is a permanent address, leave the fields blank. The fields follow the format mm/dd.
Address fields	Select a country for the address. When you select a country, the address fields adjust to match the proper address formatting for that country. The country defaults to your organization's country, but you can click Change and select a foreign country for the account address.
Short Salutation	Enter the informal name you want to use in casual communication for the constituent. For example, you can enter the constituent's first name, such as John.
Long Salutation	Enter the formal name you want to use in communication for the constituent. For example, you can enter a title and a last name, such as Mr. Smith.
Envelope Salutation	Enter the envelope name you want to use for mailing envelopes for the constituent. For example, you can enter a title, first name, and a last name, such as Mr. John Smith.
Note	Enter additional information you want to capture about this constituent. The contents of the Note field cannot be queried, so if you need to capture the same information for multiple constituents and later query on it, you might want to use a user-defined field. For more information about user-defined fields, see User Defined Fields.
Sticky Note Type	Sticky notes appear on every persona screen. To make a note sticky, select a category in the Sticky Note Type field. For more information, see Sticky Notes on page 35. This field only appears on the primary persona screen.
Phone Type Fields	Default phone types are voice, mobile, pager, and fax. Voice is set as the default phone type for accounts. Your database administrator can configure different types of phones for your organization.
Email	To enter multiple emails separate them by commas.
Web Page	When you enter a URL, a new icon appears next to the file that allows you to navigate to the web page directly.

Sticky Notes

Sticky notes allow you to notify users of an account's important information when the account record opens. For example, you can add a sticky note to inform users a constituent does not

want to be contacted after 7PM. The information automatically displays each time the record opens to alert and remind users not to call the individual after 7PM.

Note: You can only create sticky notes for the primary persona type.

- To create a sticky note for a primary persona, click Personas. When the personas page appears, in the Note field, enter the information for the sticky note. In the Sticky Note Type field, select a category. To save the note, click Save And. The note appears in the upper right corner of every page for the account.
- To create a sticky note when you create an account, from Accounts, Add an Account, select the type of sticky note to use under Persona.

Tip: Your System Administrator configures the available sticky note categories and colors. To hide a sticky note for the duration of your eTapestry session, double click it. When you do this, other users continue to view the note. To delete a sticky note, in the Sticky Note Type field, select "None" and click Save And. The information in the Note field remains, but the note no longer appears as an alert.

Relationships Page

Use relationship information to monitor connections and associations, cultivate new prospects, track matching gift information between employers and employees, and to link accounts in a household to view cumulative giving and minimize duplication in mailings.

To view the relationships for an account, click View Relationship Report under the account header and page links. This report displays a list of each relationship type and connection for the account.

Tip: You configure the relationship types you need, such as spouse, employer/employee, parent/child, and business/contact. For information about how to set up relationship types, refer to Relationship Types.

Add a relationship

To edit an existing relationship, from the account record, select Relationships in the account header. Click the relationship you want to edit. The edit relationship page appears. The items on this screen are the same as on the New Relationship page.

1. From an account record, select Relationships. The Relationships page appears.
2. To create a new relationship, click New Relationship.
3. Under Basic Information, select the relationship type and add beginning and end dates if applicable. Most relationships do not need start and end dates, but this can be useful when you track a business relationship or to keep a history of the relationship instead of deleting

it.

4. Under Choose Accounts, select the role of the first account.
5. To add the relationship, click Select Related Account. The Find an Account screen appears.
6. Search for an existing account or click Add Account to create a new one.
7. Under Household Relationship, select one account as the primary to designate it as the household account. For more information about household relationships, see Households on page 37.
8. Under Additional Information, if one of the two members of this relationship is an organization that matches gifts, you can add matching gift information. Select the organization account and manually add matching gift information.
9. To create the relationship for both accounts, click Save And.

Households

Household relationships allow you to link together multiple accounts in eTapestry in order to view their data as a whole group. This is ideal for situations where you need to maintain separate accounts for individuals but would like to combine their information for reporting or mailings. Some common situations when households are used include the following.

- You have a husband and wife in your database. One is on the board, and the other is actively involved in volunteering. You need to track their board and volunteer activities on separate accounts but would like to get one historical perspective on both of them.
- Your organization is a camp or a school, and you track parents and campers/students. You need to track camper/student data and activity, but also track donations given by the parents. You want to send single mailings to the family or see how much the family has given to you financially.
- Your organization is a church, and you track each family member's weekly attendance and involvement in different groups on separate accounts. You want to see their attendance as a group and send single mailings to the whole family.
- You need to track a business or foundation account with multiple members who have different contact information. You set up different accounts for the business itself and each of its members and link them together in a household, so you can mail to them individually or send a single group mailing.

You can link multiple accounts together in a single household. Accounts cannot, however, be members of multiple households.

Create a household relationship

1. From an account record, click Relationships. The relationships page appears.
2. To open a relationship, click on its type. For example, click Spouse or Friend.
3. Under Household Relationship, select Primary to make one of the accounts the primary contact in the household. The other account in the relationship automatically defaults to Member of the household.

   Note: Accounts cannot be members of multiple households. However, an account can be the primary account on more than one household.
4. To create the household, click Save And.

Dissolve a household relationship

1. From either account record in the relationship, click Relationships. The relationships page appears.
2. Under Household Relationship, select N/A for either account.
3. To dissolve the household, click Save And.

Household Data in Query and Reports

eTapestry provides a number of ways to query and report household data.

Query

When you set up a query, you can select a household data return type to view specific household information in your query results.

- All household accounts: The query returns all accounts that meet your criteria, plus all members of those accounts' households, even if those other members do not meet your criteria.
- Head of household accounts: The query returns only the primary/head of household of the accounts that meet your criteria.
- All household journal entries: The query returns all journal entries for accounts that meet your criteria, plus all journal entries for all members of those accounts' households. These journal entries need not be specific to your query criteria.
- Household journal entries per criteria: The query returns all journal entries for households that meet the criteria in your query.

You can also use specific query fields to display specific household information.

Query Field	Details
Household relationship	Located in the Account category, this query field locates only primary accounts, only member accounts, accounts that are either primary or a member in household, or accounts that are not in a household relationship.
Household cumulative amounts	Located in the Cumulative Amounts category, these query fields locate any households for which the combined transaction totals meet your amount criteria. • Household Cumulative Balance • Household Cumulative Gifted • Household Cumulative Gifted & Soft Credited • Household Cumulative Number Journal Entries • Household Cumulative Number Transactions • Household Cumulative Pledged • Household Cumulative Raised • Household Cumulative Raised & Soft Credited • Household Cumulative Received • Household Cumulative Received & Soft Credited • Household Cumulative Soft Credited

Note: When you query on household data, accounts without a household relationship are considered the head of household.

Reports

When you create a report, you can use certain options to report on household-specific information.

- Household Grouping: To group all items from a particular household together in custom reports, set the grouping to "Household."
- Household Fields: There are 150 report fields that display household-specific data. Most show summary information about the household's combined giving, and a few show details about the household relationship itself. You can use the "Household Relationship?" field to display whether a particular relationship is a household relationship in the report results.

Account Settings Page

To access an account's settings page from an account record, click Account Settings. When the page appears, you can edit name, recognition, and donor login information. You can also check for duplicate accounts, delete and merge accounts, and add linked account roles on this page.

The Name Format field appears first so you can change it to an Individual, Family, or Business. This selection determines the rest of the name fields that appear on the page. For example, when you select "Individual," the First Name and Last name fields appear. When you edit the First Name, Middle Name, and Last name fields on this page, eTapestry does not automatically configure name values in the Account Name, Sort Name, and Recognition fields as it does when you add an account. It also does not display the pencil icon and Cancel Custom link beside the Account Name and Sort Name fields. To edit name values in these fields, you must manually enter the information. For more information about these fields, refer to Add account with Name Formats on page 25.

Add a Role

You can add roles to existing accounts at any time. For example, a constituent that is already in your database might become the object of a tribute, or a member of your organization who is an eTapestry user can become a donor and therefore need a constituent account. For more information about roles, refer to Account Roles on page 32.

When you add a role to an account, the new role is linked to the existing account so that you can access all information about all roles in the same account record.

To add a role, from an account click Account Settings. On the Account Settings page, click Add Role under Tasks. Select the role or roles you want to add, and click Save.

Delete a Role

Note: If an account has only one role, when you delete the role, you will also delete the account.

If you no longer need a role on an account, you can delete a specific role without deleting the account. For example, if a former volunteer had a user role because they helped with the database but they no longer need access, you can delete their user role. In this scenario, you can also disable a user. For more information, refer to Disable a user on page 48.

To delete a role, from an account click Account Settings. On the Account Settings page, under Tasks, click Delete Role.

For more information about roles, refer to Account Roles on page 32.

Clone a User Account

You can clone a user to give another person access to your user account without sharing your login credentials. This can be helpful when you work with the eTapestry support team to troubleshoot an issue in your database so they can reproduce the problem and view exactly what you view.

Tip: To help troubleshoot a problem, Blackbaud Customer Support may ask you to clone your user so they can replicate the situation.

Close a user

1. From **Management**, select **My User** under **Admin** to access your user account settings.
2. On the account's settings page, click Account Settings. The account's settings page appears.
3. Click Clone This User. The Create Clone page appears.
4. In the **User** section, the **Invitation Email Address** field appears. If an email address is provided on the account's primary persona, the email address will default in this field. If no address is listed, or you want to enter another address, enter the address to send the user an invitation.

   This invitation will contain a link to create a Blackbaud ID to log in to ***eTapestry,*** or if the user already has a Blackbaud ID, they will be directed to log in. Users that already have ***eTapestry*** credentials will be directed to link their account to their Blackbaud ID.
5. In the **Security Group** drop down menu, select the security group you wish to assign to the user.
6. The **Login Enabled Until** field defaults to one week from today, but you can enter a different date. If you do not want the clone to expire, leave the field blank.
7. The Time Zone field defaults to the time zone for the user you are cloning, but you can select a different one.
8. If you are creating the clone for Blackbaud Customer Support to troubleshoot an issue, select Notify eTapestry Support. This automatically sends a notification to Support that you created the clone and it also includes the credentials.
9. To save the new user, click Save And.

Check for Possible Duplicates

On the Account Settings page for an account record, you can search for possible duplicates for any account. When duplicates appear, you can select to merge accounts or leave the accounts separate. eTapestry uses the following fields to identify possible duplicates.

- Account Name
- Email
- Address (does not include abbreviations such as St.)
- City
- Postal Code
- Phone Numbers

Check for possible duplicates

1. From an account, click Account Settings. The Account Settings page appears.
2. Under Links, click Check for Possible Duplicates. The Possible Duplicates Report appears.
3. For each possible duplicate, review the matching information.

- If the accounts are duplicates, click Merge These Accounts. The Merge screen appears. For more information about how to merge information on the accounts, refer to Merge Accounts on page 42

  Note: When you merge an individual account into an individual account, the name information for the duplicate account appends to the target account. When you merge an individual account into another family or business account, the name information for the duplicate account removes from the database.

- If the accounts are not duplicates, click Not Duplicate Accounts.

Merge Accounts

You can merge two accounts to combine information about them. This is helpful when you find duplicate accounts and need to combine the information into a single account. You can merge accounts in one of two ways from the Account Settings page of an account record.

- Under Links, click Check for Possible Duplicates.
- Under Tasks, click Merge Role.

  Note: You can only merge accounts with the same role type.

Merge accounts

1. After you select to merge accounts from Check for Possible Duplicates or Merge Role, the Merge screen appears. On this screen details appear for the duplicate account you want to merge into the target account.

Note: To reverse the order of account merging, under Tasks, click Switch Duplicate and Target.

2. For each section, such as Account Information or Personas, select to merge, replace, or ignore the conflict.

Note: Consent field values will be updated whether you select **Merge**, **Replace**, or **Ignore**. Journal entries on the two accounts will be scanned in order of the most recently created and populate the account level Consent fields until they are all populated or there are no more Journal entries.

- Merge - Select this to append data from the duplicate account to the target account.

  When you merge an individual account into an individual account, the name information for the duplicate account appends on the target account. When you merge an individual account into another family or business account, the name information for the duplicate account removes from the database.

  Tip: Name information for the duplicate account appears in a journal entry note on the target account record.

  When data in other fields includes a drop down menu for you to select one value, the duplicate account value only moves to the target account when its value is blank. If the corresponding target account drop down field contains a value, the duplicate value removes from the database.
- Replace - Select this to move all values from the duplicate account to the corresponding fields on the target account. When data does not exist in a field for the duplicate account, eTapestry ignores the empty value and the target account value remains in the field.
- Ignore - Select this to keep the target account values and ignores the duplicate account values.

3. To merge the accounts, under Tasks, click Save.

Donor Login Settings

If your organization has a Donor Login or Member Lookup site, you can manage your constituents' login information on the account's settings page.

Field	Details
Enable login	When this box is selected, the donor can log in. To prevent the donor from logging in, uncheck this box.
Login ID	A login ID is created when the constituent registers online on your Donor Login or Member Lookup site. To create or change the constituent's login ID manually,

Field	Details
	enter a new ID on this field.
Password	To set or change the constituent's password, enter a new password on this field.
Confirm Password	If you set or change the constituent's password, re-enter it on this field.
Account Number	This field displays the constituent's account number, which is automatically assigned by eTapestry when you create an account.
View Privacy Settings	This option under Links allows you to see the privacy settings the constituent has selected. These settings determine what data is available for other constituents to see through Donor Login or Member Lookup pages.

Defined Fields Page

You store additional account record information from Defined Fields. These fields track details, such as Marital Status and Maiden Name.

Defined field categories may appear as collapsed when you first access the page. To view a defined field list for a category, click the category name or the "+" beside the category name. Under Tasks, you can also click Show All Fields.

Note: You can also set up defined fields to track information on other pages on the account record. For example, you can set up a defined field for an account's address to appear on the personas page, and you can set up a defined field for an event transaction to appear on the gift page.

User Preferences Page

On the preferences page for accounts with a User role, you establish important settings such as location and time zone, user name and password, and search preferences. The options you select on this page do not impact the whole database; they are based on your login credentials.

Note: Your organization account has a separate preferences page.

Users can update their own account record preferences. However, you must have full Administrator rights to update other user account preferences. To access the user preferences, click Preferences.

Area	Field	Details
User Preferences	Locale	Set the locale to the language/country where the user is located. This affects the formatting used for dates (mm/dd/yyyy versus dd/mm/yyyy). For users in Spanish or English speaking countries, this also determines the

Area	Field	Details
		language in the database and the names of some of the system defined fields. Changes to this field are not applied until you log out of the database and log back in.
	Time Zone	Set the time zone where the user is located. This affects the time/date stamps throughout the database and also determines how calendar items are displayed. For example, meetings scheduled by users in other time zones appear in your calendar according to your time zone. Changes to this field are not be applied until you log out of the database and log back in.
	Duplicate check on save	Select this option to check for duplicate accounts when the user adds a new account or modifies an existing account's persona page. The duplicate check looks at the account's name and persona information to determine if any existing accounts might be duplicates, and lists those potential duplicates.
	Default Report Delivery	Select the default report format for all your reports in eTapestry.
	Default Letter Delivery	Select the default format for communication. When you create a mailing, eTapestry 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 type you want your queries to use. When you select a persona type for a query, that query only looks in that persona type for matches to your criteria. Regardless of your default, you can change this setting when you create individual queries.
	Login ID	In the Login Id field, enter an ID for the user to access your eTapestry database. This login ID must be unique from all other eTapestry logins.
Security Preferences	Password	To change the user's password, enter a new password. All users can reset their own password when logged into the database. Only users with full administrative rights can reset other users' passwords. When you reset another user's password, they are prompted to reset the password immediately when they first use it to log in.
	Confirm Password	If you change the user's password, re-enter it here to confirm it before you click Save And.
	Security Question	Use this field to define a security question. This question

Area	Field	Details
		appears when the user clicks Forget Your Password? on the login screen. You can select from five predefined security questions or select "Custom Security Question" to define a new question.
	Security Question Answer	Enter the answer to the security question.
	Confirm Answer	Enter the same answer as in the Security Question Answer field.
	Use Animations	Select this option to see moving features in eTapestry as a visual effect when you drag and drop elements on a screen.
	Task Pane Location	Select on what side of the screens to display the Tasks menu.
	Use Floating Task Pane	Select this option for the task menu to float down pages as you scroll.
	Use Floating Account Menu	When this is selected, the account header continues to appear as you scroll the page. When this is not selected, the account header remains at the top of the page when you scroll down, and you need to scroll back up in order to access any of the header links.
Interface Preferences	Show Defined Field Details by Default	This option determines whether or not the defined field details display when the page loads. When you select "Yes," all defined field details automatically display. If you select "No," the details are hidden by default. When you select "Auto," eTapestry displays the details on some pages and hides them on others, depending on the best work flow for you.
	Hide Empty Defined Fields by Default	This option determines whether or not the empty defined fields on a page display when the page loads. When you select "Yes," all empty defined fields are hidden when the page loads. When you select "No," all empty fields appear by default. When you select "Auto," eTapestry shows the empty fields on some pages and hides them on others, depending on the best work flow for you.
	Show Country in Address Blocks	This option displays the country code for accounts when you view search results, the personas tile on the account home page, and the account header.
	Use an External Program for Email	Select this option to send one-off emails through an external program such as *Outlook* instead of sending them directly through eTapestry when you click on an email address in an account.
Navigation Preferences	Pressing Alt+N	Select this option if you want Alt + N to open the Fast

Area	Field	Details
Search Preferences	Opens Fast Navigation	Navigation window.
	Default Search Type	Select the search screen (quick find or advanced find) to use as your default search screen.
	Number to Display Per Search Page	Set the number of search results to display on the search page. The default is 15, and you can enter any number between 1 and 100.
	Always select the primary persona if it is found in the search results	Select this option to display the primary persona on the account in the search results.
Journal Preferences	Default Journal View	Select the default view for journal pages. You can change this view from a journal page if you choose.
	Number to Display Per Journal Page	Enter the number of journal entries you want displayed in each page of the journal. The default is 15, and you can enter any number between 1 and 100.
WealthPoint Preferences	WealthPoint Username	If your organization uses WealthPoint Online, enter your WealthPoint username to enable searched through eTapestry.
	WealthPoint Password	Enter your WealthPoint password.
Tasks	Remove Lock on User Account	When a user attempts to log in with an incorrect password five consecutive times, eTapestrylocks the user's account for security purposes. The lock stays on the account for 60 minutes unless you click Remove Lock on User Account under Tasks to manually remove it.

User Account Rights

eTapestry security allows Administrator users to set up security groups with rights to perform certain actions within the database. Once a security group has been created, the Administrator can assign accounts with the user role to the group, thus granting specific rights to each assigned user. For example, an Administrator can create a group with very limited data entry and reporting rights and assign all volunteers to that group. Likewise, the Administrator can create a group that has data entry and reporting rights, but no rights to update the defined fields, and assign all of the individuals who enter gifts to that group.

You create security groups from Management, Security Groups. You assign users to these security groups on the Rights page for user accounts. You can also disable users on the Rights page when you longer want a user to have access to your database.

To view or edit your own user account rights, go to Management, My User. Next, click Rights. To access the Rights page for another user account, open the record, and click Rights.

Disable a user

When an employee leaves your organization or you no longer need a user account for any reason, you can disable it. We recommend that you disable users you no longer need instead of deleting them to preserve historic data.

1. From the user account, click Rights. The Rights page appears.
2. To disable a user, you can select one of two options.

   Note: You cannot change these options for your own account if you are currently logged in with your credentials.

   - To disable the user credentials immediately, clear the Login Enabled checkbox.
   - In the Login Enabled Until field, enter a date to disable the user account. This is helpful when you create a temporary user account, such as for a volunteer.
3. To save your changes, click Save And.

Move a user to another security group

1. From the user account, click Rights. The Rights page appears.
2. Select the security group to assign to the user.
3. To save your changes, click Save And.

Addresses

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** Addresses entered into your database before the eTapestry 7.13 release on December 7th, 2014 may need to be reformatted. Addresses for personas in the United States and Canada do not need reformatting. However, you may need to reformat addresses for other countries. If an address was entered into your database before the 7.13 release and did not include a country, eTapestry entered a default country based on your organization's country. A warning appears on the persona page to indicate the country was entered by default.

When you add or edit an account, you can enter address information about the account's personas. For information about how to add and edit accounts, refer to Accounts on page 20.

The default country for addresses is based on your organization's country. An administrator determines the organization country and the address fields that are required when users add or edit personas. For details, refer to Organation Preferences.

Address Fields for Specific Countries

You can use address fields specific to your organization's country when you insert merge tags into communication templates. You can also query, export, and report based on the specific fields for your organization's country.

- Australia - Address Lines, Suburb, State, Postal Code
- Canada - Address Lines, City, State/Province, Postal Code, County
- China - Building Number, Street Name, City/Town, Postal Code, Province
- France - Address Lines, Postal Code, Town, Region
- Germany - Address Lines, Postal Code, City/Town
- Hong Kong - Address Lines, District, Province
- India - Address Lines, City/Town, Postal Code
- Ireland - Address Lines, City, County, Eircode
- Italy - Street Name, Building Number, Address Line 2, Postal Code, Town, Region
- Malaysia - Address Lines, Postal Code, City/Town, State
- Netherlands - Street Name, Building Number, Apt Number, Postal Code, City
- New Zealand - Address Lines, Suburb, City, Postal Code
- Singapore - Address Lines, City/Town, Postal Code
- United Kingdom - Address Lines, City, County, Postal Code
- United States - Address Lines, City, State/Province, Postal Code, County
- Other - Address Lines, City/Town/District, State/Province/Region, Postal Code, County

Note: You can't report, export, or mass update based on specific address fields for foreign countries. For example if your organization's country is Italy and thus doesn't use the State field, then you can't report based on the State field. Use the State/Province/Region field for foreign addresses instead.

Foreign Address Fields

These are used for multiple countries outside of your organization's country. Specific countries may have additional address fields.

- Address Lines
- City/Town/Suburb/District
- State/Province/Region
- Postal/Post Code
- County

Communication templates

You can use merge tags to insert address fields for your country and foreign countries into communication templates.

If your template needs to include account addresses from multiple countries, we recommend you use a Full Address merge tag. These are address blocks, formatted based on the persona's country. These merge tags are available from the Account Fields category.

To include your user address or your organization's address in a template, insert a merge tag for one of the Full Address fields. These are address blocks, formatted based on your organization's country. You can choose whether the Full Address should include the country name and whether the address should be a single line. These fields are available from the Miscellaneous Fields category of available fields.

For information about communication templates, refer to Communication Templates on page 141.

Queries

You can create queries based on address fields for your organization's country. Address fields for your organization's country are included in the Account category.

You can also create queries based on address fields for addresses outside of your organization's country. These fields are included in the Foreign Address Fields category.

For information about queries, refer to Queries on page 214.

Reports

You can create reports based on address fields for your organization's country. Address fields for your organization's country are included in the Account Fields category.

You can also create reports based on address fields for addresses outside of your organization's country. These fields are included in the Multi-Country Address Fields category.

To include your user address or your organization's address in a report select a formatted block from Miscellaneous Fields category of available fields. The address block is formatted based on your organization's country.

For information about reports, refer to Reports on page 228.

Note: Address fields for existing reports were migrated during the 7.13 release on December 7th, 2014. For example, previously you might have included the State field in your report, even though the standard address format for your organization's country does not include this field. Now, your report would include the foreign State/Province/Region field instead. If the State field is included in the standard address format for your organization's country, then the field was not migrated, your report was not changed, and no additional action is needed.

Export a report

To export address fields specific to your organization's country, use the fields in the Account Fields category. To export fields specific to foreign countries, use the fields in the Multi-Country Address Fields category.

To export addresses for multiple countries, we recommend you use one of the Full Address fields. These are address blocks, formatted based on the persona's country. You can choose whether the formatted address should include the country name. These fields are included in the Account Fields category of available fields.

For information about exports and reports, refer to Exports and Reports on page 228.

Imports

Before you import addresses, you must ensure 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. When you select an import type, you select a country for the addresses in the import file. When you map the import data to eTapestry fields, you can only map to the address fields that correspond to the selected country's standard address format. When you view the possible duplicates report, possible duplicates with format conflicts appear in a separate tab. For each possible duplicate, select how to handle the conflict. After you handle possible duplicates, commit the changes and begin the import. The import cannot be

undone. For more information about how to import information, refer to Import and Mass Update Overview.

Note: If you use an import definition that was created before the 7.13 release, eTapestry attempted to remap the address fields to match the migrated address fields. However, if your import definition included a field that the standard address format for your organization's country does not include, then eTapestry could not automatically remap the field. The first time you use the import definition after this release, a warning message appears and prompts you to remap the relevant address fields.

Mass Update

You can run a mass update on existing persona values for addresses in your organization's country. When you select a category and query, choose a query that only includes personas whose addresses are in your organization's country. For information about how to mass update addresses, refer to Mass Updates on page 1.

Note: You can't run a mass update for foreign address fields. However, if your organization's country is Canada or the United States, you can run a mass update on personas for both countries.

Address Preferences

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 the Omit [your domestic country] for addresses in [your domestic country] when you use these merge fields checkbox. This provides a way for you to combine domestic and international mail, but remove your country from the address block for domestic mail.

Note: This only applies when you use the Full Address with Country (Multi Line) and Full Address with Country (Single Line) merge fields.

Reformat Addresses

To reformat addresses in bulk, we recommend you export existing addresses for a single country. Use the new query criteria called "Old Formatted Address" to find accounts with personas that need reformatted and create an export with Account Number, Name, Sort Name, Persona Type and appropriate address fields. Then import the addresses back into eTapestry. During the import process, you map the original fields to the new format. You may not be able to map every field on a one-to-one basis.

If your organization uses Custom eCommerce, Cart, or our API feature, we recommend you enable users to reformat address on an account's persona page. Edit the organization's preferences and select Enable users to reformat addresses on an account's persona page.

AddressFinder (National Change of Address).

You can purchase AddressFinder (NCOA) services to ensure that information about your accounts is up to date so that you save money when you send mailings. AddressFinder (NCOA) services are included in all Starter (1 run/year), Essentials (2 runs/year) and Pro (4 runs/year) packages. For more information, refer to AddressFinder (National Change of Address) on page 53.

AddressFinder (National Change of Address)

You can purchase AddressFinder (NCOA) services to ensure that information about your accounts is up to date so that you save money when you send mailings. AddressFinder (NCOA) services are included in all Starter (1 run/year), Essentials (2 runs/year) and Pro (4 runs/year) packages.

United States clients can also schedule a time for the update to run. After the results are downloaded, the Address, City, State, and Postal Code fields for relevant constituents are updated. User-defined fields on each persona are also updated to reflect the date and details of the update. A journal entry is also added to your organization's account; it includes an attachment that you can provide to the United States Postal Service to help qualify for discounts on your bulk postage.

To learn more about AddressFinder (NCOA), watch the eTapestry AddressFinder video.

Canadian clients currently use a less automated process. For details, refer to Canadian AddressFinder (NCOA) on page 57.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** If you track multiple constituents with a single account, the joint account may not be updated by this process. If an account uses a nickname that differs from the constituent's name in the NCOA® database, the address is not updated. Only users with admin rights can run the AddressFinder (NCOA) service.

Do not send mail to deceased accounts, accounts with bad addresses, or to accounts that have requested to not receive mail or solicitations. We recommend you create a "Do Not Mail" query to identify accounts that should not receive mail. Then, create a "Clean Mailing List" compound query that includes accounts that should receive mail, but excludes the accounts that should not receive it. You can then use this "Clean Mailing List" query to send mail. You can also use it as the starting criteria for other queries to further define mailing lists. For more information, refer to Create a "Do Not Mail" Query and Compound Queries on page 218.

Schedule and run the AddressFinder (NCOA) service

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** The address listed for your organization under Management, My Organization must be a street address in order to run the AddressFinder (NCOA) service. The service will not run if your organization's address is a PO box.

This procedure is for eTapestry clients in the United States only. Only users with admin rights can run the AddressFinder (NCOA) service. Foreign address are not updated by this process. If you track multiple constituents with a single account, the joint account may not be updated by this process. If an account uses a nickname that differs from the constituent's name in the NCOA database, the address is not updated.

Watch a video about the AddressFinder service.

1. From Management, click AddressFinder (NCOA).

   Note: AddressFinder™ requires information about your Organization account in order to schedule the service . If you are missing information required for the service to run, a message appears prompting you to update information in these required fields. These changes will be saved to your Organization account.

2. Under Run a new AddressFinder (NCOA) service, select a query category.
3. Select a query.
4. Enter a date to start the process.
5. Select whether to update all personas or just the primary persona.

   {i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** If you use personas to track information about an account's relations, then you may not want to update all personas. For example, if you have an account for a college student, but you use a persona on that account to track the parents, then you probably do not want to automatically update the address for the parent persona. We recommend you use relationship types, rather than personas, to track related individuals and organizations.

6. Select whether to reformat all address data processed by NCOA or only addresses that are changed. Addresses are reformatted to meet USPS standards. For more information about standardizing addresses, refer to the Experian Data Quality website.
7. Enter information about the contact person at your organization who should receive a summary email when the service is complete.
8. Enter your organization's North American Industry Classification System (NCAIS) code in the NCAIS Code field. For more information about NCAIS codes, you can visit the NAICS Lookup Help site.

9. You can give permission to run your data through the AddressFinder (NCOA) service from eTapestry. Previously, in order to utilize the service, your organization would need to complete the Process Acknowledgment Form (PAF) and submit it to Blackbaud.
10. 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 with a PDF file attachment.

      Note: You cannot edit or modify PDF files that have been generated by eTapestry.

      eTapestry also creates a journal note for your organization's account that includes the same PDF file.

      Note: To help quality for postal discounts and to avoid extra fees, provide the PDF—which proves that you processed AddressFinder (NCOA) within the past 90 day—to the United States Postal Service with your mailings.
    - If a constituent's address was standardized, or if the person's address was updated due to a move, then eTapestry creates a journal note for the constituent. Use the notes to see a history of the constituent's addresses. The status of the persona's address is also overwritten to show the current status.
    - Additionally, a query category called "AddressFinder (NCOA) Codes" is created. Within the category, queries for each value of codes for user-defined fields are created. The fields indicate that a persona's address was updated, standardized, or marked invalid.

      Tip: We recommend you use the queries to locate personas whose addresses have become invalid or who have moved without providing a forwarding address. If you have other methods of reaching the constituents, contact them to request updated addresses.
11. If you use a user-defined field called "Mailing status" to track which constituents have bad addresses, we recommend you run mass updates after each AddressFinder (NCOA) run. For details, refer to Clear "Bad Address" user-defined fields on page 55 and Mark "Bad Address" user-defined fields on page 56.

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.

Clear "Bad Address" user-defined fields

If you use a user-defined field called "Mailing status" to track which constituents have bad addresses, we recommend you run a mass update after each AddressFinder (NCOA) run.

1. From Management, click Mass Update. The Mass Updates page appears.
2. Under Update Existing Items, click Update Existing Accounts.
3. Select the category that corresponds to AddressFinder (NCOA).

Tip: For eTapestry clients in the United states your category is probably called "AddressFinder (NCOA) Codes." For Canadians, use the queries you created for each code. Refer to Create Queries for Updated Canadian Addresses on page 63.

4. Select the query that contains the addresses changed by AddressFinder (NCOA). Include addresses with the following NCOA codes:
   - Address Standardized (Valid)
   - Address Updated (Corrected)
5. Under Update Type, select Remove. This will clear the Bad Address value from the Mailing Status field for constituents whose addresses were corrected by the AddressFinder (NCOA) run.
6. For Account Values, click Mailing Status under Base. Then, select the Bad Address value from the menu that appears.
7. Click Next. A preview summary appears so you can verify the number of accounts that will be updated.
8. Click Next to run the mass update. Accounts whose addresses were corrected by AddressFinder (NCOA) are no longer marked as having bad addresses.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** While the mass update is in progress, users cannot access the affected records. We recommend you run the mass update when users are typically inactive. You can log out while the mass update is in progress.

Mark "Bad Address" user-defined fields

You can use a use a user-defined field called "Mailing status" to track which constituents have bad addresses. We recommend you run a mass update after each AddressFinder (NCOA) run. When you send mail, exclude accounts with bad addresses.

1. From Management, click Mass Update. The Mass Updates page appears.
2. Under Update Existing Items, click Update Existing Accounts
3. Select the category that corresponds to AddressFinder (NCOA).

Tip: For eTapestry clients in the United states your category is probably called "AddressFinder (NCOA) Codes." For Canadians, use the queries you created for each code. Refer to Create Queries for Updated Canadian Addresses on page 63.

4. Select the query that contains the addresses changed by AddressFinder (NCOA). Include addresses with the following NCOA codes:
   - Invalid Address
   - Move Identified, Address Cannot Be Updated (Not Corrected)
5. Under Update Type, select Assign. This selects the "Bad Address" value from the Mailing Status field for constituents whose addresses could not be corrected by the AddressFinder (NCOA) run.
6. For Account Values, click Mailing Status under Base. Then, select the Bad Address value from the menu that appears.
7. Click Next. A preview summary appears so you can verify the number of accounts that will be updated.
8. Click Next to run the mass update. Accounts whose addresses were marked invalid by AddressFinder (NCOA) are marked as having bad addresses.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** While the mass update is in progress, users cannot access the affected records. We recommend you run the mass update when users are typically inactive. You can log out while the mass update is in progress.

Do not send mail to deceased accounts, accounts with bad addresses, or to accounts that have requested to not receive mail or solicitations. We recommend you create a "Do Not Mail" query to identify accounts that should not receive mail. Then, create a "Clean Mailing List" compound query that includes accounts that should receive mail, but excludes the accounts that should not receive it. You can then use this "Clean Mailing List" query to send mail. You can also use it as the starting criteria for other queries to further define mailing lists. For more information, refer to Create a "Do Not Mail" Query and Compound Queries on page 218.

Canadian AddressFinder (NCOA)

You can purchase Canadian AddressFinder (NCOA) services to ensure that information about your constituents is up to date. AddressFinder (NCOA) services are included in all Essentials and Pro packages. When you keep addresses updated, you save money on mailings and may also quality for postal discounts. For information about the number of Canadian AddressFinder (NCOA) runs remaining for your organization, contact your *Blackbaud* Sales associate.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** If you track multiple constituents with a single account, the joint account may not be updated by this process. If an account uses a nickname that differs from the constituent's name in the NCOA database, the address is not updated. Non-Canadian addresses are not updated by this process. Only users with admin rights can run the Canadian AddressFinder (NCOA) service.

Canadian eTapestry clients should follow these procedures to update constituent addresses.

1. Create a custom Canadian AddressFinder (NCOA) report. For details, refer to Create a custom Canadian AddressFinder™ (NCOA®) report on page 58.
2. Run the custom Canadian AddressFinder (NCOA) report to export constituent information. For details, refer to Export constituents with Canadian addresses on page 59.
3. Follow the procedures in this Knowledgebase solution. After Target Analytics analyzes and updates the addresses, you receive results you can import into your database.

   Note: In addition to your import file, you may also receive a CSV file that contains addresses which were rejected from the Canadian AddressFinder (NCOA) process. You do not need to import addresses that are rejected. These addresses were not analyzed. These addresses may be international addresses. If you have other methods of contacting these constituents, we recommend you do so to verify these addresses manually.
4. Set up user-defined fields associated with the Canadian AddressFinder (NCOA) import process. For details, refer to Create user-defined fields to import Canadian addresses on page 60.
5. Import updated constituent addresses. For details, refer to Import updated Canadian addresses on page 61.
6. Create queries to identify constituents whose addresses were updated. For details, refer to Create Queries for Updated Canadian Addresses on page 63.
7. Run a mass update to update the mailing status for constituents whose addresses were corrected by the Canadian AddressFinder (NCOA) service. For details, refer to Clear "Bad Address" user-defined fields on page 55.
8. Run a mass update to update the mailing status for constituents whose addresses could not be corrected by the Canadian AddressFinder (NCOA) service. For details, refer to Mark "Bad Address" user-defined fields on page 56.

Do not send mail to deceased accounts, accounts with bad addresses, or to accounts that have requested to not receive mail or solicitations. We recommend you create a "Do Not Mail" query to identify accounts that should not receive mail. Then, create a "Clean Mailing List" compound query that includes accounts that should receive mail, but excludes the accounts that should not receive it. You can then use this "Clean Mailing List" query to send mail. You can also use it as the starting criteria for other queries to further define mailing lists. For more information, refer to Create a "Do Not Mail" Query and Compound Queries on page 218.

Create a custom Canadian AddressFinder™ (NCOA®) report

1. From Reports, select a category in which to store the report definition. Consider creating a category called "Canadian AddressFinder™ (NCOA®)" or "Accounts."
2. From the report category, click New Report under Tasks. The Create a New Report page appears.
3. Enter a name for the report definition, such as "Canadian AddressFinder (NCOA)."

4. Enter a description to help other users understand what the report contains and how the information should be used. You use this report to export constituents addresses, and you send the export file to Target Analytics.
5. You can also select to mark the report as Private, Read Only, or a Favorite.
6. Under Available Fields, select the Account Fields category.
7. Select the following fields.
   - Account Name
   - Address Line 1
   - Address Line 2
   - City
   - State
   - Postal Code
   - Persona Type
   - Account Number
   - Sort Name
   - Name Format
8. Under Group Report By, select Do Not Group.
9. Adjust the report columns as necessary.
   - Click + next to Sort Name name under Selected Fields. The row expands and additional options appear. Click the eye icon to make the column visible in the report.
   - To reorder columns, select the column name. Then drag and drop the column to the required location.
10. Click Save and. You are ready to run the report.

Tip: You'll use this report definition every time you export constituent information for Canadian AddressFinder (NCOA).

Export constituents with Canadian addresses

1. From Reports, select a category in which the report definition is stored. This is probably a category called "Canadian AddressFinder (NCOA)" or "Accounts."
2. Under the report definition, click Run Report. The report definition is probably called "Canadian AddressFinder (NCOA)."
3. Select the Base query category.
4. Select the All Constituents query.
5. Select to remember the query for the next time you run the report.
6. Under Export As, select Transactions.

7. Under Personas Reported, select All.
8. Under Export Format, select Export as Tab-delimited.
9. Under Delivery Options, select Excel or CSV report format.

   You can choose to download the export file, receive the file as an email attachment, or save the file to your eTapestry dropbox. If you choose to receive the export file by email, enter your email address and a subject.
10. Schedule the report for off-hours or click Submit to launch it now.

Note: When the report processes, you cannot start additional queries, reports, or exports until after the export file is generated.

Create user-defined fields to import Canadian addresses

1. From Management, click User Defined Fields under Database Configuration.
2. Under Tasks, click New Category.
3. For Name, enter "Canadian AddressFinder (NCOA) Codes."
4. Click Save And View All Categories.
5. Under the category you created, click New Field.
6. For Name, enter "Canadian AddressFinder (NCOA) Codes."
7. Enter a description to help other users understand what information the field contains and how it should be used. You'll use this field to track when the Canadian AddressFinder (NCOA) updates a constituent's address.
8. For Data Type, select Text.
9. Click Next.
10. Under Field Application, select Notes for Journal Types.
11. Select Personas for Other.
12. Click Next.
13. Under Field Attributes, you can select to enable users to search based on this field using Advanced Find.
14. You can select to make this field visible in eTapestry Mobile.
15. Click Next.
16. Under Display Type, select Allow assignment of only one value.
17. Click Next.
18. If your organization uses the Advanced Security module, you can limit which users can see and use this field.
19. Click Next.
20. To add a value, enter the value name and then click Add Value. Add these values:

- Address Updated (Corrected)
- Address Standardized (Valid)
- Invalid Address
- Move Identified, Address Cannot Be Updated (Not Corrected)

21. Click Next. The field and its values are saved.

Import updated Canadian addresses

1. Ensure that the import file meets the General Import Set Up requirements. For details, refer to General Import Setup.
2. From Management, click Import. The Import Categories page appears.
3. Select an import category. Consider creating a category called "Canadian AddressFinder (NCOA)" or "Accounts."
4. Select your "Canadian AddressFinder (NCOA)" import template. The Import page appears.

   Tip: To create a new template, click New Import under Tasks. The Import page appears. Then enter a unique name for the import, such as "Canadian AddressFinder (NCOA)" You'll use this same import definition every time you import updated constituent addresses from Canadian AddressFinder (NCOA).

5. Enter a description. For example, "Constituent addresses were provided to Target Analytics for Canadian AddressFinder (NCOA) services. Use this import to update the addresses."
6. Click Browse... and select the .csv file which contains the latest AddressFinder™ results.
7. Under Select the Type of Information to Import, select Account Information with Single Note.
8. In the Multi Select Delimiter field, use the default settings.
9. Click Next to continue to the next step. The Map your Import File screen appears.
10. The required fields for Account Information with a Single Note import type appears. You must map data to these required fields. You'll also map data to user-defined fields you set up to track Canadian AddressFinder (NCOA) Codes.
    - On the Persona Type field, you can map a field from your source file or, if all your imported accounts have the same persona type, you can type in that persona type in the field provided under the Import Data column.
    - To map to a field in the source file, click the icon to the right of the Import Data field. You must click the icon next to the specific field you want to map to. The Select Import Field window appears with a list of all column titles from your source file. Click the appropriate column to map from your source file, and close the Select Import Field screen.

- You sometimes need to map more than one field from your source 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 must map both those columns to the eTapestry field Account Name. To do this, click the icon and select the First Name field, enter a space, and select the Last Name field. You can do the same for the Sort Name field, although in that case you map the Last Name field first, enter a comma and a space, and then map the First Name field.
- After you map all the 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. You can scroll to find a field or use the search box if you know the field name. The list includes all eligible fields for this import type, including user-defined fields. You can use as many of these fields as you want in your import.

  After you select the fields you want to add to the import, you must map them to a column from your source file. To do this, click the icon to the right of each field and select the appropriate column.
- To delete any additional fields after you add them to the mapping, click the red X next to the field you want to delete. You cannot delete required fields.
- As you map fields, you can view a sample on the right of the screen. Use this to confirm you are mapping fields correctly. You can review all your mapped data on Step 3 of the import wizard.

11. Under Key, select the Account Number and Persona Type as duplicate keys.

Note: eTapestry uses duplicate keys to search for potential duplicates on those fields. Later, you review potential duplicates and indicate how to handle them in the import. You cannot submit an import without at least one duplicate key.

12. Click Next. The Preview page appears to show the first 25 lines of the import. View the exact data that will be mapped to your eTapestry database. To correct mapping errors, click Back to return to step two and re-map your data.
13. After you preview the data, click Next. The Possible Duplicates Report appears.

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

14. The report shows potential duplicates in your import based on the duplicate key(s) you previously selected. To handle each potential conflict, select Replace.

    All data from your import source file is moved 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.

15. Click Next to commit the changes and begin the import. The data is imported and the constituent addresses are updated.

{i class="fa-solid fa-triangle-exclamation"}{/i} **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.

Create Queries for Updated Canadian Addresses

Create a query for each code used to classify the results of the Canadian AddressFinder (NCOA) process.

- Move Identified, Address Updated
- Address Standardized
- Invalid Address
- Move Identified, Address Cannot Be Updated

You'll use the Address Updated and Address Standardized queries to identify constituent addresses that were updated by the process. If you use a user-defined field called "Mailing status" to track which constituents have bad addresses, you will also use these queries to run mass updates after each Canadian AddressFinder (NCOA) run.

We recommend you use the Invalid Address and Move Identified queries to locate personas whose addresses have become invalid. If you have other methods of reaching the constituents, contact them to request updated addresses.

Giving

Your organization probably encourages your supporters to give in a variety of ways. You might accept:

- Donations, pledges, and gifts-in-kind - These typically include one-time donations, but they can also be used to record other activity such as item or ticket purchases, and membership dues. Pledges are used to record donation commitments that will be paid at a later date. They may be paid in one payment or in scheduled installments. For more information refer to Gifts on page 111.
- Recurring gifts and payroll deductions - When a constituent commits to giving regularly with no specific end date, use a recurring gift to track the donations. For more information, refer to Recurring Gifts on page 119.
- Major gifts - Your organization can create a plan to cultivate major giving prospects. For more information, refer to Major Gifts on page 70.
- Tributes - These are gifts made in honor of, in memory of, or in celebration of someone. For more information, refer to Tributes on page 96.
- Matching gifts - When some donors give, their employers may "match" those gifts with corresponding donations. Refer to Matching Gifts on page 79.
- Soft credit - Use soft credits to give constituents credit for gifts which their relations made. Refer to Soft Credits on page 120.
- Foundation grants - Track money your organization receives from grants and foundations. Refer to Track Grants and Foundations on page 67.
- Special events - Dinners, galas, tournaments, and other special events enable you to raise money, advocate for a cause, and thank donors. Refer to Special Events on page 92.
- Online donations, sales, walk-a-thon sponsorships, and event registration fees - Refer to Online Presence.
- Volunteering - Many constituents choose to give their time and skills on behalf of your mission. For information about how to track their contributions and thank them for their support, refer to Volunteers on page 98.

Regardless of how people give, it's always a good idea to send thank you letters. Not only is it polite, but it helps build relationships with donors, and reaffirms your appreciation of their contributions. For more information, refer to Thank You Letters on page 177.

Cultivation Process

To increase donations, you need more than just new donors. You also need stronger relationships with your existing constituents. To help you identify when and how to ask these constituents for a donation, we recommend you follow a cultivation process.

1. Create the following user-defined fields. For information about how to create user defined fields, refer to User-Defined Fields,
   - Solicitor 1 and Solicitor 2 - These fields should apply to Account Constituent and Journal Transaction. For each field, include the values of each current solicitor. The gift entry is the historical record and reflects the solicitors at the time of the gift.
   - Contact Purpose - For this field, include values of prospect cultivation, prospect identification, and prospect solicitation. Contact Purpose applies to Journal Transaction. Later, you can query based on this field.
   - Cultivation Step - This field will apply to Account Constituent and Journal Transaction. This should be a single select field with values 1-10, Current or Last and Next. They are numbered due to the fact that the actual step action will differ from individual to individual. Until the functionality of exporting the last or last 2 entries in a query range is incorporated into eTapestry, the utilization of Cultivation Steps of Current or Last and Next are necessary. After the step is completed, you will change the cultivation step to corresponding number. The step on the account screen will reflect the number. Current, Last, or Next will be meaningless there.
2. Create a journal query with qualifying a date range and Cultivation step of Current and Next. For information about how to create a basic query, refer to Basic Queries on page 216.
3. Create a journal type report. Include these fields: account number, name, sort name, voice, account last gift date, and account last gift amount, account first gift date, and account first gift amount, account largest gift date, and account largest gift amount, Solicitor 1 and 2, journal date, journal cultivation step, journal subject, and journal note. For information about how to create a report, refer to Standard Reports on page 228. To open the report, use *Microsoft Excel*.

Tip: Moves management is another concept for cultivating donors. For information about this concept and how to implement it, refer to Moves Management Overview on page 72.

Disbursements

Disbursements are payments your organization makes for expenditures such as brokerage fees, event and mailing expenses, and payments made back to constituents. You can use disbursements to track differences in stock prices between donation and sale. If you return unused grant funds, use disbursements to track the money.

When you enter a disbursement, the negative amount appears on your received totals, giving you a more accurate picture of your organization's revenue.

Add a disbursement

1. From a constituent record, click Journal.
2. Click **Add**. The Add Journal Entry screen appears.
3. Select Disbursement. The New Disbursement screen appears.

   Tip: You can also add a disbursement from the Quick Add Menu on the Find Account page.

4. Under Basic Information, complete the disbursement details.

   In the Disbursed Amount field, enter the amount that will be paid out or returned. Parenthesis appear around the total to indicate that the amount is negative and will count against the received total.
5. Click Save And to save the disbursement to the constituent's account.
6. If your organization uses the Attachments module, you can edit the disbursement to add an attachment.

Edit a disbursement

From a constituent record, click Journal, select the disbursement from the entry list, enter your changes, and click Save.

Tip: If your organization uses the Attachments module, you add an attachment when you edit t`he disbursement.

Delete a disbursement

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** When you delete a disbursement, the disbursement record is erased. If your organization exports disbursements for use in an accounting software, such as *Quickbooks*, or if you want to easily audit all transactions entered in the database, reverse the transaction instead of deleting it. For instructions, refer to Reversing Finalized Transactions on page 130.

1. From a constituent record, click Journal.
2. Select the disbursement from the entry list. The disbursement appears.
3. Click Delete.
4. Click OK to confirm you want to delete the disbursement.

Track Grants and Foundations

To track foundations, you can create an account for each foundation or for the individual responsible for the grant. Then enter address and contact information. For multiple contacts, enter multiple personas (e.g. Contact 1, Contact 2, etc.). Use the defined fields to enter information about the grant.

Tip: We recommend you use the user-defined field set to help track grant information. For information about how to add a defined field set, refer to Add Defined Field Sets. Alternatively, you could manually create the fields. For more information, refer to Create UDFs to Track Grants and Foundations.

To remind yourself of important due dates and other things to do, create queries based on the defined fields. Run the queries and reports regularly to track your grant information. For general information about queries or reports, refer to Queries on page 214 or Reports on page 228.

Gifts

In eTapestry, you record single donations as gifts. Gifts are most commonly used to record one-time donations, but you also use them to record other activity such as ticket purchases or membership dues.

When a donor wants to make regular donations to your organization on a scheduled frequency for an undetermined amount of time, enter the donations as a recurring gift. For information about recurring gifts, refer to Recurring Gifts on page 119.

Add a gift

1. From a constituent record, click Journal.
2. Click Add. The Add Journal Entry screen appears.
3. Select Gift/Pledge. The New Gift/Pledge screen appears.

   Tip: You can also access this screen from the Add New menu in the Quick Add column on the search results screen, or you can click Giving, Add a Gift or Pledge and enter the account number in the Account Number field or click Search for an Account and select the account who gave the gift.
4. Complete the gift details. For more information about the items on this screen, refer to Add a Gift Screen on page 111.
5. Click Save And to save the gift to the constituent's account.

Tip: After you add a gift, you can edit information about the transaction. If you use the attachments module, you can also add an attachment to a gift after you create it. To edit a gift, from the Journal screen on a constituent record, click the gift you want to edit. For more information about the items on this screen, refer to Add a Gift Screen on page 111.

Add a Gift Screen

The table below explains the items on the Add a Gift/Pledge screen. For information about how to access this screen, refer to Add a gift on page 111.

Screen Item	Description
Final	When you do not want anyone to edit the gift after you save it, select Final. Only System Administrators can edit final gifts.
Date	The Date field defaults to today's date. You can change it if necessary, but a date is required to save the gift.
Pledged Amount	When you add a gift, leave the Pledged Amount field as "0." This screen is used for both gifts and pledges, so when you leave the pledged amount as zero and enter an amount in the Received Amount field, the form becomes a gift-entry screen.
Received Amount	In the Received Amount field, enter the total amount of the gift. If the donor has any outstanding pledges, they appear under Pledge Information. To apply this donation as a payment to an outstanding pledge, click the paperclip next to the pledge. If you add the item as a gift, you cannot convert it to a pledge payment later .
Non-Deductible	In the Non-Deductible field, enter the portion of the gift that is not considered tax deductible. For example, if the donor is giving a $100 gift and receiving a $20 benefit from that gift such as a T-shirt, then only $80 is considered tax deductible. Using this example, the non-deductible amount is $20. This is reflected on receipts to the donor.
Fund	You must select a fund to identify the purpose of the gift.
Campaign	A campaign is required when your System Administrator configures this for your database.
Approach	An approach is required when your System Administrator configures this for your database.
Letter	In the Letter field, select the thank you letter to use for the gift acknowledgment.
Receipt	In the Receipt field, you can enter a receipt number. Note: This field is for manually entered receipt numbers and does not affect

Screen Item	Description
	eReceipts. When you use eReceipting, *eTapestry* creates an auto-generated receipt number. This number appears below the Receipt field as a link for you to click to view the eReceipt.
Note	When you have additional information to record about the gift, enter a note. You cannot search or query on the contents of a note.

Delete a gift

You can delete a gift after you create it. From the Journal screen on a constituent record, click the gift you want to delete to open it. On the gift record, click Delete.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** eTapestry does not keep a record of deleted gifts. If you export gifts for use in an accounting software such as *QuickBooks*, or if you want to keep an audit trail of all transactions entered in the database, we recommend that you reverse the transaction instead of deleting it. For details, refer to Reversing Finalized Transactions on page 130.

Convert gift to a pledge payment

Note: In order to view this option, you will need to have rights to create transactions. If the gift has been marked Final, then only administrative users can convert the gift to a pledge payment.

Convert gift to a pledge payment

1. From a constituent record, click Journal.
2. Select the gift you want to convert. The Gift screen appears.
3. Select Convert Gift to Pledge Payment. The Convert Gift to Pledge Payment screen appears.
4. Under Select Pledge, select which open or written off pledges you wish to apply the gift to.

   If you select to apply the gift to a pledge that has been written off, the pledge will be re-opened.

   If the Default to Copy Pledge Payment Defined Fields on Future Payments check box is selected on the pledge you have chosen, the single-select and text user defined fields will be merged to the new payment if those fields are not already populated on the gift you select to convert. Multi-select user defined fields will be merged with all values from the gift and pledge.
5. To convert the gift, click Save.

Major Gifts

Your organization determines what you consider a major gift. For example, you might consider a $500 donation a major gift whereas another organization might only consider gifts of at least $10,000 as a major gift. Regardless of their exact value, major gifts are special because they often have a specific purpose. For example they may be applied to a capital campaign, endowment, or they may be planned gifts.

Major gifts may be an important part of a donor's legacy with your organization. Typically, major giving prospects are mature donors who already give regularly in support of your organization. They may also be board members, committee members, passionate volunteers, or regular event participants. To identity major giving prospects, you must identify your most dedicated and passionate individual supporters.

Most major gifts are not spontaneous. Instead, they are the result of a deliberate plan of action in which you cultivate an a greater affinity for your mission and then ask the prospect to consider making a major gift. You might even assign a solicitor to give the donor special attention or invite the donor to special events. Then when a donor makes a major gift, be prepared to respond with thoughtful, personalized thanks.

You can use For Impact to improve how you identify and cultivate major giving prospects. For details, refer to For Impact on page 71. Moves management is another concept for cultivating prospects. For information about this concept and how to implement it, refer to Moves Management Overview on page 72.

Determine your organization's plan for major gifts, create a document to describe it, and save the file to a shared location. We recommend you upload the file to your eTapestry database. For details, refer to Organization User Manuals.

You'll also need to know personal information about the donor. For example, know who the donor has relationships with, other organizations or causes the donor is involved with, what interests the donor has, which events and committees the donor participates in, every interaction and contact your organization has made. Enter this and other relevant information on the individual's account. For details, refer to Accounts on page 20.

Tip: We recommend you use the user-defined field set to help track major gifts. For information about how to add a defined field set, refer to Add Defined Field Sets.

You can also create a query category called "Major Gift Tracking Queries" and then use queries to help you identify prospects, track solicitor and individual assignments, and track upcoming steps for your plan of action. To analyze your major giving efforts, run reports based on these queries. For example, the Top Donor Report helps you identify the top 10% of donors each year. For details, refer to Top Donor Report on page 231.

Note: For questions about additional tools for prospect research, please contact your Account Manager or send an email to eTapClientAccountExecs@blackbaud.com..

For Impact

eTapestry users in the United States and Canada can use the For Impact module to help identify potential donors that may contribute to your organization. To track For Impact information, add defined field sets for your major giving prospects and donors. For information about how to add a defined field set, refer to Add Defined Field Sets.

Tip: For more information about For Impact fundraising, refer to http://forimpact.org/.

For Impact Fields

We recommend you use the defined field set to help track For Impact information.

After you add the For Impact defined field set to your database, you can complete the fields for your major giving prospects and donors. For each field, the lowest value is 1 and the highest is 5.

For Impact Field	Description
Capacity	This is an estimate of the constituent's ability to make a transformational gift to your organization. The definition of a transformational gift depends on the level that your organization considers a major gift.
Relationship	This is an estimate of how closely-affiliated this constituent is with your organization.
Timing	This is an estimate of whether it is a good time to ask for a major gift.
Giving History	This is a measurement of what the constituent has demonstrated in the past to your organization. Multiple gifts or a very large one-time gift would normally rank someone higher on this value.
Philanthropic History	This is a measurement of the constituent's interest and propensity to support philanthropic causes in general. For major prospects, you can often find information on past giving in the local community foundation annual report.

You assign values for each For Impact field so that you can determine the Qualified Prospect Index (QPI) rating of each constituent. This is calculated by the For Impact Master Prospect List report and also on the Defined Fields tile on the account Home page. For more information about the report, refer to For Impact Master Prospect List on page 248.

- Each of the values in the five For Impact fields are multiplied by a weighting factor (listed below) and totaled so that the score is based on a 100 point maximum.

- The default value for a field is 3, so that if your organization does not know how to score a particular field for a constituent, 3 is used as a neutral value. Therefore, if you do not enter information for a field, the QPI is calculated as if you had selected 3 in those fields. This ensures that constituents are not ranked low unjustly when there is not enough information. For this reason, all constituents without updated values have a QPI of 60, based on the weighting factors for each field being multiplied by 3.

Each field has a different weight in the QPI calculation.

Field Name	Weighting Factor
Capacity	7
Relationship	6
Timing	3
Giving History	2
Philanthropic History	2

Moves Management Overview

Tip: This module is available for clients in the United States and Canada. To take advantage of the moves management functionality, add the defined field set for moves management. For information about how to add a defined field set, refer to Defined Field Sets. For information about the specific fields included in this set, refer to Moves Management Codes on page 76.

Moves management is a cultivation process in which fundraisers manage a series of steps, known as moves, for each prospect. Although these steps vary depending on the individual prospect, each step "moves" the prospect from attention, to interest, to desire to give. Fundraisers continually move prospects toward their next gift. For an overview of the solicitation process for moves management, refer to Solicitation Process on page 73.

Each "move" represents a separate contact that your organization had with the prospect.These include emails, phone calls, letters, faxes, face-to-face conversations, and planned events. Most moves don't involve asking the prospect to make a gift. Instead they cultivate affinity for your organization. For example you might discuss community issues, with a prospect at a dinner party and of the issues is the focus of your organization. During a dinner party, you don't ask the prospect for a gift, but you do build a relationship. You want to make an impression on the prospect regarding your organization or a giving opportunity. Try to make one move per month. For information about how to prepare for a move, refer to Create Goals for Each Move on page 75.

Cultivating prospects for major gifts is a very personal process. You nurture your or organization's relationship with the prospect. You must also consider other people or organizations related to the prospect, including Alma maters, parents/children, spouses, friends,

and employers/employees. Use these relationships with "natural partners" and "centers of influence" to make your contacts with the prospect more effective. For information about natural partners and centers of influence, refer to Moves Management Relationships on page 78.

As you learn about the prospect, add relevant information to the user-defined fields on the prospect's account. For general information, refer to Accounts on page 20.

To evaluate the prospect's financial capability and interest in supporting your organization, refer to The Prospect Evaluation Grid (PEG) on page 75.

Solicitation Process

Note: For general information about how to cultivate donors for major gifts, refer to Cultivation Process on page 64 and Major Gifts on page 70.

When you cultivate relationships with prospects for major giving, follow a thoughtful, disciplined process. The process creates an opportunity for the prospect to give to a cause he or she already believes is important. Moves Management establishes a four-phased plan for this process.

Phase 1 - Presolicitation Planning

Moves Management recommends you gather the following information:

- The prospect's interest in your organization
- Affiliations with clubs, churches, and other organizations
- The prospect's other major interests
- Events in the prospect's life that can influence donations
- Centers of influence for the prospect

Additionally, plan for open-ended questions so that you can engage the prospect in meaningful conversation and learn about the person. Good questions establish a warm relationship and open communication, which are necessary for a successful solicitation. Plan for questions which enable you to:

- Explore the person's feelings about charitable interests in general
- Explore the person's feelings about your organization
- Explore the person's feelings about specific programs and services
- Explore the person's understanding of your organization's mission and the problems it solves
- Check your previous research about the person
- Learn what about your organization is attractive to the person

You should also create a solicitation team, including a primary and secondary natural partner. Natural partners should also be familiar with matters related to your organization.

Phase 2 - Arranging the Solicitation

Determine who asks for the gift. Then, you can plan how the person asks for and arranges an appointment with the prospect.

Phase 3 - Planning the Solicitation Visit

Moves management recommends you use a structured, sequential process to plan and organize a solicitation visit. The five elements that make up the process are:

1. The Opening - Establish warmth and common ground. Establish a serious but friendly tone for the visit. This engages the prospect in the visit. A sincere opening is the best route to success later.
2. Prepare for a discussion and presentation - Review and revise your questions as you learn about the prospect and as more people become involved in the process.

   During the visit, focus on listening to how the prospect responds to your questions. Be flexible in case you need to adjust your questions during the discussion.
3. Presentation - While research suggests the formal presentation is the least important part of the process, you should still plan for it. Develop a basic premise for the foundation for your presentation. Determine how to make your presentation meaningful and memorable. Think about your own beliefs; you may be asked to express these as you ask about the prospect's beliefs.
4. Ask for a major gift - Plan who will ask for the gift when you complete the visit. Also plan who will create a document for the agreement. The moves management process recommends you prepare three "prepared closes" to give you confidence. Consider basing your prepared closes on the prospects' answers to questions which were prepared prior to the visit.Many seasoned fundraisers find their closes in their
5. Deal with objections - When you deal with objections well, the results can still be good. You may even overcome multiple objects after you ask for a major gift. Moves management recommends you designate one person on the team to respond to objections.

Phase 4 - Planning Stewardship Activities

Determine what you will do after you meet the prospect and ask for a gift. Plan for all possible outcomes: you get a gift, you don't resolve the matter of a gift, or you agree there will not be a gift in response to the opportunity you presented.

Moves management recommends you focus on what to do when you receive a gift. Prepare a contact record on the meeting and express thanks. Also plan for a series of contacts by people who can reinforce the positive feelings your constituent is experiences after a major gift commitment.

Tip: To take advantage of the moves management functionality, add the defined field set for moves management. For information about how to add a defined field set, refer to Defined Field Sets.

Create Goals for Each Move

Because most moves are primarily cultivation, rather than asking for a gift, you may find it difficult to determine a goal for each move, especially during a casual conversation. Try to avoid very general or unrealistic goals. For example, it is unrealistic to expect a very large gift after only two moves. An important goal is to learn how the prospect feels about your organization. This can help you determine how to pursue and carry out your next moves.

When you plan each move, determine the best possible outcome and the minimal acceptable outcome. For example, the best possible outcome might be that the prospect agrees to tour your facility on a specific date. The minimal acceptable outcome might be the prospect agreeing to a tour at a later unspecified date.

Moves Management recommends you do the following before each move:

- Remind yourself of the best possible outcome and the minimal acceptable outcome.
- Review key points you want to cover during the move.
- List a small number of benefits generated by programs/projects that you think will appeal to the prospect.
- Track what you ask the prospect to do, agree to, or act upon. In other words, determine what you want by way of resolution or next step in the process.
- List questions you anticipate the prospect will ask as well as your answers.

Remember to track the goal and the result in eTapestry.

The Prospect Evaluation Grid (PEG)

A team of management consultants for the Institute for Charitable Giving modified the prospect evaluation grid (PEG) to define management styles for fundraising purposes. The PEG measures prospect's financial capability and current interest. Use PEG score to rate prospects so that you can focus your time and energy. The PEG score is also a common rating system for your team of fundraisers to use when you discuss prospects.

For example, a wealthy prospect with no interest in your organization might have a PEG score of 1/9 where 1 represents low interest and 9 represents high financial capability. A dedicated volunteer might have extremely high interest in your organization but little financial capability.

The volunteer might have a PEG score of 9/1 where 9 represents high interest and 1 represents low financial capability.

Tip: To take advantage of the moves management functionality, add the defined field set for moves management. For information about how to add a defined field set, refer to Defined Field Sets. For information about the specific fields included in this set, refer to Moves Management Codes on page 76.

Guidelines for evaluating financial capability

- Net Worth: In general, the higher the net worth, the better.
- Discretionary Income: The more, the better.
- Number of Children: In general, the fewer the children, the better. Children are very expensive and people are more free to convey net worth when family obligations are minimal.
- Age: Prospects 55 and over are typically more willing to make a major contribution.
- Prior Gifts: Prior gifts to any other organization scores points on the financial capability scale. Giving begets giving and subsequent gifts are often easier to obtain.

Guidelines for evaluating cultivatable interest

- Prior Gifts to Your Organization: You can feel confident about giving a previous donor a few extra points, regardless of level.
- Service on Board or Committee: Give a prospect with prior involvement a few more points. Alumnus, grateful patients, or family members of a beneficiary or your services should all receive a higher score.
- Close Relationships with Volunteer or Staff Member: Relationships are vital to accessing the prospect and eventually obtaining a gift.
- Spousal Involvement: Big gifts almost always involve both spouses so pay attention to prospects whose spouse is also interested or involved.

Moves Management Codes

Tip: This module is available for clients in the United States and Canada. To take advantage of the moves management functionality, add the defined field set for moves management. For information about how to add a defined field set, refer to Defined Field Sets.

For information about the prospect evaluation grid, including guidelines for evaluating financial capability and cultivatable interest, refer to The Prospect Evaluation Grid (PEG) on page 75.

Financial Rating -- Based on the PEG ratings, these are used to classify constituents in regard to their net worth.

- Below 20th percentile
- 20th percentile
- 30th percentile
- 40th percentile
- 50th percentile (Middle class affluence)
- 60th percentile
- 70th percentile
- Second ten percent
- Top ten percent

Gift Rating -- Use these to classify constituents by potential gift amount.

- 25,000 - 50,000
- 50,001 - 100,000
- 100,001 - 250,000
- 250,001 - 500,000
- 500,001 - 750,000
- 750,001 - 1,000,000
- 1,000,001 - plus

Interest Rating -- Based on the PEG ratings, these are used to classify constituents in regard to their interest and knowledge about your organization.

- No idea what interests are
- No interaction or involvement
- Knows we exist, no contact
- Knows we exist, in a leader's network
- Aware of us, no affiliation
- Interested, not involved
- Involved, or had a good experience with us
- Very dedicated and involved
- Most dedicated and involved

Moves Status: one of five rating points assigned to a constituent to indicate the current status in the moves management process.

- Solicit
- Cultivate
- Qualify

- Stewardship
- Inactive

Moves Management Relationships

According to fundraising expert William Sturtevant, natural partners are those who already have organic relationships with a prospect and can provide information that helps develop a strategy to cultivate a productive relationship with the prospect. Each prospect has one primary natural partner, but often many secondary natural partners, and each can play a role at different points of the cultivation process. For example, the primary partner can help you learn about the prospect's charitable interests, while secondary partners may play a role later in the cultivation to help define your approach and set up a personal meeting. When you work with natural partners, you can cultivate new prospect relationships with them, so they may also become donors or help assist in solicitation.

Centers of influence include people in a prospect's network or circle of friends, such as personal friends, colleagues, acquaintances, and other natural partners who can provide information about the prospect. Centers of influence may have active relationships with the prospect, or they might have known each other in the past.

When you add the moves management field set, three types of relationships are automatically added. These are used to track relationships between your solicitors and constituents.

- Center of influence/Major gift donor
- Primary partner/Major gift donor
- Secondary partner/Major gift donor

You add relationships on the Relationships tab on constituent accounts. For more information about adding relationships, see Add a relationship on page 36.

Create a Moves Management Report

Consider creating a report which includes moves management data. You can create multiple reports to meet your organization's needs. For information about how to create a custom report, refer to Create a custom report on page 269.

Tip: To take advantage of the moves management functionality, add the defined field set for moves management. For information about how to add a defined field set, refer to Defined Field Sets.

For example, you can create a report that includes basic constituent information and moves management details. To do so, create a custom report which includes the following fields:

- From the Commonly Used Fields category, select Name, Email, Phone - Voice, and any other contact fields you want.

- From the User-Defined Fields: Account category, select Gift Rating, Financial Rating, Moves Status, and Interest Rating.

We recommend you sort the report in ascending order based on the Moves Status field. This enables you to review your prospects by their stage in the moves management process.

Matching Gifts

Companies may match a donation made by one of their employees or corporate partners. For example, if an employee donates $100 to your organization, you may receive an matching gift from his employer. Some companies even match gifts for their retirees. Organizations can also match gifts donated by other organizations; however, an organization cannot match its own gift. Individuals can even match gifts. For example, a major donor might offer to match gifts up to specific amount during a fundraiser or event.

Matching gifts may have some restrictions. For example, a company may only match gifts for full time employees, gifts greater than a specific amount, up to maximum total per employee per year, to specific nonprofits, or gifts made by cash or check. Companies may also vary in how often they submit matching gift payments. For example, small companies might submit payments for matching gifts on an annual basis, instead of year round.

To help answer questions about each company's matching gift program, we recommend you identify a contact person at each company.

1. Before you can process matching gifts, you must set up a relationship type with roles for "Employer" and "Employee". You can also set up relationship types for other matching gift pairs. For information about how to manage relationship types, refer to Relationship Types.
2. Create an approach called ""Matching Gifts." Use it to indicate which gifts and pledges are matching gifts. Typically, you'll also apply the money to an annual fund. For details, refer to Campaigns, Funds, and Approaches.
3. When you learn about a constituent's work, add the employment information to the constituent's account. You can acquire employment information from in person meetings, phone calls, mailings, social media, email addresses, event registration forms, DIY forms, and more. Then establish relationships between constituents and their employers who match gifts. When you add a relationship, enter the employer's matching gift information. To do this, open the constituent's record and add a relationship. For details, refer to Add a relationship on page 36.
4. When a constituent with a matching gift relationship gives a donation, enter the transaction as a gift. Use the approach for matching gifts. For details, refer to Gifts on page 111. For general information about how to add or edit journal entries, refer to Journal on page 100.

Enter the gift on the constituent's journal as you normally would, click Save and Edit, and then click Tribute, Soft Credit, Matching Gift Relationships. The matching gift information appears. Click the constituent name of the employer who is matching the gift. The employer's Persona page appears.

Note: An employee should receive soft credit for the amount matched by the employer. You could also give the employer soft credit for the employee's original donation, but this is not necessary. You enter soft credit information when you enter each gift. For general information about soft credit, refer to Soft Credits on page 120.

5. Send a thank you letter and receipt for the initial gift from the employee. Refer to Thank You Letters on page 177.
6. Based on the employer's matching gift conditions, create a pledge to track the amount that you anticipate the employer will donate to fulfill the matching gift. Use the same fund, campaign, approach, and letter that you used for the employee. Refer to Gifts on page 111.

   The employee should receive soft credit for the matching gift pledge.

   To track soft credit, from the employer's pledge, click Tribute, Soft Credit, Matching Gift Relationships. For Recipient, click Select. On the Find Accounts screen, select the employee constituent. To check that the pledge was entered correctly, click Save And Go to Journal.
7. Contact the employer and provide the information necessary to receive a payment to fulfill the matching gift pledge.

Tip: If a matching gift is not fulfilled, contact the employer. You may need to update employment information for your constituents or submit corrected paperwork. If the matching gift still can't be fulfilled, write off the pledge for the matching gift.

8. When you receive the matching gift from the employer, apply the payment to the pledge. The employee should receive soft credit for the matching gift pledge payment. Refer to Gifts on page 111.
9. Send a receipt and letter of thanks to the employer. Be sure to indicate that the employer did not receive goods or services in exchange for the donation. The employer can use this information to receive tax credits. Refer to Thank You Letters on page 177.
10. Notify the employee that you received a matching gift from their employer. Include the matching gift amount when you recognize the employee's contributions.

You can create queries based on your matching gift needs. Consider creating a query category called "Matching Gift Queries." To identify matching gifts, use the approach you created. You can also report on matching gift information. We recommend you create a category called "Matching Gift Reports."

Other query and reports to consider creating:

- A query that identifies constituents whose employment information was recently updated. These constituents may have recently become eligible or ineligible for matching gifts.
- A report to track the total amount you receive from matching gifts as compared to your organizations total revenue.
- A report that shows the total amount each company give in matching gifts.
- A report to track the number of pledges for matching gifts that were written off.

For information about queries, refer to Queries on page 214. For general information about reports, refer to Reports on page 228.

Payroll Deductions

Tip: For best practice information about payroll deductions, refer to eTapestry Best Practices: Payroll Deductions.

Many organizations allow employees to adjust their benefit selections and payroll options during a specific time of the year (an enrollment window). During this time, some of your organization's employees may indicate that they want to deduct some of their paychecks to support your mission.

Before you accept payroll deductions:

- Create an approach called ""“Employee Giving” or “Payroll Deduction.” Use it to indicate which pledges are payroll deductions. Typically, you'll also apply the money to an annual fund. For details, refer to Campaigns, Funds, and Approaches.
- Create a query based on the approach criteria. Use journal items as the data return type. You'll use the query when you report on payroll deductions and when you apply pledge payments in bulk. For information about queries, refer to Queries on page 214.

Typically, you should treat payroll deductions as annual pledges.

1. At the beginning of the year, calculate how many pay periods will occur for the year and the total amount the employee will give. This total determines the number of pledge payments and the pledge amount.
2. Create a pledge and schedule for each employee who gives payroll deductions. The frequency should be the same as the payment schedule. The First Installment Date should match the date of the first payroll deduction. For general information about pledges, refer to Gifts on page 111.

   Tip: When a new employee decides to make payroll deductions, add the pledge and use the same fund, approach, pledge schedule, and frequency as the other pledges which are

payroll deductions. For the first installment date, enter the date when the amount will be deducted from the employee's first paycheck.

3. When your accounting department sends a check for each pay period, apply the payments to employee pledges. To apply the same pledge payment to all payroll deductions, run a Mass Update to add scheduled payments to the employee's journals. When you run a mass update for the journal items, use the query that you created to identify payroll deductions. Use the pay period date as the pledge payment date. For information about mass updates, refer to Import and Mass Update Overview.

Note: You can use eTapestry to track payroll deductions. However, eTapestry can't access your accounting department or withdraw money from employee bank accounts. Work with your accounting or payroll department to receive the money from payroll deductions.

4. To adjust an amount or delete a payment after pledge payments are applied , edit the journal item on the employee's account. For information, refer to Journal on page 100.
5. At the end of the year, write off the remainder of any pledge that was not completed. For example, an employee may leave your organization during the year, and thus you stopped receiving payroll deductions from that person. At the start of the next year, you'll create pledges and pledge schedules for employees who choose to give payroll deductions.
6. Remember to thank employees for their monetary support. Refer to Thank You Letters on page 177.

Note: Alternatively, you could treat the payroll deductions as recurring gifts. Do this if an employee intends to give "forever" rather than for a year. When the employee retires or leaves the organization, end the recurring gift schedule. You'll still use an approach to indicate that the recurring gifts are payroll deductions. Create a query based on the approach criteria and use journal items as the data return type. Create a recurring gift schedule for each employee's recurring gift. Run mass update to apply payments to the recurring gift schedules. For general information about recurring gifts, refer to Recurring Gifts on page 119

Pledges

Use pledges to track donation commitments to be paid on a future date. Pledges can be paid in one payment or on a schedule of payments until the committed amount is fulfilled. Donations made toward fulfilling the pledge are recorded as payments on the pledge.

Pledges are similar to recurring gifts. However, recurring gifts are for regular donations to your organization on a scheduled frequency for an undetermined amount of time. For information about recurring gifts, refer to Recurring Gifts on page 119.

Add a pledge

1. From a constituent record, click Journal.
2. Click Add. The Add Journal Entry screen appears.
3. Select Pledge. The New Pledge screen appears.

   Tip: You can also access this screen from the quick add menu on the search results screen.

4. Complete the pledge details. For more information about the items on this screen, refer to Add a Pledge Screen on page 112.
5. For a pledge, if you enter a Pledged Amount and the first payment (Received Amount), enter the Gift Type information. When you enter a pledge without a received amount, you will enter gift type information when you receive payments for the pledge.

   Complete the schedule details under Pledge Information.

   Note: When you enter Tribute Information on a pledge, the information is applied to the associated payments. After you select a tribute account for a pledge, you cannot select a different account for the payments. If you want user-defined field information applied to associated payments, select Default to Copy Pledge Payment Defined Fields on Future Payments. You can edit user-defined fields for each payment. You can also enter Recognition Information and Soft Credit for a pledge. However, the information does not appear on the pledge payments. To track recognition or soft credit for payments, enter the information when you enter each payment.

6. To save the pledge, click Save And.

Note: After you add a gift, you can edit information about the transaction. If you use the attachments module, you can also add an attachment to a pledge after you create it. To edit a pledge, from the Journal screen on a constituent record, click the pledge you want to edit. For more information about the items on this screen, refer to Add a Pledge Screen on page 112.

Delete a Pledge or Pledge Payment

You can delete a or pledge after you create it. From the Journal screen on a constituent record, click the pledge you want to delete to open it. On the pledge record, click Delete.

If a pledge has payments, you must delete the payments before you can delete the pledge. From the constituent's journal, select the payment and click Delete.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** eTapestry does not keep a record of deleted payments. If you export pledge payments for use in an accounting software such as *QuickBooks*, or if you wish to keep an audit trail of all transactions entered in the database, we

recommend that you reverse the transaction instead of deleting it. For details, refer to Reversing Finalized Transactions on page 130.

If a constituent fulfills none or part of a pledge, consider writing it off. When you write off a pledge, the entry appears in the constituent's journal, but it no longer appears in queries or reports as an outstanding pledge. For more information, refer to Write off a single pledge on page 86.

Add a Pledge Screen

The table below explains the items on the Add a Pledge screen. For information about how to access this screen, refer to Add a pledge on page 83

Screen Item	Description
Final	Check Final if you do not want anyone to edit the gift after you save it. Only your administrator can edit gifts marked "Final."
Date	The Date field defaults to today's date. You can change it if necessary, but a date is required to save the gift.
Pledged Amount	Enter the total amount of the pledge. This screen is used for both gifts and pledges. When you enter a pledge amount and leave the Received Amount as $0, additional pledge data entry fields appear. When you save the transaction, eTapestry displays it throughout the database as a pledge.
Received Amount	Leave this amount as $0 for a new pledge. When the donation is a pledge payment for an outstanding pledge, click the paperclip next to the pledge under Pledge Information. The screen updates for a new payment, and you enter the amount in this field to apply it to the pledge. Note: If you add the payment as a gift without applying it to an outstanding pledge, you cannot later convert it to a payment.
Non-Deductible	In the Non-Deductible field, enter the portion of this gift that is not considered tax deductible. For example, if the donor is giving a $100 gift and receiving a $20 benefit from that gift such as a T-shirt, then only $80 is considered tax deductible. In this situation, the non-deductible amount is $20. This is reflected on receipts extended to the donor.
Fund	A fund is required and reflects the purpose for which the donation will be used.
Campaign	A campaign is required if your database administrator configured campaigns as required in your database.
Approach	An approach is required if your database administrator configured approaches as required in your database.

Screen Item	Description
Letter	In the Letter field, select the thank-you letter you want to use for acknowledging this gift.
Receipt	In the Receipt field, you can enter a receipt number for the gift if you wish.
Note	Enter a note if you have any additional information you want to record about the gift. Note content cannot be searched or queried on.

The table below explains the items under Pledge Information on the Add a Gift/Pledge screen.

Screen Item	Description
Default to Copy Pledge Defined Fields on Future Payments	When you create a pledge schedule, select this to copy information from user-defined fields on the pledge to the associated pledge payments.
Process Type	Select whether to process the payments manually or automatically. For information about auto-processing, refer to Auto Processing Rules on page 130.
Standard or Custom	Select whether the donor wants to pay payments with a standard frequency. If the schedule is very similar to a standard one, select the standard options and then select Save as Custom Schedule. This creates a custom schedule based on a standard one. Then, you can adjust the schedule as necessary. After you select a custom schedule, you can't mark it as standard.
Frequency	For a standard schedule, select how often the donor makes payments, such as annually, semi-annually, quarterly, bi-monthly, monthly, semi-monthly, bi-weekly, or weekly.
First Installment Date	By default, the first installment date is today. However, you can edit it. If the date is today, the first payment must be processed manually.
Installment Amount	For a standard schedule, by default the installment amount is equal to the pledge amount divided by the frequency. You can change this amount. For a custom schedule, enter an amount for each installment.
Installment Date	When a constituent makes irregular payments, create a custom schedule. Enter an installment date and amount, then click Add.
Remove Installment	To remove an installment from a custom schedule, select the installment and click Remove Installment.
Note	Enter a note if you have any additional information you want to record about the schedule. You cannot query or search on notes.

Add a pledge payment

After you have a pledge on a constituent's journal, you can record payments towards that pledge.

1. From the constituent's account, go to the Journal page.
2. Click Add. The Add Journal Entry screen appears.
3. Select Pledge Payment. The New Payment screen appears.
4. The Date field defaults to today's date. Change it if the date the payment was received is different.
5. The Received Amount field defaults to the total amount of the pledge, or the next installment due if you set up installments. You may change the payment amount if it is different from the default.
6. The Fund, Campaign, and Approach fields default to the selections on the pledge. You cannot change these when you enter a pledge payment.
7. Complete the rest of the screen, and click Save And.

Write off a single pledge

If a constituent does not fulfill a pledge or only fulfills part of it, consider writing it off. When you write off a pledge, the entry appears in the constituent's journal, but it no longer appears in queries or reports as an outstanding pledge. You can write off a single pledge or use Mass Update to write off all pledges in a query.

1. From the constituent's journal, select the pledge. The pledge appears.
2. Select Write Off. A date field appears.
3. If necessary, edit the Write Off Date.
4. Click Save.

Upgraded Pledges

If a constituent has a pledge and asks to increase the pledge amount or the period of time scheduled to make payment, upgrade the pledge. When you upgrade a pledge, you can select a different fund, campaign, or approach. For example, a donor might pledge $1000 for the Annual Fund, but then upgrade with a pledge of another $500 for the Building Fund.

Note: To upgrade a pledge, your organization must use the SplitTransactions module.

Some pledges cannot be upgraded.

- Pledge/Payment Entries - In order to upgrade a pledge when the original Pledge entry includes a received amount and a pledged amount, first remove the received amount and save the pledge. Add the received amount as a payment on the pledge schedule. Then, you can upgrade the pledge.
- Finalized pledges - To upgrade a finalized pledge, clear the Final checkbox and save the pledge.
- Written off pledged - To upgrade a pledge that has been written off, clear the Write Off checkbox and save the pledge.
- Split Pledges - If a pledge was originally entered as a split transaction, it cannot be upgraded.

Upgrade a pledge

1. From the constituent's journal, select the pledge. The pledge appears.
2. Under Pledge Information, click Upgrade This Pledge.The Upgrade Pledge wizard appears.
3. For Step One, enter Account Information, including the date of the upgrade, the additional amount, and the fund for the added amount.
4. Click Next.
5. For Step 2, enter Pledge Schedule information for the additional amounts.
6. Under Consolidated Pledge Schedule, review the upgraded information.
7. Click Next.
8. For Step Three, complete User-Defined Fields for the upgraded portion of the pledge. To copy this information to the associated payments, select Default to Copy Pledge Defined Fields on Future Payments.
9. Click Next to save and finish. The original pledge and the upgraded pledge appear in the journal list.

Edit or delete an upgraded pledge

For information about how to edit a pledge, refer to Add a gift on page 111. For information about how to delete a pledge, refer to Delete a gift on page 114.

Delete an upgrade split

After you save an upgrade pledge, you can delete upgrade splits.

1. From the constituent's journal, select the pledge. The pledge appears.
2. From the split you want to remove, click Delete Split.

Note: When there is only one split, click OK confirm you want to delete it. The pledge upgrade no longer appears.

3. Click Save.

Write off an upgraded pledge split

If a constituent cannot fulfill part of the pledge, write off just the original portion of the pledge or an upgraded portion.

1. From the constituent's journal, select the pledge. The pledge appears.
2. From the split you want to write off, select Write Off.
3. The Write Off Date defaults to today, but you can edit it.
4. Click Save. The split no longer appears as an outstanding pledge in the Consolidated Upgrade Information section of the upgraded pledge screen.

Add a payment to an upgraded pledge

From an upgraded pledge, you can add a payment under Consolidated Upgrade Information. You can apply the payment to the whole pledge or a split.

If the payments on the upgrade overlap the payments on the original pledge schedule, when you apply a payment to that pledge during the overlap, the payment will be a new split transaction.

Otherwise, the normal new payment screen appears.

For more information about how to add a payment, refer to Add a pledge payment on page 114.

Query on upgraded pledges

When you query on upgraded pledges, keep the following differences in mind.

- Journal and Commonly Used categories - When you select Pledge from Journal Entry Type, the query includes pledge entries, pledge split entries, and pledge upgrade entries. When you select Upgraded Pledge from the Journal Entry Type, the query includes pledge upgrade entries only.
- Amount category - When you select Individual Transaction Pledged, Individual Transaction Pledge Arrears, Individual Transaction Pledge Balance, Individual Transaction Raised, Individual Transaction Non-Deductable, Individual Transaction Balance, or Individual Transaction Soft Credit, the query includes the designated amount based on the original pledge or any upgrade splits, but not both.

When you select Individual Transaction Number Splits, the query includes the designated amount based on the original pledge and any upgrade splits (combined).

When you select Upgraded/Split Transaction Total Pledged, Upgraded/Split Transaction Total Arrears, Upgraded/Split Transaction Total Pledge Balance, Upgraded/Split Transaction Total Raised, Upgraded/Split Transaction Total Non-Deductible, Upgraded/Split Transaction Total Balance, or Upgraded/Split Transaction Total Soft Credit, the query includes the designated amount based on the original pledge and any upgrade splits (combined).

Report on upgraded pledges

When you report on upgraded pledges, only splits that meet the query criteria are included.

When you use a Journal Entry query, you can collapse upgrades/splits. This option combines any splits from an upgraded pledge or splittransaction into one line per pledge or per transaction. Any currently or number fields are totals.

To view specific details about each upgrade split clear the Collapse Upgrades/Splits option. For example, if your report includes Fund, Campaign, or Approach, you should not collapse the splits because these may vary from one split to another. When combined, the fields would appear blank.

Tip: If you select Collapse under the Group Option, all of the transactions in the report are already collapsed into one line for each account or household.

The following report fields from the Journal Fields category show details for the whole upgraded pledge, even if some splits are not included in the query.

- Upgraded/Split Transaction - Consolidated Payment Schedule
- Upgraded/Split Transaction - Next Payment Amount
- Upgraded/SplitTransaction - Next Payment Date
- Upgraded/Split Transaction - Non-Deductible Total
- Upgraded/Split Transaction - Number of Splits
- Upgraded/Split Transaction - Revised Total Pledged
- Upgraded/Split Transaction - Revised Total Raised
- Upgraded/Split Transaction - Total Amount Paid on Pledge
- Upgraded/Split Transaction - Total Arrears
- Upgraded/Split Transaction - Total Arrears Plus Current Payment
- Upgraded/Split Transaction - Total Arrears Plus Current Payment Date
- Upgraded/Split Transaction - Total Number of Payments

- Upgraded/Split Transaction - Total Outstanding Balance
- Upgraded/Split Transaction - Total Overpaid
- Upgraded/Split Transaction - Total Paid
- Upgraded/Split Transaction - Total Pledged
- Upgraded/Split Transaction - Total Raised
- Upgraded/Split Transaction - Total Received
- Upgraded/Split Transaction - Total Variance

All other fields show details for only the splits of the upgraded pledge that are included in the query. Examples include:

- Pledged
- Outstanding Balance
- Fund
- Campaign
- Approach
- Arrears Amount
- Arrears Plus Current Payment
- Arrears Plus Current Payment Date
- First Installment Date
- Frequency
- Installment Amount
- Next Payment Amount
- Next Payment Date

Pledge reminders

You may want to remind constituents about their pledges. Update the As of Date and the scheduled payment date each time you use the query. This query excludes those who have made a prepayment to their scheduled pledge but still select those who owe you a payment sometime during that month(s).

1. Create a query. In the Name field, enter "Pledge Reminders."
2. Under Starting Query, select Base - All Constituents.
3. Under Results, select Journal Entries in the Data Return Type menu.
4. On the Browse Fields tab, select Dates in the available fields menu.

5. Select **Scheduled Payment Date**. Enter the date range for which you want to print reminders.
6. On the Browse Fields tab, select Amounts in the available fields menu.
7. Select Individual Transaction Pledge Arrears.

   In the Individual Transaction Pledge Arrears field, select Greater than or equal to and enter "1." Do not enter a dollar sign.

   Enter a date for As of. Use the end of the month you wish to send the reminders.
8. Click Save and.

Use the query to create a pledge reminder export. For details, refer to Pledge Report on page 240.

Soft Credits

To give a constituent credit for a donation another constituent makes, add a soft credit. Soft credits help you track who gives to your organization and develop relationships with prospective donors. For example, use soft credits to credit a donor when their company matches gifts, to credit a solicitor, or to credit a participant in a sponsored event.

To analyze the soft credits in your database, run a soft credit report or a custom report. For information about reporting on soft credits, refer to Soft Credit Reports on page 242. To determine whether users can track soft credits, select to enable or disable soft credits when you edit your organization preferences. For details, refer to Organation Preferences.

Add a linked soft credit

For information on how to create a linked soft credit transaction for a constituent account, see Tribute, Soft Credit, Matching Relationship.

Add an unlinked soft credit to an account

1. From a constituent record, click Journal.
2. Click Add. The Add Journal Entry screen appears.
3. Select Soft Credit. The New Soft Credit screen appears.
4. Enter the date.
5. Enter the amount of the credit.
6. Complete the soft credit details.
7. Click Save. The soft credit appears on the constituent's journal.

Delete a soft credit

From a constituent record who received soft credit, click Journal, select the soft credit entry, and click Delete.

Or, from the constituent record who made the gift, click Journal, select the gift entry, click Tribute, Soft Credit, and Matching Gift Relationship, click X next to the soft credit, and confirm you want to delete the soft credit.

Note: If you delete the original transaction, the soft credit is also deleted.

Special Events

Tip: For best practice information about special events, refer to eTapestry Best Practices: Events.

When your organization has special events,you can track information about the event, invitees, and attendees. We recommend you use the event user-defined and system-defined field sets to help track event information. For information about how to add a defined field set, refer to Add Defined Field Sets.

Create a user-defined field category with the name of the event. This way, you can create user-defined fields specific to this event, such as table seating, dietary requirements, and more. Event information is tracked through defined fields on journal contacts and transactions. For free events, or events where only attendance tracking is needed, the Contact Methods screen allows you to track invitations, acceptance of an invitation, and attendance of your event. For events that require the purchase of a ticket, we recommend that most fields appear on the Transaction screen. For more information, refer to User-Defined Fields.

Create an Approach with the name of the event, such as Golf Tournament 2015. When you enter gifts, use this the approach for the event. This enables you to create queries and reports for the event. For details, refer to Approaches.

You can also use DIY forms to create an event registration page. This enables people to register online, purchase tickets, and enter personal information. For general information about DIY forms refer to Do-It-Yourself Forms. For details about event registration pages, refer to Event Registration Page.

After your data entry is complete, you can run a variety of queries and reports. Create a journal entry query on the event approach. Use the query for reports and exports, including for your thank you letters. Create queries based on other fields, such as to locate who is attending or what dinner options they chose. For general information about queries, refer to Queries on page 214.

To break the event information down by fund or by the approach activity summary, run the Fund Activity Summary report. Use this information to compare this event to previous ones. For details, refer to Fund Activity Summary on page 237.You can even create your own reports based on fields you created, such as to create seating charts or dietary lists. For general information about reports, refer to Reports on page 228.

Recurring Gifts

When a constituent commits to giving regularly with no specific end date, use a recurring gift to track the donations. For example, use recurring gifts to track payroll deductions or sustained giver programs. Before you add recurring gifts, create a recurring gift schedule for the constituent. To stop a recurring gift schedule, enter an end date for the schedule. Recurring gifts are similar to pledges, except that the installment amounts and frequency cannot be varied on a custom schedule, and there is no end date specified when the schedule is created.

Add a recurring gift schedule

1. From the Journal page, click **Add**. The Add Journal Entry screen appears.
2. Select Recurring Gift Schedule. The New Recurring Gift Schedule screen appears.
3. Complete the recurring gift schedule details. For more information about the items on this screen, see Add a Recurring Gift Schedule Screen on page 95.
4. In the Scheduling Information section, select whether you want to process transactions manually or automatically when each installment is due. Automatic processing requires that you have a payment processor set up for the database.
5. In the First Installment Date field, enter the date when you want to process the first payment.
6. In the Frequency field, enter the frequency of the recurring payments. The number in parenthesis indicates the number of installments per year, not the total number of installments.
7. In the Note field enter any notes for the schedule.
8. Click Save And to save the recurring gift schedule to the constituent's account.

Add a recurring gift schedule using SEPA

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

1. From the Journal, click **Add**. The Add Journal Entry screen appears.
2. Select Recurring Gift Schedule. The New Recurring Gift Schedule screen appears.
3. Complete the recurring gift schedule details.

4. In the Schedule Information section, select **SEPA**.
5. In the First Installment Date field, enter the date when you want to process the first payment.
6. In the Frequency field, enter the frequency of the recurring payments. The number in parenthesis indicates the number of installments per year, not the total number of installments.
7. In the IBAN field, enter the donor's bank account number.
8. In the BIC field, enter the unique identifier for the donor's bank account.
9. The Mandate ID field is automatically generated as a unique identifier for this transaction. However, to enter a different ID, select I want to manually enter the mandate ID and enter it in the Mandate ID field.
10. In the Mandate Signature Date field, enter the date when the donor signed the mandate.
11. In the Pre-Notification Sent field, enter the date you sent the notification letter to the donor.
12. In the Note field enter any notes for the schedule.
13. Click Save And to save the recurring gift schedule to the constituent's account.

Edit a Recurring Gift Schedule

To edit a recurring gift schedule, click the recurring gift schedule from the constituent's journal, update the schedule, and click Save.

- If a gift has been processed based on the schedule, you cannot change the Process Type, First Installment Date, or Frequency.
- To stop a recurring gift schedule, enter a stop date. After the stop date, you can't add new gifts to the schedule and scheduled gifts that are automatically processed will no longer be processed.

  If you know more about why the donor wants to stop the recurring gift, add the information to the donor's journal. For example, the donor may be moving away. Or perhaps the donor wants to continue support but has a financial hardship. In this later case, the donor may still be willing to volunteer. The donor may still want to receive emails and newsletters in order to stay in touch with your cause. It the donor has been giving for a long time, add a personal touch so that the donor remains likely to support your organization in the future.

  Then send a letter to the donor as confirmation that the recurring gifted stopped.

  - If this is a rare request, locate paper with your official letterhead and use a word processor (such as Microsoft *Word*) to write a letter. After you send the letter, add a journal contact to the account in eTapestry to track the communication. Copy the contents of the letter into the journal contact for future reference. Alternatively, send a one off email. Refer to Send a One-Off Email on page 155.

- If donors frequently want to stop recurring gifts, create a communication template in eTapestry. The template should thank the donor for past support and invite them to reconnect in the future, such as at lower amount or as a volunteer. You might want a generic letter for this situation, which you can edit in special situations. To do this, you'd generate a one off letter, download it to your local computer, open it in a word processor, enter your changes for the special situation, and then send it to the donor. Copy the contents of the letter into a journal contact for future reference. Refer to Communication Templates on page 141 and Generate One-Off Documents on page 165.
- To restart a recurring gift schedule, enter a new start date from the old schedule. A new schedule is created based on previous schedule.

Delete a Recurring Gift Schedule

If a schedule does not have associated gifts, then you can delete the schedule. If a schedule has gifts, you must delete the gifts before you can delete the schedule.

To delete a schedule, click the recurring gift schedule from the constituent's journal and then click Delete.

Add a Recurring Gift Schedule Screen

The table below explains the items on the Add a Gift Recurring Gift screen. For information about how to access this screen, see Add a recurring gift schedule on page 119.

Screen Item	Description
Final	Check Final if you do not want anyone to edit the gift after you save it. Only your administrator can edit gifts marked "Final."
Date	The Date field defaults to today's date. You can change it if necessary, but a date is required to save the gift.
Installment Amount	Enter the amount for each installment.
Non-Deductible	In the Non-Deductible field, enter the portion of this gift that is not considered tax deductible. For example, if the donor is giving a $100 gift and receiving a $20 benefit from that gift such as a T-shirt, then only $80 is considered tax deductible. In this situation, the non-deductible amount is $20. This is reflected on receipts extended to the donor.
Fund	A fund is required and reflects the purpose for which the donation will be used.
Campaign	A campaign is required if your database administrator configured campaigns as required in your database.

Screen Item	Description
Approach	An approach is required if your database administrator configured approaches as required in your database.
Letter	In the Letter field, select the thank-you letter you want to use for acknowledging this gift.
Receipt	In the Receipt field, you can enter a receipt number for the gift if you wish.
Note	Enter a note if you have any additional information you want to record about the gift. Note content cannot be searched or queried on.

Add a recurring gift

If a constituent has a recurring gift schedule, you can add a recurring gift. For more information, refer to Add a recurring gift schedule on page 119.

If your organization uses recurring gifts to track payroll deductions, consider adding a recurring gift to a group of recurring gift schedules that have the same dates. To do this use the Scheduled Recurring Gifts Mass Update. For more information refer to Import and Mass Update Overview.

1. From a constituent record, click Journal.
2. Click **Add**. The Add Journal Entry screen appears.
3. Select Recurring Gift. The New Recurring Gift screen appears.
4. If the account has multiple recurring gifts schedules, select which to use.
5. Complete the gift details. For more information about the items on this screen, see Add a Gift Screen on page 111.

   Tip: Based on the schedule, the Received Amount, Non-Deductible Amount, Fund, Campaign, Approach, Letter, Tribute, Soft Credit, Defined Fields, and Recognition Information fields are automatically completed. The received amount is based on the installment amount. Edit these fields if necessary.
6. Click Save And to save the gift to the constituent's account.

Tributes

You can use eTapestry to track gifts given in tribute of someone. For example, when someone passes way, the family might request that a donation be made to your organization in lieu of flowers. Alternatively, when someone active in your organization celebrates a birthday, wedding, or anniversary they may donations to be made in lieu of gifts.

To track whether a transaction is made in honor of, in memory of, or in celebration of the tribute account, add a transaction user-defined field called "Tribute Type." For details, refer to Create a Tribute Type UDF for Transactions.

When you learn that you will receive donations on a tribute's behalf, open the account that is being honored or memorialized. From the account page, click Account Settings. Under Tasks, click Add Role, select the tribute role, and then click Save. When you add an account, select Tribute instead of or in addition to Constituent role. For more information account types/roles refer to Account Roles on page 32. For information about how to manage roles for an account, refer to Account Settings Page on page 40.

When you receive a gift that is made in tribute of someone, add new gift information from the donor's account as you would normally. Then, enter the additional tribute information.

You can notify donors that their tribute gifts were received and thank them for their support by sending tribute notifications.

To track tribute gifts, use the eTapestry standard tribute reports. To access these, go to Reports, eTapestry Standard Reports, Tribute Reports. For more information, refer to Tribute Reports on page 241.

Enter tribute information for a transaction

1. When you receive a gift that is in tribute of another person, access the donor's account.
2. Add the new gift information as usual.
3. Under Gift Types and Pledge Information, select Tribute, Soft Credit, Matching Gift Relationships.
4. Under Tribute Information, click Select.
5. On the Find Account page , search for and open the tribute account.

   Tip: You can also add a new tribute account. Click Add account, enter the relevant tribute information, and click Save.

   The tribute information appears on the new gift and you return to the gift page.
6. Select Defined Fields.
7. In the Tribute Type field, select whether the gift is in honor of, in memory of, or in celebration of the tribute.
8. Save the gift.

Send tribute Notifications

To thank donors for a tribute gift in honor or memory of someone and to send a tribute notification to a recipient when a gift has been received, use eTapestry's notification process.

1. To set up notifications, go to Management, User Defined Fields.
2. On the page that appears, click the Base category.

3. Under Tasks, select New Defined Field.
   a. On Step 1, in the Name field, enter "Notify." In the Data Type field, select Text.
   b. On Step 2, in the Other row, select Relationships.
   c. On Step 3, you can select whether the field should be required.
   d. On Step 4, under Display Type, select Select from a set of values.
   e. Then, go to Step 6. In the Name field, enter "Yes" and click Add Value.
   f. To save the Notify user-defined field (UDF), click Save and Finish.
4. Next, add the individual who receives tribute notifications as a constituent account. Then establish a relationship between this account and the tribute account.
   a. From the donor's account, open the relationship page and select New Relationship.
   b. In the Relationship Type, field select the type that applies to tributes.
   c. Under Choose Accounts, click Select Related Account to find and select the tribute account. In the Notify UDF, select Yes.
   d. In the Notify UDF, select Yes.

   Note: To notify someone a gift has been made in honor or celebration of them, create a constituent account and a tribute account for the individual.
5. After you establish a relationship between the donor who receives the notification and the tribute, use the Tribute Notification Export to export the tribute data and merge it in your Microsoft *Word* notification letter.
   a. From Management, Standard Exports, click Tribute Notification Export.
   b. To include all tribute gifts in your database, select the Base category and select the All Tributes Query.

      After you process the export and save the file to your computer, you can merge it with your *Word* letter.

      Tip: When you create your own query to use for this export, remember to base the query on All Tributes. Do not select All Constituents. Also, under Relationship Defined Fields, make sure you select Yes.

Volunteers

Constituents who give their time and skills are often your organization's most dedicated supporters. These people choose to spend parts of their lives, rather than just their money, on behalf of your mission. Don't underestimate the value of their contributions.

We recommend you use the volunteer user-defined field set to help track volunteer information. For information about how to add a defined field set, refer to Add Defined Field Sets.

Alternatively, you could manually create the recommended fields. For more information, refer to Volunteer Tracking.

Then, use these user-defined fields to track information about constituents who volunteer. From a constituent account, access the Defined Fields page. Click the Volunteer Information category, select appropriate values for each field, and then click Save. For more information about the defined fields page, refer to Defined Fields Page on page 44.

To make it easier for constituents to sign up to volunteer, create a registration webpage using DIY forms. For details, refer to Create a volunteer page.

The constituent may volunteer on many different occasions. Each time a constituent volunteers for your organization, open the constituent account and click Journal. Add a new contact or edit an existing contact to track the constituent's volunteer hours, team, project or event, using the user-defined fields for volunteers. For information about how to add or edit journal entries, refer to Journal on page 100.

Remember to thank your volunteers regularly. You can personalize the letter with details from journal entries, including hours, team, project, and event information. Refer to Thank You Letters on page 177.

If volunteers help with data entry in eTapestry, assign them the user account role and adjust your security settings to restrict the data they can access and edit. For information about security, refer to ETAP Security Options.

You can create queries based on your volunteer needs. We recommend you create a category called "Volunteer Queries." For information about queries, refer to Queries on page 214. You can also report on volunteer information. We recommend you create a category called "Volunteer Reports." For general information about reports, refer to Reports on page 228.

- Consider creating a report to track the volunteer total hours. The report should include a column for the user-defined field called Volunteer Hours. To create a total for a group of volunteers, for Grouping click Account and for Group Options click Show Totals. This will show the total hours for each volunteer in the query.
- To create a report of all of your volunteer related fields from the Defined Fields page of the constituent account and the volunteer information for Journal Contacts, use a query with a data return type of Journal Entries.

Tip: Do you use *VolunteerHub*? *VolunteerHub* is cloud-based software that streamlines volunteer and event management. It assists organizations by providing scheduling, communication, and tracking. It also automates many day-to-day volunteer coordination tasks such as email communication, collection of volunteer contact information, skills, and liability waivers, event registrations, cancellations, and waitlists. It also integrates with eTapestry. For more information, contact *VolunteerHub* or contact your Blackbaud account representative.

Journal

The Journal tracks all interactions with your constituents, such as mailings, donations, and event attendance.

Tip: For best practice information about the many uses of the Journal page, refer to eTapestry Best Practices: Journal Page.

Journal Views

To display journal items in your preferred way, select a journal view from the View menu. When you select a view on an account's journal, that view remains selected for all accounts for the eTapestry session. When you log out, the view returns to the default list view.

- List view- Shows a summary of each item in the journal.
- Household list view - Shows asummary of each item in the journal for all members of the household. The Name column shows the account in the household for each item.

Journal Columns

When your journal view is set to List or Household, you can edit the columns in the journal to display the information you want to see. By default, you see the Date, Original Account, Type, Description, Pledged, Received and Attachments columns.

To sort the list by a particular column, click the column title. To customize the columns, click Choose columns. The Choose columns to show in the list screen appears. You can choose from a variety of columns to see different data about journal items.

To narrow down a column, click on the All categories drop down menu and select a category, such as Transaction Fields or Contact Fields, or search for a column in the search bar. Select or clear the checkbox next to the column you want to appear or remove. To quickly select or clear the values for these fields, click Select all or Clear all. After you make your selections, click Apply Changes.

To change the column order, drag and drop the column on the Journal page.

After you add or remove columns or change column order, you can click Restore Defaults to return default column settings.

Column	Details
Date	Displays the date the journal item was entered.
Original Account	Displays the name of the household member for the journal item. This column is only displayed when the household or split household views are used.

Column	Details
	To access the Home page of an account through the Original Account column on the Journal page, select the name in the column. The account's Home page appears.
Type	Displays the type of journal item.
Description	For gifts, pledges, payments, recurring gifts, split transactions, upgraded pledges, and disbursements, the description displays the fund selected on the transaction. For soft credits, it displays the soft credit amount. For recurring gift schedules, it displays the installment amount. For notes, it displays the first line of the note text. For contacts, it displays the contact subject. For calendar items, it displays the title.
Pledged	Displays the pledged amount on transaction items. Negative amounts display in parentheses. This column is blank for notes, contacts, and calendar items. A total appears at the top of the list for pledged amounts.
Received	Displays the received amount on transaction items. Negative amounts display in parentheses. This column is blank for notes, contacts, and calendar items. A total appears at the top of the list for received amounts.
Attachments	Displays attachments to the journal entry. Journal entries that allow attachments include gifts, pledges, pledge payments, disbursements, recurring gifts, contacts and notes.

Journal Filters

Journal filters allow you to filter the list of journal items on the journal page. You can choose to see only entries of a certain type or within a certain date range.

Click the Filters icon to select a type of journal item. Enter a date range in the From and To fields to see journal items within those dates.

The type of entry and date ranges are the default filters. Entry types are divided into two categories: Transaction and Non Transaction.

To hide a type of journal item, clear the box next to the item type and click Apply filters. To clear all filters, you can click Clear all filters.

Journal filters remain selected for the account you are on. If you open a different account, the filters are reset to the default.

You can also use the journal search to find a particular item. To remove criteria entered for the search, click X next to the search term to remove your criteria from the page.

Quick Add

When you search for an account, you can add journal entries from the search results screen.

1. From the Find Account page, enter your search criteria and click Find.
2. From the search results, locate the account.
3. Under Quick Add, select the type of journal entry.

   Note: The options available vary based on the account type and your security rights.
4. Add the journal entry.

Transactions

Use transactions to track financial information in your database. Although there are different transaction types for various donations, most transactions include the same basic information.

You can use the following hot keys to quickly navigate the transaction screen.

- **CTRL+S** - Save the form data using your current "Save and" option.
- Ctrl+UP - Expand the section above the one you have open.
- Ctrl+DOWN - Expand the section below the one you have open.
- Ctrl+DEL - Clear the entered data and reset the form to its default values.

Setting Defaults

You can also set data entry defaults on the transaction screen. This is useful when you enter several transactions that share details. To set defaults, complete the information on the transaction screen that you want to set as defaults. You can set defaults for any field under Basic Information, Gift Type, Tribute or Soft Credit Information, User Defined Fields, and Recognition Information. When you enter a pledge, you can also set defaults in the Frequency, First Installment Date, and Installment Amount fields.

If you want to use this information for several days, but you want to continue to use the same date in the Date field, select Default date field to always be today's date.

Set as Quick Entry Default: To use the defaults for your current eTapestry session, click this button. Quick entry defaults clear when you log out of the program.

Set Permanent Defaults: To leave the defaults in place after you log out of the program, click this button.

Clear Defaults: To clear defaults, click this button.

Tip: Transaction screen defaults carry over to the Quick Gift Entry screen and vice versa.

Transaction Fields

Basic Information

The fields located under Basic Information vary from one transaction type to another, but many of the fields are the same across all transactions.

- Final - Select this checkbox to prevent further changes to a transaction.
- Date - Use this field to record the transaction date. This date is also known as the Journal Entry Date. eTapestry automatically records a separate Creation Date that you cannot edit.
- Pledged Amount - Use this field to enter a pledge gift amount. This field is not available on pledge payments, recurring gift schedules, recurring gifts, disbursements or soft credits.
- Received Amount - Use this field to record the money received for a transaction. This field is not available on recurring gift schedules or soft credits. For disbursements, the field displays as Disbursed Amount.
- Non-Deductible Amount - Use this field to record any portions of the transaction that are not fully deductible. For example, when a donor is given an item in return for a donation, you enter the value of the item in this field. This field is not available on pledge payments, disbursements, or soft credits.
- Fund - Use this field to record where the money is going for your organization. On pledge payments, the fund for the original pledge entry displays and you cannot change it. For more information about funds, refer to Funds on page 1.
- Campaign - Use this field to record whether the donation is associated with any particular fundraising effort. For example, your organization may have a building campaign specifically directed at raising funds for a new wing of your building. On pledge payments, the campaign for the original pledge entry displays and you cannot change it. For more information about campaigns, refer to Campaigns on page 1.
- Approach - Use this field to record why the donation came into your organization. For example, if the donor gave the money after a personal visit by a solicitor, you may select "Personal Solicitation." On pledge payments, the approach for the original pledge entry displays and you cannot change it. For more information about approaches, refer to Approaches on page 1.
- Letter - Use this field to associate the transaction with a type of letter, such as a thank you letter.
- Receipt - If your organization manually assigns receipt numbers to transactions, enter the receipt number in this field. When you generate eReceipts in eTapestry, the program assigns unique receipt numbers to transactions, but these values are not stored in this field.

- Note - Enter any necessary details for the transaction that are not captured by other system-defined or user-defined fields on the transaction page.

Gift Types

Gift types are used to record the gift format, such as Credit Card or Stock. The available gift types are Cash, Check, Credit/Debit Card, Electronic Funds Transfer (EFT), In Kind, Real Estate, Stock, Bond, and Insurance. When you select a gift type, fields appear for you to enter the applicable details about the gift.

Note: An asterisk (*) beside a field denotes a required field based on the gift type in this section. For example, when you select Check, Check Date and Check Number are required fields.

- Check - When you select Check, the following fields appear.
  - *Check Date - Record the check date.
  - *Check Number - Record the check number.
  - Bank - Record the name of the financial institution.
  - Account - Record the account number on the check.
  - Signator - Record the name of the person who signed the check. On a business account, this may be important to record as it may differ from the name on the account.
  - Payee - Allows you to record the name as it appears on the "Pay to the Order of" line. In most cases, this is the name of your organization. Occasionally, a constituent may make the check payable to a specific fund or board member.
  - Note - Enter any necessary details for the check.
- Cash - When you select Cash, a Note field appears for you to enter details about the cash donation.
- Credit/Debit Card
  - *Credit/Debit Card Number - The full credit or debit card number is required when you process it through your eTapestry database. During the eTapestry credit and debit card transaction, the program converts all but the last four digits of the number into asterisks for secure storage. However, unprocessed transactions display the full number in the field. For security purposes, if you are not going to process the card through the database, do not enter the full number in the field. We recommend you enter the last four digits only or replace the number with another character such as "*" or "x". eTapestry is not liable for improperly stored credit or debit card information in the database.

- *Expiration Date - Enter the expiration date on the card in mm/yyyy format.
- Name on Card - Record the name as it appears on the card.
- Credit/Debit Card Type - Select the type of card from the drop down menu. To edit the list of cards that appear in this field, select Management, System Defined Fields.
- Transaction Processor - If your organization has more than one credit and debit card processor set up for your database, this field appears so you can select the processor to use for the card.
- Authorization Code - When the credit or debit card is processed through one of the eTapestry processor vehicles (for example, the database, an eCommerce page, a Donor Login site, or the API), this field displays the authorization code from the processor. The code appears automatically in the field when the card processes successfully and you cannot change it.
- Note - Enter any necessary details for the card.

- Electronic Funds Transfer (EFT) - When you select EFT, the following fields appear.
  - *Account Type - Select whether the account is Checking or Savings.
  - Routing Number - Record the bank account routing number.
  - Account Number - Record the bank account number.
  - Bank Name - Record the name of the financial institution.
  - Process Date - Record the EFT process date.
  - Social Security Number - Record the constituent's social security number.
  - Authorization Code - When the credit or debit card is processed through one of the eTapestry processor vehicles (for example, the database, an eCommerce page, a Donor Login site, or the API), this field displays the authorization code from the processing company. The code appears automatically in the field when the card processes successfully and you cannot change it.
  - Note - Enter any necessary details for the card.
- Gift In Kind - When you select Gift In Kind, the following fields appear.
  - Sale Date - When your organization selects to sell the gift in kind, enter the date the item sells.
  - Sale Value - Enter the sale amount.
  - Note - Enter any necessary details for the gift in kind.
- Real Estate
  - *Type - Select the real estate type, such as building, land, or condominium. To edit real estate types, select Management, System Defined Fields.

- Location - Record the location of the property. Include as many details as possible, such as street address and zip code.
- Tax Parcel Number - Record the tax number for the property.
- Size - Record the size of the property. You may enter the total acreage for land or the total square feet for a house, condominium, or apartment.
- Sale Date - When your organization selects to sell the real estate, enter the date the property sells.
- Sale Value - Enter the sale amount.
- Note - Enter any necessary details for the real estate. For example, you can enter the name of the constituent's estate attorney.

- Stock - When you select Stock, the following fields appear.
  - *Company - Record the name of the company that issued the stock certificates.
  - *Number of Shares - Enter the total number of shares of stock.
  - *Price Per Share - Enter the price per share of the stock when it was donated.

    Note: The Received Amount field under Basic Information must equal the Number of Shares multiplied by the Price Per Share.
  - Ticker - Record the market ticker symbol for the stock.
  - Sale Date - Record the date your organization sold the stock.
  - Sale Price Per Share - Record the price per share at the time your organization sold the stock.
  - Broker Name - Record the name of the broker for the stock.
  - Brokerage Fee - Record the broker transaction fee.
  - Note - Enter any necessary details for the stock.
- Bond - When you select Bond, the following fields appear.
  - *Issuing Entity - Record the name of the organization that issued the bond. This is usually a corporation or government entity.
  - *Maturity Date - Record the date the bond is due to be repaid.
  - Date Cashed - Record the date your organization cashed the bond.
  - Actual Value - Enter the total value of the bond at the time it was cashed.
  - Note - Enter any necessary details for the bond.
- Insurance - When Insurance is chosen, the following fields appear.
  - *Insurer - Record the name of the insurance company that issued the policy.
  - *Policy Number - Enter the number for the donated policy.

- *Beneficiary - Enter the person who may become eligible or who receives benefits under the insurance policy.
- Surrender Date - Record the date the policy matures.
- Surrender Value - Record the amount due to the insured if the policy is surrendered.
- Org. Is Paying Premiums - Select whether your organization is going to pay the costs associated with keeping the policy active.
- Premium Frequency - Select the interval the premiums are paid, such as monthly or yearly.
- Premium Amount - Record the amount of the premium based on the interval you selected. For example, if the premium is paid monthly, type the monthly payment amount.
- Length of Policy Agreement - Record the length of the insurance policy.
- Note - Enter any necessary details for the policy. For example, you can note the insurance agent contact information.

Tribute, Soft Credit, Matching Gift Relationship

The Tribute, Soft Credit, Matching Gift Relationship section allows you to link the transaction to a tribute account if it was made in honor, celebration, or memory of someone. You can also create a linked soft credit transaction for another constituent account to credit he or she for the transaction, and you can view the details of a matching gift relationship from the constituent account to help you pursue a matching gift for the donation.

Note: You cannot create a matching gift for a soft credit or disbursement.

Adding Tribute Transactions

- When you receive a donation in honor, celebration, or memory of another person, you can link the transaction to a tribute account. When you do this, you can track tribute transactions, run reports to see totals given for a tribute, and you can notify other accounts related to the tribute when you receive tribute donations.
- To create a tribute transaction, open the Tribute, Soft Credit, Matching Gift Relationships section on the transaction page. Tribute Information appears with No tribute by default. To change this, click the magnifying glass icon to select a tribute account.

  The Find an Account screen appears so you can search for a tribute account. When you locate the correct account in your search results, click the account to select it.

  When the tribute account does not exist in your database, you can click Add Account to add a new tribute account. After you click Save to save the new tribute account or select the existing account in the search results, the screen closes and you return to Tribute, Soft

Credit, Matching Gift Relationships. The tribute account displays under Tribute Information.

To change the tribute account again, click the magnifying glass to select another account. To remove the tribute selection, click the "X" beside the magnifying glass. After you select the tribute, you can continue to add transaction details.

After you save the transaction, a tribute transaction appears on the journal of the tribute account. If you do not already have the Tribute column added to the journal page, select Choose columns and select the Tribute column. Click Apply changes to add the column. The account name linked to the tribute from the original transaction appears in the Tribute column on the journal screen. To go the Home page of the linked account, click the account name.

Note: The tribute transaction is linked to the original transaction on the constituent account. To edit the tribute transaction, you must edit the original transaction. Likewise, any changes made to the original transaction reflect on the tribute transaction. If the original transaction is reversed or deleted, the tribute transaction also reverses or deletes.

Adding Linked Soft Credits

- When one constituent donates a gift and you want to recognize another constituent for helping to bring in the donation, you can select to soft credit the original transaction. This is commonly done when a company matches an employee gift so you can give the employee credit for the company donation. You can also enter a soft credit on the constituent accounts of solicitors to track the donations a solicitor generates.
- To create a soft credit, open the Tribute, Soft Credit, Matching Gift Relationships section on the transaction page. Soft Credit Information appears with No account by default. To change this, click the magnifying glass icon to select the constituent account that should receive the soft credit.

  The Find an Account screen appears so you can search for a constituent account. When you locate the correct account in your search results, click the account to select it.

  When the constituent account for the soft credit recipient does not exist in your database, you can click Add Account to add a new constituent account. After you click Save to save the new account or select the existing account in the search results, the screen closes and you return to Tribute, Soft Credit, Matching Gift Relationships. The soft credit appears under Soft Credit Information.

  To change the constituent account again, click the magnifying glass to select another account. To remove the constituent selection, click X beside the magnifying glass.

After you select a constituent, the Amount and Note fields appear. In the Amount field, enter the amount to soft credit the constituent. In the Note field, enter any necessary details for the soft credit. For example, you can enter the reason for the credit.

After selecting the soft credit constituent and entering the soft credit information, you can continue to add transaction details. After you save the transaction, a soft credit appears on the journal of the constituent account. If you do not already have the Soft Credit Amount column added to the journal page, select Choose columns and select Soft Credit Amount column. Click Apply changes to add the column.

You can open the soft credit transaction to make adjustments to it. However, you cannot adjust the Date from here. To edit the date, you must adjust the soft credit on the original transaction. There is a link to this transaction on the soft credit screen.

Note: If the original transaction is reversed or deleted, the soft credit also reverses or deletes.

To view the account name linked to the soft credit from the original transaction, hover over the original transaction on the journal screen. The account name linked to the soft credit appears. To go the Home page of the linked account, click the account name.

Matching Gift Relationship Details

- The Matching Gift Relationships section displays the matching gift relationships for the account. If one does not exist, No Matching Gift Relationships appears. For more information about matching gifts, refer to Matching Gifts on page 79. When a matching gift exists, you can click the relationship details to go directly to the related account.

User-Defined Fields

- The User Defined Fields section displays all user-defined fields (UDFs) that are available for transactions. Transaction UDFs allow you to record details about the transaction that are important to your organization. The following transaction UDFs are examples your organization may want to use.

  Tribute Type: Create this UDF to record the type of tribute donation, such as in honor of or in memory of.

  Payroll Deduction: Create this UDF to record whether or not a transaction is from a payroll deduction.

  Membership Expiration Date: Create this UDF to record the expiration details for membership dues transactions.

Your organization may have other items that are important to record on the transaction page. You can create as many UDFs as necessary to capture information. For information about how to create a UDF, refer to User-Defined Fields on page 1.

Recognition Information

- You can track recognition information for an account on the Account Settings page, but you can also select recognition preferences that are specific to a transaction. For example, a donor can make a large gift and request to recognize another constituent as a gift to that individual. The Recognition Information section allows you to establish unique recognition details for a single transaction. When you do this, there is no impact to the donor's recognition information on the Account Settings page.
  - Under **Recognition Information**, select Change Recognition to change the recognition type to associate with the transaction. You should select the type based on the constituent's name request for recognitions such as donor walls, donor kiosks, events, or the Annual Report for Board Members.
    - Use Account Recognition Setting: Use this default option to duplicate the name from the Account Name field into the Recognition field.
    - No Recognition: When a constituent does not want to be recognized and you need to exclude he or she from Recognition Reports, select this option. When you do this, "{OMIT}" appears when you include the Recognition column in a custom report.
    - Anonymous: When a constituent does not want their name to appear on recognition displays such as a donor wall, select this option. Their name will be replaced with "Anonymous" on recognition displays, in Recognition Reports, and in the Recognition column in a custom report.
      - **Custom**: When you want to enter a custom recognition name for a constituent, select this option.
    - Use Transaction Recognition Name: When you select this, the name you enter in the Transaction Recognition Name field appears.

Journal Items Data Entry

Every time you have an interaction with a constituent, you can record that interaction in the journal. Some interactions, such as communication, record automatically when they are done directly from eTapestry. You can also enter all interactions manually one at a time, or enter a group of interactions at the same time through import.

You also track giving information in the journal. For information about giving, refer to Giving on page 64.

Gifts

In eTapestry, you record single donations as gifts. Gifts are most commonly used to record one-time donations, but you also use them to record other activity such as ticket purchases or membership dues.

When a donor wants to make regular donations to your organization on a scheduled frequency for an undetermined amount of time, enter the donations as a recurring gift. For information about recurring gifts, refer to Recurring Gifts on page 119.

Add a gift

1. From a constituent record, click Journal.
2. Click Add. The Add Journal Entry screen appears.
3. Select Gift/Pledge. The New Gift/Pledge screen appears.

   Tip: You can also access this screen from the Add New menu in the Quick Add column on the search results screen, or you can click Giving, Add a Gift or Pledge and enter the account number in the Account Number field or click Search for an Account and select the account who gave the gift.
4. Complete the gift details. For more information about the items on this screen, refer to Add a Gift Screen on page 111.
5. Click Save And to save the gift to the constituent's account.

Tip: After you add a gift, you can edit information about the transaction. If you use the attachments module, you can also add an attachment to a gift after you create it. To edit a gift, from the Journal screen on a constituent record, click the gift you want to edit. For more information about the items on this screen, refer to Add a Gift Screen on page 111.

Add a Gift Screen

The table below explains the items on the Add a Gift/Pledge screen. For information about how to access this screen, refer to Add a gift on page 111.

Screen Item	Description
Final	When you do not want anyone to edit the gift after you save it, select Final. Only System Administrators can edit final gifts.
Date	The Date field defaults to today's date. You can change it if necessary, but a date is required to save the gift.
Pledged Amount	When you add a gift, leave the Pledged Amount field as "0." This screen is used for both gifts and pledges, so when you leave the pledged

Screen Item	Description
	amount as zero and enter an amount in the Received Amount field, the form becomes a gift-entry screen. In the Received Amount field, enter the total amount of the gift.
Received Amount	If the donor has any outstanding pledges, they appear under Pledge Information. To apply this donation as a payment to an outstanding pledge, click the paperclip next to the pledge. If you add the item as a gift, you cannot convert it to a pledge payment later .
Non-Deductible	In the Non-Deductible field, enter the portion of the gift that is not considered tax deductible. For example, if the donor is giving a $100 gift and receiving a $20 benefit from that gift such as a T-shirt, then only $80 is considered tax deductible. Using this example, the non-deductible amount is $20. This is reflected on receipts to the donor.
Fund	You must select a fund to identify the purpose of the gift.
Campaign	A campaign is required when your System Administrator configures this for your database.
Approach	An approach is required when your System Administrator configures this for your database.
Letter	In the Letter field, select the thank you letter to use for the gift acknowledgment.
Receipt	In the Receipt field, you can enter a receipt number. Note: This field is for manually entered receipt numbers and does not affect eReceipts. When you use eReceipting, *eTapestry* creates an auto-generated receipt number. This number appears below the Receipt field as a link for you to click to view the eReceipt.
Note	When you have additional information to record about the gift, enter a note. You cannot search or query on the contents of a note.

Add a Pledge Screen

The table below explains the items on the Add a Pledge screen. For information about how to access this screen, refer to Add a pledge on page 83

Screen Item	Description
Final	Check Final if you do not want anyone to edit the gift after you save it. Only your administrator can edit gifts marked "Final."
Date	The Date field defaults to today's date. You can change it if necessary, but a date is required to save the gift.
Pledged Amount	Enter the total amount of the pledge.

Screen Item	Description
	This screen is used for both gifts and pledges. When you enter a pledge amount and leave the Received Amount as $0, additional pledge data entry fields appear. When you save the transaction, eTapestry displays it throughout the database as a pledge. Leave this amount as $0 for a new pledge.
Received Amount	When the donation is a pledge payment for an outstanding pledge, click the paperclip next to the pledge under Pledge Information. The screen updates for a new payment, and you enter the amount in this field to apply it to the pledge. Note: If you add the payment as a gift without applying it to an outstanding pledge, you cannot later convert it to a payment.
Non-Deductible	In the Non-Deductible field, enter the portion of this gift that is not considered tax deductible. For example, if the donor is giving a $100 gift and receiving a $20 benefit from that gift such as a T-shirt, then only $80 is considered tax deductible. In this situation, the non-deductible amount is $20. This is reflected on receipts extended to the donor.
Fund	A fund is required and reflects the purpose for which the donation will be used.
Campaign	A campaign is required if your database administrator configured campaigns as required in your database.
Approach	An approach is required if your database administrator configured approaches as required in your database.
Letter	In the Letter field, select the thank-you letter you want to use for acknowledging this gift.
Receipt	In the Receipt field, you can enter a receipt number for the gift if you wish.
Note	Enter a note if you have any additional information you want to record about the gift. Note content cannot be searched or queried on.

The table below explains the items under Pledge Information on the Add a Gift/Pledge screen.

Screen Item	Description
Default to Copy Pledge Defined Fields on Future Payments	When you create a pledge schedule, select this to copy information from user-defined fields on the pledge to the associated pledge payments.
Process Type	Select whether to process the payments manually or automatically. For information about auto-processing, refer to Auto Processing Rules on page 130.
Standard or Custom	Select whether the donor wants to pay payments with a standard frequency. If the schedule is very similar to a standard one, select the standard options

Screen Item	Description
	and then select Save as Custom Schedule. This creates a custom schedule based on a standard one. Then, you can adjust the schedule as necessary. After you select a custom schedule, you can't mark it as standard.
Frequency	For a standard schedule, select how often the donor makes payments, such as annually, semi-annually, quarterly, bi-monthly, monthly, semi-monthly, bi-weekly, or weekly.
First Installment Date	By default, the first installment date is today. However, you can edit it. If the date is today, the first payment must be processed manually.
Installment Amount	For a standard schedule, by default the installment amount is equal to the pledge amount divided by the frequency. You can change this amount. For a custom schedule, enter an amount for each installment.
Installment Date	When a constituent makes irregular payments, create a custom schedule. Enter an installment date and amount, then click Add.
Remove Installment	To remove an installment from a custom schedule, select the installment and click Remove Installment.
Note	Enter a note if you have any additional information you want to record about the schedule. You cannot query or search on notes.

Add a pledge payment

After you have a pledge on a constituent's journal, you can record payments towards that pledge.

1. From the constituent's account, go to the Journal page.
2. Click Add. The Add Journal Entry screen appears.
3. Select Pledge Payment. The New Payment screen appears.
4. The Date field defaults to today's date. Change it if the date the payment was received is different.
5. The Received Amount field defaults to the total amount of the pledge, or the next installment due if you set up installments. You may change the payment amount if it is different from the default.
6. The Fund, Campaign, and Approach fields default to the selections on the pledge. You cannot change these when you enter a pledge payment.
7. Complete the rest of the screen, and click Save And.

Delete a gift

You can delete a gift after you create it. From the Journal screen on a constituent record, click the gift you want to delete to open it. On the gift record, click Delete.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** eTapestry does not keep a record of deleted gifts. If you export gifts for use in an accounting software such as *QuickBooks*, or if you want to keep an audit trail of all transactions entered in the database, we recommend that you reverse the transaction instead of deleting it. For details, refer to Reversing Finalized Transactions on page 130.

Upgraded Pledges

If a constituent has a pledge and asks to increase the pledge amount or the period of time scheduled to make payment, upgrade the pledge. When you upgrade a pledge, you can select a different fund, campaign, or approach. For example, a donor might pledge $1000 for the Annual Fund, but then upgrade with a pledge of another $500 for the Building Fund.

Note: To upgrade a pledge, your organization must use the SplitTransactions module.

Some pledges cannot be upgraded.

- Pledge/Payment Entries - In order to upgrade a pledge when the original Pledge entry includes a received amount and a pledged amount, first remove the received amount and save the pledge. Add the received amount as a payment on the pledge schedule. Then, you can upgrade the pledge.
- Finalized pledges - To upgrade a finalized pledge, clear the Final checkbox and save the pledge.
- Written off pledged - To upgrade a pledge that has been written off, clear the Write Off checkbox and save the pledge.
- Split Pledges - If a pledge was originally entered as a split transaction, it cannot be upgraded.

Upgrade a pledge

1. From the constituent's journal, select the pledge. The pledge appears.
2. Under Pledge Information, click Upgrade This Pledge.The Upgrade Pledge wizard appears.
3. For Step One, enter Account Information, including the date of the upgrade, the additional amount, and the fund for the added amount.
4. Click Next.
5. For Step 2, enter Pledge Schedule information for the additional amounts.
6. Under Consolidated Pledge Schedule, review the upgraded information.
7. Click Next.

8. For Step Three, complete User-Defined Fields for the upgraded portion of the pledge. To copy this information to the associated payments, select Default to Copy Pledge Defined Fields on Future Payments.
9. Click Next to save and finish. The original pledge and the upgraded pledge appear in the journal list.

Edit or delete an upgraded pledge

For information about how to edit a pledge, refer to Add a gift on page 111. For information about how to delete a pledge, refer to Delete a gift on page 114.

Delete an upgrade split

After you save an upgrade pledge, you can delete upgrade splits.

1. From the constituent's journal, select the pledge. The pledge appears.
2. From the split you want to remove, click Delete Split.

   Note: When there is only one split, click OK confirm you want to delete it. The pledge upgrade no longer appears.
3. Click Save.

Write off an upgraded pledge split

If a constituent cannot fulfill part of the pledge, write off just the original portion of the pledge or an upgraded portion.

1. From the constituent's journal, select the pledge. The pledge appears.
2. From the split you want to write off, select Write Off.
3. The Write Off Date defaults to today, but you can edit it.
4. Click Save. The split no longer appears as an outstanding pledge in the Consolidated Upgrade Information section of the upgraded pledge screen.

Add a payment to an upgraded pledge

From an upgraded pledge, you can add a payment under Consolidated Upgrade Information. You can apply the payment to the whole pledge or a split.

If the payments on the upgrade overlap the payments on the original pledge schedule, when you apply a payment to that pledge during the overlap, the payment will be a new split transaction.

Otherwise, the normal new payment screen appears.

For more information about how to add a payment, refer to Add a pledge payment on page 114.

Query on upgraded pledges

When you query on upgraded pledges, keep the following differences in mind.

- Journal and Commonly Used categories - When you select Pledge from Journal Entry Type, the query includes pledge entries, pledge split entries, and pledge upgrade entries. When you select Upgraded Pledge from the Journal Entry Type, the query includes pledge upgrade entries only.
- Amount category - When you select Individual Transaction Pledged, Individual Transaction Pledge Arrears, Individual Transaction Pledge Balance, Individual Transaction Raised, Individual Transaction Non-Deductable, Individual Transaction Balance, or Individual Transaction Soft Credit, the query includes the designated amount based on the original pledge or any upgrade splits, but not both.

  When you select Individual Transaction Number Splits, the query includes the designated amount based on the original pledge and any upgrade splits (combined).

  When you select Upgraded/Split Transaction Total Pledged, Upgraded/Split Transaction Total Arrears, Upgraded/Split Transaction Total Pledge Balance, Upgraded/Split Transaction Total Raised, Upgraded/Split Transaction Total Non-Deductible, Upgraded/Split Transaction Total Balance, or Upgraded/Split Transaction Total Soft Credit, the query includes the designated amount based on the original pledge and any upgrade splits (combined).

Report on upgraded pledges

When you report on upgraded pledges, only splits that meet the query criteria are included.

When you use a Journal Entry query, you can collapse upgrades/splits. This option combines any splits from an upgraded pledge or splittransaction into one line per pledge or per transaction. Any currently or number fields are totals.

To view specific details about each upgrade split clear the Collapse Upgrades/Splits option. For example, if your report includes Fund, Campaign, or Approach, you should not collapse the splits because these may vary from one split to another. When combined, the fields would appear blank.

Tip: If you select Collapse under the Group Option, all of the transactions in the report are already collapsed into one line for each account or household.

The following report fields from the Journal Fields category show details for the whole upgraded pledge, even if some splits are not included in the query.

- Upgraded/Split Transaction - Consolidated Payment Schedule
- Upgraded/Split Transaction - Next Payment Amount
- Upgraded/SplitTransaction - Next Payment Date
- Upgraded/Split Transaction - Non-Deductible Total
- Upgraded/Split Transaction - Number of Splits
- Upgraded/Split Transaction - Revised Total Pledged
- Upgraded/Split Transaction - Revised Total Raised
- Upgraded/Split Transaction - Total Amount Paid on Pledge
- Upgraded/Split Transaction - Total Arrears
- Upgraded/Split Transaction - Total Arrears Plus Current Payment
- Upgraded/Split Transaction - Total Arrears Plus Current Payment Date
- Upgraded/Split Transaction - Total Number of Payments
- Upgraded/Split Transaction - Total Outstanding Balance
- Upgraded/Split Transaction - Total Overpaid
- Upgraded/Split Transaction - Total Paid
- Upgraded/Split Transaction - Total Pledged
- Upgraded/Split Transaction - Total Raised
- Upgraded/Split Transaction - Total Received
- Upgraded/Split Transaction - Total Variance

All other fields show details for only the splits of the upgraded pledge that are included in the query. Examples include:

- Pledged
- Outstanding Balance
- Fund
- Campaign
- Approach
- Arrears Amount
- Arrears Plus Current Payment
- Arrears Plus Current Payment Date
- First Installment Date
- Frequency
- Installment Amount

- Next Payment Amount
- Next Payment Date

Recurring Gifts

When a constituent commits to giving regularly with no specific end date, use a recurring gift to track the donations. For example, use recurring gifts to track payroll deductions or sustained giver programs. Before you add recurring gifts, create a recurring gift schedule for the constituent. To stop a recurring gift schedule, enter an end date for the schedule. Recurring gifts are similar to pledges, except that the installment amounts and frequency cannot be varied on a custom schedule, and there is no end date specified when the schedule is created.

Add a recurring gift schedule

1. From the Journal page, click **Add**. The Add Journal Entry screen appears.
2. Select Recurring Gift Schedule. The New Recurring Gift Schedule screen appears.
3. Complete the recurring gift schedule details. For more information about the items on this screen, see Add a Recurring Gift Schedule Screen on page 95.
4. In the Scheduling Information section, select whether you want to process transactions manually or automatically when each installment is due. Automatic processing requires that you have a payment processor set up for the database.
5. In the First Installment Date field, enter the date when you want to process the first payment.
6. In the Frequency field, enter the frequency of the recurring payments. The number in parenthesis indicates the number of installments per year, not the total number of installments.
7. In the Note field enter any notes for the schedule.
8. Click Save And to save the recurring gift schedule to the constituent's account.

Add a recurring gift

If a constituent has a recurring gift schedule, you can add a recurring gift. For more information, refer to Add a recurring gift schedule on page 119.

If your organization uses recurring gifts to track payroll deductions, consider adding a recurring gift to a group of recurring gift schedules that have the same dates. To do this use the Scheduled Recurring Gifts Mass Update. For more information refer to Import and Mass Update Overview.

1. From a constituent record, click Journal.
2. Click **Add**. The Add Journal Entry screen appears.
3. Select Recurring Gift. The New Recurring Gift screen appears.

4. If the account has multiple recurring gifts schedules, select which to use.
5. Complete the gift details. For more information about the items on this screen, see Add a Gift Screen on page 111.

   Tip: Based on the schedule, the Received Amount, Non-Deductible Amount, Fund, Campaign, Approach, Letter, Tribute, Soft Credit, Defined Fields, and Recognition Information fields are automatically completed. The received amount is based on the installment amount. Edit these fields if necessary.
6. Click Save And to save the gift to the constituent's account.

Soft Credits

To give a constituent credit for a donation another constituent makes, add a soft credit. Soft credits help you track who gives to your organization and develop relationships with prospective donors. For example, use soft credits to credit a donor when their company matches gifts, to credit a solicitor, or to credit a participant in a sponsored event.

To analyze the soft credits in your database, run a soft credit report or a custom report. For information about reporting on soft credits, refer to Soft Credit Reports on page 242. To determine whether users can track soft credits, select to enable or disable soft credits when you edit your organization preferences. For details, refer to Organation Preferences.

Add a linked soft credit

For information on how to create a linked soft credit transaction for a constituent account, see Tribute, Soft Credit, Matching Relationship.

Add an unlinked soft credit to an account

1. From a constituent record, click Journal.
2. Click Add. The Add Journal Entry screen appears.
3. Select Soft Credit. The New Soft Credit screen appears.
4. Enter the date.
5. Enter the amount of the credit.
6. Complete the soft credit details.
7. Click Save. The soft credit appears on the constituent's journal.

Delete a soft credit

From a constituent record who received soft credit, click Journal, select the soft credit entry, and click Delete.

Or, from the constituent record who made the gift, click Journal, select the gift entry, click Tribute, Soft Credit, and Matching Gift Relationship, click X next to the soft credit, and confirm you want to delete the soft credit.

Note: If you delete the original transaction, the soft credit is also deleted.

Disbursements

Disbursements are payments your organization makes for expenditures such as brokerage fees, event and mailing expenses, and payments made back to constituents. You can use disbursements to track differences in stock prices between donation and sale. If you return unused grant funds, use disbursements to track the money.

When you enter a disbursement, the negative amount appears on your received totals, giving you a more accurate picture of your organization's revenue.

Add a disbursement

1. From a constituent record, click Journal.
2. Click **Add**. The Add Journal Entry screen appears.
3. Select Disbursement. The New Disbursement screen appears.

   Tip: You can also add a disbursement from the Quick Add Menu on the Find Account page.
4. Under Basic Information, complete the disbursement details.

   In the Disbursed Amount field, enter the amount that will be paid out or returned. Parenthesis appear around the total to indicate that the amount is negative and will count against the received total.
5. Click Save And to save the disbursement to the constituent's account.
6. If your organization uses the Attachments module, you can edit the disbursement to add an attachment.

Edit a disbursement

From a constituent record, click Journal, select the disbursement from the entry list, enter your changes, and click Save.

Tip: If your organization uses the Attachments module, you add an attachment when you edit t`he disbursement.

Delete a disbursement

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** When you delete a disbursement, the disbursement record is erased. If your organization exports disbursements for use in an accounting software, such as *Quickbooks*, or if you want to easily audit all transactions entered in the database, reverse the transaction instead of deleting it. For instructions, refer to Reversing Finalized Transactions on page 130.

1. From a constituent record, click Journal.
2. Select the disbursement from the entry list. The disbursement appears.
3. Click Delete.
4. Click OK to confirm you want to delete the disbursement.

Notes

Journal notes provide an area for you to record details specific to an account that fall outside other types of journal items. For example, you can store an article about a constituent or track a major life event in a note.

Add a Note

1. From a constituent record, click Journal.
2. Click Add. The Add Journal Entry screen appears.
3. Select Note. The New Note screen appears.

   Tip: You can also access this screen from the quick add menu on the search results screen.
4. Select Final if you only want your database administrator to have access to edit or delete the note.
5. In the Date field, enter the date for the note. This is normally the date you enter the note, which defaults to the field.
6. In the Note field, record the details that you want to store in the note.
7. If your database has any note user-defined fields, they appear below the Note field. Complete any relevant information. For information about user-defined fields, refer to User Defined Fields.
8. Click Save And to save the note to the constituent's account.

   Note: To delete a note after you create it, click the note to delete on the Journal screen. After it opens, click Delete.

Edit a Note

After you add a note, you can edit the content anytime. If you use the attachments module, you can also add an attachment to a note after you create it. To edit a note, from the Journal screen on a constituent record, click the note you want to edit.

Set Note Defaults

To speed up data entry when entering a group of similar notes, you can set note defaults. After you complete the fields that the notes have in common, click Set as Note Defaultin the Tasks menu. The note defaults persist for the duration of your eTapestry session. When you log out, note defaults are reset.

Add Notes with Mass Update

For information about how to add a group of notes in a mass update, refer to Import Types.

Move note information to other accounts

Under Tasks, select Move to Another Account. Search for and select an account to move the note information.

Contacts

Contacts provide a way to capture interactions with your constituents and provide a history of your organization's relationship with a constituent. Common contacts with constituents include phone calls, emails, letters, event attendance, and volunteer participation.

Add a Contact

1. From a constituent record, click Journal.
2. Click Add. The Add Journal Entry screen appears.
3. Select Contact. The New Contact screen appears.

   Tip: You can also access this screen from the quick add menu on the search results screen.
4. Select Final if you only want your database administrator to have access to edit or delete the contact.
5. In the Date field, enter the date the contact took place.

6. In the Subject field, enter the subject of the contact. If the contact is an email or letter, you may want to enter the subject of the communication or a summary of the reason for the contact.
7. In the Method field, enter the communication method you used to contact the constituent. Your administrator can configure contact methods available on this form.
8. In the Note field you can enter any additional information about the contact. If the contact is a letter or email, you may want to include the entire text here.
9. If your database has any contact user-defined fields, they appear below the Note field. Complete any relevant information. For information about user-defined fields, see User Defined Fields.
10. Click Save And to save the note to the constituent's account.

Edit a Contact

After you add a contact, you can edit it anytime. If you use the attachments module, you can also add an attachment to a contact after you create it. To edit a contact, from the Journal screen on a constituent record, click the contact you want to edit.

Set Contact Defaults

To speed up data entry when entering a group of similar contacts, you can set contact defaults. After you complete the fields that the contacts have in common, click Set as Contact Defaultin the Tasks menu. The contact defaults persist for the duration of your eTapestry session. When you log out, contact defaults are reset.

Move contact information to other accounts

Under Tasks, select Move to Another Account. Search for and select an account to move the contact information.

Calendar Items

Calendar items allow you to schedule tasks, plan meetings, and remind yourself of upcoming events. Some common uses for calendar items include:

- Creating a to-do list of tasks you want to accomplish
- Scheduling meetings and emailing notifications of the meeting to the attendees
- Setting recurring reminders to remind users to perform a task on a regular basis

Calendar items can appear on the Home page for all users to view. For meetings, users who are attendees can review the item and set the status to pending or accepted. For action items, users can set the status to "Complete" after the task is done.

Calendar items can include an invitation that provide different options for editing, querying, and reporting.

You can only create calendar items on user accounts. You can list constituents and tributes as attendees on a calendar item, and this causes an invitation version of the calendar item to appear on the constituent or tribute account's journal. Additionally, users can be listed as attendees, causing the invitation version of a calendar item to appear on the user account's journal.

Because a calendar item can only be created on a user account, when you select Add Calendar Item on a constituent, tribute, or other user's account, eTapestry displays a New Calendar Item screen on your user account, with the constituent, tribute, or other user account set as an attendee.

When you save that calendar item, there is a calendar item entry on your user account's journal and an invitation version of the calendar item entry on the constituent, tribute, or other user's journal.

Add a Calendar Item

1. From Management, click My User. You user account appears.
2. Click Journal. The Journal page appears.
3. Click Add. The Add Journal Entry screen appears.
4. Select Calendar Item. The Calendar Item page appears.
5. In the Name Your Calendar Item section, enter the general information for your item.
    - In the Title field, enter a descriptive name for the item. This title appears on the Home page and in the journal description.
    - Select whether you want the item to be public or private. Public items display on the Home page for all users to view in your organization. Private items are restricted to you.
    - Select a priority level. Different priority levels display with different colors on your calendar.
    - To include the item on your Home dashboard, select Display on Home.
    - In the Destination field, select if you want the item to appear just on your calendar or on the organization's calendar. If you select your organization's calendar, all users in your organization can view the item.
6. Under Set Date and Time, enter the date and time information for your item.

7. Under Recurring Item, select if this is a recurring meeting or a one-time appointment. If you select Yes, indicate the recurrence and the end date.

   Note: When you create a recurring calendar item, a partial list of the recurring items appears to show the first five recurring items.

8. Under Invite Accounts, you can add constituents, tributes, or users to the meeting. You can add attendees in one of three ways.
   - Click Add Attendees. The Find Account screen appears for you to search and select the attendee accounts.
   - Add the calendar item from the journal of the attendee's account. The account automatically lists under Name on the New Calendar Item page. If you add the calendar item from another account's journal, you cannot remove them as an attendee until you save the item.
   - You can add an entire query of accounts as attendees to your calendar item. Select a Category and Query and click Invite Accounts From Query. Each account in your query appears in your attendee list. To remove accounts, check the box to the left of the account you want to remove and click Remove Selected.

   To send an email to the attendees, check Send email to attendees. Only attendees with a valid email address receive the invitation.
9. Under Create on Behalf Of, you can select a different user in your database on behalf of whom you want to create this calendar item. When you select someone else to create the item on behalf of, the item appears on their calendar and does not appear in yours. You must first have rights to create their items. When you do, select the user from the box on the left, and click Add to designate he or she as the creator of the calendar item. To send an email to the user, select Send email to user.
10. In Notes, you can add information to the calendar item. When you send email to attendees, the email includes the information you enter in this box.
11. If you have user-defined fields dedicated to calendar items, you can enter information on those fields under System Defined Fields. A common user-defined field for calendar items is Calendar Item Type with options that include Event, Reminder, and Meeting.
12. To create the calendar item, click Save And.

Edit a Calendar Item

After you add a calendar item, you can edit it. To edit a calendar item, from the Journal screen on a constituent record, click the calendar item you want to edit. For more information about the items on this screen, refer to Add a Calendar Item on page 125.

Delete a Calendar Item

You can delete a calendar item after you create it. From the Journal screen on a constituent record, click the calendar item you want to delete to open it. On the calendar item record, click

Delete.

Note: When you delete a calendar item, any invitations associated with the calendar item are deleted. When you delete any occurrence of a recurring calendar item, all other occurrences are also deleted.

Delete an Invitation

You can only remove invitations by removing the attendee from the original calendar item. From the calendar item page, under Invite Accounts, select the attendee name you want to remove and click Remove Selected. To save the change and delete the invitation, click Save And .

Export a Calendar Item as iCal

You can export eTapestry calendar items in order to upload them to your *Outlook* calendar or *iCalendar* for Mac users.

Export a Single Calendar Item to iCal

To export a single calendar item, under Tasks, you can click Export as iCal on a calendar item. When you are prompted to open the item or save it, select to open the file. An *Outlook* calendar item appears. Complete any information you want you add to your calendar item and click Save. The calendar item is saved to your *Outlook* calendar.

Tip: You can also export a single calendar item by clicking Save And with Export as iCal selected in the drop down menu.

Export Multiple Calendar Items to iCal

You can export multiple calendar items in an iCal file. To do this, create a query that contains all of the calendar items you want to export. Next, open a calendar item. Under Export, click Export Multiple Calendar Items to iCal to begin the export.

Split Transactions

When you receive a gift or pledge to be distributed across more than one purpose, you create a split transaction. This allows you to allocate parts to different funds, tributes, campaigns, or approaches.

Add a Split Transaction

1. Click Add. The Add Journal Entry screen appears.
2. Select Split Transaction. The New Split Transaction screen appears.

3. Enter the details for the transaction totals. You can only enter one date for segment transactions. If you edit one segment at a later time, the segment date remains the same for it and all other transactions.
4. In the Number of Segments field, enter the total number of segments for this transaction. You can enter up to 60 segments for a transaction.
5. To indicate that all segments of the transaction are of the same gift type (such as cash or check), select One Gift Type. You cannot change this setting once you add segments. If you select this option, the gift type you use for the first segment repeats for all remaining segments.
6. Click Add Segments. The segments for your transaction appear below.
7. Complete each segment as you would any individual transaction. The totals from the segments must equal the overall totals you indicated for the transaction. The available balance at the top of each segment indicates how much of the overall total remains to be assigned to a segment.
8. To save the transaction and navigate to the option in the drop down menu, click Save And.

Add a Segment to an Existing Split Transaction

To add segments to an existing transaction, from the segment transaction record adjust the total in the Number of Splits field. Additional segments appear at the bottom of the screen, where you complete details for the new segments.

Note: When you add segments to a transaction, you must adjust your received, pledged, and non-deductible amounts on the overall transaction to reflect the updated totals.

Delete a Single Segment

To delete a segment from a transaction without deleting the whole transaction, click Delete Split on the segment you want to remove. After the confirmation message appears, you must click Save to complete the deletion.

Note: When you delete segments from a transaction, you must adjust your received, pledged, and non-deductible amounts on the remaining segments to match the totals for the overall transaction.

United Kingdom Declarations

As a requirement of Gift Aid in the United Kingdom, you must track declarations your donors submit. You only need one declaration for each donor, and all donations received after the declaration are eligible for Gift Aid. You record written or verbal declarations in eTapestry on the constituent journal.

Add a Declaration

1. From a constituent record, click Journal.
2. Click AddThe Add Journal Entry screen appears.
3. Select Declaration. The New Declaration screen appears.

   Note: You can also access this screen from the quick add menu on the search results screen.
4. In the Date field, enter the date you received the declaration.
5. Select Verbal or Written depending on how you received the declaration from the donor. Gift Aid requires you to track this distinction.
6. The Status field shows the current status of the declaration:
   - Confirmed: The declaration has a confirmation date
   - Unconfirmed: The declaration does not have a confirmation date
   - Invalid: The confirmation date is not valid or is missing for a written declaration
7. In the Confirmation Date field, enter the date on the written declaration. For verbal declarations, enter the date in which you sent a written confirmation to the donor after their declaration. This field is required to save a written declaration, but can be left blank for a verbal declaration. We recommend that you enter this date once you sent written confirmation for a verbal declaration.
8. Enter the date range covered by the declaration. You can backdate the declaration, and you can leave the end date empty to indicate an indefinite declaration end.
9. The name and address fields are automatically filled in based on the account information for which you are adding the declaration. You can edit this information if necessary.
10. In the Note field you can enter any additional information about this declaration.
11. To save the declaration to the constituent's account, click Save And.

Edit a Declaration

After you add a declaration, you can edit information as necessary. From the Journal screen on a constituent record, click the declaration you want to edit. If you use the attachments module, you can also add an attachment to a declaration after you create it, such as a copy of the written declaration or of the confirmation sent to the donor. If you enter a verbal declaration and you leave the confirmation date blank, edit the declaration when you send a written confirmation to the donor. The date you send the written confirmation is typically the date you enter as the confirmation date.

Note: To delete a declaration, click the declaration from the Journal screen to open it and then click Delete.

Reversing Finalized Transactions

When you reverse a transaction, eTapestry creates a separate transaction that cancels out any amounts listed on the original transaction. Only transactions marked "Final" in the transaction record can be reversed.

Some organizations finalize and reverse transactions to keep clear audit trails of transaction entries.

Other organizations who export financial data from eTapestry for use in other accounting systems can choose to finalize all transactions that they have already exported and uploaded into their accounting system. Then, they use reversals to cancel out any transactions that they later want to remove from both systems. The next time they run their accounting export, the reversing transactions can be exported and uploaded into their accounting system. This prevents their accounting system from becoming out of sync with the eTapestry data, which could occur if users were editing or deleting eTapestry transactions and not remembering to edit or delete those transactions in the accounting system as well.

Users with full administrative rights can Reverse finalized transactions. At the bottom of a finalized transaction screen, a Reverse button appears below the Save options, along with a note box. Enter notes regarding why the transaction is being reversed in the Note Box, then click the Reverse button to reverse the transaction.

This creates a Reversing transaction on the account's journal.

The reversing transaction will show the same amounts as the original transaction but listed in parentheses, indicating that they are negative amounts (if the reversed item was a disbursement, then the reversing transaction will show positive amounts to cancel out the disbursement's negative amounts). If you open the reversing transaction, you'll see the reversal notes listed in the Note field and a link to take you to the Offsetting Transaction (i.e. the original transaction).

Tip: When you use EFT to process direct debits with the BBMS processor, eTapestry automatically generates a reversal for transactions that do not process successfully within seven days.

Auto Processing Rules

You can auto process recurring gifts and pledge payments. It's important that your organization's time zone and auto process report email are up to date. You set these preferences in the Organization Preferences page. For more information, refer to Organization Preferences.

Note: Auto processing is completed after midnight, based on your organization's time zone.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** If your Database Language Locale is en_GB, eTapestry does not automatically mark any auto processed transactions as final so that any gift aid eligible gifts will not be missed.

Several rules apply to auto processing, depending on the type of payment.

New Recurring Gifts Schedules

When you create a recurring gift schedule, under Schedule Information, select Auto for the Process Type.

- The First Installment Date is the first date the installment amount is donated. This date cannot be in the past.
- If you set the first installment date to today, you must confirm that you want the first auto processing to happen today.

Existing Recurring Gift Schedules

- After there is at least one recurring gift, you cannot update the Process Type, First Installment Date, or Frequency fields.
- Stop dates for a recurring gift schedule cannot be in the past.
- You cannot edit or delete a stop date in the past.
- Gift type cannot be updated, although you can update information about the gift type at any time. For example, you can enter a new credit card or debit card when the original one expires.

Note: For more information about how to create, stop, or restart a recurring gift schedule, refer to Recurring Gifts on page 119.

Pledges

When you create a pledge, under Pledge Information, select Auto for the Process Type.

- You can switch the process type between manual and auto at any time.

  Note: If you change the process type from Auto to Manual, the existing auto process credit/debit card or EFT information is erased. If you change the process type from Manual to Auto, re-enter the credit/debit card or EFT information.
- If the first installment date is today and the process type is automatic, you must still process the payment manually.
- If you select automatic process type, you cannot change the gift type.

- Pledges set to process automatically with a standard schedule are processed until the entire amount of the pledge is fulfilled. This process continues even if the donor is behind or ahead with their payments. In this case, the processing might continue past the original planned date until the full amount is fulfilled.
- Pledges set to process automatically with a custom schedule are processed according to the custom schedule you create. The process ends when it reaches the end date in the custom schedule, even if the full amount has not been fulfilled. If the pledge is fulfilled early, the schedule stops processing early.
- If you manually add a payment to schedule for an auto-processing pledge, the credit card or debit card or EFT information stored on the pledge schedule is not automatically included in a manual payment. To use the same credit card or debit card or EFT setup to process a manual payment, re-enter those payment details.

Order Item, Shipping, Tax

If your organization uses the eStore (Cart) module, you can create the following journal items using the Online Cart.

- Order Items - These are used to record the portion of a cart order that is associated with the purchase of a specific Item
- Order Shipping - These splits are used to record the shipping fee associated with a cart order.
- Order Tax - Use these to record the tax associated with a cart order.

Although you can edit an Order Item, Order Shipping or Order Tax entry, you cannot change any fields related to the amount of the overall purchase. This ensures that record of the purchase in eTapestry matches the amount charged to the credit/debit card by the Cart at the time of the purchase.

You cannot delete an Order Item, Order Shipping or Order Tax split from an order. However, you can delete the entire order. To do so, from the journal, select the order. The Order appears. Click Delete and then click OK to confirm.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** When you delete an order, the order record is erased. If your organization exports Order transactions for use in an accounting software, such as *Quickbooks*, or if you want to easily audit all transactions entered in the database, we recommend you reverse the transaction instead of deleting it.

Processing Gifts Manually in the Database

After you set up a processor account, you can use to process gifts.

Tip: Looking to speed things up? Consider auto processing for recurring gifts and pledges made by credit/debit card or electronic funds transfer (EFT). For details, refer to Auto Processing Rules on page 130.

1. First add a gift and enter basic details. For information about how to enter a gift, see Add a gift on page 111.
2. Under Gift Type, select Credit/Debit Card, enter the full credit/debit card number, expiration date, cardholder name, and credit/debit card type. Do not enter an authorization code.

   If you use a Sage Payment Solutions processor, you can also process gifts as Electronic Funds Transfers, or EFT. To do so, under Gift Type, select Electronic Funds Transfer. In the Account Type field, select whether the donor is using a checking or savings account. Then enter the routing number, account number, and other details. Do not enter an authorization code.

   If you have multiple processors, select which one to use for the gift.
3. Enter any additional information about the gift.
4. Click Save.

   Note: To enter a credit/debit card and EFT transaction without processing it, set Transaction Processor to "None Selected" and only enter the last 4 digits of the account number or “XXXX” to not be prompted to process when you save the transaction.
5. Confirm you want to process this gift with the credit/debit card or EFT details provided.
6. When a transaction processes successfully, the gift appears in the list on the constituent's journal. Under Gift Type, a "Card has been processed via eTapestry Virtual Terminal" message appears. For security proposes, only the last four digits of the credit/debit card number are visible. Your processing company provides an unique authorization code which can be used to compare with your processing company's data.

   If a transaction process fails, an error message appear to individuate why the attempt failed. After you read the message, click OK to return to the transaction screen.

   - If the message indicates a problem with the credit/debit card, verify that the gift type information is entered correctly before you attempt to process the transaction again.

     If the gift type information was entered correctly, contact the cardholder to verify the information or to ask if the card has been reported lost or stolen.
   - If the error message indicates a problem with your processor, such as an invalid processor code or password, verify that you have entered the processor information correctly.

     If the processor type information was entered correctly, contact your processing company to verify whether they are experiencing technical difficulties.

Working with Multiple Processors

Organizations with multiple transaction processors select the processor to use for each credit/debit card or EFT transactions. Input your gift information and, under Gift Type, select your preferred processor for the transaction.

Refunding a Processed Transaction

When necessary, you can refund a transaction that has been processed.

1. To ensure your accounting totals will be correct after the refund, reverse the transaction. This creates a separate, negative transaction on the account for the full amount of the original donation. For more information, refer to Reversing Finalized Transactions on page 130.
2. Next, access your processing company's Virtual Terminal and refund the money to the donor's card.
   - For a Sage Payment Solutions processor, log in to the Sage Virtual Terminal.For more information about how to locate and refund the transaction after you log in, contact Sage Customer Service.
   - For a IATS processor, log in to the IATS Virtual Terminal. The Client Code and Password are the same as the Online Agent Key and Online Agent Password you used when you set up the processor in eTapestry. For more information about how to locate and refund the transaction after you log in, contact IATS Customer Support.

Gift Aid

Organizations in the United Kingdom can track gift aid amounts for donors who've made declarations to the organization. This allows you to maximize donor giving by reclaiming the basic tax rate on those donors' gifts.

Note: Your user locale must be English/United Kingdom. If your locale is correct your date format is dd/mm/yyyy and options for declarations and gift aid appear in the journal area.

Based on the UK basic tax rate at the time of the donation, eTapestry applies gift aid rates to each transaction. Gift Aid is calculated using the formula below:

Gift Aid = Received Amount x (Gift Aid Rate / (100 – Gift Aid Rate))

Date	Gift Aid Rate
Prior to April 6, 2008	22%

Date	Gift Aid Rate
Between April 6, 2008 and April 5, 2011	20% + extra 2% for Transitional Relief
After April 5, 2011	20%

Enter a gift aid declaration

1. From a constituent record, click Journal.
2. From the Add... menu, select Gift Aid Declaration. The New Gift Aid Declaration page appears.
3. Enter details for the new gift aid declaration.
   - Date - This is the date you received the declaration. By default, today's date appears.
   - Type - Select whether the declaration was made verbally or in writing.
   - Status - When a declaration has a confirmation date, it is confirmed. When the date is missing, it is unconfirmed. When the date is not valid or is a written declaration has a missing date, it is invalid.
   - Confirmation Date - For a written declaration, this is the date from the written form. Fora verbal declaration, this is the date when you send a letter to the donor confirming the declaration.
   - This Declaration is in Effect From/To - Enter a range for the declaration. The From date can occur in the past. To extend the declaration indefinitely, do not enter a To date.
   - Name - This is the constituent who makes the declaration.
   - Address Lines, City, County, Postal Code, and Country- These are the persona address fields for a constituent in the United Kingdom.

     Tip: The address fields that appear on this page are determined by the country selection on the constituent's persona. For example, when a constituent's persona includes a French address, the fields that appear are Address Lines, Postal Code, Town, and Region. For more information about address fields for specific countries, refer to Addresses on page 49.
   - Note - Enter any extra notes regarding the declaration.
4. Click Save. The declaration appears in the constituent's journal and Gift Aid options appear on the constituent's transaction entries.
5. If your organizations has the Attachments module and the declaration was made in writing, consider editing the declaration to attach a copy of the declaration.
6. Next, you need to mark the constituent's transactions as eligible for gift aid.
7. From a constituent record, click Journal.

8. From the Add... menu, select Gift Aid Declaration. The New Gift Aid Declaration page appears.
9. Enter details for the new gift aid declaration.
   - Date - This is the date you received the declaration. By default, today's date appears.
   - Type - Select whether the declaration was made verbally or in writing.
   - Status - When a declaration has a confirmation date, it is confirmed. When the date is missing, it is unconfirmed. When the date is not valid or is a written declaration has a missing date, it is invalid.
   - Confirmation Date - For a written declaration, this is the date from the written form. Fora verbal declaration, this is the date when you send a letter to the donor confirming the declaration.
   - This Declaration is in Effect From/To - Enter a range for the declaration. The From date can occur in the past. To extend the declaration indefinitely, do not enter a To date.
   - Name - This is the constituent who makes the declaration.
   - Address Lines, City, County, Postal Code, and Country- These are the persona address fields for a constituent in the United Kingdom.

     Tip: The address fields that appear on this page are determined by the country selection on the constituent's persona. For example, when a constituent's persona includes a French address, the fields that appear are Address Lines, Postal Code, Town, and Region. For more information about address fields for specific countries, refer to Addresses on page 49.
   - Note - Enter any extra notes regarding the declaration.
10. Click Save. The declaration appears in the constituent's journal and Gift Aid options appear on the constituent's transaction entries.
11. If your organizations has the Attachments module and the declaration was made in writing, consider editing the declaration to attach a copy of the declaration.
12. Next, you need to mark the constituent's transactions as eligible for gift aid.

Note: Declarations can also be added to accounts by importing them. For more information, refer to Import and Mass Update Overview.

Edit a gift aid declaration

From a constituent record, click Journal, select the declaration, enter your changes, and click Save.

Mark a constituent's donation eligible for gift aid

After a constituent has a current declaration, mark the donor's gifts as eligible for gift aid. From each transaction, under Gift Aid, select Gift Aid Eligible. When you enter a donation from the constituent's journal or from the Quick Add column on the Find an Account page, Gift Aid Eligible is automatically selected.

If a donation is not eligible for gift aid, clear the Gift Aid Eligible option.

Note: If you enter gifts from Quick Gift Entry, select Gift Aid Eligible.

When you import donations using the Account Information with Single Gift Import and the Single Gift by Account Number Import, you can also mark the donations as eligible for gift aid. To do so, include a column in the import file for Gift Aid Eligible. For each eligible gift enter Yes, Y, or True. Then map the column to the Gift Aid Eligible field during the import process.

Apply gift aid using mass update

To apply gift aid to multiple eligible transactions, run the Gift Aid Mass Update.

1. From Mass Update, select Gift Aid. The Gift Aid page appears.
2. Select the Journal Entry query that includes the transactions for which you want to apply gift aid.
3. In the Gift Aid Claimed Date field, enter when the gift aid is applied.
4. Click Next. Preview the transactions and date information.
5. Click Next. To confirm you want to run the mass update, click OK. When the update is complete, a summary message appears.

Note: While a mass update runs, other users cannot open the records being updated. As such, we recommend you run mass updates at the end of the day. You can only run one mass update at a time. If you log out, the mass update will continue.

Delete gift aid from a transaction

To remove gift aid that has been applied to a transaction, from the transaction screen click Remove Gift Aid. All gift aid information is delete from the transaction and the Gift Aid Eligible option is cleared.

Query of gift aid

The following query criteria are often useful for gift aid information.

- Gift Aid Declaration Type - Includes declarations entries based on type: Written or Verbal. This field is located under Journal.
- Gift Aid Declaration Status - Includes declaration entries based on status: Confirmed or Unconfirmed. This field is located under Journal.
- Gift Aid Declaration Effective Date - Includes declarations in effect from/to date for the specified date range. This field is located under Dates.
- Transaction with Valid Gift Aid Declaration - Includes transactions based whether a valid declaration existing on the constituent account for the specified date range. This field is located under Journal.
- Transaction Gift Aid Ready - Includes transactions based on whether Gift Aid Eligible is selected. This field is located under Journal.
- Transaction Gift Aid Applied - Includes transactions based on whether a gift aid amount is listed. This field is located under Journal.
- Transaction Gift Aid Claimed Date - Includes transactions based on whether the Gift Aid Claimed Date is within the specified date range. This field is located under Journal.

Report on gift aid

To view declaration and gift aid information, create a report.

- Gift Aid Declaration Type - Shows whether the type is written or verbal.
- Gift Aid Declaration Confirmation Date - Shows the confirmation date.
- Gift Aid Declaration Start Date - Shows the In Effect From date.
- Gift Aid Declaration End Date - Shows the In Effect To date.
- Gift Aid Declaration Name - Shows the constituent name.
- Gift Aid Declaration Address, City, State, Postal Code, and Country- Shows the constituent's primary address.
- Gift Aid Declaration Note - Shows any additional notes.

Note: The Declaration fields include information from the declaration entry. For transactions with applied gift aid, they also include information from the associated declaration.

- Gift Aid Ready - Shows whether a transaction is marked Gift Aid Eligible. If a transaction currently has gift aid applied to it, this is No.
- Gift Aid Applied - Shows whether a transaction has a Gift Aid Amount associated with it.
- Gift Aid Amount - For transactions with gift aid applied, this shows the Gift Aid Amount. Otherwise, the amount is zero.

- Gift Aid Claimed Date - For transactions with gift aid applied, this shows the Gift Aid Claimed Date.
- Gift Aid Transitional Relief - For transactions between 6/4/2008 and 5/4/2011 with gift aid applied, this shows the Transitional Relief amount. Otherwise this is zero.

Communications

From Communications, you create and send regular mail and email to constituents and you also track these interactions. To begin, you create communication templates to create letters, receipts, emails, envelopes, and mailing labels for different groups of constituents. To organize templates, you create communication categories.

Outlook Integration

The eTapestry integration with Microsoft *Outlook* allows you to automatically add email from *Outlook* to the journal of your constituent accounts. Before you can take advantage of this integration, you must install a small component on your computer.

If you use *Gmail* for your email communications, but have *Outlook* installed on your computer, you can take advantage of the integration and still use your *Gmail* account to send and receive email through *Outlook*. For instructions on how to synchronize *Outlook* with your *Gmail* account, see Google's Gmail Help.

Note: Only a Windows user with local administrative privileges can install the *Outlook* integration.

Install Microsoft Outlook Integration

Note: Only a Windows user with local administrative privileges can install the *Microsoft Outlook* integration.

1. Access the appropriate version of the *Outlook* Integration.
   - *Outlook* 2010 or higher (32 bit OS)
   - *Outlook* 2010 or higher (64 bit OS)
   - Older versions of *Outlook*

   The file download window appears. We suggest you verify the version of your operating system to determine which installer to download.
2. Click Save File.
3. Double click on the file. The Open File window appears.
4. Click Run. The installer appears.
5. Click Next. The Select Installation Folder appears.
6. To install the integration to the recommended folder, click Next. You can also browse to another folder and then click Next. The Confirm Installation screen appears.
7. Click Next. The Installation Complete screen appears.
8. To exit, click Close.

Note: The first time you use the integration from *Outlook*, you will be prompted to enter credentials. You can view and edit these credentials on the **Security Preferences** tile from **My User**, **Preferences**.

Add Email from Outlook to eTapestry

When you send email from *Outlook*, you can automatically add the email to the constituent's record in your eTapestry database.

- To search for an eTapestry account to include as an email recipient as you compose your email, click Search eTapestry.
- To add an email to the database as you send it, click Send & Add to eTapestry to send the email.
- To add an email to the database after you have sent it, on the email, click Add to eTapestry.

Communication Templates

Any time you create a communication, you begin with a template. eTapestry provides two types of pre-defined templates that you can edit to better suit your needs: document or classic email templates and drag-n-drop email templates. You may also begin with a blank template and create your own design.

Note: The drag-n-drop email template is only available through the Advanced Mass Email module.

Document or Classic Email Templates

From Communications, click Manage Communications. The Communication Categories page appears. To add a template to an existing category, click the category name. To create a new category, under **Tasks**, click New Category.

When you are on a category page, under Tasks, click New Document or Classic Email Template. The Communication Template Wizard appears.

Note: If your internet browser includes an add-on for Skype or Lync, the add-on may convert all phone numbers in your template into clickable links which can open Skype or Lync. We recommend you disable these types of add-ons. For details, refer to your internet browser's help documentation.

Step 1: Settings

On Step 1, enter the basic information for your template.

1. In the Name field, enter a name for your template.
2. In the Description field, you can enter a description to help you identify the template.
3. To prevent other users in your organization from editing the template, select Read Only.
4. To make this template a favorite, select Favorite Communication Template. Favorite templates appear in the Favorites tile on your Home dashboard.
5. In the Subject field, if you intend to send this communication as an email, enter a subject for the email.
6. To include a link for recipients to forward the message to a friend, select Include "Forward to a Friend" Link within. Select whether you want this link on the header or footer of the email.
7. To include a link for recipients to open the message in a web browser, select Include "View as a Web Page" Link.
8. To include links to share the communication in social media, select Include Sharing Links.
9. If you intend to print the document or create a PDF, select the page size, orientation, and margins.
10. Click Next to select a layout for your template.

Step 2: Layouts

On Step 2, select the category of document you want to create. Templates are provided for printed documents, envelopes, event invitations, and newsletters. Once you select a category, click on a template to select it, or choose a blank template to begin from scratch.

If you select a pre-defined template, you can still change the colors, layout, fonts, and images. For more information, see Document or Classic Email Layout on page 143.

Step 3: Edit

On Step 3, you can edit the appearance of the communication template.

Note: To preview the text version of the template, click Text Version.

1. To edit an element, click on element's block. The Edit Contents screen appears. For more information on how to edit elements, see Guided Editor Mode on page 147.

   Tip: On the Edit Contents screen, you can use the TinyMCE HTML editor to create, edit, and style content. For more information, see TinyMCE HTML Editor on page 195.

2. To add a new element, select the block you want to add in the Add Block field.

3. To rearrange the elements of the design, hover over the block and click the four-way arrow to drag and drop.
4. To delete an element in the template, hover over it and click X.

Step 4: Save

On Step 4, select an option from the Save and drop down menu and click Next to save the template.

Document or Classic Email Layout

For your convenience, eTapestry provides several layouts for you to select from as you create documents or classic emails. These layouts make it easy to create a professional, attractive email or document by simply customizing the images, text, and links already inserted in the layout.

Note: Depending on your internet browser, some differences may occur between the preview of your communication and its final appearance. We recommend that you test to ensure your communication renders as you have designed it and make any necessary adjustments.

There are five categories of layouts.

Newsletters

The Newsletters category contains pre-made layouts whose formatting can easily be used to set up professional and eye-catching newsletters. These layouts are characterized by containing multiple images, links, columns, and sections for articles.

Note: Email is the primary use for this template. When you attempt to generate Newsletter templates as *Word* documents, you may receive an error message in *Word*, and the template may not open correctly or look exactly like it does in the HTML editor or in emails. If you must generate your Newsletter as a document, we recommend generating a .pdf file.

Events

The Events category contains fifteen pre-made layouts formatted for use as invitations and sign in cards. These layouts are characterized by their brief text and spaces for event details.

Documents

The Documents category contains thirteen pre-made layouts formatted for use as letters and receipts. These layouts are characterized by having standard letter styles and few images, though more images can be inserted in the layout after it has been selected for use. Several of

these layouts contain pre-selected merge fields and widgets, which can also be edited once the layout has been selected.

Note: These layouts automatically select the page size 8.5 by 11 inches. To print them on paper with different dimensions, be sure to set the dimensions using the Document Options in Step 1 of the communication template wizard.

eCommerce Confirmation

The eCommerce Confirmation layout can be used as a starting point for creating a custom eCommerce confirmation email. It already contains the eCommerce Details widget and some text geared toward thanking a constituent for using your online form.

Envelopes

The Envelopes category contains pre-made layouts formatted for use when creating envelopes. These layouts correspond to thirteen different envelope sizes (#10, #11, #12, #14, #16, #05, #06, #07, #09, Monarch, Check, A2 Invitation, and A4 Invitation).

The envelope layouts are pre-populated with the recipient address fields, the return address fields (based on your organization's Persona field data), and a logo image space in the return address block. You can edit the template to remove or update the merge fields and logo.

When an Envelope layout is chosen, the page size and margins automatically adjust to the correct dimensions to fit the standard envelope sizes listed below.

Note: If you adjust the page size or margins manually, it may cause your envelopes to print incorrectly.

- #10 - 9.5" x 4.125"
- #11 - 10.375" x 4.5"
- #12 - 11" x 4.75"
- #14 - 11.5" x 5"
- #16 - 12" x 6"
- #05 - 5.5" x 3.0625"
- #06 - 6" x 3.375"
- #07 - 6.75" x 3.75"
- #09 - 8.875" x 3.875"
- Monarch - 7.5" x 3.875"
- Check - 8.625" x 3.625"

- A2 Invitation - 5.75" x 4.375"
- A4 Invitation - 5.125" x 4.625"

With the exception of the Envelopes category, all categories include Blank Template as the first option layout. When you select a blank template, you create your own content in Advanced Editor Mode without pre-formatted information.

Create an Email Template

Getting Started

From Communications, click Manage Communications and select the category to store your template. From the category page, under Tasks, click New Document or Classic Email Template. The Communication Template wizard opens to help you complete the process.

Step 1: Settings

On this step, enter a name and description for your email template. Under Email Options, the template name automatically defaults in the Subject field, but you can change it. When you change the template name, it does not automatically appear in the Subject field; you must manually update it if necessary.

When you use the Advanced Mass Email module, checkboxes appear for you to include Forward to a Friend, View as a Web Page, and sharing links in your email template.

Note: When you create an email template, disregard the Document Options section.

Step 2: Layouts

On this step, you select an eTapestery layout for your communication template. You can select a layout category, such as Newsletters or Events, to display the layouts for that category and then select the one you want to use for your template.

Step 3. Edit

Use the TinyMCE editor to design the content of your labels. For more information about this editor, refer to TinyMCE HTML Editor on page 195.

Preview

Under Preview, click Email to test how the email appears for recipients. The Preview Email screen appears. To send the current template contents as an email to the addresses, click Send.

When you include merge tags in your template, merged data from your own user account appears in the Preview. If your user account does not contain data for the merged field, it appears blank in the Preview.

Tip: Due to variations in how different email providers read HTML, your email contents may vary slightly across providers. You can send a test email to multiple providers to verify the content renders in an acceptable format for each one.

Step 4: Save And

Use these options to save the template and navigate to another page from the Save and drop down field.

Finish: Saves the template and returns you to the communication category.

Create Document: Saves the template and takes you to the first step of the document generation wizard.

Mass Email: Saves the template and takes you to the first step of the mass email wizard.

Edit: Saves the template and keeps you on the current step of the template setup wizard.

Create an Envelope Template

Getting Started

From the Communications tab, click Manage Communications and select the category to store your template. From the category page, under Tasks, click New Document or Classic Email Template. The Communication Template wizard opens to help you complete process.

Step 1: Settings

On this step, enter a name and description for your envelope template.

Under Document Options, enter custom dimensions if you use a non-standard envelope size. When you use a standard envelope size, the dimensions default automatically in this section when you select the envelope template on Step 2.

Step 2: Layouts

To select an envelope templates, click Envelopes.

Step 3: Edit

Use the TinyMCE editor to design the content of your labels. For more information about this editor, refer to TinyMCE HTML Editor on page 195.

Preview

Under Preview, click PDF or Word to download a preview of your template. This helps you verify the envelope template is correct.

Note: You cannot edit or modify PDF files that have been generated by eTapestry.

When you include merge tags in your template, merged data from your own user account appears in the preview. If your user account does not contain data for the merged field, the preview is blank.

Step 4: Save And

Use these options to save the template and navigate to another page from the Save and drop down field.

Finish: Saves the template and returns you to the communication category.

Create Document: Saves the template and takes you to the first step of the document generation wizard.

Mass Email: Saves the template and takes you to the first step of the mass email wizard.

Edit: Saves the template and keeps you on the current step of the template setup wizard.

Document or Classic Email Template Edit Modes

When you create a document or classic email template, there are three types of editing modes: guided editing mode, advanced editor mode, and no editor mode.

Guided Editor Mode

The default guided editor mode provides a way for you to easily add, delete, and move sections, adjust formatting such as background color and text styles, and automatically generate a Table of Contents with links to each section. You may want to use this mode when you create email templates such as newsletters.

This mode has limits, but you can do the following.

- Add, edit, move, and delete sections.
- Update text styles and background colors throughout the template.
- Automatically create a Table of Contents for Newsletters.

Guided Editor Mode Blocks

When you edit a template in the guided editor mode, the template contains content blocks. These blocks are small sections that contain a certain type of placeholder content for you to update. You can easily add, move and delete blocks.

- To add another block to your template, click Add Block and select the block. The block adds to the bottom of its default are of the template. For example, if you add a "Quick Links" block, it appears last in the Quick Links list on the template. You can move the block as necessary.

  Note: The available blocks in the Add Block drop down field vary depending on the layout of your template.

- To move a block from one area of your template to another, select the block and click Move. A gray box appears to indicate that it is in "move" mode. Place your cursor in the desired location. A green arrow and line indicate available locations. Click your mouse button to drop the box in the new location. The template adjusts the surrounding blocks.
- To edit the contents of a block, click inside the block or click Edit above the block. The Edit Contents screen appears. Enter your changes and then click Update.

  Note: The Table of Contents block is the only block that you cannot edit this way. For more information about this block, refer to Edit the Table of Contents Block on page 148.

- To remove a block, select the block and then click X.

Edit the Table of Contents Block

To help you link to the main sections of your template, eTapestry includes special formatting for the Table of Contents block in the guided editor mode.

For a newsletter template, the Table of Contents block, automatically creates links to each article and feature block. This enables readers to quickly access the content they want. When you add, edit, move, or delete an article or feature block in your template, the corresponding link is updates in the Table of Contents.

To edit the Table of Contents in guided editor mode, click inside the Table of Contents block or click Edit.

- To rename the Table of Contents, enter name in the Title field. For example, enter "In this issue".
- To rename a link, enter a name for the article. The first few words of the article appears below the name. For example, rename feature areas or articles with long names.
- To remove a link, clear the option next to the link name. The article or feature block still appears in the template, but does not link to the Table of Contents.

To apply the changes, click Update.

Tip: You can also manually create a Table of Contents. To do so, add a Quick Links block to your template and create an anchor for each area to include in the Table of Contents. Next, link to each anchor from the Quick Links block. If you change the order or rename an article or feature block, remember to edit the Quick Links block. For information about anchors, refer to HTML Editor: Inserting Links and Anchors.

Advanced Editor Mode

Note: After you enter template content in this mode, you cannot return to guided editing mode.

Advanced editor mode enables you to edit and format your template using the HTML editor. To access this mode, under the Preview icons, click Advanced Modes and then click Advanced Editor Mode.

If you are familiar with using an HTML editor, you can do custom editing in this mode. You can even insert HTML code that was created elsewhere. To do this, click HTML Source to manually edit the HTML. eTapestry may adjust inserted code to ensure proper formatting. To prevent eTapestry from making code changes, use No Editor Mode instead.

When your template is complete, click Save And Finish.

No Editor Mode

Use this mode to insert HTML code that you do not wanteTapestry to adjust. After you switch to this mode, you cannot return to guided editor mode. Therefore, we recommend you only use this mode when you are proficient with HTML. To access the no editor mode, under the Preview icons, click Advanced Modes and then click No Editor Mode.

When you use no editor mode, eTapestry does not provide assistance editing code and the rendered code does not display as you work. You cannot auto-generate a text version, use the spellcheck, insert data merge tags, insert widgets, insert images, preview a rendered version of the code, or generate document templates (such as PDF). However, you can generate emails and send a test email to verify your code renders as expected.

To manually create the text version after you create the HTML version, click Edit Text Version.

When your template is complete, click Save And Finish.

Drag-n-Drop Templates

Note: This option is only available through the Advanced Mass Email module.

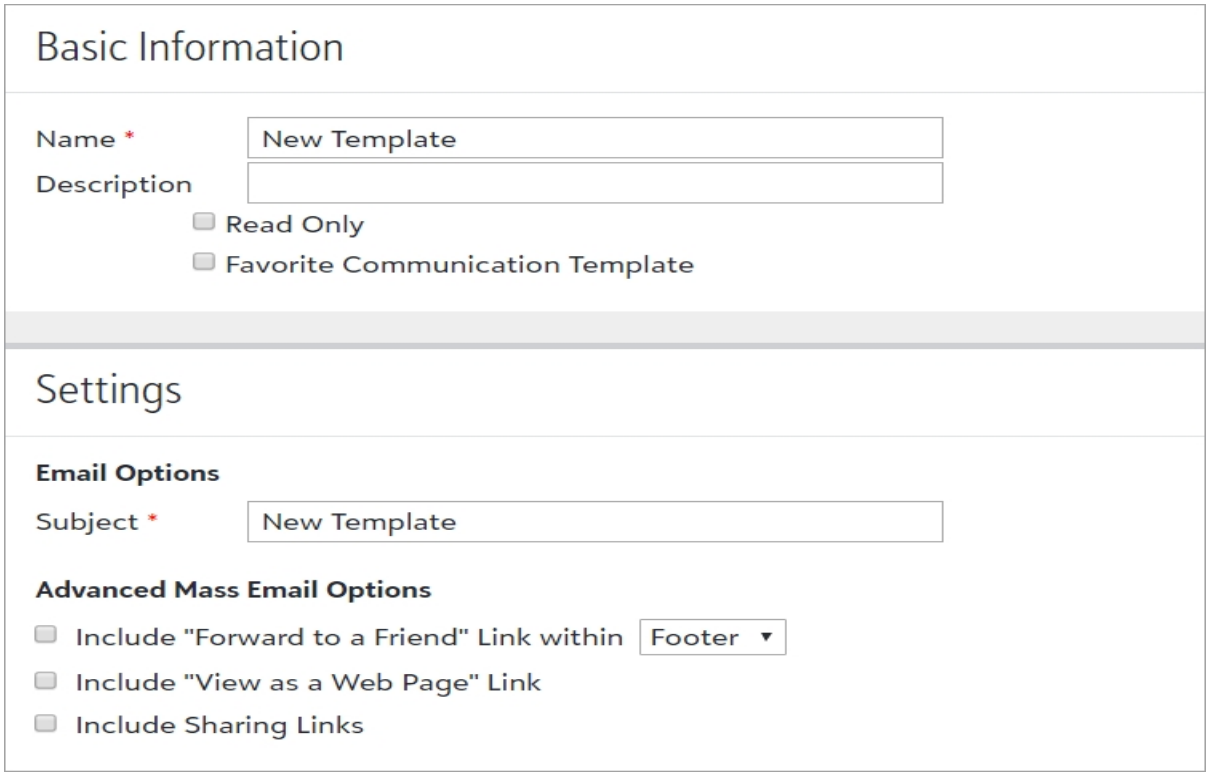
From **Communications**, click **Manage Communications**. The Communication Categories page appears. Click the category name.

When you are on a category page, under **Tasks**, click **New Drag-n-Drop Email Template**. The Template Wizard appears. For more information on your drag-n-drop template's layouts and content editor, see here.

Tip: To create a new drag-n-drop template based on a existing one, under the template you wish to copy, select **Copy**. From the Copy screen, you can edit the category and name. Select Copy to create a duplicate template.

Step 1: Settings

On this step, enter a name and description for your email template. Under **Email Options**, the template name automatically defaults in the **Subject** field, but you can change it. When you change the template name, it does not automatically appear in the **Subject** field; you must manually update it if necessary.

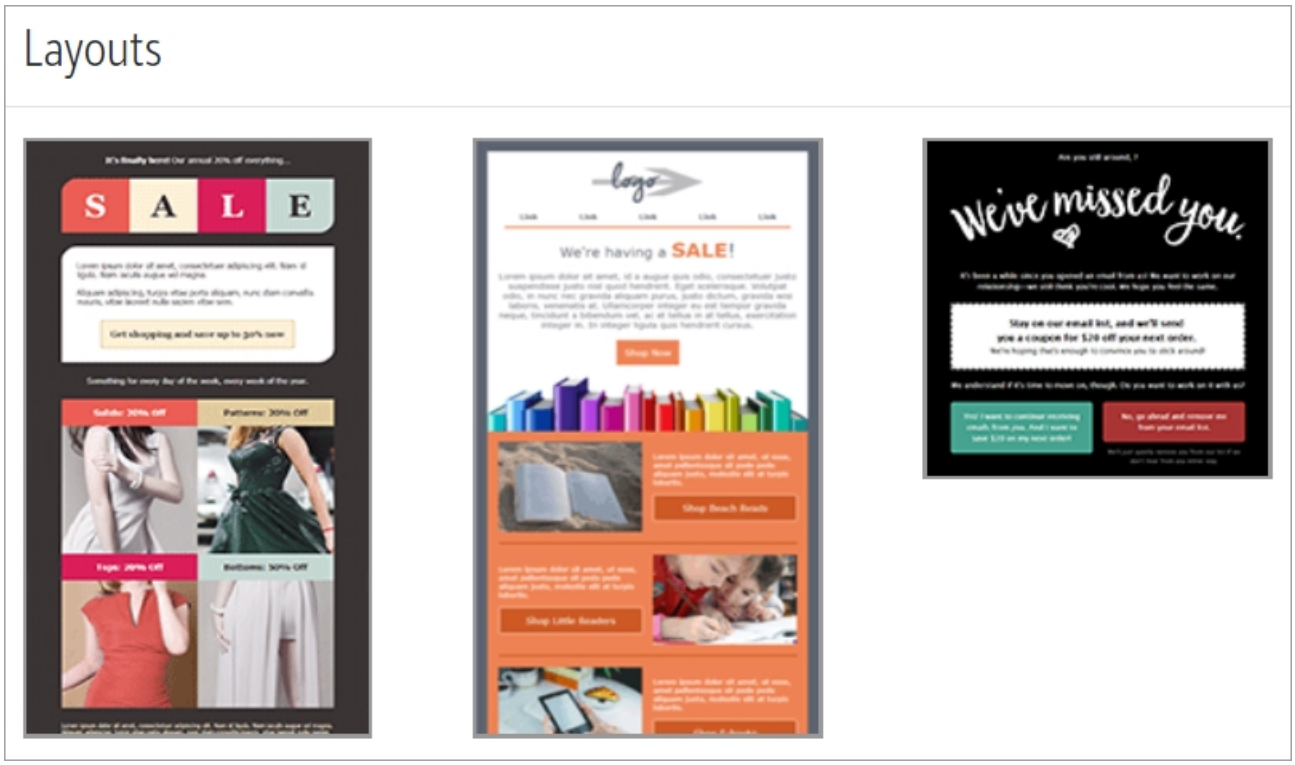


Options are available for you to include Forward to a Friend, View as a Web Page, and sharing links in your email template.

Step 2: Layouts

On Step 2, select the template layout you wish to use.

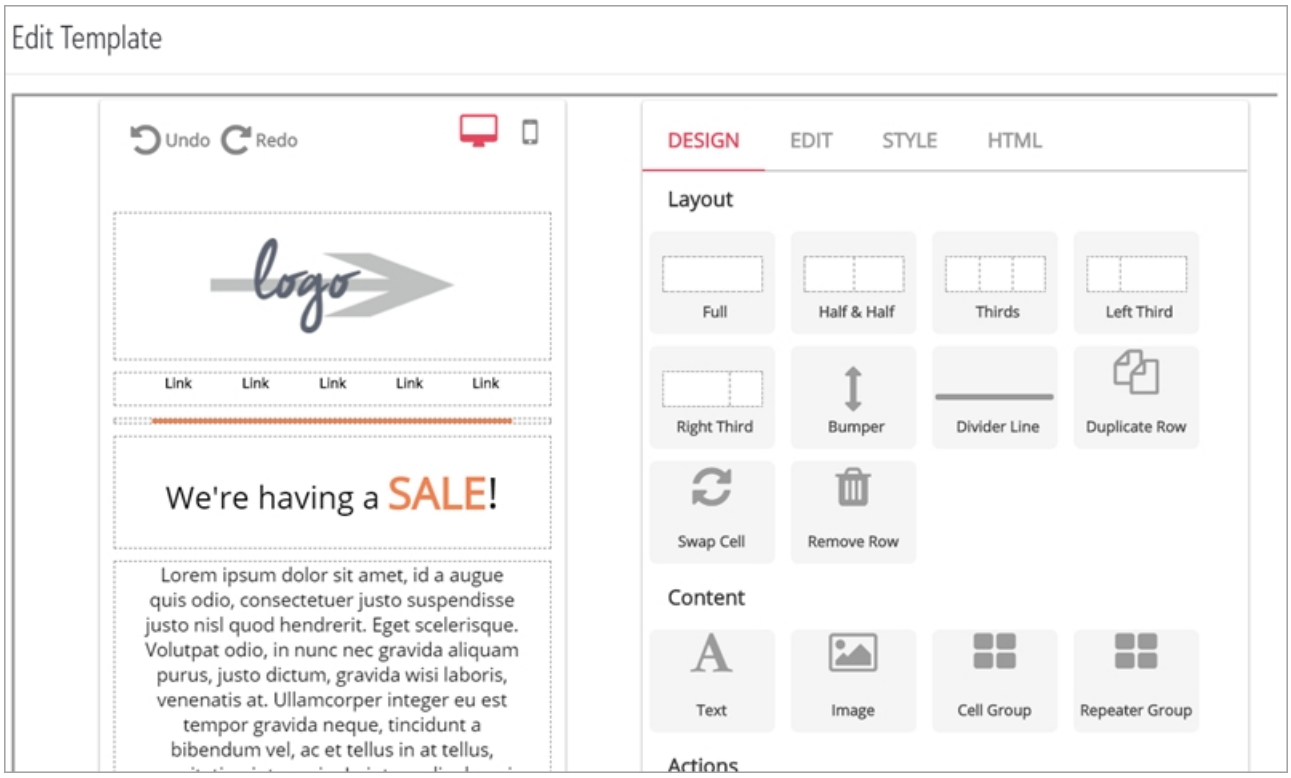
{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** If you change the layout on an existing template, it will overwrite all of its content.



Step 3: Edit

On Step 3, you can use the template editor to drag and drop layout, content, and action design elements to your desired location. To add design elements, from the **Design** tab, drag the element you wish to add to your template over to where you want it to display.

Note: You can use **Cell Group** and **Repeater Group** interchangeably as they perform the same action.



You can click on a design element to edit its content.

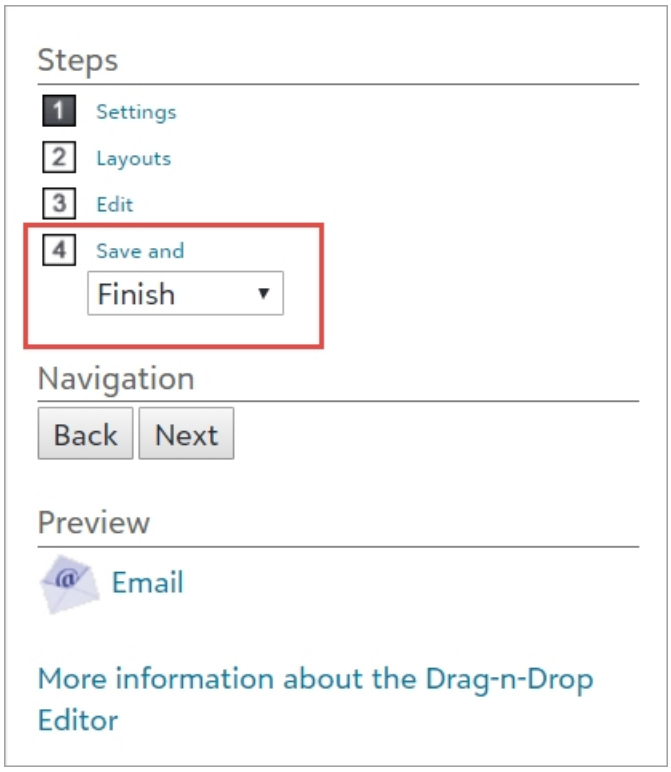
{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** The **Insert RSS Content** functionality is not available.

To change the appearance of a design element, select it and choose the **Style** tab. If you would like to view the source code, you can select the **HTML** tab.

To insert data merge tags into a text content area, from the **Edit** tab, select the **Insert merge tag** icon. Data merge tags enable you to merge data from some account fields into emails. When you generate emails, the tag is replaced with the specific data from each account in your query.

Step 4: Save

Once you have finished editing your template, select an option in the drop down menu and select **Save**.



Mailing Label Template

From the Communications, click Manage Communications and select the category to store your template. From the category page, under Tasks, click New Mailing Label. The Mailing Label Template wizard opens to help you complete process.

Step 1: Basic Information

On this step, enter a name and description for your mailing label template.

Step 2: Layout

On this step, you can create your own custom label size by entering your dimensions in the fields or you can select an Avery label size. When you select an Avery label, the dimensions automatically default in the fields.

- Page Size- Height and width of the sheet containing the labels.
- Page Margins- Top and side margins of the sheet containing the labels.
- Label Size- Height and width of the labels themselves.
- Label Margins- Top, bottom, left side, and right side margins on the labels.

- Label Spacing- Horizontal and vertical space between the labels on each sheet.
- Number of Labels- The number of labels across and down each sheet.
- Units- Set dimensions to Inches (in) or Millimeters (mm).

Step 3: Edit

Use the TinyMCE editor to design the content of your labels. For more information about this editor, refer to TinyMCE HTML Editor on page 195.

Tip: Not all TinyMCE editor features apply to Mailing Label templates.

When you include images that are larger than the defined label size, irregularities may appear in the generated document. To avoid this, make sure to preview your template to verify the image fits within your label dimensions.

Preview

Under Navigation, click Preview to view a sheet of labels for the template. The information that appears in the preview defaults data from your user account.

Step 4: Save And

Use these options to save the template and navigate to another page from the Save and drop down field.

Finish: Saves the template and returns you to the communication category.

Edit: Saves the template and keeps you on the current step of the template setup wizard.

Generate Labels: Saves the template and takes you to the first step of the label generation wizard.

Send Communications

You can generate and send email or print communications directly from eTapestry.

Tip: When you send communication, you indicate the account personas to use . For example, you can use persona types to differentiate personal, business, joint, and seasonal addresses. For information about personas, refer to Personas Page on page 33.

Send a One-Off Email

To send an email to a single constituent or a few constituent accounts, send a one-off email instead of a mass email. Unlike test emails, one-off emails are sent from a specific account and you can automatically create journal contacts to indicate the email was sent.

If you plan to email the same accounts multiple times, such as a group of board members, consider creating a custom account query to group the accounts and then send them mass emails.

Note: Before you send a mass email, we recommend you send a test email to yourself so you can verify the message content and format. You can send a test email to any email address, even address not in your database. For information about test emails, refer to Send Test Email on page 156.

1. To send a one-off email, search for an account. Then, from the Find Account screen, click the email address for the account.

   Or, from an account's Personas page click the envelope icon next to the email field.
2. From the **One-Off Email Format** tile, select to use no template or an existing template.

   If you to use no template, the HTML editor appears for you to create the contents of the email.

   If you select to use a template, you can choose from drag-n-drop or classic email templates from the drop down menu.
   - If you select a drag-n-drop template, the Preview tile appears for you to view how your template will appear.

     Note: Drag-n-drop templates cannot be edited when sending a one-off email. You will need to edit the template from Communications. . If you manually added social share buttons to your drag-n-drop template to allow the email to be shared, the buttons will not work when sent as a one-off email. If you want the recipient to be able to share the email, you must send the template as a mass email.
   - If you select a classic email template, you can personalize the contents using the HTML editor. The template is not affected.
3. To create or edit the text version of the email, click Text, enter a subject for the email, and then enter the text contents.

   Note: This option is not available for drag-n-drop templates. Instead, eTapestry automatically generates a text-only email that provides a link to the web page version for recipients that cannot receive HTML emails.
4. To email additional recipients, click To or CC, then search for and select other recipients. .

5. In the To and CC fields, you can also enter email addresses. However, you will not have the option to create journal contacts for recipients entered in this way if you later select the Create Journal Contact Record checkbox.
6. If your organization uses the Attachments module, you can upload up to 2MB files. Under Attachments, click Browse, select the file from your computer, and click Upload.

   We recommend you do not send file attachments. Instead, host the files on your website and include a link to them. If you must send file attachments, smaller files are better. This reduces download time and makes it easier for recipients to view the files.
7. In the **Tracking** tile, select Create Journal Contact Record to create a journal contact for selected recipients. For Method, select Email. Then enter any user-defined fields.

   Under Create Contacts for the Following Accounts, eTapestry shows the constituents accounts for which a journal contact will be created.
8. Review the email. After you verify the contents and options, click Send and to send the email.

Send Test Email

Before you generate a mass email, we recommend that you send a test email to yourself or others at your organization, so that you can verify the email contents and format.

Tip: Set up free email accounts with some of the most popular web-based email providers, such as Google, Yahoo, Hotmail/Outlook. Send a test email to each account to verify how your message appears for multiple email providers. Your email may vary slightly based on how each provider renders the HTML content. We also recommend viewing the email from a smart phone and in text only mode.

You can send a test email when you set up the communication template. The advantage of this method is that you remain on the template set up screen in eTapestry, so you can easily edit the template if your test email has an issue.

1. From the set up page for a communication template, click Email under Preview.
2. Enter up to five email addresses (one per line).
3. Click Send.

   If the template includes data merge tags, the test email will use information from your user account. If your user account doesn't have some information, then the default value or a blank appears for the field.

You can also send a test email when as you prepare to generate a mass email. Use this method after you previously confirmed that the template results are as you expect. The advantage of this method is that the test email is very similar to what your constituents will receive.

1. From Communications, click Manage Communications.
2. Under the communication category, locate your communication template and click Mass Email.
3. If your organization uses the Advanced Mass Email module, select Advanced Mass Email, otherwise click Basic Mass Email.

   Note: Drag-n-drop templates are only available through the Advanced Mass Email module. If you select to generate mass email from a drag-n-drop template, Advanced Mass Email will be the only option available.
4. Click Send a Test.
5. Enter up to five email addresses (one per line).
6. For an advanced mass email, we recommend you select Send a Spam Check to the First Email Address. Only the first email address that you entered can receive a spam check email.
7. Continue as though you were generating a normal mass email. You can even attach files if you have the Attachments module.
8. When you are ready to send the test, click Send.

   The test email includes a footer with shows your organization's name and address, based on the persona on the My Organization account, and a logo image to indicate that eTapestry produced the email.

   If you use advanced mass mail, the footer also includes the image for our partner company *Delivera*, and the opt-out, forward to a friend, and view as web page links.

   Note: The opt-out link is for testing purposes only. Test recipients can not actually opt-out.

   If you selected to receive a spam check, the first test email address receives an email from Lyris. Lyris rates your test email on several factors and sends a "grade" to indicate how "friendly" your email is. It help you avoid potential problems with recipients who have spam filters.

   Note: Lyris filters your message through Spam Assassin, an anti-spam program to determine whether your message has characteristics typical of spam email. Spam Assassin assigns your message points based on each failed spam test. The lower your score, the better your message. The higher your score, the more your message resembles spam. If your score is greater than 5, we recommend you edit your message.

   Tip: If you do not see the Spam Check email in your inbox, check your junk or spam folder.

Generate Mass Email

You can use mass email to send an email to a group of constituent accounts. To generate a mass email, you need a classic email or drag-n-drop communication template that contains the

email content and a query that includes the accounts of the intended recipients.

Tip: Before you send the email to everyone, consider sending a test email to yourself or someone at your organization. For details, refer to Send Test Email on page 156.

1. From Communications, click Manage Communications.
2. Select the category and communication template.
3. Under the template name, click Mass Email.
4. If your organization uses the Advanced Mass Email module, select whether the email is basic or advanced.

   Note: Drag-n-drop templates are only available through the Advanced Mass Email module. If you select to generate mass email from a drag-n-drop template, Advanced Mass Email will be the only option available.

   Tip: We recommend you select to use advanced mass email, so you can include Forward to a Friend and View as Web Page links, and for eTapestry to track the email delivery, opens, and click through statistics.
5. For Criteria, select the category and query that contains the accounts of the intended recipients.
6. For classic email templates, select how accounts or entries from your query should be grouped and whether split and upgraded transactions should be consolidated (rolled up).
7. Because some constituents use different email addresses for different personas, select which personas should receive the email.
   - The Primary Persona only - Sends an email to all email addresses associated with the primary persona for each account in the query.
   - All Personas on the Account - When an account has multiple personas, all email addresses for each account in the query receive an email.
   - All of the Personas I select - Select which personas to include for accounts in the query. All email addresses associated with the selected personas receive the email. If none of the selected personas include an email address, eTapestry sends the email message to the email addresses associated with the primary persona.
   - One Persona, based upon the Hierarchy I select - Set up an order of persona types in your database. For each account, eTapestry sends an email to the email addresses associated with the highest persona that includes an email address. If none of the selected personas include an email address, eTapestry sends the email message to the email addresses associated with the primary persona.
8. Click Next.
9. Enter the name and address of the person to whom replies should be sent. By default, your user account information appears, but you can change this to your organization's

information or another person in your organization.

10. To receive confirmation emails when the mass email begins and finishes, enter a confirmation email. By default, this is your account's email address.
11. For advanced mass email, select whether to schedule the email to be sent at a later date and time. If so, enter when the email should be sent.

Tip: Later, you can review and update this schedule from the Scheduling Report.

12. If your organization uses the Attachments module, you can select one or more files to attach. Click Browse, select a file from your local computer, and click Upload.

Tip: We recommend that you do not send attachments. Instead, host the file on your website and include a link to it in your email. Many recipients are more likely to click a link than to download a file attachment. If you must send attachments, keep them small so that they are easier for recipients to receive, download, and view. Remember you can only send 6,144 MB of information by basic mass email each month. For advanced mass email, you can send an unlimited number of file attachments, but each file must be less than 10 MB. Recipients open these attachments by the links at the bottom of the email.

13. Click Next.
14. Select whether you want to track your email. Under Tracking - Interactions, select the check box next to Track interactions for each recipient.

    A shared Mass Interaction will appear on the Mass Interactions page for each account that is sent an email.

    If you wish to create Journal contacts with marked defined fields, you can do so through a mass update. For more information, see Mass Updates.
15. Enter a subject for the journal contact or Mass Interactions page entry in the Subject field. Select the contact method in the Method drop down menu and enter user-defined fields.
16. Select whether you want to create a separate query of accounts that don't have an email address. If so, select a category and enter a name for the query.

    You can use this query to identify which constituents to contact in other ways or which constituents to ask for email addresses.
17. Click Next.
18. Verify the email summary and preview the content of the email. To make changes, click a previous step.

    For an advanced mass email, the preview statistics show information about accounts that have duplicate email addresses. The email is sent to each email address only one time.
19. To send the mass email, click Send.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** You cannot stop, retract, or edit the email after you click send. For an advanced mass email that is scheduled to be sent at

a later time, you can make changes to the scheduled date and time through the Scheduling Report. However, if you make any changes to the query or template, you will need to cancel and reschedule the advanced mass email in order for those changes to appear.

Tip: For information about your advanced mass email subscription, review your Usage Report. This report is an eTapestry Standard Report.

View as Web Page

When you send advanced mass email, you can include a link that enables users to view the email contents in a web browser. Because some email providers do not render HTML code correctly, some recipients choose to view email in their web browsers to avoid display problems.

To include a view as web page link on a specific email, from the communication template click Settings and select Include "View as Web Page" Link under **Advanced Mass Email Options**. The link appears at the top of the email contents. When a recipient clicks the link, his default web browser opens to show the email content.

After you send an advanced mass email that includes the view as web page link, you can also create links to the hosted web version of that email. For example, if you send a newsletter by email, you could also create a blog post that links to the emailed newsletter. If your communication includes data merge tags, the hosted version of the email uses the default values for each field.

Your delivery report includes the primary link to the hosted version of the email. For details about the report, refer to Delivery Report on page 251.

Forward to a Friend

When you send advanced mass email, you can include a link that enables users to forward the email with their personal details removed. The email format remains intact.

To include a forward to a friend link on a specific email, from the communication template, click Settings and select Include "Forward to a Friend" Link under **Advanced Mass Email Options**. Select whether the link should appear in the header or footer of the email.

When you edit the content of the template, include default values for any data merge fields. For example, if you include the Short Salutation field, enter a default value of "Friend." The default values are used in place of the original recipient's information on the forwarded copy.

When a recipient clicks Forward to a Friend, a forward page appears so the recipient can enter up to five email addresses and a brief message to include with the forwarded message. The recipient previews the forwarded email and clicks Submit to send the email.

Although the recipient could use their email program to forward an email, the forward to a friend link has several advantages.

- The recipient's email provider can't affect the email's content. Since some email providers may not render HTML correctly, using the forward to a friend link helps avoid passing those rendering issues to the friend's copy.
- Any information about the recipient that was entered as a data merge tag is removed and replaced with the default values. This enables the original constituent to maintain privacy while still forwarding the message. If the email includes financial information, this is especially important.
- If the original recipient uses their email program to forward an email, the friend could click the opt-out link in the original message and accidentally opt-out the original recipient, preventing your well-established constituent from receiving emails from your organization. When the original recipient uses the Forward to a Friend link, the opt-out link is not forwarded, so the original recipient's email address is protected.

Link Tracking Options

When you send advanced mass email, you can track which constituents click your links and how many times they click links, so that you can learn what is the most interesting to them. You can track any website URL that you enter into a communication template, including both Classic and Drag-n-Drop templates.

Note: Links to email addresses and anchors are not tracked. Links are only tracked when the recipient clicks from the email. If the recipient adds the link to his bookmarks or favorites or opens the URL from some other source, the click is not tracked. Links in basic mass emails are not tracked.

If an email template includes multiple links to the same URL, the tracking is consolidated as if it were one link for the delivery report.

Tip: To determine your click through rate (CTR) divide the number of clicks by the number of emails you sent.

When you insert or edit a link into a communication template, you can set link tracking options under Advanced Mass Email Properties. By default, all website links are tracked, however, you can select Don't track it if you do not care about the link's click through rate.

Note: The Don't track it option is only available for Classic templates. Link tracking is always available for Drag-n-Drop templates. For both templates, you must enter a name for the link in order for tracking to appear in the delivery report.

In the Link Name field, enter a name for the link to appear on your delivery report. For example, you may want the delivery report to show "Event Registration Page" instead of "http://...". The link names does not appear in the email itself and the recipient will not see the link name. If you do not enter a link name, the eTapestry automatically enters a link name based on the URL.

Tip: When you send advanced mass email, you can track which constituents click a link and how many times from the delivery report. For more information, see Delivery Report.

Auto Generated Text Version

Although the majority of your recipients use email providers or programs that render HTML, so may not accept HTML versions of email. To accommodate them, we recommend you generate a text version of your email, to use in addition to the HTML version.

The text version only includes text. It does not show images, tables, colors, or links (although it can show the full URL, which the recipient can paste into their browser).

If you use guided or advanced editor modes, you can allow eTapestry to auto-generate the text version or manually enter your own. By default, the text version is auto-generated when you create a template in these modes. When you update the text in the HTML version, the auto-generated text version is also updated.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** If you use no editor mode, you need to manually create your text version.

To view the auto-generated text version, click Text Version. A separate screen appears to show the text version.

- In guided mode, the auto-generated text version includes relevant text from your HTML template. It excludes items such as the table of contents, because the links would not work in a text version. For other links, the text version shows the original link text, follows by the full URL listed in brackets. If your template includes blocks, these are delineated into sections by rows of tildes (~).
- In advanced editor mode, because the template is not broken up into clearly defined sections, eTapestry cannot determine which items should or should not be replicated in the auto-generated text version. Therefore, all text in the HTML version appears in the auto-generated text version and sections are not delineated using tildes(~). However, each link is still shown as the original link text, followed by the full URL listed in brackets.

To edit the text version manually, click Text Version, enter your changes, and click Update. Your changes are saved. However, the text version is no longer auto-generated. Any changes you make to the HTML version are no longer automatically updated in the text version.

Tip: Next to the Text Version button, "Auto-Generated Mode" appears or "Manually Edited Mode" appears to indicate whether your text version is automatically updated.

To discard your manual edits and return to auto-generated mode, click Text Version and then click Auto-Generate.

Note: All templates created prior to the 6.5.0 release that included a text version, were placed in manually edited mode. When you edit these templates, you can click Text Version and then click Auto-Generate to discard the original text version and auto-generate a new one.

Opt Out of Mass Emails

CAN-SPAM regulations require all mass emails to include a visible unsubscribe mechanism and for all requests to be honored within 10 business days. For more information about CAN-SPAM regulations, refer to the Federal Communications Commission guide.

Each mass email you send contains a link at the bottom to enable recipients to opt-out of receiving emails from your organization at that address. When a recipient of a mass email opts-out, eTapestry stores this information on the account's persona page. Any other personas in your databases that contain the email address are also opted out, so that you don't accidentally email a constituent because you have duplicate accounts.

- If a constituent has different email address for different personas, he may choose to opt-out for some or all of those personas.
- If a constituent has multiple email address for a single persona and she chooses to opt-out, none of the emails for that persona are able to receive mass email. If she wants to continue receiving emails at the other address, move those addresses to different persona's on her account.

  After the opt out, if you add an account with the same email address, the new persona is not opt-ed out. For example, if the constituent donates online and enters a different mailing address, this may result in a duplicate account. If the constituent uses the same email address that she previously opted-out, then the email address is not opted out on the new account's persona.

  Tip: If you have an e Commerce page, we recommend you regularly run the Online Journal Entries Report. Then run the Duplicate Check on All process to identify duplicate accounts. Promptly merge any duplicate accounts, so that you don't accidentally send mass email to an email that was previously opted-out.
- If a constituent previously opted-out but later wants to opt-in, update the opt-out settings. From the account, click Personas. Under Opt Out Settings, click Change and clear the Opt Out of all Mass Emails checkbox that appears. To save your changes, click Save And.
- To update the opt-out settings for multiple constituents at one time, add the Opt out of all Mass Emails field to the account information import. From the Map Your Import File step of the import process, select Import Another eTapestry field. Select the Opt out of all Mass Emails field.

  Note: The value for this field must be “true,” “yes,” or “y” to successfully opt the persona

out of mass emails. The value for this field is not case-sensitive.

For more information, see Import.

When you send a mass email, if your query includes email addresses or personals that have been opted-out, those emails are automatically excluded from the mass email.

Generate Mailing Labels

After you have set up a mailing label template you can then generate those labels in batches for a group of accounts or journal entries included in a query. After the labels generate, you can save and print them.

Tip: Before you generate labels, create a query to group the accounts or entries for the labels. We recommend you preview the results of your query before you generate your labels. For more information about queries, see Queries on page 214.

Create a Mailing Label Template

1. From Communications, click Manage Communications. The Communication Categories page appears.
2. Click a category to select it, or click New Category under Tasks to create a new category.
3. Once in a category, click New Mailing Labels under Tasks. The Mailing Label Template Wizard appears.
4. On Step 1, enter the basic information for your template.
   - In the Name field, enter a unique name.
   - You can enter a description to help you identify the template.
   - To prevent other users in your organization from editing the template, select Read Only.
   - To make this template a favorite, select Favorite Communication Template. Favorite templates appear in the Favorites tile on your Home dashboard.
5. Click Next.
6. On Step 2, enter the dimensions of your labels. You can select from a number of pre-configured commercial sizes, or enter the dimensions manually. Most label manufacturers include these dimensions in the packaging of the labels.
7. Click Next.
8. On Step 3, edit the content of the labels. The template comes pre-populated with the most common address fields for the United States. However, you can edit these mail-merge fields to best suit your needs. To add a mail-merge field, click Insert eTapestry Data Merge Value (the orange icon on the editor bar).
9. We recommend that you click Preview to see an example of how the labels will print.

10. Click Next to save the template.

Note: Saving your template does not print the mailing labels.

Creating a Mailing Label Export

You can generate mailing letters from within eTapestry communications, or export data to merge into labels in your word processor.

1. To create an export, from Reports, click Manage Reports.
2. Select System.
3. Click Mailing Labels.
4. Review the list of predefined fields.
   - To remove a field, click X.
   - To add a field, select an option under Available Fields.
5. Click Save and Run. The export is ready to use.
6. Select the category and query that includes the accounts you want to include in the export.

   Do not send mail to deceased accounts, accounts with bad addresses, or to accounts that have requested to not receive mail or solicitations. We recommend you create a "Do Not Mail" query to identify accounts that should not receive mail. Then, create a "Clean Mailing List" compound query that includes accounts that should receive mail, but excludes the accounts that should not receive it. You can then use this "Clean Mailing List" query to send mail. You can also use it as the starting criteria for other queries to further define mailing lists. For more information, refer to Create a "Do Not Mail" Query and Compound Queries on page 218.
7. For Export as, select Transactions.
8. If a account in your query has an address other than the primary address, such as a seasonal address you want to mail to, select the address under Personas Reported. If an account does not have a seasonal address, eTapestry will use the primary address.
9. For Export Format, select Tab Delimited.
10. For Delivery Options, select Export File - Download, Export File – Drop Box, or Export File - Email.
11. Click Submit.
12. Save the file to your local computer. You are ready to create a mail merge of mailing labels in a word processing program, such as *Microsoft Word.*

Generate One-Off Documents

Occasionally, you may want to print a single document for an account or journal entry. For example, if a constituent calls to ask about the status of a pledge, you may also want to send a letter detailing previous payments and the remaining balance.

1. When the document template contains merge fields specific to a journal entry, create the document from the journal entry.

   Tip: When the document template does not contain specific journal entry information, you can generate a single document from the account's Persona page by clicking Create Document.

2. For Step 1: Criteria, select whether the document should be a PDF or *Word* file and enter a file name. If your template includes restricted HTML, you cannot generate the document as a Microsoft *Word* file.

   Note: You cannot edit or modify PDF files that have been generated by eTapestry.

3. After you select a communication template to use for the document, a preview appears.
4. If you generate a single document from within a journal entry and the constituent has multiple personas, under Personas to Export, create a hierarchy to indicate the order eTapestry should use to locate the personas and how to merge the field data. By default, eTapestry uses the primary persona. If you select one or more personas, eTapestry consolidates data from the selected personas.

   Note: The preview does not update based on your persona selection.

   If you generate a single document from the account's Persona page, that persona is used, even if it is not the primary persona.
5. For a split transaction, select a grouping option.
   - Treat each upgrade/split as its own transaction - This creates separate documents for each split.
   - Roll up related upgrades/splits into one transaction - This consolidates all splits into a single transaction, in a single document.
6. Click Next.
7. On Step 2: Receipting, select options for your eReceipt. The communication template you select on Step 1: Criteria under Select Template must include the Generated Receipt Number merge value to generate eReceipts.

   When you select Generate, the eReceipt includes the next, unique receipt number that is available in the database.
8. Click Next.
9. On Step 3: Delivery, select whether you want to create a journal contact to track the document communication to the account. If so, select a contact method and enter user-defined fields. The Contact includes the subject "Document Generated" and note indicating the category and name of the communication template.
10. Select a delivery method.

- Download - Select this to download the document to your local computer. You cannot navigate to another area of eTapestry until after the document is generated and the download is complete.
- Place Documents in My Drop Box - If your drop box is under its limit, eTapestry places the document in your drop box.You can navigate to other areas of eTapestry and perform data entry-type tasks while the document is generated.
- Email Documents to Me - Select this to receive the document as an email attachment. Then enter your email address and a subject. You can navigate to other areas of eTapestry and perform data entry-type tasks while the document is generated.

11. Under Auto-mailing, to send the document to the constituent by email, select Automatically email the documents to accounts with email addresses. Additional email options appear.
    - Use the document's contents as the body of the email itself - We recommend this option for communication such as thank you letters, invitations, newsletters and other day-to-day communication. It reduces the size of the email, download time for your recipient, and the chance of being blocked as spam.
    - Include the document as an attachment on a separate email - When you select this, eTapestry generates documents based on the contents of your template and sends them as attachments on an email.

      Note: When you select the include attachment option, Compose your Auto-mailing email appears. In the drop down field, you can select an email template to begin your template and then edit it using the HTML editor.

    - Enter a subject for the email.

      Tip: You receive a copy of the auto-mailed documents.

12. To generate the document, click Run.

Use Query to Generate Documents in Bulk

Before you generate documents or envelopes in bulk, set up a communication template to define what the document should include and how it should look. Then, create a query to group the accounts or journal entries that should receive the document. After you have a template and query, you are ready to generate documents or envelopes in bulk.

1. From Communications, select the category that includes your template.
2. Under the template, click Create Documents.
3. For Criteria, select the query that includes that accounts or journal entries for which you want to generate documents.

   Do not send mail to deceased accounts, accounts with bad addresses, or to accounts that have requested to not receive mail or solicitations. We recommend you create a "Do Not

Mail" query to identify accounts that should not receive mail. Then, create a "Clean Mailing List" compound query that includes accounts that should receive mail, but excludes the accounts that should not receive it. You can then use this "Clean Mailing List" query to send mail. You can also use it as the starting criteria for other queries to further define mailing lists. For more information, refer to Create a "Do Not Mail" Query and Compound Queries on page 218.

4. For Persona options, you can create a hierarchy to determine how to handle constituents with multiple personas. By default, the primary persona is used.
5. Click Next.
6. For Document Options,select to receive a PDF or *Microsoft Word* document. Then enter a name for the file.

Note: If your template includes restricted HTML content, you can only receive a PDF. You cannot edit or modify PDF files that have been generated by eTapestry.

7. For File Management, select whether you want to receive one big file (recommended) or a file for each document. For a single file, select whether to sort the documents by account Sort Name or Postal Code.
8. For Grouping, select whether to receive one document per journal entry, per account, or per household.
   - One document per journal entry - For a journal entry query, this generates a document for each journal entry in the query.
   - One document per account - This generates a document for each account. For a Journal entry query, any currency fields show the sum of amounts from each journal entry. However, if you've included the Entry List widget, each entry appears as a separate line in the Entry list.
   - One document per household - This generates one document for each household in the query. For persona fields, the head of the household is used.
9. If you use the Split Transactions module, select grouping options for upgraded/split transactions. You can choose to treat each upgrade or split as its own transaction or to roll up related upgrades/splits.
10. Click Next.
11. Select how the documents should be delivered.
    - Download - Save the documents to your local computer. You cannot navigate to another part of eTapestry, until the download is complete.
    - Place documents in My Drop Box - If your drop box has space, the finished documents are saved to your eTapestry Drop Box. You can navigate to other areas of eTapestry and perform data entry-type tasks in the meantime.

- Email documents to me - Select this option to receive the documents as a email attachment. Enter an email address and subject. When you receive the email, you can open the attachment and download the documents to your local computer. You can navigate to other areas of eTapestry and perform data entry-type tasks in the meantime.

12. To email the contents of the document to constituents, select an auto-mailing option. If a constituent account does not have an email address, you receive the document based on the delivery method you previously selected.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** Constituents will receive communications you select to auto-mail, regardless of their opt-out preferences.

- Use the document's contents as the body of the email itself - This option sends emails to your constituents that include content based on your template. We recommend this option for daily communication, such as as thank you letters, invitations, and newsletters. It reduces the email size, download time, and the chance of the email being blocked as spam. Enter a subject for the email.
- Include the document as an attachment on a separate email - This generates documents based on your template. The document files are sent as email attachments to your constituents. You also receive the documents based on the delivery method you previously selected. For the body of the email, you can select an existing email template and edit it, or create a new email using the HTML editor.

13. Click Next.
14. On the Tracking step, you can select how to track your document. Under Tracking - Interactions, select the check box next to Track interactions for each account.

    Enter a subject for the Mass Interactions page entry in the Subject field. Select the method in the Method drop down menu.

    A shared Mass Interaction appears on the Mass Interactions page for each account.

    Note: If you wish to create Journal contacts with marked defined fields, you can do so through a mass update. For more information, see Mass Updates.

15. Select whether you want to create a separate query of accounts that don't have an email address. If so, select a category and enter a name for the query.

    You can use this query to identify which constituents to contact in other ways or which constituents to ask for email addresses.

16. Click Next.
17. For Preview, verify the summary information.
18. Click Run.

Note: You cannot perform other query based processes, until after the documents are generated.

Generate and Send eReceipts

Note: You cannot receipt the following transaction types: pledges, split/upgraded pledges, disbursements, recurring gift schedules, and soft credits.

You can automatically generate a receipt number to include on communication templates. In eTapestry, when you include receipt information as a part of your communication templates, you are creating an "eReceipt" by definition. You can print or email eReceipts to recipients.

When you set up templates for eReceipts, you need to include the following data merge tags from the journal fields category.

- Generated Receipt Number - Shows the receipt number that eTapestry generates for each transaction. If you select to void receipts, the voided receipt number is used. If you replace receipts, the new receipt number is used.
- Generated Voided Receipt Number - Shows the voided receipt number for each transaction. This is required for templates used to replace receipt numbers.

For each field, add text to the template to label the data merge tag, so the recipient can understand what the number indicates.

After you complete the design for a communication template for eReceipts, use the template to generate, void, and replace receipts for multiple transactions and accounts based on a query, a single transaction, or for online transactions.

When generating eReceipts for a query of transactions, you can select to generate separate receipts for each transaction, or you can group transactions together by account to create multiple transaction receipts.

Tip: If your organization has a Canadian database, your donors will also receive a PDF attachment to the confirmation email with the same receipt details. For security purposes, these attachments are not editable.

Generate eReceipts for multiple transactions based on a query

Before you begin, make sure your communication template contains the Generated Receipt Number and Generated Voided Receipt Number data merge tags described in the introduction to this section.

1. To generate eReceipts for a group of transactions in a query, create one that includes the transactions to receipt.

   {i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** You cannot remove a receipt number for a transaction. However, you can void or replace it. We recommend you preview the query before you use it to generate receipts, so you can verify the query includes the correct transactions.

2. Under the communication category name that includes your eReceipt template, click Create Documents.
3. When you generate documents, make the following adjustments.
   a. On Step 1, make sure the query you use has a Journal entry return type.
   b. On Step 2, select Grouping options.
      - One Document Per Journal Entry - Generates separate receipts for each transaction.

        Tip: When you select this option, each segment in a split transaction receives its own receipt number.

      - One Document Per Account - Generates one receipt per constituent. When a constituent has multiple transactions, a single receipt with all of the transactions generates.
      - One Document Per Household - Receipt actions do not apply when you group by household.

   c. On Step 3, select receipting options.
      - Nothing - eReciepting actions do not occur. eTapestry generates documents based on the Grouping option selected on Step 2, but receipt numbers do not generate, void, or replace.
      - Generate - When you select the Assign a receipt number to transactions checkbox, eTapestry generates a document for each eReceipt and assigns a unique receipt number to eligible transactions. Documents do not generate for ineligible transactions and transactions that already have receipt numbers.

        When you select the Void existing receipts and create checkbox, eTapestry generates voids active receipts and creates new receipt numbers for affected transactions. There is no impact to transactions without existing receipt numbers.

        Note: When you select both Generate options, active receipts in your query are voided and new receipt numbers generate for all eligible transactions in the query; it does not matter whether they were previously receipted or not.

- Void - eTapestry voids transactions that have an active or valid receipt. When you select this, "VOID" appears on each generated document. There is no impact to transactions without existing receipt numbers.

d. Select receipt bundling options.

When a multiple transaction receipt is created, the transactions are "bundled" together with the same receipt number. Your query may contain transactions that share an active receipt number with other transactions not included in the query so these options determine how to handle multiple transaction receipts that you previously created.

- Skip those transactions - Transactions that share an active receipt number with other transactions not included in the query will be skipped and documents do not generate.
- Apply the receipting action to all transactions that share the same receipt number - The receipting action applies to all transactions in the bundle, even though some transactions may not be in the query.

  When you void and generate new receipt numbers, you apply the action to all of the transactions in the bundle. When you void the receipt number, but do not generate a new receipt, the transactions are no longer bundled, and you can receipt them separately.

e. On Step 4, select how you want to deliver the letters. To email receipts directly to the donor accounts, select Automatically email documents to accounts with email addresses. For recipients without an email address on their account records, a file generates for you to print and mail the documents.

f. On Step 5, select how to track the letters.

g. On Step 6, preview the summary information.

Tip: When the options you select do not apply to any transactions in the query, an error message appears.

4. Click Run.

Generate eReceipts for a single transaction

Before you begin, make sure your communication template contains the Generated Receipt Number and Generated Voided Receipt Number data merge tags described in the introduction to this section.

To generate a receipt for a single transaction, open the transaction and click Create Document. The Generate Letters Wizard appears. For details about how to generate one-off documents, refer to Generate One-Off Documents on page 165.

- For Criteria, select a template that includes eReceipt data merge values.
- For Receipting, select a receipt option for the transaction.
  - Nothing - eReciepting actions do not occur. eTapestry generates a document, but receipt numbers do not generate, void, or replace.
  - Generate - Assign a unique receipt number to an eligible transaction that has never been receipted and generate a document for it.
  - Generate (Replace) - If the transaction has an active or voided receipt number, create a new number and generate a document. Previously active numbers are voided.

    This option does not appear unless you previously receipted the transactions.
  - Void - Voids an active or valid receipt and generates a new document. The word "VOID" appears on the document.

    Note: When the receipt status reads "Split transaction with different receipt numbers," the program voids current receipt numbers and replaces them with different numbers for all transactions. When the status reads "Split transaction with different receipt numbers when one or more segments shares a receipt number with another transaction," the program does not void or replace numbers. To void and replace receipts with this status, create a query that contains the split transaction and send a communication.
- You cannot generate new multiple transactions receipts when you generate eReceipts for a single transaction. However, you can void or replace the receipt number for a bundle when you generate a one-off document. When you perform an action on a multiple transaction receipt, all transactions in the bundle are affected.

Tip: When a multiple transaction receipt is created, the transactions are "bundled" together with the same receipt number. To create receipts for multiple transactions, create a query and send a communication.

Generate eReceipts for online transactions

You can automatically generate a receipt number to include on donation confirmation email messages for transactions submitted through any eTapestery online forms. Depending on the type of online form, the communication template you use for online transaction eReceipts must include the Generated Receipt Number merge value, the eCommerce Details widget, or the Order Details widget to display eReceipt information. When you send an eReceipt, it includes the next unique receipt number that is available in the database on each receipt.

Note: eTapestry does not generate eReceipts for recurring gifts submitted through a DIY form, eCommerce page, or Fundraiser.

- DIY Form: Under Online Settings, select the Generate receipts on transactions from this page checkbox to generate eReceipts for transactions submitted on the published web page. The communication template you use for this donor confirmation email must include the Generated Receipt Number merge value or the eCommerce Details widget to generate the eReceipt information.

  Tip: If you do not select a communication template for the DIY form, eTapestry uses the default template to automatically include eReceipt information.

- Personal Fundraiser: The Generate receipts on transactions from this page checkbox appears on Step 8: Donation Options for both donations and registrations. The communication template you use for this confirmation email must include the Generated Receipt Number merge value to include the eReceipt information.

  Tip: If you do not select a communication template for the Personal Fundraiser, eTapestry uses the default template to automatically include eReceipt information.

- eStore (Cart): When you edit cart preferences, the Generate receipts on transactions from this page checkbox appears on Step 5: Transaction Options. On Step 4: Email Options, the communication template you select in the Email Template field uses the required Order Details widget to include the eReceipt information. In the Confirmation Sender field, you must also enter the email address you want to display as the sender.

View generated receipt number details

When you edit a transaction on the Journal page, the receipt number appears under Basic Information. To view receipt details, click the number. Voided receipt numbers appear with a strikethrough. When you replace a receipt number, the new number appears beside the voided number.

eReceipt query and custom report fields

Use these query fields when you query on receipt transactions. All fields appear in the Journal category.

- Transaction generated receipt date - Locate transactions based on the date a transaction's receipt was issued.
- Transaction generated receipt range - Locate transactions with receipt numbers in a specific range.
- Transaction generated receipt status - Locate transactions based on their current receipt status (original, voided, replaced, or none).

Use these custom report fields to report on receipt transactions. All fields appear in the Journal Fields category.

- Generated receipt date issued - Shows the date that a transaction's receipt was issued.
- Generated receipt number - Shows the current active or voided receipt number on a transaction.
- Generated receipt status - Shows the transaction's current receipt status (original, voided, replaced, or none).
- Generated voided receipt number - Shows the voided receipt number on transactions for receipts that have been voided and replaced.

Quick Formatting

When you edit a communication template in Guided Editing Mode, you can use quick formatting options to update text styles and background colors. To begin, select Quick Formatting on the editing screen.

Edit text styles

- To edit the font type, locate the type of text under Text Styles and select a font.
- To edit the font size, locate the type of text under Text Styles and select a size.
- To edit the font color, locate the type of text under Text Styles, click the color icon, and select a color. You can select a predefined color, click More Color sto select a custom color, or use the color picker.

  You can also enter the hexadecimal code of the color you want.

Click Update to apply the changes.

Note: If you previously manually edited font type, size, or color, your manual changes are not overwritten.

Edit background colors

1. Under Background Styles, locate the background color and click the color icon.

   Tip: You can also enter the hexadecimal code of the color you want.
2. Select a color. You can select a predefined color, click More Colors to select a custom color, or use the color picker.
3. Click Update to apply the changes.

Note: In Guided Editing Mode, you cannot manually edit the background color of a content block.

Split Transactions in Communications

If your organization uses split transactions, you can include the details of these transactions in thank you letters and annual receipt letters. To show splits in a detailed or itemized view, create a template for your split transaction letters, generate and send the letters, and track the results.

In the example below, the donor gave a $100 gift, $50 of which was applied to one fund and $50 to another fund. The letter shows the two $50 splits in the Entry List, with the Fund for each split displayed.



Melissa's Most Extreme Kids
6107 W. Airport Blvd - Greenfield, IN 46140 - 317-336-3827

June 30, 2008

Melissa's Most Extreme Kids
6107 W. Airport Blvd. Suite 120
Greenfield, IN 46140

Stanley Hudson
101 W. Corporate Way, Suite 305
Scranton, PA 01234

Dear Mr. Hudson,

On behalf of Melissa's Most Extreme Kids, I would like to thank you for your recent donation of $100.00 which we received on 6/26/2008. Please see a detailed listing of the funds to which this donation was applied in the table below.

Date	Fund	Received	Non-Deductible
6/26/2008	Delaney Jordan Scholarship	$50.00	$0.00
6/26/2008	Unrestricted	$50.00	$0.00
		$100.00	**$0.00**

The estimated value of any goods or services provided in return for your donation is $0.00 Please keep this written acknowledgment of your donation for your records.

Again, we thank you for your support and helping us succeed in our mission. The work we do is only possible because of thoughtful contributions from people like you.

Sincerely,

Melissa Jordan
Executive Director
Melissa's Most Extreme Kids
mjordan@extremekids.org

Create a template

1. From Communications, select a category to store your template, such as Thank You Letters.
2. Click Create a New Template.
3. In Step 1, enter a name and description.

4. If necessary, adjust the page size and margins.
5. Click Next.
6. In Step 2, click Documents and select the Split Transaction Letter.
7. In Step 3, edit the content of the letter, including images and text. The details for each split appear in the Entry List section of the letter.

   By default, the entry list widget includes columns for date, fund, received, and non-deductible, but you can edit it to show other information that you'd like to display.
8. After you set up the letter, preview the letter using the PDF or *Microsoft Word* options.

   Note: You cannot edit or modify PDF files that have been generated by eTapestry.

   For data merge tags and widgets, the preview uses information from your user account. As such, some fields may appear blank.
9. Make adjustments as necessary.
10. Click Save and Finish.

Generate letter for the split transactions

1. From Communications, click Create/Send communication.
2. Select the category where your letter template is stored and then select your template.
3. Generate documents like you normally would, but with the following adjustments.
4. In Step 1, the query that you use should have a Journal entry return type.
5. In Step 2, select Grouping options.
   - To place all splits/transactions for each account into one single document per account, with the details for the splits/transactions displayed in the Entry List, select Account
   - To create one document per household, select Household.
   - For Upgrade/Split Transactions, select Treat each upgrade/split as its own transaction, so that each split shows up on its own line in the Entry List, instead of being rolled up into one single line for the entire split transaction.
6. In Step 3, select how you want to deliver the letters.
7. In Step 4, select how you want to track the letters.
8. In Step 5, preview the summary information and then click Run.

Thank You Letters

When you receive donations, you send a thank you letter to reaffirm your appreciation for the contribution.

Determine who should receive letters and how often you want to send letters. To do this, create a query. For example, if you send letters at the end of each week, create a query that includes all donations for that time. If you want to send specialized letters for a specific fund or campaign, create your query accordingly.

We recommend you set up letter values so that when a you receive a donation, your data entry person can select the type of letter that should be sent. Next, create a query that uses the Letter field. To determine what the letters should say and how they should look, create a template. Generate thank you letters on a regular basis, so you can send them promptly. Then use a mass update to mark the accounts and transactions, so you can track that letters were sent.

Create the Letter field

1. From Management, click Letters.
2. Under Tasks, click New Letter.
3. Enter a name for the letter, such as Basic Thank You Letter.

   Note: When you create the letter template, we recommend you enter the same name so you can easily track the template to use for each letter.
4. Enter a description.
5. To save the letter, click Save and.

Create the Letter Sent user-defined field

1. From Management, click User Defined Fields.
2. From the Base category, click New Defined Field.
3. On Step 1: Basic Information, enter a name for the field, such as "Letter Sent?"
   a. Enter a description.
   b. In the Data Type field, select Text. Under Navigation, click Next.
4. On Step 2: Field Application, in the Journal Type row, select Transactions.
5. On Step 3: Field Attributes, select whether the field should be required.
   a. Select whether the field should be visible in eTapestry Mobile.
6. On Step 4: Display Type, select Selection from a set of Values.
7. On Step 5: Security, you can control how users view and use the new UDF when your organization uses Advanced Security.
8. On Step 6: Values, in the Name field, enter the value "Yes" for the UDF. Click Add Value.
9. Under Navigation, click Save and Finish.

Create a thank you letter query

Determine who should receive letters and how often you want to send thank you letters. After you enter transactions, create your query based on how often you want to generate letters. For example, you may plan to generate letters once per week.

1. From Queries, select the category for your query.
2. Under Tasks, click New Query.
3. Enter a name for the query. We recommend you enter a name that is the same or similar to the name of the Basic Thank You Letter.
4. Enter a description. For example, you can enter how often you plan to generate letters.
5. Under Starting Criteria, select your criteria. For example, in the Category field, select Constituent Journal Entry Date. Then in the Query field, select All Constituents.
6. Under Data Return Type, select Journal Entries. This enables you to filter specific information from the transactions into the letters that you will run using this query.
7. Under Available Fields, select Defined Fields.
8. Click Letters. Letter options appear on the left.
9. Under Criteria, select the type of letter you want to send.
10. Under Tasks, click Save And to save the query and navigate to the page you select in the drop down field. To review the query results, select "Preview" in the field.

Create a thank you letter template

1. From Communications, click Manage Communications. The Communication Categories page appears.
2. To store the template in a new category, under Tasks, click New Category. If the category already exists, click the name of it.
3. From the category page, under Tasks, choose **New Document or Classic Email Template**. The Communication Template Wizard appears.
4. On Step 1, enter the basic information for your template.
    - In the Name field, enter a unique name. We recommend you enter a name that is the same as or similar to the thank you letter field. For example, you can name the communication template Basic Thank You Letter.
    - Enter a description to help identify the template. We recommend you indicate the query to use with this template and when to generate the letters.
    - To prevent other users in your organization from editing the template, select Read Only.

- To make this template a favorite, select Favorite Communication Template. Favorite templates appear in the Favorites tile on your Home dashboard.
- If you intend to send this communication as an email, enter a subject for the email.
- To include a link for recipients to forward the message to a friend, select Include "Forward to a Friend" Link within. Select whether you want the link in the header or footer of the email.
- To include a link for recipients to open the message in a web browser, select Include "View as a Web Page" Link.
- To include links to share the communication in social media, select Include Sharing Links.
- If you intend to print the document or create a PDF, select the page size, orientation, and margins.

5. Click Next.
6. On Step 2, select the Documents category. Next, click a template to select it. You can select a pre-defined template or a blank one. When you select a pre-defined template, you can change the colors, layout, fonts, and images.
7. On Step 3, edit the content of the template. For information about how to use the TinyMCE HTML Editor, refer to TinyMCE HTML Editor on page 195.
   - To change the colors, click Quick Formatting.
   - To preview the text version of the template, click Text Version.
8. Click Next to save the template and use this same template every time you send this thank you letter.

Send thank you letters

1. From the Communication Categories page, select the category for your letter.
2. Under the template for your letter, click Create Documents.
3. On Step 1, enter who should receive a letter.
   - In the Category field, select the category for your query.
   - In the Query field, select your query.
   - Select the personas to export.
4. Click Next.
5. On Step 2, select how to print the letter.
   - Select whether you want to save the letters as a PDF or *Microsoft Word* file.

   Note: You cannot edit or modify PDF files that have been generated by eTapestry.

- In the File Name field, enter a name for the document.
- Under File Management, select whether you want to combine the letters into one file or leave each letter as its own file. If you select to combine documents, select how to sort them.
- Under Grouping, select how to group letters to reduce duplicate mailings.
- Under Upgrade/Split Transactions, select Treat each upgrade/split as its own transaction to display each split as its own line. Select Roll up related upgrades/segments into one transaction to display them as one single line for the entire split transaction.

6. Click Next.
7. On Step 3, a notification reminds you that the SEPA Pre-Notification template does not include Generated Receipt Number.
8. Click Next.
9. On Step 4, select how you want to receive the letters.

   Under Receiving, select how you want to access the documents.

   - Download documents - This option saves letters to your computer. As this processes, you cannot use other eTapestry features until the documents complete and the download window appears.
   - Place documents in My Drop Box - If your eTapestry Drop Box is under its 10MB limit, you can save the letters in it. As this processes, you can navigate to other areas of eTapestry and perform data entry tasks.
   - Email documents to me - This options emails the letters to you as a file attachment. As this processes, you can navigate to other areas of eTapestry and perform data entry tasks.

   Under Auto-mailing, to send the document to the constituent by email, select Automatically email documents to accounts with email addresses.

   {i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** Constituents will receive communications you select to auto-mail, regardless of their opt-out preferences.

   - Use the document's contents as the body of the email itself - We recommend this option for thank you letter communication because it reduces the size of the email, the download time for your recipient, and the chance of it being blocked as spam.
   - Include the document as an attachment on a separate email - When you select this, eTapestry generates documents based on the contents of your template and sends them as attachments to an email.

10. Click Next.

11. On the Tracking step, you can select how to track your document. Under Tracking - Interactions, select the check box next to Track interactions for each account.

    Enter a subject for the Mass Interactions page entry in the Subject field. Select the method in the Method drop down menu.

    A shared Mass Interaction appears on the Mass Interactions page for each account.

    Note: If you wish to create Journal contacts with marked defined fields, you can do so through a mass update. For more information, see Mass Updates.

12. If you selected to automatically email documents to accounts with email addresses on the previous step, you can now select whether you want to create a separate query of accounts that don't have an email address. If so, select a category and enter a name for the query.

    You can use this query to identify which constituents to contact in other ways or which constituents to ask for email addresses.

13. Click Next.
14. On Step 6, preview your summary of options and the number of documents you are about to create. To make changes, under Navigation, click Back.
15. To generate the thank you letters, under Navigation, click Run.
16. After the letters generate, save the file and print the letters to send to constituents.

Update the Letter Sent user-defined field

After you send thank you letters to a group of transactions, you can update the Letter Sent user-defined field (UDF) for each transaction to track the letter has been sent.

1. From Management, click Mass Update.
2. Under Update Existing Items, click Update Existing Transactions.
3. On Step 1, select the query you use to generate letters.
   - Under Update Type, select Assign.
   - Under the Base UDF node, click Letter Sent and select the Yes checkbox.

   Under Navigation, click Next.
4. The preview shows the details and the number of transactions to update. If the number of transactions does not match the number of letters you generated, click Back to make changes.
5. To process the mass update, click Run.

Thank You Letters Sent Confirmation

After you mark the Letter Sent user-defined field (UDF) as Yes, you can create queries to make sure a letter was sent to each donor. You can also create queries to identify additional constituents that need to be acknowledged.

First, create a query to confirm a letter went out to each donor.

1. From Queries, select the category of your letter.
2. Under Tasks, click New Query.
3. In the Name field, enter "Letter Sent."
4. In the Data Return Type field, select Journal Entries.
5. Under Criteria Options, select UDFs - Transactions.
6. For the Letter Sent UDF, select Yes.
7. Under Tasks, click Save And with View Queries in the drop down field.

Next, create a query of all transactions that typically receive thank you letters:

1. From Queries, select the category of your letter.
2. Under Tasks, click New Query.
3. In the Name field, enter "All Transactions."
4. On the Data Return Type field, select Journal Entries.
5. To include a journal entry date range, click Commonly Used Fieldsand select Journal Entry Date. Under Criteria, enter start and end dates. To view included transactions regardless of when they were made, do not select dates.
6. Under Commonly Used Fields, select Journal Entry Type.
7. Select the transactions types for which you send thank you letters.
8. Click Save and View Queries.

Finally, create a query to locate donors that have not been sent thank you letters:

1. From Queries, select the category of your letter.
2. Under Tasks, click New Compound Query.
3. In the Name field, enter "Letter NOT sent."
4. For the data return type, select Journal Entries.
5. For the combination type, select Subtract.
6. For Query 1, select the category of your letter and then select your "All Transactions" query.
7. For Query 2, select the category of your letter and then select your "Letter Sent" query.
8. Click Save and Preview.

Tip: You can also set up your Thank You Letter query to exclude transactions that are already marked as "Letter Sent?" = Yes. To so do, create a compound query which subtracts your "Letters Sent" query (query 2) from your "Basic Thank You Letter" query (query 1). Use this compound query to prevent printing duplicate thank you letters.

Thank you letter export for a mail merge

1. To group accounts and their transactions, first create a query for the time period or use a predefined query based on constituent journal entry date.
2. From Reports, click System.
3. Click Thank You Letter.
4. Review the list of predefined fields.
   - To remove a field, click X.
   - On the Browse Fields tab, select any additional fields you want to include.
5. Click Save and Run. The Launch page appears.
6. Select your query category and query.
7. If an account's address in your query has a persona type other than primary, such as Seasonal, select the type under Personas Reported. The program uses the primary address for accounts that do not have the type you select.
8. Select a delivery method.
   - To receive the file as an email attachment, select Email Export File and enter your email address, and click Submit. After you receive the email, save the attachment to your local computer.
   - To download the file, select Download Export File, click Submit, and save the file to your local computer.
   - To save the file to your drop box within eTapestry, click My Drop Box, and click Submit. After the file is in your dropbox, save it to your local computer.

   The file exports so you can create your mail merge in Microsoft *Word*.

Sending a SEPA Pre-Notification Letter

Before you process direct debit payments, you need to send a SEPA pre-notification letter to each donor. Review your nation's SEPA guidelines to determine when to notify donors.

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

Create SEPA notification template

1. From Communications, click Manage Communications. The Communication Categories page appears.
2. Click a category to select it, or click New Category under Tasks to create a new category.
3. From a category, click New Email or Document Template under Tasks. The Communication Template page appears.
4. On Step 1, enter the basic information for your template.
   - In the Name field, enter a unique name.
   - You can enter a description to help you identify the template.
   - To prevent other users in your organization from editing the template, select Read Only.
   - To make this template a favorite, select Favorite Communication Template. Favorite templates appear in the Favorites tile on your Home dashboard.
   - If you intend to send this communication as an email, enter a subject for the email.
   - To include a link for recipients to forward the message to a friend, select Include "Forward to a Friend" Link within. Select whether you want this link on the header or footer of the email.
   - To include a link for recipients to open the message in a web browser, select Include "View as a Web Page" Link.
   - To include links to share the communication in social media, select Include Sharing Links.
   - If you intend to print the document or create a PDF, select the page size, orientation, and margins.
5. Click Next. On Step 2, select the Documents category.
6. Select the SEPA Pre-Notification template.
7. On Step 3, edit the content of the template.
   - To edit text and image boxes, click them.
   - You can also rearrange the elements of the design. Hover over the element and click the four-way arrow to drag and drop.
   - To delete an element in the template, hover over it and click X.
   - To add a new element, select the block you want to add in the Add Block field.
   - To change the colors, click Quick Formatting.
   - To preview the text version of the template, click Text Version.
8. Click Save and to save the template.

Send SEPA notification letter

1. From the Communiation Categories, under your SEPA Pre-Notification template, click Create Documents.
2. On Step 1, enter the criteria for who should receive a letter.
   - In the Category field, select Pledges and Payments.
   - In the Query field, select Pledges with Scheduled Payments.
   - Select personas to export.
3. Click Next. On Step 2, select Document Options for how the letter should be printed.
   - Select whether you want to save the letters as a PDF or *Word* file.

     Note: You cannot edit or modify PDF files that have been generated by eTapestry.
   - In the File Name field, enter a name.
   - Under File Management, select whether you want to combine the letters into one file or leave each letter as its own file. If you select to combine documents, select how you want to sort them.
   - Under Grouping, select how to group letters to reduce duplicate mailings.
   - If your organization uses the Split Transaction module, select whether you want to treat each update/split as its own transaction or roll up related ones.
4. Click Next. On Step 3, select how you want to receive letters.

   Under Receiving, select how you want to access the documents.
   - Download - Save the letters to your computer. You will not be able to use other eTapestry features until after the documents are generated and the download window appears.
   - Place documents in My Drop Box - If your eTapestry Drop Box is under its 10MB limit, you can save the letters there. Meanwhile, you can navigate to other areas of eTapestry and perform data entry tasks.
   - Email documents to me - Send the letters to your email address as a file attachment. Meanwhile, you can navigate to other areas of eTapestry and perform data entry tasks.

   Under Auto-mailing, to send the document to the constituent by email, select Automatically email documents to accounts with email addresses.
   - Use the document's contents as the body of the email itself - We recommend this option for thank you letter communication because it reduces the size of the email, the download time for your recipient, and the chance of it being blocked as spam.
   - Include the document as an attachment on a separate email - When you select this,

eTapestry generates documents based on the contents of your template and sends them as attachments to an email.

5. Click Next. In Step 4, select whether you want to Create a Journal contact for Each Account to track that a document was generated.
   - If you select to create a journal contact, enter a Subject.
   - In the Method field, select Letters.
   - If needed, enter values for user defined fields.
6. Click Next. In Step 5, review the summary options that you've chosen and the number of documents that you want to create. If the information appears correct, click Run.

Mailing Codes

When you create a letter or custom report, you can associate it with a mailing code. A mailing code is a unique code that contains identifying information about the fund, campaign, approach, and letter. The mailing code, in combination with an account number, forms the Payment Reference.

If you include the Payment Reference field, eTapestry creates a Payment Reference for each individual donor that you can use for tracking purposes when you generate the letter or custom report.

Note: Mailing codes are currently available for eTapestry users in the Netherlands only.

Add a mailing code

1. From Management, select Mailing Codes under Database Configuration. The Mailing Codes page appears.

2. To create a new mailing code, click New Mailing Code from the Tasks menu.

3. Complete the following information.

   • To make this mailing code the default mailing code, select Default.

   • On the Name field, enter a unique and descriptive name for the mailing code. You can edit the name of the mailing code after you create it. This field is required.

   • On the Description field, enter a longer description of the mailing code to help other users in your organization when they use the field.

   • In the Future Gift Attributes section, specify the Fund, Campaign, Approach and Letter to be used for the mailing code.

4. To create the mailing code, click Save And.

Send Direct Debit Communications

Note: Direct Debit is currently available in the UK only.

1. To add Direct Debit fields to your communication, from the Edit step of a new or existing template page, select to edit the content of the communication.

2. On the Edit Contents screen, select Insert eTapestry Merge Value. The Merge Tags screen appears.

3. To view Direct Debit fields, in the Category drop down menu, select Gift Type Fields. The Direct Debit fields will now appear in the Field drop down menu. Scheduled Direct Debit fields are also available from the Scheduled Gift Type Fields category. To view these fields, select the Scheduled Gift Type Fields category from the drop menu. For more information on how to add fields to communication, see **Data merge tags** on TinyMCE HTML Editor.

Constant Contact Integration

eTapestry integrates with *Constant Contact* to synchronize your email lists and track activity in both systems. If you use *Constant Contact* for your email communication, you can compare databases, transfer email addresses, and track *Constant Contact* communications and opt-outs from within your eTapestry database and track email activity as journal entries in eTapestry. This allows you to use *Constant Contact* to complement your basic or advanced mass email communications from eTapestry.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** Contact entries for Constant Contact communications do not appear on the Journal page for user accounts.

Before you begin using the integration with *Constant Contact*, you need to connect the two systems. This allows eTapestry to access your *Constant Contact* lists and activity directly from the database so you can compare contacts, transfer email addresses, and synchronize activity from *Constant Contact* into eTapestry.

Note: By default, only system administrators have security rights to the *Constant Contact* integration. If you cannot access the integration, contact your system administrators, who can grant you rights under Manage, Security Groups. For more information about security groups, refer to the Security section.

Connect to Constant Contact from eTapestry

1. From Communications, click Link eTapestry to your Constant Contact account. The Blackbaud eTapestry & Constant Contact page appears.

2. In the User Name and Password fields, enter you *Constant Contact* login credentials.
3. eTapestry automatically synchronizes with *Constant Contact* on a weekly basis to ensure that your email activity in *Contact Contact* is properly tracked in eTapestry. We recommend that you leave this box checked to ensure proper tracking.

   Note: Every Sunday night, eTapestry looks for changes in subscription preferences in *Constant Contact* and updates your eTapestry accounts with this information. This weekly synchronization also looks for matching email addresses and creates journal contacts for accounts in eTapestry that match email recipients in *Constant Contact*. Synchronizations are tracked in your organization's journal, so you can create a report as needed.

   Tip: To prevent connection issues with your *Constant Contact* integration, you can manually refresh your connection from eTapestry. From Manage preferences, under Links, select Refresh Integration Connection then Refresh connection.
4. We recommend that you leave the Synch Opt Outs box checked to ensure proper tracking. Clear this box if you do not want to track accounts who unsubscribe from communications sent with *Constant Contact*.

   Note: Opt-outs from *Constant Contact* are tracked in a user defined field on the persona page in eTapestry. In the Base category, it is called Constant Contact Opt Out, and it is created the first time you synchronize your databases to record journal contacts and opt-out statuses. These email addresses are not automatically excluded from future communications within eTapestry, so if you want to avoid sending communications from eTapestry to those contacts who have unsubscribed from *Constant Contact*, use a query that excludes these accounts.
5. To link your eTapestry and *Constant Contact* accounts, click Save .

Database Comparison

You can compare your eTapestry database to your *Constant Contact* lists at any time to find email address matches between the systems. This helps you avoid sending duplicate communications to the same constituent, track activity from *Constant Contact* in your eTapestry accounts, and identify new potential donors who are not yet constituents in eTapestry but do receive your *Constant Contact* communications.

The database comparison uses email addresses to compare accounts, and does not check for matches on other biographical information. When comparing email addresses on the accounts, it looks for the following:

- Accounts that match in both databases: The accounts in this group have at least one email address in both eTapestry and *Constant Contact*. When the search is complete you can create a Custom Account query for this group.

- Accounts in eTapestry without a match in Constant Contact: The accounts in this group have at least one email address listed in eTapestry but no matches in *Constant Contact*. You can create a Custom Account query and export these accounts to *Constant Contact* after the search is complete.
- Accounts in Constant Contact without a match in eTapestry: The accounts in this group do not have a matching email address in eTapestry. You may want to create a list of these accounts in *Constant Contact* to contact separately, which you can do from the comparison screen. In some cases this group may represent prospective donors.
- eTapestry accounts without an email address: The accounts in this group do not have an email address recorded in any persona type in eTapestry. We recommend creating a query to review the contact information for each account in this group.

Note: If an email field in eTapestry has multiple email addresses, the comparison looks for matches in *Constant Contact* for each email address.

After the comparison is complete, you can create custom account queries for the three categories that have information within eTapestry. This can be done directly from the comparison screen using the button on the page. These queries are automatically saved under the query category "Constant Contact Comparison," which is created the first time you create a query from this screen.

When a scheduled database comparison is complete, eTapestry sends a notification to the email address you indicate.

Compare databases

1. From Communications, click Constant Contact. The Blackbaud eTapestry & Constant Contact page appears.
2. Click Database comparison. The Constant Contact - Database Comparison screen appears.
3. In the Notification Email field, enter the email address where you want to receive notification of the comparison.
4. Click Schedule for Off-Hours to schedule the comparison. The comparison is a resource-intensive process, so you cannot run processes such as query while the comparison runs. The comparison automatically runs overnight, and this process cannot be scheduled on a recurring basis.

   Note: You cannot schedule more than one database comparison. If a comparison is already scheduled, you receive an error if you try to schedule it again before the initial one has run. Because it is a resource-intensive process, the database comparison can only run overnight, so you can only schedule one comparison per day

Transfer Email Addresses

To send communications from *Constant Contact* to your eTapestry constituents, you can transfer groups of email addresses from your eTapestry database to your *Constant Contact* lists. This transfer only includes email addresses without any additional constituent information such as name, address, or phone number. It does not include any constituents who have opted out of communications. You can transfer email addresses to existing lists in *Constant Contact* or create new lists.

Note: When you transfer email addresses into a *Constant Contact* list, the transfer appends the new email addresses to the ones on the existing list. If you choose to override the existing list with the transferred email addresses, you may permanently lose existing data.

When a scheduled transfer is complete, eTapestry sends a notification to the email address you indicate on the transfer screen. This message includes information about the transfer, such as total count before and after the transfer and possible reasons for any discrepancies.

Note: *Constant Contact* can only handle email addresses that contain alphanumeric characters found in the standard English alphabet.

You can transfer email addresses from *Constant Contact* to eTapestry if you have the import module activated. When importing contacts, always make sure you include a name associated with each new email address. For information about importing accounts, refer to the Import and Mass Update Overview.

Transfer email addresses

1. From Communications, click Constant Contact. The Blackbaud eTapestry & Constant Contact page appears.
2. Click Transfer email addresses. The Constant Contact - Transfer Email Addresses screen appears.

   Note: You can also access the transfer process from the Query List page, the Query Definition page, and the Query Preview page.
3. In Step 1, select a query for the accounts you want to transfer to *Constant Contact* and which personas you want to include. If you access this process from the query pages, the query is automatically filled in.
4. In Step 2, enter a name for the new contact list or select an existing *Constant Contact* list.

   Note: When you transfer email addresses into a *Constant Contact* list, the transfer appends the new email addresses to the ones on the existing list. If you choose to override

the existing list with the transferred email addresses, you may permanently lose existing data.

5. In Step 3, enter the email address where you want to receive notification of the transfer.
6. Click Transfer to begin the transfer process.

Manage Preferences

After the initial integration setup between eTapestry and *Constant Contact*, you can change your preferences at any time. This allows you to update your *Constant Contact* login credentials and change your synchronization preferences between the two systems.

If you change your password in *Constant Contact*, you will be automatically brought to the preferences page in eTapestry the next time you access the integration screen so you can update your credentials.

Select preferences

1. From Communications , click Constant Contact. The Blackbaud eTapestry & Constant Contact page appears.
2. Click Manage Preferences. The Constant Contact - Manage Preferences screen appears.
3. Update your user name, password, or synchronization preferences. For more information about this screen, see Connect to Constant Contact from eTapestry on page 188.
4. Click Save.

Disable Constant Contact

If you no longer want to use the integration with *Constant Contact*, you can disable it.

1. From Communications, click Constant Contact.
2. Select Manage Preferences. The Constant Contact - Manage Preferences page appears.
3. Under Constant Contact Integration Status, clear the Enabled checkbox.
4. Click Save to disable the integration.

Note: To enable the integration after it has been disabled, select the Enabled checkbox and click Save.

Refresh Constant Contact connection

To prevent connection issues with your *Constant Contact* integration, you can manually refresh your connection from eTapestry. From Manage preferences, under Links, select Refresh

Integration Connection then Refresh connection.

Constant Contact Integration Best Practices

To get the most value out of integrating eTapestry with *Constant Contact*, we recommend the following best practices.

- Your *Constant Contact* records might only have email address information. We do not recommend that you import records into eTapestry with only email address information, as you will be missing the rest of the constituent information.

  Note: If you want to import *Constant Contact* information into eTapestry, you must have the Import Module activated.

- *Constant Contact* saves email campaign data for 90 days. This includes information such as send date, list mailed, and open/click through information. After 90 days, the information is discarded from *Constant Contact*. Because of this, it is important to create journal entries within eTapestry to track emails that are sent from *Constant Contact*, to ensure your records are complete and accurate.
- If you plan to use the database comparison to evaluate similarities between eTapestry and *Constant Contact*, we strongly recommend against deleting *Constant Contact* email addresses if they have been unsubscribed. Emails that are unsubscribed from your *Constant Contact* account will still appear in the database comparison as emails existing within *Constant Contact* even if they have been deleted from your *Constant Contact* account. This is because they are still marked and stored in *Constant Contact* with the unsubscribed status.
- In order to get the most value out of your eTapestry database, it is important to save the *Constant Contact* opt-out statuses of your constituents within eTapestry. This will allow you to better split any email campaigns that are run from your eTapestry database.
- It is a good idea to run the comparison between your databases periodically, to be sure your data is up to date. This will help remind you to try to acquire email addresses for those accounts missing an email address in eTapestry, and will also help you cultivate *Constant Contact* accounts into better qualified eTapestry constituents.
- By default, eTapestry only allows administrators to access the eTapestry/*Constant Contact* integration. It is important that administrators only grant rights to the *Constant Contact* integration to the appropriate people, to protect data integrity and security.

Email Feature Comparison

The following is a quick reference of the main features of the advanced email functionality in eTapestry and *Constant Contact*.

eTapestry

- Transactional emails (thank you messages, receipts, pledge reminders, etc.)
- Personalized emails
- Multiple security groups
- Attachments

Constant Contact

- Marketing materials
- Non-personalized emails
- Spam check
- Graphed reporting

Both Solutions

- Scheduled emails
- Reporting information (opens/click throughs/bounces)
- Social media links
- Journal entries in eTapestry
- Preview and test modes

Query Constant Contact Information

When you integrate with *Constant Contact*, you can query activity recorded in eTapestry from that interaction.

Organization Journal Query

When you integrate eTapestry with *Constant Contact*, eTapestry adds notifications to your organization's journal when activity occurs. To view these notifications, from Management, click My Organization, and select Journal.

- When a comparison between eTapestry and *Constant Contact* is completed, a notification shows the date of the comparison and related statistics, including the number of email addresses in both databases, number of email addresses only in *Constant Contact*, number of email addresses only in eTapestry, and number of constituents in eTapestry who did not have an email address. To report on this data, query based on the journal note.
- If your organization chooses to track new opt-outs from *Constant Contact*, a notification shows when the two databases were synchronized, and how many new and removed opt-outs were updated.

Note: A notification also appears on each individual account. For information about how to query on the accounts, see Query Constant Contact opt-outs on page 195.

- If your organization chooses to track communications sent from *Constant Contact*on each recipients' journal in eTapestry, the journal contacts are created when the two databases are synchronized. Additionally, a notification on your organization's journal shows when the synchronization occurred and how many contacts were created. For information on how to query these notes, see Organization Journal Query on page 1.
- When email addresses are transferred from eTapestry to *Constant Contact*, a notification shows the transfer date, the query and persona selections, and information about the *Constant Contact* list. The list information provided includes the name of the list, whether it was a new list, whether it was cleared, and the total count on the list after the transfer.

Query Constant Contact opt-outs

When recipients opt-out of receiving further communication using the link provided in a *Constant Contact* message, eTapestry tracks this information in a user defined field in the persona page. Because this is separate from regular opt-outs in eTapestry, constituents who have this field selected are not automatically excluded from eTapestry emails. If you want to exclude them from emails sent from eTapestry, you must query on this User Defined Field and exclude those email addresses from communications.

1. From the Queries tab, click the name of a query category to select it. The Edit Query Category page appears.
2. Click New Query under Tasks. The Create a New Query page appears.
3. Name the query and make general selections for the query.
4. Under Available Fields, select "UDFs - Persona" from the drop-down menu. From the persona user defined fields displayed below, click Constant Contact Opt Out. The field is added to the Criteria list.
5. Under Constant Contact Opt Out - Persona, select Yes.
6. Click Save and to create the query and return to the previous page.

TinyMCE HTML Editor

You can use the TinyMCE HTML editor to create content for templates and website pages. Although the editor appears throughout eTapestry, some editor options may not be available in all locations. The editor also respects many standard keyboard short cuts.

We recommend you use the editor to:

- Compose the text and HTML formatting within the eTapestry Communication Template Wizard. Do not compose in a word processor program and copy and paste the content into

the template, because Microsoft Word and other programs may apply formatting that cause errors with the template.

- Format spacing for text, images, tables, and other items. Do not use the space bar to adjust alignment, because this can cause some email to display incorrectly.
- Upload, insert, and format images. Do not copy and paste an image from your computer into the template, because the image must be uploaded for your recipient to receive it. Do not link to an image that is uploaded on a website that your organization does not host and maintain, because if the website changes your link and image may break.

For information about options on the HTML editor toolbar, review the following sections.

Text options

To bold text, select the text and click Bold.

To italicize text, select the text and click Italic.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** Arial Black, Comic Sans, Impact, Lucida Console, Lucida Sans Unicode, or Tahoma fonts, will not be italicized in PDFs generated from eTapestry. However, they will be italicized in the HTML editor, emails, and Microsoft Word. This is because these six fonts do not have an italicize version available, but most operating systems and email providers can create a fake italicized version.

To underline text, select the text and click Underline.

To align text to the left, select the text and click Align left.

To center text, select the text and click Align center.

To align text to the right, select the text and click Align right.

To justify the text, select the text and click Justify.

To insert an unordered list, place your cursor in the desired location and click Bullet list.

To insert an ordered list, place your cursor in the desired location and click Numbered list.

To indent less, select the text and click Decrease indent.

To indent more, select the text and click Increase indent.

To select a font, select the text, click Font Family, and select a font.

Tip: If your template includes non-Latin characters, you must use the International Serif font.

To re-size text, select the text, click Formats, and select a size.

To change the color of text, select the text, click Text color, and select a color.

To change the background color, select the text, click Background color, and select a color.

General options

To remove an item, select it and click Cut.

To duplicate an item, select it and click Copy.

To insert a item that you have cut or copied, place your cursor in the desired location and click Paste.

To undo a recent action, click Undo.

To redo an action that was undone, click Redo.

Paste from Microsoft Word

In general, we do not recommend pasting content from another programs into eTapestry's HTML editor. When you copy and paste content, invalid HTML code commonly copies over from the other program. This may cause problems with the way that the content appears in the HTML editor for your documents and emails.

The HTML editor is equipped to handle the pasting in of foreign content, particularly content that was created in *Word*. The HTML editor attempts to sanitize the content by removing incorrect formatting commands from the other program. However, this is not a guarantee your HTML code is clean. Depending on the content's format applied by the other program, the HTML editor may or may not be able to remove all non-HTML code. Due to this, eTapestry does not support the use of content created in another program and pasted in the HTML editor. If you experience issues with a template that contains content created in another program, we recommend you create and design the content again using the HTML editor.

Images

To insert or change an image, place your cursor in the desired location and click Insert/edit image. The General tab of the Insert/edit image window appears.

Tip: To improve image load time, we recommend that an image's file size be less than 20 KB for newsletters and online forms for desktop and mobile devices. You can insert larger images, but some newsletter recipients may flag the email as spam.

- In the Source field, browse to and select an image from your local computer.
- In the Image description field, enter a brief description of the image. This description appears whenever an image fails to load or when a reader hovers a cursor over the image. It's also used by screen readers for visually impaired recipients.
- To limit the display size, enter Dimensions.

Note: For a relative width, enter a percent and select the percent sign (%). For a PDF, we recommend you use a relative width so that the image adjusts to best fit the page. For a fixed width, enter the number of pixels and select px. For a *Word* document or email, we recommend you use a fixed width, so *Microsoft Word* and *Outlook 2007* render the image correctly. Alternatively, you can select the image and drag the side of the image to re-size it. To maintain the width to height ratio, drag the corner of the image. When you re-size an image this way, the image is set to a fixed pixel width.

To maintain the width to height ration and prevent distortion of fixed width images, select Constrain proportions.

Tip: We recommend banner and header images be less than 600 pixel wide, sidebar image be less than 100 pixels wide, and main column images less than 350 pixels wide.

- To enter a CSS style string, enter a style on the Advanced tab.
- To adjust the margins around the image, click the Advanced tab and then enter the pixels of vertical and horizontal space.
- Click Ok.

To move a image up or down in the template, select the image and drag it to the desired location.

Links, emails, and anchors

To insert or change a hyperlink, place your cursor in the desired location and click Insert/edit link.

- In the URL field, enter the full web address (including http://)

  For a email address, type "mailto:" and then enter the full email address. Based on the recipient's default browser, a compose message window appears with the linked address in the To field.

  To link to an existing anchor, type "#" and then enter the name of the anchor.
- In the Text to display field, enter a brief description of the link. This description appears for the recipient to click the link.
- In the Target field, you can determine whether the link should open in a new window. If you select None, the link respects the recipient's browser settings.
- Click Ok.

To create an anchor, place your cursor in the desired location and click Anchor. Enter the name and click Ok. The anchor icon appears in your template to indicate the anchor location; however, readers will not see the icon. An anchor is a marker for a particular section in your template. Use an anchor to create a short cut so readers can jump to the particular section. For example, you

can create a table of contents for a newsletter and use anchors so readers can jump to a specific article of interest.

Tip: In advanced editor mode for a communication, you can also choose the anchor from the anchors menu, which lists all anchors in the template.

Videos

To insert a YouTube video, place your cursor in the desired location and click YouTube. Enter the video URL and click Insert.

Note: You can only insert a YouTube video when you design a Personal Fundraising web page.

Special characters

To insert special characters (such as mathematical symbols or foreign accents) place your cursor in the desired location, click Special Character, and select a character.

Lines

To insert solid, horizontal line, place your cursor in the desired location and click Horizontal line.

Tables

To insert a table in a template, place your cursor in the desired location and click Insert Table, or right click and then select Insert a New Table. The Insert Table screen appears. Enter the number of columns and rows. Then click Insert.

To view or hide grid lines for the cells, click Toggle Guidelines.

To edit a table, click inside the table and then click Edit Table, or right click on the table and select Table Properties. Enter your changes and click Update. However, you can't add columns or rows in this way.

You can edit the alignment of text within a table when you insert or edit a table. From the General tab, select whether the text should be left justified, right justified, or centered.

For example, the following image shows a template that uses tables nested inside each other. The table with a white background, headers, and two columns of content is centered inside the table with a dark red background.



You can edit the width of the entire table when you insert or edit one. From the General tab, in the Width field, enter a percent and the percent sign (%) for a relative width. We recommend you use a relative width so that the table adjusts to best fit the reader's screen. For a fixed width, enter the number of pixels only.

You can edit the height of the entire table. However, we recommend that you leave the Height field on the General tab blank, so that the content determines the height of the table.

You can edit the background color of the entire table, a specific row, or a specific cell when you insert or edit a table. From the Advanced tab, click the icon to open the color picker. Select a color and click Update to apply it.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** From the Advanced tab, you can also select a background image for your table. However, we recommend you do not use background images because Microsoft Outlook 2007 does not render the images. If you use a background image, also select a background color so all recipients can read the text.

To remove a table, right click on the table and select Delete Table. The table and its contents are deleted.

To add a row to a table, right click a row above or below where you want to add another. A menu appears. Hover your cursor over the Row option and then click Insert Row Before or Insert Row After.

To remove a row from a table, right click the row. A menu appears. Hover your cursor over the Row option and then click Delete Row. The row and its contents are deleted.

To add a column to a table, right click a column adjacent to where you want to add another. A menu appears. Hover your cursor over the Column option and then click Insert Column Before or Insert Column After.

To remove a column from a table, right click the column. A menu appears. Hover your cursor over the Column option and then click Delete Column. The column and its contents are deleted.

To combine adjacent cells in a table, select the cells that you want to merge and click Merge Table Cells. You can also select the cell in the top left corner, click Merge Table Cells, enter the number of rows and columns to merge, and click Merge.

To split cells that were merged, place your cursor inside the cell and click Split Merged Table Cells. The cells are separated into their original format.

To hide or show grid lines that delineate cells, click Toggle Guidelines.

You can edit the width, padding, background color, border color of a cell. You can also edit the alignment of its contents. Place your cursor insider the cell and click Table Cell Properties. You can also select cells, right click, hover your cursor over the Cell option, and select Table Cell Properties. Enter your changes and click Update to apply them.

- To edit the alignment of the content of a cell, from the General tab, in the Alignment field, select whether the content should be left justified, right justified, or centered. You can also highlight the content of the cell and click Align Left, Align Right, or Align Center.
- To edit the width of a cell, from the General tab, in the Width field, enter a percent and the percent sign (%) for a relative width based on the table size. For a fixed pixel width, enter a number only. When you adjust the width of one cell, all cells in the column are also updated.

  Tip: We recommend you leave width blank so the content determine the cell width.
- To create space between the contents of a cell and the sides of the cell, increase the padding. From the General tab, enter the number of pixels for padding to the top, bottom, left and right of the content of the cell. When you adjust the padding, rows and columns also adjust.

  {i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** Programs that use Microsoft Word to render text, such as Microsoft Outlook 2007, may not render cell padding correctly.
- To edit the background color of a cell, from the Advanced tab, click the color icon to open the color picker.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** From the Advanced tab, you can also select a background image for your cell. However, we recommend you do not use background images because Microsoft Outlook 2007 does not render the images. If you use a background image, also select a background color so all recipients can read the text.

Note: When you select colors for a table, the cell color takes precedence over the row and table colors and the row color takes precedence over the table color. If no cell or row color is selected, the table color is used.

Data merge tags

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. Consider using data merge tags for a thank you letter template to include the constituent's name, address, salutation, and the date and amount of the donation.

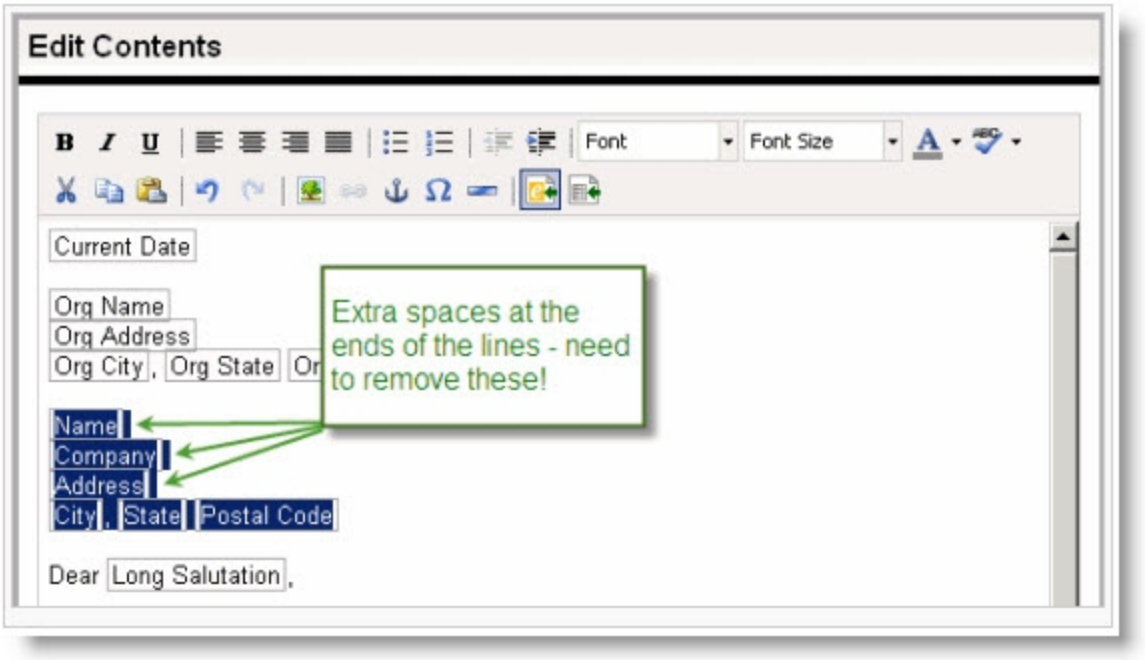
Tip: You can also use widgets to merge data into your documents or emails.

When you preview a template, the preview document shows your user account information for the data tags, because you have yet to select a constituent account. If you use fields that do not exist for your user account, the fields are blank in the preview. However, if you insert the "Received" tag, the received amount will preview as $5.00. If you insert tags for other system-defined currency fields, the amounts will preview as $0.00. If you insert the tag for the journal field Date, the transaction date previews as the current date.

When you generate a document or email, if there is no data for the entry in a field that you inserted, the field is blank in the communication.

- You may need to include fields in the address block that might not have data in them for every constituent. For example, some people insert a Company field in the address block in case the constituent prefers to receive mail at their Business persona, however many constituents may not have a company listed. We recommend you do not include extra spaces in your address block. In this way, when there is no company list, instead of a blank space, the line is "collapsed." To ensure that you have no extra spaces, highlight the address block.
- In the following example, you'd need to remove the extra spaces at the end of the lines containing "Name", "Company", and "Address" to ensure that those lines can collapse if

there is no data in the fields.



To insert a data merge tag into a communication template, place your cursor in the location where you want to insert the field and then click Insert eTapestry Data Merge Value. The Merge Values screen appears. From the Fields tab, select a Category and then select a Field; you can also use the search field at the bottom of the screen. From the Options tab, you format the field, select aggregate options, and select default values. Then click Insert.

To edit an inserted data merge tag, double click the tag, or right click the tag and then click Modify eTapestry Merge Value. Enter your changes and click Update to apply them.

Aggregates enable you to perform calculations on journal entry fields. There are three categories of aggregates: Math, Date Ranges, and Ordinal Number.

Tip: You can use these same aggregate options for custom reports.

Math functions aggregate data using basic bath functions on currency and number fields.

- Sum - This shows the total of all values in the field for each account, based on the journal entries in your query.

  Note: When you generate documents or emails, if you select One Per Account or One Per Household for Grouping, eTapestry automatically sums the corresponding values even if you do not use the sum aggregate.

- Avg - This shows the average of all values in the field for each account, based on the journal entries in your query.
- Min - This shows the lowest value in that field for each account, based on the journal entries available in your query.
- Max - This shows the greatest value in that field for each account, based on the journal entries available in your query.

Date range functions calculate sums for currency and number fields based on a specific time period for each account, based on the journal entries available in your query.

Note: The Fiscal Year date range is based your organization preference setting for Last month of the fiscal year.

Ordinal number functions aggregate data based on the date order of journal entries.

- First - This shows data starting with the oldest journal entry for each account, based on the journal entries in your query.
- Second - This shows data starting with the second oldest journal entry for each account, based on the journal entries in your query.
- Third - This shows data starting with the third oldest journal entry for each account, based on the journal entries in your query.
- Fourth - This shows data starting with the fourth oldest journal entry for each account, based on the journal entries in your query.
- Fifth - This shows data starting with the fifth oldest journal entry for each account, based on the journal entries in your query.
- Last - This shows data starting with the most recent journal entry for each account, based on the journal entries in your query.

You can format data merge tags so the text looks how you want, based on whether the field is a text, date, currency, or number field.

For text fields:

- Text - This shows the text in its plain, original format.
- Lower Case - This shows the text with all capital letter made lower case.
- Upper Case - This shows the text in all capital letters.

For date fields:

- Date - This shows the original format of the date (mm/dd/yyyy or dd/mm/yyyy)
- Date (Long Format) - This show the date as Month dd, yyyy. For example January 1, 2015.

- Month/Day - This shows the date as mm/dd.
- Month/Year - This shows the date as mm/yyyy

For currency fields:

- Currency, Full - This shows the monetary amount with currency symbol, punctuation, and two decimal places. For example, $1,500.50.
- Currency, No Decimal - This shows the monetary amount rounded to the nearest whole number, with currency symbol and punctuation. For example, the amount $1500.50 would be displayed as $1,501.
- Number, Full - This shows the monetary amount with punctuation and two decimal places but no currency symbol. For example, 1,500.50.
- Number, No Decimal - This shows the monetary amount rounded to the nearest whole number, with punctuation but no currency symbol. For example, the amount $1500.50 would be displayed as 1,501.

For number fields:

- Number - This shows the amount as it was entered, with punctuation inserted for numbers greater than 999. For example, 1,000 or 1,000.00.
- Number, Full- This shows the amount with two decimal places and punctuation inserted for numbers greater than 999. For example,1,000.00.
- Number, No Decimal - This shows the amount rounded to the nearest whole number, with punctuation inserted for numbers greater than 999. For example, 1,000.

You can also set a default value for data merge tags, so that when a field is blank the document or email shows the default value. For example, if you use the Short Salutation field, you may want to enter "Friend" as the default value, in case some constituent accounts don't have a short salutation.

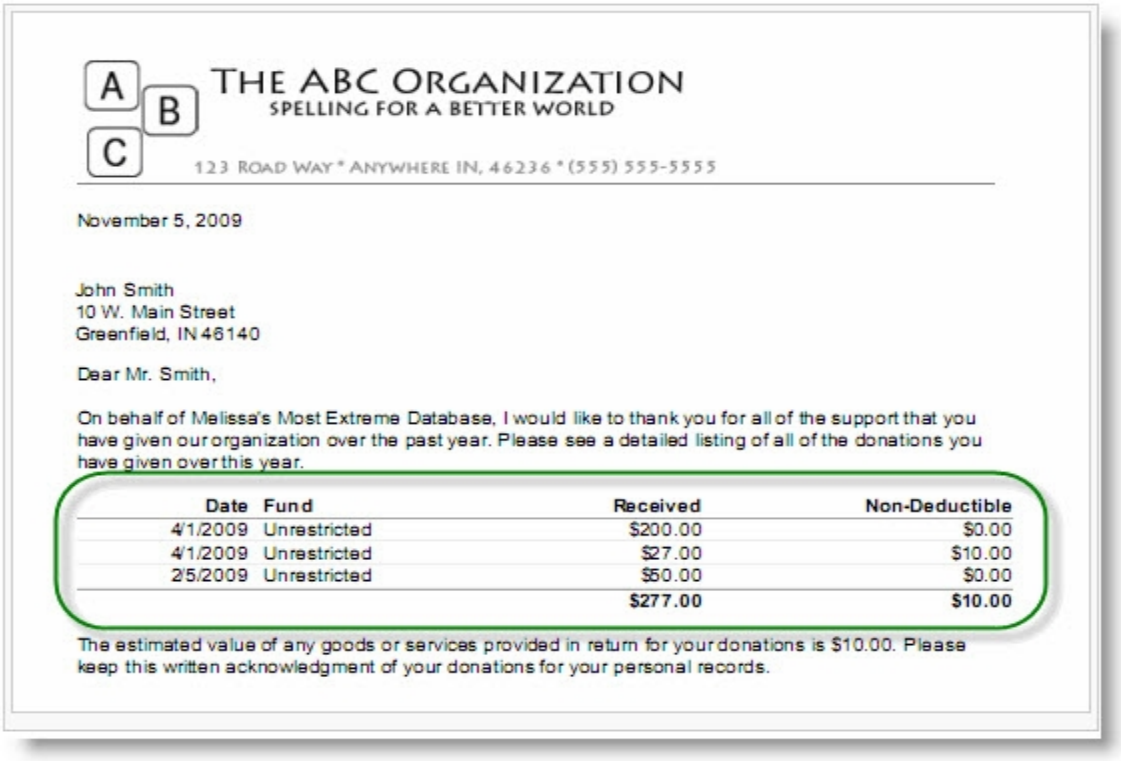
Note: For Advanced Mass Emails, the default values are used for Forward to a Friend and View as Web Page options.

Letter widgets

Letter widgets enable you to merge data from your eTapestry database entries into documents or emails in a structured format.

- Entry List - This widget shows journal entries in a list format, much like a report. Consider using this in annual receipts to show details about each donation you received from the constituent this year.

You can customize this widget by selecting which columns to include, naming the column headings, formatting and aligning the data, and sorting by a column. You can also select whether to include a Total at the bottom of the list.



THE ABC ORGANIZATION
SPELLING FOR A BETTER WORLD

123 ROAD WAY * ANYWHERE IN, 46236 * (555) 555-5555

November 5, 2009

John Smith
10 W. Main Street
Greenfield, IN 46140

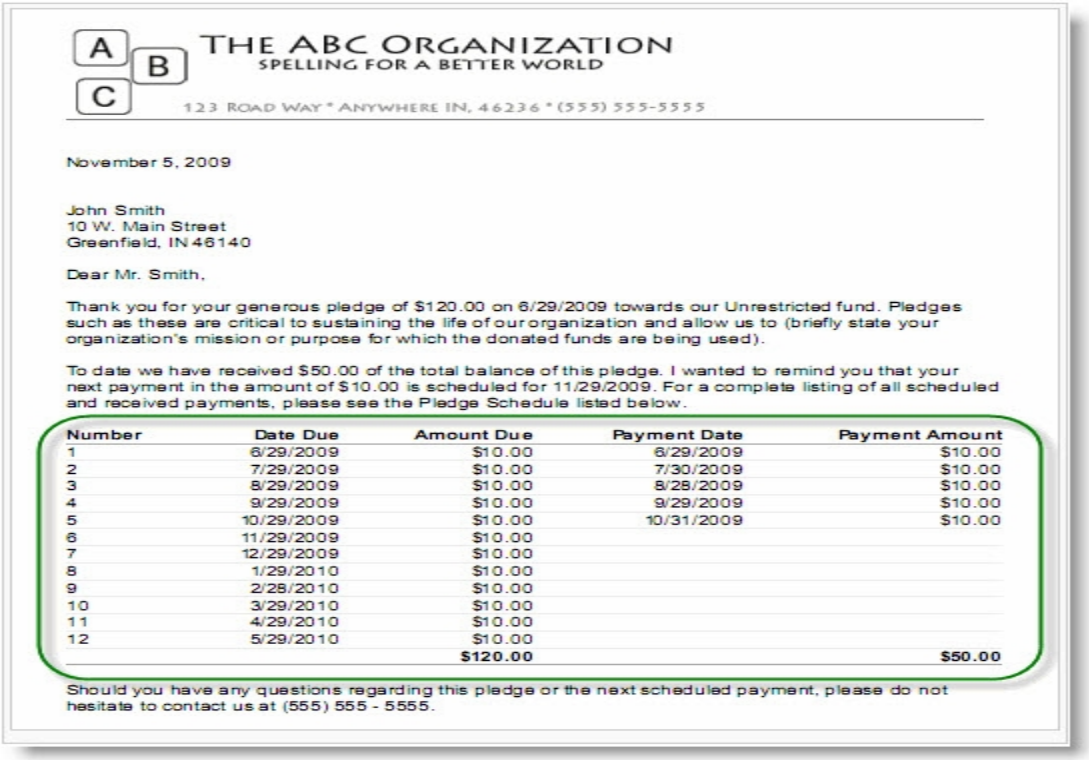
Dear Mr. Smith,

On behalf of Melissa's Most Extreme Database, I would like to thank you for all of the support that you have given our organization over the past year. Please see a detailed listing of all of the donations you have given over this year.

Date	Fund	Received	Non-Deductible
4/1/2009	Unrestricted	$200.00	$0.00
4/1/2009	Unrestricted	$27.00	$10.00
2/5/2009	Unrestricted	$50.00	$0.00
		$277.00	**$10.00**

The estimated value of any goods or services provided in return for your donations is $10.00. Please keep this written acknowledgment of your donations for your personal records.

- Pledge Schedule - This widget shows the dates and amounts of scheduled and received payments for a particular pledge. Consider using this in pledge reminders to give the constituent an overall picture of the pledge.



THE ABC ORGANIZATION
SPELLING FOR A BETTER WORLD

123 ROAD WAY * ANYWHERE IN, 46236 * (555) 555-5555

November 5, 2009

John Smith
10 W. Main Street
Greenfield, IN 46140

Dear Mr. Smith,

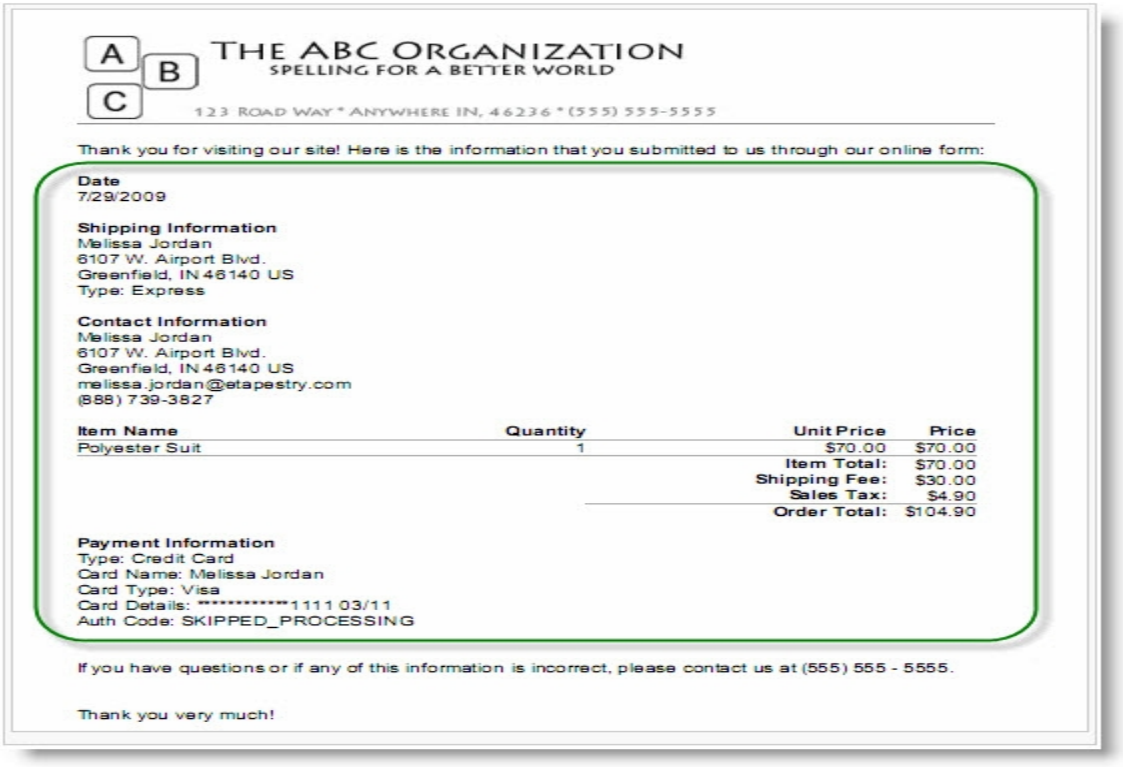
Thank you for your generous pledge of $120.00 on 6/29/2009 towards our Unrestricted fund. Pledges such as these are critical to sustaining the life of our organization and allow us to (briefly state your organization's mission or purpose for which the donated funds are being used).

To date we have received $50.00 of the total balance of this pledge. I wanted to remind you that your next payment in the amount of $10.00 is scheduled for 11/29/2009. For a complete listing of all scheduled and received payments, please see the Pledge Schedule listed below.

Number	Date Due	Amount Due	Payment Date	Payment Amount
1	6/29/2009	$10.00	6/29/2009	$10.00
2	7/29/2009	$10.00	7/30/2009	$10.00
3	8/29/2009	$10.00	8/28/2009	$10.00
4	9/29/2009	$10.00	9/29/2009	$10.00
5	10/29/2009	$10.00	10/31/2009	$10.00
6	11/29/2009	$10.00		
7	12/29/2009	$10.00		
8	1/29/2010	$10.00		
9	2/28/2010	$10.00		
10	3/29/2010	$10.00		
11	4/29/2010	$10.00		
12	5/29/2010	$10.00		
		$120.00		**$50.00**

Should you have any questions regarding this pledge or the next scheduled payment, please do not hesitate to contact us at (555) 555 - 5555.

- Order Details - When you use eStore (Cart) that is available with the eTapestry Essentials package, you must include this widget in the communication template for the order confirmation email.



THE ABC ORGANIZATION
SPELLING FOR A BETTER WORLD

123 ROAD WAY * ANYWHERE IN, 46236 * (555) 555-5555

Thank you for visiting our site! Here is the information that you submitted to us through our online form:

Date
7/29/2009

Shipping Information
Melissa Jordan
6107 W. Airport Blvd.
Greenfield, IN 46140 US
Type: Express

Contact Information
Melissa Jordan
6107 W. Airport Blvd.
Greenfield, IN 46140 US
melissa.jordan@etapestry.com
(888) 739-3827

Item Name	Quantity	Unit Price	Price
Polyester Suit	1	$70.00	$70.00
		Item Total:	$70.00
		Shipping Fee:	$30.00
		Sales Tax:	$4.90
		Order Total:	$104.90

Payment Information
Type: Credit Card
Card Name: Melissa Jordan
Card Type: Visa
Card Details: **********1111 03/11
Auth Code: SKIPPED_PROCESSING

If you have questions or if any of this information is incorrect, please contact us at (555) 555 - 5555.

Thank you very much!

- eCommerce Details - This widget is used for custom eCommerce confirmation emails. It shows the primary details from an eCommerce submission, including the name, address, email, phone, and transaction information.

Tip: You are not required to include this widget. You can use merge tags for an entry list widget instead.



- Account Photo - When you use *Attachments* that is available with the eTapestry Essentials or Pro packages, you can select this widget to include the image stored on the account's Home page. Consider using this widget in a mailing label template to create a constituent directory. When you include it, a placeholder image appears in the template. Although you cannot customize this widget, you can customize the height, width, and alignment of the image.



Note: The account photo widget is compatible with document types, such as PDFs and *Microsoft Word* files. However it is not compatible with emails.

- Donor Loyalty Link - If you use the Donor Loyalty module, you can use this widget to insert a link to the Donor Loyalty Survey page. You define the text for the link (for example, "Click here." or "Let us know what you think!") and it inserts the correct link associated with each recipient account in the email.

You insert widgets when you edit the communication template. To insert a widget, place your cursor in location where you want the widget and click Insert eTapestry Letter Widget. The widget screen appears. On the Select tab, select the type of template to add. For entry list and donor loyalty link widgets, use the Options tab to customise the widget. Then click Insert.

To edit an inserted widget, double click the widget. You can also right click the widget and the click Modify eTapestry Letter Widget. After you enter your changes, click Update to apply them.

Tip: To change the text for a Donor Loyalty Link, delete the link from your template and then reinsert the widget.

Edit the Entry List Widget

To edit an inserted widget, double click the widget. You can also right click the widget and the click Modify eTapestry Letter Widget.

Tip: By default, the Entry List includes Date, Fund, Received, and Non-Deductible columns.

- To a column, click Add Another Column.
- To include a sum for any currency or number data, from the Options tab, click Show Totals.
- To change the field for a column, select the name of the column you want to replace. A box appears around the column with an arrow. Select the category for the new field and then select the field name.
- To rename a column, select the name of the column. A box appears around the column with an arrow, edit the column display name.
- To reorder columns, use the up and down arrows next to the column name. The columns are displayed starting from the left, and ending on the right.
- To reformat data, select the name of the column. A box appears around the column with an arrow, select your preferred format.
- You can use aggregate s to perform calculations on fields that include date, number of currency information. Typically, you aggregate data merge values, instead of columns in the entry list, but the process is similar. For more information, refer to TinyMCE HTML Editor on page 195.
- By default, eTapestry automatically aligns column data. However, you can manually adjust the alignment to be left justified, right justified, or centered.
- To sort items in an the entry list, based on a single column, select the name of the column. A box appears around the column with an arrow. Select whether the sort should be ascending or descending.
- To delete a column, select the name of the column and then click X.

After you enter your changes, click Update to apply them.

Advanced editor

In Advanced Editor Mode for communication templates, you can also remove formatting, edit HTML source code directly, and preview the results.

- To remove all formatting, select items and click Remove Formatting.
- If you prefer to work in HTML code, click Edit HTML Source. You can edit the code directly and paste code created in other programs into the editor. When you paste code, the editor automatically makes some revisions. To prevent automatic revisions, use No Editor Mode instead.
- To review the content, click Preview. Use the preview to test links and anchors. If you inserted widgets or data merge tags, the preview will not show constituent data yet.

Color options

You can use the HTML editor to change the color of text in your template.

- In guided editor mode, use the Quick Formatting options to adjust the text and background colors. You can also manually adjust the text color. You cannot manually adjust background color.
- In advanced editor mode, you can manually adjust the text color and background color. You can also directly edit the HTML Source to use the color you want.

To manually edit text color, highlight the text and then click the text color icon. To use the currently selected color, click A. To select a different color click the arrow next to A. Predefined color appear. To select a predefined color, click it.

To select an undefined color, click Custom. Choose a custom color, enter the hexadecimal code for the color you want, or enter RGB values for the color. Click OK. To apply the custom color, select it from the list of custom colors.

Drop Box

When you generate communication and exported reports, you can chose to store the files in your eTapestry drop box to download later. Each user has a separate drop box.

To access your drop box, from Home, click See All beside My Drop Box. You can also click My Drop Box from the Quick Links tile on your home dashboard.

To download an item, click the file name. The file is downloaded to your computer, based on your browser settings.

To view how much storage you have used and how much space remains, access your drop box and review the Space Used information. If your drop box is nearly full, but has not yet exceeded its storage limits, you can still send a file to the drop box, even if that file would cause you to exceed the storage limit. However, after the limit is exceeded, you must delete files before you can store additional items here again.

To delete an item, click Delete under the file name. The file is removed from eTapestry. To delete all files from the drop box, click Clear Drop Box.

Queries

You use queries to split your database based on a series of criteria you define. There are four types of queries in eTapestry.

Tip: For best practice information about queries, refer to eTapestry Best Practices: Query 101.

- System-Defined Query: These are queries that are pre-defined in eTapestry and cover some basic splitations. We recommend that you always check to see if a system-defined query can serve your need before you create a manual query. System-defined queries are often the starting criteria for manual queries.
- Basic Query: In a basic query, you specify the criteria for entries. For example, the state a constituent's address is in, the date of an entry, the fund a transactions, etc. The query mechanism searches through all of your accounts or journal entries and locates only the ones that meet your specified criteria.
- Compound Query: In a compound query, you can combine two other queries by adding their results together, subtracting the results of one query from the other, or intersecting the results to find only the accounts or entries that exist in both queries. While compound queries are sometimes necessary, often you can add more criteria to a simple query without the need for a compound query.
- Custom Account Query: In a custom account query, you can manually select the specific accounts that you want. These accounts do not have to share any specific data in common because you are able to manually pick out the ones that you want. You can also create a custom account query from a basic query, then manually remove any accounts that you do not want in your final results.

Queries are used in different areas of the program to provide the specific split of the database to work with.

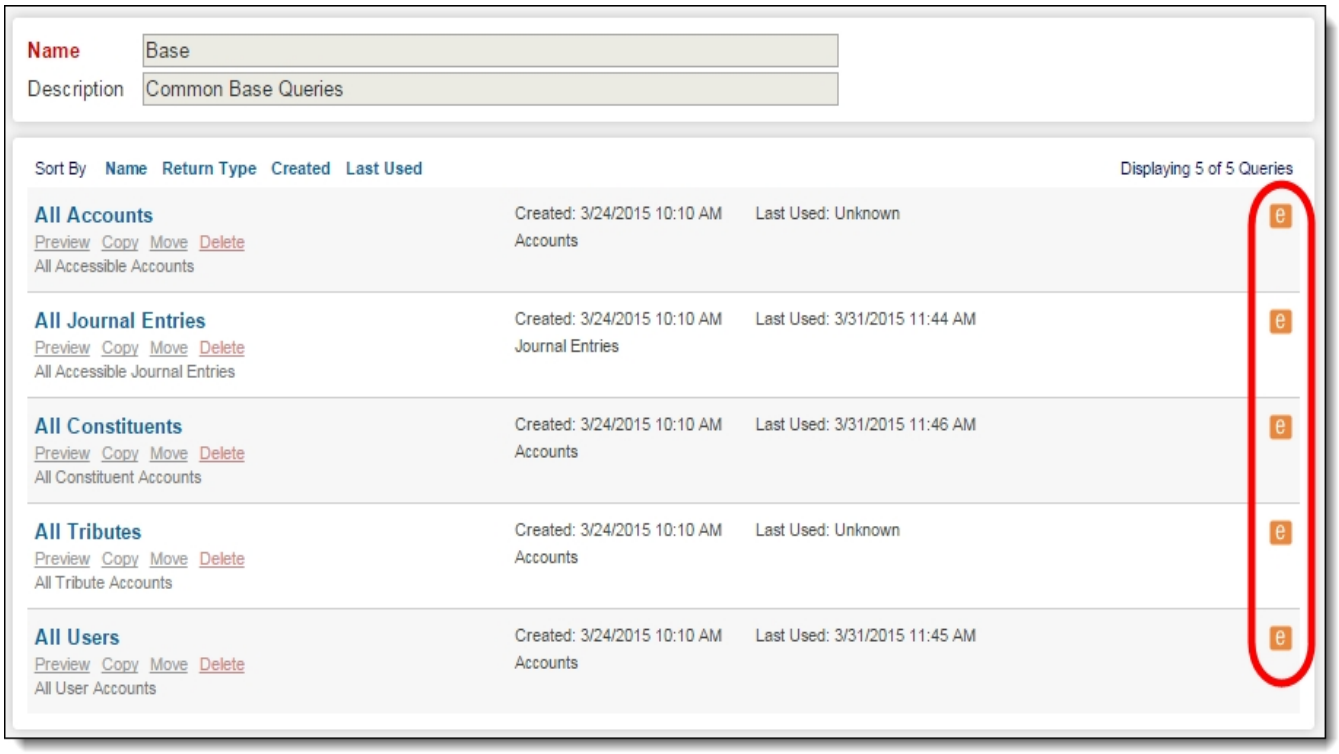
- Reports: When you run a report, you specify the query that contains the accounts or journal entries to include in the report. The report itself determines the data to show for those accounts or entries, but the query determines which accounts or entries appear.
- Communications: eTapestry's communication tool allows you to generate batches of letters and mass email. You use a query to determine which journal entries or accounts to send the communication to.
- Mass Update: eTapestry's mass update tool allows you to update accounts or journal entries. When you run a mass update, you use a query to specify which accounts or journal entries to update.
- Find Account: You can use a query on the Advanced Find screen to limit your search to only those accounts included in the query.

- Advanced Security: Organizations that use eTapestry's Advanced Security module can set up queries to define which accounts and journal entries users can view and edit.

System-Defined Queries

System-defined queries are basic queries provided by eTapestry to help you quickly query data you often want to group together such as all accounts, all constituents, and all journal entries from the last 365 days. You cannot edit, copy, or delete system-defined queries.

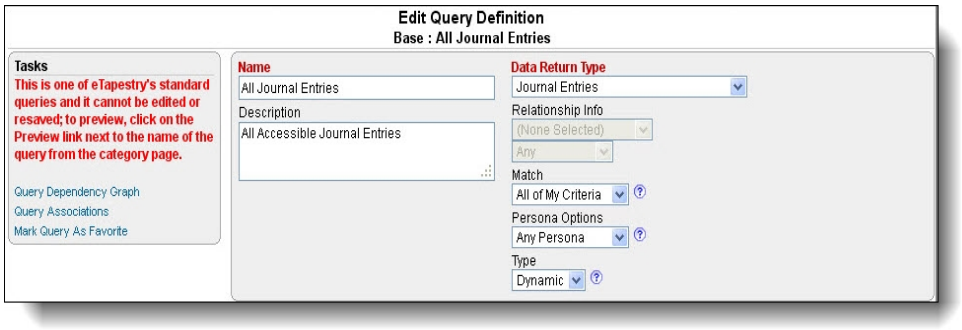
You can identify these queries by the e icon in the query row on the far right side of the page.



Mark a system-defined query as a favorite

1. From Queries, click Manage Queries. The Query Categories page appears.
2. To select a query category, click the category name. The Edit Query Category page appears.
3. Click on a system-defined query name to select it. The query screen appears.

Tip: You can identify a system-defined query by the e icon in the query row on the far right side of the page.



4. Under Tasks, click Mark Query as Favorite. The query saves as a favorite. You can view a list of your favorite queries in the Favorites tile on the Home page, in the Favorite Queries tile on the Query Categories page, or under Favorites on the Query tab.

Tip: To remove a system-defined query as a favorite, click Remove From Favorite Queries under Tasks.

Basic Queries

In a basic query, you specify which criteria the entries must have, and the query mechanism searches through all of your accounts or journal entries and locates only the ones that meet your specified criteria.

Note: You cannot delete standard queries, queries that are used as the starting criteria for another query, or queries that part of a compound query.

Create a basic query

1. From Queries, click Manage Queries. The Query Categories page appears.
2. Click on a category to select it, or to create a new category click New Category under Tasks. After you access a category, the Edit Query Category page appears.
3. Click New Query under Tasks. The Create a New Query page appears.
4. Under Query Basics, enter a name and description for your query. Be as descriptive as possible so that you and other users in your organization know what the query is used for.
5. To mark this query as a favorite, select Favorite Query. Links to your favorite queries appear on your eTapestry home page when you use the Favorites tile. For more information about customizing your home page, see Customize Home Page.
6. To hide this query from other users in your organization, select Private.

7. To prevent other users in your organization from editing this query, but allow them to view and select it, select Read Only.
8. 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.
9. Every basic query in eTapestry is based on another existing query, called the Starting Query. By default, this is set to the Base - All Constituents query, which includes all constituents in your database. Your starting query selections must contain data to generate results.

   However, you can choose a different query to be the starting query for your new query. This can either narrow your query's search; for example, you can set the Starting Criteria to Constituent Journal Entry Date - This Year to make sure that your query only looks at journal entries in the current year, or it can widen your query's search. For example, you could change it from All Constituents to All Accounts to make sure that Users and Tributes are also included in your query's search.

   Note: If you select a starting query which contains criteria from the Personas page, such as the Email field or a user-defined field, your query will only focus on the personas that were matched in the starting query even if you choose to check any persona.

   If you need to query on multiple persona criteria and match all persona types, you will want to create a compound query to ensure all personas are considered in your query results. For more information, see this Knowledgebase solution.
10. 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 or donation-related results, select "Journal Entries." For more information about data return types, see Data Return Types on page 224.
11. If you select "Related Accounts" in the Data Return Type field, select an option in the Relationship Info field.
12. In the Criteria Matching field under Criteria Options, select whether you want all of your criteria to be matched in the results, or if you want to include every result that fits at least one of your criteria, even if it does not meet all of them.
13. The Which persona should be checked for matches? field is relevant if any of 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.
14. Enter the criteria for your query. For more information, see Query Criteria.

15. Click Save And to save the query and navigate to the page selected in the drop down field.

Compound Queries

Compound queries are used when you want to combine the results of two other queries to come up with a new set of results. In a compound query, you can combine the queries by adding their results together, subtracting the results of one query from the other, or intersecting the results to find only the accounts or entries that exist in both queries.

Create a compound query

1. From Queries, click Manage Queries. The Query Categories page appears.
2. Select a category or create a new one.
3. Once inside a category, click New Compound Query under Tasks.
4. Under Query Basics, enter a name and description for your query. Be as descriptive as possible so that you and other users in your organization know what the query is used for.
5. To mark this query as a favorite, select Favorite Query. Links to your favorite queries appear on your eTapestry home page when you use the Favorites tile. For more information about customizing your home page, see Customize Home Page.
6. To hide this query from other users in your organization, select Private.
7. To prevent other users in your organization from editing this query, but allow them to see and use it, select Read Only.
8. Under Query Type, 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.
9. Under Results, select the appropriate option depending on the type of results you want on 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 or donation-related results, select "Journal Entries." For more information about data return types, see Data Return Types on page 224.
10. If you select Related Accounts in the Data Return Type field, select an option in the Relationship Info field.
11. Under How would you like the results of each query to interact?, select how you want to combine the results.
    - To query on items that appear on both queries, select Intersect.
    - To query on items that appear on either query, select Add.

- To query on items that appear on one query but not the other, select Subtract. This is the only option for which the order of the queries can alter the results.

12. Under Query 1, select the category where the query is located and the query.
13. Under Query 2, select the category where the query is located and the query.
14. Click Save And to create the query.

Create a "Clean Mailing List" query

When you send mail, do not send items to bad addresses, constituents who opted out of mailings, and the deceased. To send mail to a clean list, first create a query that identifies the accounts to exclude. When the mailing is an appeal for fundraising or sales, you should also exclude accounts marked as Do Not Solicit. For more information, refer to Create a "Do Not Mail" Query. Next, create a compound query that includes the accounts you want to send mail to, but excludes the accounts you need to prevent from receiving the mail.

1. From the Queries, click Manage Queries. The Query Categories page appears.
2. Click on a category to select it, or to create a new category click New Category under Tasks. After you access a category, the Edit Query Category page appears.
3. Click New Compound Query under Tasks. The Create a New Compound Query page appears.
4. For the Name, enter "Clean Mailing List. "
5. Enter a description so that you and other users in your organization know what the query is used for. You can use this "Clean Mailing List" query to send mail. You can also use it as the starting criteria for other queries if you need to further define your mailing lists. This is a compound query which subtracts the "Do Not Mail" query from the "All Constituents" query.
6. Select Change Query Type under Query Type and select Dynamic Query.
7. From Data Return Type, under Results, select Accounts. For more information about data return types, see Data Return Types on page 224.
8. Under How would you like the results of each query to interact?, click Subtract.
9. Under Query 1, for Query Category select Base. For Query, select All Constituents - A.
10. Under Query 2, for Query Category select Base. For Query, select Do Not Mail.
11. Click Save and to save the query and navigate to the page selected in the Save And menu. You are ready to use this "Clean Mailing List" query to send mail. You can also use it as the starting criteria for other queries if you need to further define your mailing lists.

Compound Queries and Data Return Types

In a compound query, you can combine two queries by adding their results together, subtract the results of one query from the other, or intersect the results to find only the accounts or entries that exist in both queries.

Some combinations in a compound query are likely to return results, some will return results in certain cases, and some combinations will never work.

Combinations that are likely to return results

Query 1	Combination	Query 2	Compound Query	Description
Accounts	Add	Accounts	Accounts	Accounts from both queries.
Accounts	Subtract	Accounts	Accounts	Accounts in Query 1 that are not in Query 2.
Accounts	Intersect	Accounts	Accounts	Accounts that are only in both queries.
Journal Entries	Add	Journal Entries	Journal Entries	Journal entries from both queries.
Journal Entries	Intersect	Journal Entries	Journal Entries	Journal entries that are only in both queries.
Journal Entries	Subtract	Accounts	Journal Entries	Journal entries from Query 1 with accounts that are not in Query 2.

Combinations that sometimes work

Query 1	Combination	Query 2	Compound Query	Description
Journal Entries	Subtract	Journal Entries	Journal Entries	Journal entries in Query 1 that are not in Query 2. This combination only works if both queries contain the same types of journal entries.
Accounts	Add	Journal Entries	Accounts	All accounts from Query 1 and the accounts that contain journal entries in Query 2.
Accounts	Add	Journal Entries	Journal Entries	All journal entries from the accounts in Query 1 and the journal entries found in Query 2.

Combinations that never work

Query 1	Combination	Query 2	Compound Query	Description
Journal Entries	Intersect	Accounts	Accounts	There are no journal entries in Query 2 to match and intersect with Query 1.
Journal Entries	Intersect	Accounts	Journal Entries	There are no journal entries in Query 2 to match and intersect with Query 1.
Accounts	Subtract	Journal Entries	Accounts	All journal entries from Query 2 from accounts in Query 1. Since Query 1 does not contain journal entries, Query 2 cannot remove journal entries from a query that does not return journal entries.
Accounts	Subtract	Journal Entries	Journal Entries	All journal entries from Query 2 from accounts in Query 1. Since Query 1 does not contain journal entries, Query 2 cannot remove journal entries from a query that does not return journal entries.

Custom Account Query

To select specific accounts that you want to include in a query, use a custom account query. These accounts do not have to share common data because you are able to manually select the ones that you want.

Create a custom account query

1. From the Queries, click Manage Queries. The Query Categories page appears.
2. Select a category or create a new one.
3. Once inside a category, click New Custom Account Query under Tasks.
4. Under Query Basics, enter a name and description for your query. Be as descriptive as possible so that you and other users in your organization know what the query is used for.
5. To mark this query as a favorite, select Favorite Query. Links to your favorite queries appear on your eTapestry home page when you use the Favorites tile. For more information about customizing your home page, see Customize Home Page.

6. To hide this query from other users in your organization, select Private.
7. To prevent other users in your organization from editing this query, but allow them to see and use it, select Read Only.
8. On the Data Return Type field, under Results, select the appropriate option depending on the type of results you want. To see results related to accounts, such as if you are querying on individuals, select Accounts. If your query is looking for gifts or donation-related results, select Journal Entries. For more information about data return types, see Data Return Types on page 224.
9. Under Accounts to Include, add accounts to your query.
   - Click Add Account to search for an account and add it.
   - To remove an account, select it and click Remove.
10. Click Save And to create the query.

Query Preview

With new query preview options, you can customize query previews. You can choose which columns appear in the preview grid, drag and drop columns in the order you want them to appear, and export your results.

To verify your query results, you can now use the query preview search to find a particular account. The search returns results that match any terms you enter. For example, if you search for "John Smith," the results will include anyone in your query with "John" or "Smith" in the account name.To remove criteria entered for the search, click Clear Search. This does not perform a new search. It only removes your criteria from the page.

Note: If you search for accounts in your query preview results and then choose to export results, all results will be exported.

Preview query preview results

1. From Queries, click Manage Queries. The Query Categories page appears.
2. Select a query category. The Edit Query Category page appears.
3. Under the query you wish to preview, select Preview. The Query Preview page appears.
4. To select which columns appear in the preview grid, select Choose columns. The Choose columns to show in the list screen appears. For more information about columns in the Query Preview grid, see Query Preview Columns on page 223.
5. From the More Options drop down menu, you can select to run a report or create a communication with your query results.

- **Run a Report** - Select Run a Report to run a report using your query results. The Report Categories page appears. From this page, you can select which report you want to run.
- **Create a Communication**- Select Generate Communication to generate communication, such as a thank-you letter or a receipt, with your query results. The Communication Categories page appears. From this page, you can select which communication you want to create.
- Transfer to Constant Contact - If your database is linked to a *Constant Contact* account, you can transfer your query preview results to use with *Constant Contact*. Select Transfer to Constant Contact. The Constant Contact - Transfer Email Addresses page appears.
- Delete Query - To delete your query, select Delete Query.

6. To export your query results in a format that you can use outside eTapestry, select Export Results from the toolbar. The Export Results screen appears. For more information, see Export Query Preview Results on page 224.

Query Preview Columns

When you preview your query results, you can edit the columns on the Query Preview page to display the information you want to see.

To sort the list by a particular column, click the column title. To choose which columns will appear on the Query Preview page, click Choose columns on the toolbar. The Choose columns to show in the list screen appears. The Query Preview page only includes the most commonly used columns in eTapestry. For more column options, create a custom report.

You can select a column category from the All categories dropdown menu, such as Base or Account Fields, or search for a column in the search bar at the top of the menu to filter available columns.

Select or clear the checkbox next to the columns you want to appear or remove. To quickly clear all the values for these fields, click Clear all. Click Apply Changes after you make your column selections to return to the Journal page.

You can change the order of the columns by selecting a column header and dragging.

When you resize a column width in the grid, the adjusted width now remains in place until you resize it again. You can click **Restore Defaults** to return default column settings.

Note: Journal related columns are not available when the Data Return Type is set to an Account Option.

Export Query Preview Results

Once you preview query results, you can select to export your results in a format that you can use outside eTapestry, such as a PDF.

Export query preview results

1. From the toolbar on the Query Preview page, select Export Results to export the results that appear in the Query Preview grid. The Export Results screen appears.
2. Under Format, select how you want to receive your query preview results. For example, if you want a PDF sent to a specific email address, select PDF Document - Email in the drop down menu.

   You cannot edit or modify PDF files that have been generated by eTapestry.
3. If you select an email format, enter your email address and a subject line for the email.
4. If you have a large amount of query preview results, select Archive in Zip File so that the file is compressed for faster transmission.
5. To begin the export process, click Export.

Note: Once a query-based process starts, the process continues until completion on the eTapestry server. You will be unable to start additional queries, reports, or exports until the process completes.

Data Return Types

A query's Data Return Type determines whether the query returns accounts or journal entries. Although data return types can only ever return either accounts or journal entries, there are six different data return types, and each returns different accounts or journal entries based on a different set of rules.

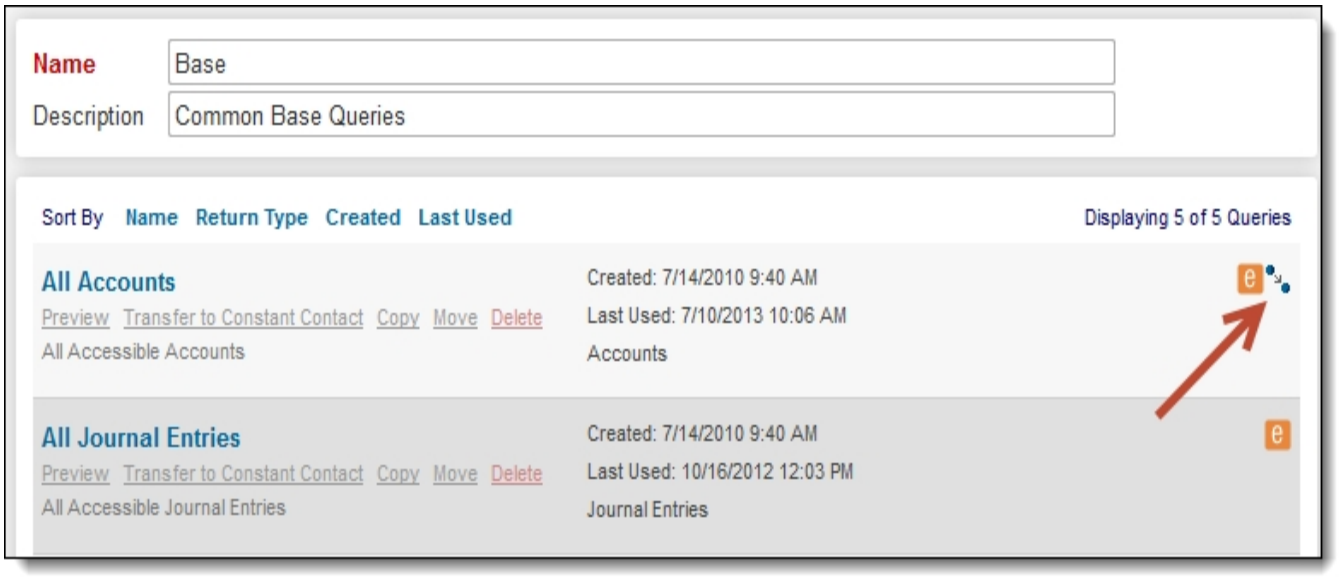
Accounts or Journal Entries	Data Return Type	Details
Account	Accounts	The Account data return type returns only the accounts that meet the selected query criteria.
Account	All Household Accounts	The All Household Accounts data return type returns the accounts that meet the selected query criteria, plus any other accounts that are connected to those accounts via a household relationship.
Account	Head of Household Accounts	The Head of Household Accounts data return type first locates the accounts that meet the selected query criteria. Then, it looks to see

Accounts or Journal Entries	Data Return Type	Details
Account	Related Accounts	if those accounts are in a household relationship. If so, the query returns whichever account is listed as the primary/head of household in that relationship. If the account is not in a household relationship, it is considered to be the primary/head of household account, and the query returns it in the results. The Related Accounts data return type is used to locate accounts that are related to other accounts via a certain relationship type. It first finds the accounts that meet your selected query criteria. Then, it looks at the selected relationship type and the selected side of the relationship in the Relationship Info fields, and it returns the accounts that have that relationship with the accounts that meet your query's criteria. For example, let's say that you have set up Solicitor/Constituent relationships between your staff and board members and your donors. Now you want to locate the solicitors of all constituents who have donated over $10,000 to your organization over their lifetime so that you can talk to those solicitors about their methods and see how they are able to promote such high giving. First, you set up your query to use the Cumulative Received field to find all constituents who have given $10,000+. Then, you set the data return type to Related Accounts, select the relationship type to Solicitor/Constituent, and select that you want the Solicitor half of the relationship. The query will then locate the Solicitors of the $10,000+ givers.
Account	Matching Gift Accounts	The Matching Gift Accounts data return type is used to locate accounts that are related to other accounts via a Matching Gift relationship. It first finds the accounts that meet your selected query criteria. then, it looks at the relationships on those accounts, and returns any accounts that are related to those accounts via a matching gift relationship.
Journal Entries	Journal Entries	The Journal Entries data return type returns only the journal entries that meet the selected query criteria.
Journal Entries	All Household Journal Entries	The All Household Journal Entries data return type first locates the accounts that meet the selected query criteria. Then, it returns 'all journal entries on those accounts, plus all journal entries on any accounts that are connected to those accounts via a household relationship.
Journal Entries	Household Journal Entries Per Criteria	The Household Journal Entries Per Criteria data return type first locates and returns the entries that meet the selected query criteria. Then, it looks at any accounts that are connected to those

Accounts or Journal Entries	Data Return Type	Details
		accounts via a household relationship, and it returns the journal entries on those accounts that also meet the selected journal entry criteria on the query.

View Query Associations

The Query Associations page allows you to see which other queries are using a particular query in their setup, either as starting criteria in a basic query or as a composing query in a compound query. To view the query associations for a query, you can click the icon next to the query on the category page.



You can also click Query Associations under Tasks in the query setup page. From the query associations page, you can complete a few tasks.

- Click the name of the associated query to access its definition page.
- Click Delete under the associated query to delete it.
- Click Preview under the associated query to preview the results.

View the Query Dependency Graph

Some queries are based on other queries. The dependency graph shows how queries are related and can help you analyze complex, compound queries, such as those use for direct mail

lists. To view the dependency graph, from the setup query page, click Query Dependency Graph under Tasks.

The current query appears at the top of this tree-like diagram. The branches below show the starting criteria and other queries that are used to create the current one. To view more branches, click Show All Dependencies under Tasks. The lowest branch is the Base-All Accounts query.

When two queries are added, intersected, or subtracted from one another, an icon at the top of the branch indicates their relationship.

For each query in the graph, icons indicate the data return type.

 - Accounts
 - Journal Entries
 - All Household Accounts
 - Head of Household Accounts
 - All Household Journal Entries
 - Household Journal Entries Per Criteria

Reports

Reports allow you to see the performance of your fundraising efforts and analyze your data. Reports can help you:

- Measure the success of funds, campaigns, approaches, events, and other fundraising efforts
- Identify and analyze giving trends
- Identify donors and volunteers whose support has lapsed
- Identify donors and volunteers whose support has grown
- Identify major giving prospects
- Identify frequent and recurring donors and volunteers
- Identify new donors and volunteers
- Identify constituents with incomplete account records, such as missing email addresses
- Compare the results of your efforts across multiple time periods
- Compare the results of split communications
- Compare your organization with similar nonprofits
- Recognize lifetime giving

For each report, you'll first select a query. The query defines a split of your database based on the criteria you used to create the query.

In some circumstances the Query Preview will provide an export of the information you need. However, in cases where you need to group, analyze, or further manipulate the data you will run your Query through a Report

Standard Reports

When you work with standard reports, eTapestry always presents a summary report first, which provides an overview or preview of the data. In some reports you can view more details with the detail report. Hyperlinked information from the summary report can take you to the detail report with one simple click. If a detail report is provided it will give you more specific information regarding the constituents that make up the numbers in the summary reports. Reports are essential to organizing and presenting your data.

- Account Reports - Refer to Account Reports on page 229.
- Recognition Reports - Refer to Recognition Reports on page 235.
- Activity Summary Reports- Refer to Activity Reports on page 236.
- Journal Entry Report - Refer to Journal Entry Reports on page 237.
- Tribute Reports - Refer to Tribute Reports on page 241.

- Soft Credit Reports - Refer to Soft Credit Reports on page 242.
- Executive Reports - Refer to Executive Reports on page 244.
- Online Giving Reports - Refer to Online Giving Reports on page 249.
- eStore (Cart) reports - Refer to Cart Reports on page 250.
- Mass Email Reports - Refer to Mass Email Reports on page 250.
- Advanced Mass Email Reports - Refer to Advanced Mass Email Reports on page 251.
- Fundraiser Reports - Refer to Fundraiser Reports on page 255.
- Wish List Reports - Refer to Wish List Reports on page 257.
- Defined Fields Reports - Refer to Defined Fields Reports on page 258.
- Social Networking Reports - Refer to Social Networking Reports on page 259.

Account Reports

Account reports group individuals into different categories to help you analyze your constituents according to general criteria they have in common.

Account List Report

This report shows a list of accounts included in a specific query. You can export this information to use outside the database. This report is similar to a query preview. It shows the name, city, state, postal code, and phone number for the included accounts. To view details about an account, click the account name.

Directory Report

If you use the Attachments module to add pictures to your accounts, you can use this report to view a list of accounts with pictures. The report also includes name, address, phone number, and email address.

Almost Expired Auto Process Credit/Debit Cards Report

When you use auto-processing for credit and debit card donations or payments, we recommend you run this report regularly so that you do not miss a pledge payment or recurring gift due to expired cards. The report shows constituents with credit or debit cards set to automatically process that are about to expire in the current month and next month, based on when you run the report. Use the information to determine the constituents to contact to ask for credit and debit card information updates.

Tip: When you create this report, you can create a query to use for the report that is described in this Knowledgebase solution. However, you can create any query to use based on your organization's needs.

- Name - This shows the name of the constituent whose credit/debit card is about to expire.
- Address - This shows the address of the constituent whose credit/debit card is about to expire.
- City - This shows the city of the constituent whose credit/debit card is about to expire.
- State/Province - This shows the state of the constituent whose credit/debit card is about to expire.
- Postal Code - This shows the postal code of the constituent whose credit/debit card is about to expire.
- Phone Number - This shows the phone number of the constituent whose credit/debit card is about to expire.
- Expiration Date - This shows the expiration date of the constituent's credit/debit card.

Donor Loyalty Summary Report

If you use the Donor Loyalty module, this report enables you to view the results about constituents who took your loyalty survey. The report shows the number and percentage of constituents for each of the four loyalty categories: Truly Loyal, Accessible, Trapped, and High Risk.

Tip: To easily group donors that fall into each loyalty category, you can query on each one to group donors for your report. From Query, you filter categories when you select Loyalty Ratings under the Account category.

Review the following for information about columns in the legend on the report.

- Rating – This shows the four ratings associated with the donor loyalty survey – truly loyal, accessible, trapped, or high risk. To view a detailed report for a specific rating, click the category name.
- Count - This shows the number of constituents in each rating category. Click this to view a detailed report for the specific rating.
- Percent – This shows the percentage of constituents in each rating category. This is based on the total number of constituents from your query who completed the survey.

Postal Code Summary Report

This report shows information about each postal/zip code that exists in your database. It includes US postal codes that were not entered as 9-digits, other non-9-digit postal codes, international postal codes, and 9-digit postal codes. Use the headers to sort the report by all constituents with Non Zip+4 postal codes (international and all postal codes not entered as 9 digits), all constituents with Zip+4 postal codes, and total number of constituents with postal codes in the range. To access a report that shows details about a postal code, click the specific postal code.

- Postal Code – This shows each of the postal codes within a certain code area. To view contact information for the constituents with a specific postal code, click the postal code.
- Non Zip+4 - This shows international postal codes and other postal codes not entered as 9 digits).
- Zip + 4 - This shows all constituents with Zip+4 postal codes.
- Total - This shows the number of personas within each postal code.

Top Donor Report

Use this report to identify your top donors. Consider using this report to compare the top 10% of donors from year to year. This can be overall or within a specific query. For example you can base the report on all constituents in your database, or narrow it down to top donors for a specific fund. You can also identify the top donors by pledged, received, or raised amounts. By default, the report sorts the results by rank. To sort the report differently, click a column name to sort by that column.

- Name – This shows the constituent's name. Click this to access the constituent's Home page.
- Rank – This shows the constituent's rank among the top donors in the report. The report will shows ranking order starting with 1. When constituents are tied with the same amount, they share a rank number.
- Pledged – This shows the constituent's pledged amount. This is based on the query used to run the report.
- Received – This shows the amount your organization received from the constituent, based on the query used to run the report.
- Gifted – This shows the amount that the constituent gave in outright gifts, based on the query used to run the report.
- Raised – This shows the amount the constituent raised for your organization, based on the query used to run the report. It includes outright gifts and pledges.

Note: For information about major gifts, refer to Major Gifts on page 70.

Duplicate Report

Use this report to identify potential duplicates. When you use this report, you compare a query of accounts against your entire eTapestry database. We recommend you use this report for account that have recently been added or modified.

When possible duplicates are identified, they are listed in pairs. The first account is from the query used to run the report. The first account is mostly likely the more accurate account. The second account is the mostly likely possible duplicate from the database. For each account, only the most likely duplicate is shown. To find all possible matches, run the report multiple times.

For each pair of possible duplicates, determine what should be done.

- Merge These Accounts – Access the account merge page, which enables you to select how the accounts should be combined.
- Link these accounts – Create a relationship between the two accounts.

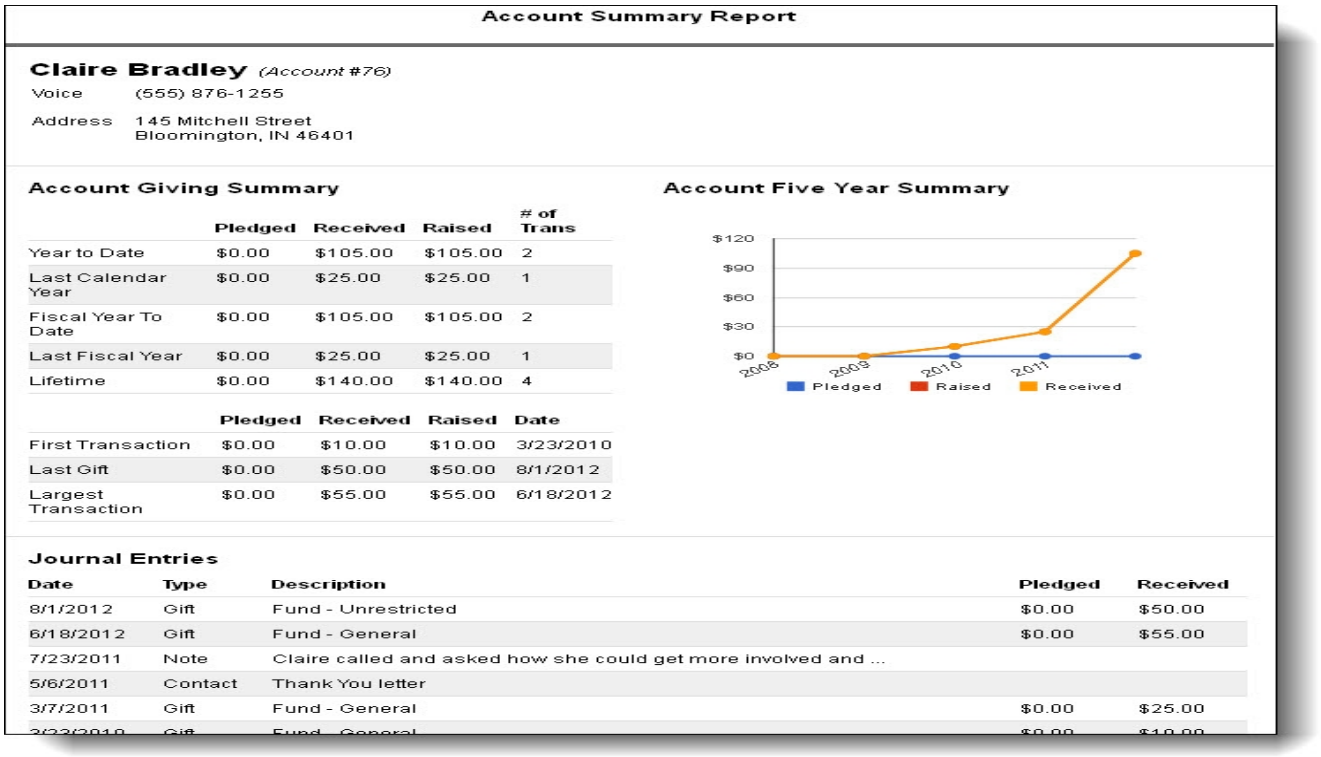
  Note: Once you link relationships from the Duplicate Report, the duplicate pairing no longer appears in the report.

  Tip: You can also link accounts from an account's Account Settings page. Select Check for Possible Duplicates to view duplicate accounts.
- Not Duplicate Accounts - Place an exception on both accounts. The exception ensures that the accounts will no longer appear as possible duplicates. The exclusion appears on each account's Account Settings page.

Account Summary Report

This report provides a snapshot of all activity for a constituent. You can choose whether to include relationships, user-defined fields, and recognition information. You can also limit the journal entries included in the report to the fifteen most recent entries.

Tip: You can run the report from the eTapestry Standard Reports screen or from a constituent's account. To run the report from a constituent's account record, click Generate Account Summary Report on the Quick Actions tile of the account's home page.



Account Summary Report

Claire Bradley *(Account #76)*

Voice (555) 876-1255

Address 145 Mitchell Street
Bloomington, IN 46401

Account Giving Summary

	Pledged	Received	Raised	# of Trans
Year to Date	$0.00	$105.00	$105.00	2
Last Calendar Year	$0.00	$25.00	$25.00	1
Fiscal Year To Date	$0.00	$105.00	$105.00	2
Last Fiscal Year	$0.00	$25.00	$25.00	1
Lifetime	$0.00	$140.00	$140.00	4

	Pledged	Received	Raised	Date
First Transaction	$0.00	$10.00	$10.00	3/23/2010
Last Gift	$0.00	$50.00	$50.00	8/1/2012
Largest Transaction	$0.00	$55.00	$55.00	6/18/2012

Account Five Year Summary

Journal Entries

Date	Type	Description	Pledged	Received
8/1/2012	Gift	Fund - Unrestricted	$0.00	$50.00
6/18/2012	Gift	Fund - General	$0.00	$55.00
7/23/2011	Note	Claire called and asked how she could get more involved and ...		
5/6/2011	Contact	Thank You letter		
3/7/2011	Gift	Fund - General	$0.00	$25.00

Data Health Scorecard

The Data Health Scorecard appears when eTapestry automatically analyzes your database. eTapestry determines the health of your database by comparing information about your constituents to other known information, such as addresses and public assets. If the information in your database is complete and current, you database will receive a better score.

Addresses

On the Addresses tab of the Data Health Scorecard, address health is determined by comparing the addresses of your constituents with *Target Analytics* information. When most of your addresses are complete and current, your database receives a good score. Lower scores indicate a higher volume of incomplete or incorrect addresses. The highest possible score is an A, and the lowest possible score is an E. This scorecard also indicates whether it has been more than 90 days since you ran AddressFinder (NCOA). We recommend you run AddressFinder (NCOA) regularly so that you qualify for postal discounts. AddressFinder (NCOA) helps you keep constituent addresses up to date, so you do not waste money sending mail to outdated addresses.

Tip: The AddressFinder (NCOA) service is included in the eTapestry Essentials or Pro packages. United States clients can schedule a time to run the service. For more information,

refer to AddressFinder (National Change of Address) on page 53. Canadian clients use a less automated process. For details, refer to Canadian AddressFinder (NCOA).

Social

On the Social tab, Social Media Finder details appear. The information 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. For more information, refer to Social Media Finder Service.

If you are using eTapestry in the United States, the scorecard tile appears for System Administrators on the Home page dashboard after your database health is analyzed. You can close the tile manually or wait for it to disappear after a few days. The report also appears for System Administrators under Account Reports on the eTapestry Standard Reports page.

For all other countries, the report appears for System Administrators under Account Reports on the eTapestry Standard Reports page only.

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.

Wealth

On the Wealth 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.

Target Analytics rates the constituent's overall wealth based on their public assests and ranks it up to five stars. The higher the wealth rating, the higher the stars.

- ★★★★★ – 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.

You can use these ratings to help segment your constituents and determine how to cultivate relationships with them. For example, we recommend you assign your four- and five-star constituents to an attentive fundraiser with more care and interaction that other donors.

Recognition Reports

Use recognition reports to group constituents based on the amounts that they donate and the purposes for which they donate. By default, these reports use each constituent's default recognition type and recognition name.

Recognition According to Gift Amounts

This report enables you to group constituents into giving level categories based on gift amounts that you specify. Consider using this report if you need a list of constituents, by giving levels, for recognition in newsletters, pamphlets, for special events. The report shows constituents by recognition name; if there is no recognition name, the account name is used.

- Recognition – This shows the constituent's recognition name. Click the name to access the constituent’s home page.
- Pledged – This shows the amount the constituent pledged.
- Received – This shows the amount received from each constituent.
- Raised – This shows the amount each constituent raised.

Recognition According to Funds, Campaigns, and Approaches

This report provides a list of constituents who gave to specific funds, campaigns, or newsletters. We recommend you use this report to identify constituents for recognition dinners, pamphlets, or newsletters.

- Recognition – This shows the constituent's recognition name. If there is no recognition name associated with a constituent, the account name appears. Click this to access the constituent's home page.
- Pledged – This shows the amount each constituent pledged.
- Received – This shows the amount received from each constituent.
- Raised – This shows the amount each constituent raised.

Recognition According to Tribute Types

This report shows which constituents have given in tribute, to which tribute they gave, and why they gave. It shows the constituent recognition names who gave to specific Tribute accounts. The tributes are categorized based on the tribute user-defined field for each transactions, such as in memory, in honor, in celebration, etc.

We recommend you use this report to create a list of constituents to include in letters to the tribute's family or for recognition purposes.

- Recognition - This shows the name of the tribute. Click the tribute name to access the tribute's home page. Under the tribute name, the constituents who gave to it appear. Click a constituent name to access the constituent's home page.
- Pledged – This shows the amount pledged for a specific tribute.
- Received - This shows the amount received for a specific tribute.
- Raised - This shows the amount raised for a specific tribute.

Activity Reports

Activity reports show the distribution of donations according to approach, campaign, and fund. They can also show how the fundraising performance compares to the goals.

Approach Activity Summary

This report provides a snapshot of how well your approaches are doing. Use this report to determine which approaches are the most successful for your organization.

- Approach – This shows the approach name. Click this to edit a specific approach.
- # of Transactions – This shows the number of transactions made to each approach, based on the query used to run the report. Click this to access a detailed report that shows the constituents and their transactions.
- Pledged – This shows the pledged amount for each approach in the report. Click this to access a detailed report that shows the constituents and their transactions.
- Received – This shows the received amount for each approach in the report. Click this to access a detailed report that shows the constituents and their transactions.
- Pledge Balance – This shows the pledge balance due for each approach in the report. Click this to access a detailed report that shows the constituents and their transactions.

Campaign Activity Summary

This report provides a snapshot of how well your campaigns are doing. Use this report to determine which campaigns are the most successful for your organization.

- Campaign – This shows the campaign name. Click this to edit the campaign.
- # of Transactions – This shows the number of transactions made to each campaign, based on the query used to run the report. Click this to access a detailed report that shows the constituents and their transactions.
- Pledged – This shows the pledged amount for each campaign in the report. Click this to access a detailed report that shows the constituents and their transactions.
- Received – This shows the received amount for each campaign in the report. Click this to access a detailed report that shows the constituents and their transactions.
- Pledge Balance – This shows the pledge balance due for each campaign in the report. Click this to access a detailed report that shows the constituents and their transactions.

Fund Activity Summary

This report provides a snapshot of how funds are doing. Consider using this report to determine which funds are the most successful.

- Fund – This shows the fund name. Click this to edit the fund.
- # of Transactions – This shows the number of transactions made to each fund, based on the query used to run the report. Click this to access a detailed report that shows the constituents and their transactions.
- Pledged – This shows the amount pledged to each fund in the report. Click this to access a detailed report that shows the constituents and their transactions.
- Received – This show the amount each fund received. Click this to access a detailed report that shows the constituents and their transactions.
- Pledge Balance – This show the pledge balance due for each fund in the report. Click this to access a detailed report that shows the constituents and their transactions.

Goal Summary Report

Use this report to monitor the progress your organization is making towards set goals, such as revenue goals, gift amount goals, and new donor recruitment.

Tip: If you select to view the report on screen, and you are currently viewing the summary page, you can only export the report as a PDF. To view or export detailed information, click the details include for a goal. The supporting details appear. You can export the details in PDF, CSV, or *Microsoft Excel* format. You cannot edit or modify PDF files that have been generated by eTapestry.

Journal Entry Reports

Journal entry reports show transaction data grouped according to journal entries.

Donor Cash Projection

This report provides a snapshot of pledges. It enables you to predict how much money your organization can expect to receive from pledges during upcoming years. It shows you the names of the constituents who have a pledge in the query used to run the report, how much they pledge, how much has been received, how much remains, and how much is in arrears.

- Donor – This shows the constituent's name. Click this to access constituent's home page.
- Date – This shows the date of each transaction. Click this to access the pledge.
- Fund – This shows the fund associated with each pledge.
- Pledged – This shows the amount each constituent pledged. Click this to access the pledge.
- Received – This shows the amount of the pledge that has been received from the constituent.
- Balance Due – This shows how much is owed for the pledge.
- Arrears – If a pledge is past due, this shows the amount that is past due.
- Variance – This shows the amount overpaid or written off for each pledge.
- Frequency – This shows how often the payments for a pledge occur. This is equal to the number of payments that the constituent promised to make to fulfill the pledge.
- Last Payment Due – This shows the date when the last payment for the pledge is due. This is when the pledge ought to be fulfilled.
- Years – These columns show the years included in the report. This is dependent on the number of years that you select to view for the report. You select the number of years when you run the report.

Cash Projection Report

This report shows all funds and the pledges made to them. Use this report to predict how much money each fund will raise. You can also use this report to view which funds have pledges in arrears and which funds will likely be the most successful.

- Fund – This shows the name of each fund. Click this to edit the fund.
- Arrears – This shows the amount in arrears for each fund.
- Years – The years for which you have chosen to receive a cash projection display. You select the number of years when you launch the report. Click the amount for specific year to view a twelve month report which shows details about the fund and how much to expect to receive for each month.

Journal Entry List

This report provides details about each journal entry and account included in the report. Use this report to organize and print journal entries. It show information from journals for multiple

accounts.

- Date – This shows the date of each journal entry.
- Name – This shows the name of the constituent. Click this to access the constituent's home page
- Fund – If the journal entry is a transaction, this shows the fund associated with it.
- Type – This shows the type of the journal entry. Click this to access the transaction.
- Pledged – If a transaction is a pledge, this shows the pledged amount.
- Received – This shows the amount received for each transaction.

Transaction List

This report shows details for each transaction in the query used to run the report. Use this when you want to organize or print a list of transactions. This report is similar to the Journal Entry List Report, except that this only shows transactions for accounts included in the query used to run the report.

- Date – This shows the date of the transaction.
- Name – This shows the name of the constituent who made the transaction. Click this to access the account's home page
- Fund – This shows the fund associated with a transaction.
- Type – This shows the transaction type. Click this to access the transaction.
- Pledged – If the transaction is a pledge, this shows the pledged amount.
- Received – This shows the amount received from a transaction.

Auto Process Failures

Use the Auto Process Failures report to process a transaction again that previously failed. You can also use this report to estimate how much money to expect from successfully processing failed transactions. In addition to constituent name, fund, type, and amount, the report displays information about failure codes and messages to clarify why the processor failed a transaction.

- Name – Displays the name of the constituent whose transaction is available for processing again. Click this to access the constituent's Home page.
- Fund – Displays the fund associated with the transaction. This is the same as the fund for the original transaction.
- Type – Displays the type of the transaction scheduled to process again. Click this to access the original transaction.
- Failure Code – Displays the failure code from the processor.
- Failure Message – Displays the message from the processor to clarify why the transaction previously failed.
- Amount – Displays the amount to process.

On the report, click Retry beside each transaction row you want to process again.

Note: The Auto Process Failures report design makes it easier to attempt to process transactions again that previously failed due to processor related maintenance and technical issues. Transactions that fail for reasons such as "Expired card" or "Invalid account number" should not be tried again because they will continue to fail. For common failures like these, we recommend you contact the donor to obtain updated payment information.

When a transaction successfully processes after you click Retry on this report, the reversed transaction (for the original transaction) is deleted, and the credit card and EFT information remains on the transaction that processed successfully. When the transaction fails again, the reversed transaction (for the original one) is updated with the most recent failure code and failure message.

Pledge Report

This report enables you to view statistics about pledges within the query used to run the report. Use this report to create a list of constituents with pledges and to view how well your pledge process works.

- Donor – This shows the name of the constituent who made the pledge. Click this t access the constituent's home page.
- Date – This shows the date of the original pledge. Click this to access the original pledge transaction.
- Fund – This shows the fund associated with the pledge.
- Pledged – This shows the original pledged amount.
- Received – This shows how much has been received for a pledge.
- Balance Due – This shows the remaining balance due for a pledge.
- Arrears – If the pledge is in arrears, this shows by how much.
- Variance – This shows the amount overpaid or the amount written off for the pledge.

Scheduled Auto Process Transactions

This report enables you to view information about transactions that are scheduled to process automatically within one week, one month, one year, in the week, in the month, or in the year, based on the day that you run the report. Use this report to predict how much money to expect from scheduled auto processed transactions for a specific time frame.

- Date – This shows the date of the original transaction.
- Name – This shows the name of the constituent whose transaction is scheduled to be auto processed. Click this to access the constituent's home page.

- Fund – This shows the fund associated with the scheduled transaction. This is the same as the fund for the original transaction.
- Type – This shows the type of the transaction which is scheduled to auto process. Click this to access the original transaction.
- Scheduled – This shows the date when the transaction is scheduled to process.
- Amount – This shows the amount that will be processed.

Tribute Reports

Tribute reports show information about donations given in tribute to another individual. Use these reports to view constituents that make gifts in honor, in memory, or in celebration of tribute accounts. The reports also show the tribute accounts which inspired the donations.

Tribute Activity Summary Report

Use this report to determine how much money was given as a tribute to each Tribute account. We recommend you use this report to let the families of tribute accounts know how much has been raised on behalf of their loved ones.

- Tribute – This shows the name of the tribute account. Click this to access the tribute's home page.
- # of Transactions – This shows the number of transactions associated with each tribute. Click this to access the Tribute Activity Detail Report, which shows the transactions and the constituents who made the donations.
- Pledged – This shows amount pledge on behalf of each tribute account. Click this to access the Tribute Activity Detail Report, which shows the transactions and the constituents who made the donations.
- Received – This shows the amount that has been received on behalf of each tribute account. Click this to access the Tribute Activity Detail Report, which shows the transactions and the constituents who made the donations.
- Pledge Balance – This shows the pledge balance for pledges associated with each tribute account. Click this to access the Tribute Activity Detail Report, which shows the transactions and the constituents who made the donations.

Tribute Report

This report enables you to view a list of tribute accounts and the amount of money donated on their behalf. It shows the tribute accounts, followed by the constituents who made gifts to them and the gifts.

- Tribute – This shows the name of the tribute account. Click this to access the tribute’s home page.

- Donor – This shows the name of the constituent who made the gift. Click this to access the constituent's home page.
- Date – This shows the date of the transaction. Click this to access the transaction.
- Fund – This shows the fund associated with the gift. Click this to access the transaction.
- Pledged – This shows the amount that the constituent pledged. Click this to access the transaction.
- Received – This shows the amount received for a transaction. Click this to access the transaction.

Tribute Report by Donor

This report enables you to view a list of constituents who gave in tribute and the tribute accounts associated with the gifts. The report shows the name of the constituent who made a gift, followed by the associated tributes and donations.

- Donor – This shows the name of the constituent who made the gift. Click this to access the constituent's home page.
- Tribute – This shows the names of the tributes associated with the gifts. Click this to access the tribute's home page.
- Date – This shows the date of the transaction. Click this to access the transaction.
- Fund –This shows the fund associated with the transaction. Click this to access the transaction.
- Pledge – This shows the amount the constituent pledged. Click this to access the transaction.
- Received – This shows the received amount. Click this to access the transaction.

Soft Credit Reports

Use soft credit reports to analyze donations that are credited to more than one individual or organization.

Soft Credit Activity Summary Report

This report enables you to create a list constituents who are soft credit recipients and how many transactions they are associated with. We recommend you use this report to notify constituent how they impact giving levels for your organization.

- Soft Credit Recipient – This shows the name of the constituent who received the soft credit. Click this to access the constituent's home page.
- # of Transactions – This shows the number of transactions for which the constituent received soft credit. Click this to access the Soft Credit Activity Detail Report, which shows the transactions and the constituents who made the gifts.

- Soft Credit – This shows the amount for which the constituent received soft credit. Click this to access the Soft Credit Activity Detail Report, which shows the transactions and the constituents who made the gifts.

Soft Credit Report

This report enables you to create a list of soft credit recipients, the names of the constituents who gave, and the transactions. We recommend you use this report to view how much money soft credit recipients bring to your organization.

- Recipient – This shows the constituent who is a recipient of soft credit. Click this to access the constituent's home page.
- Donor – This shows the constituent who gave the gift. Click this to access the constituent's home page.
- Date – This shows the date of the gift. Click this to access the transaction.
- Fund – This shows the fund associated with the transaction. Click this to access the transaction.
- Pledged – This shows the amount the constituent pledged. Click this to access the transaction.
- Received – This shows the received amount. Click this to access the transaction.
- Soft Credit Amount – This shows the amount that was soft credited from the transaction. Click this to access the transaction.

Soft Credit Report by Donor

This report enables you to create a list of constituents who gave gifts that had soft credit recipient information. The report shows the constituents who made the gift, followed by the recipients of the soft credit.

- Donor – This shows the name of the constituent whose made the gift. Click this to access the constituent's home page.
- Recipient – This shows the name of the constituent who is a soft credit recipient. Click this to access the constituent's home page.
- Date – This shows the date of the transaction. Click this to access the transaction.
- Fund – This shows fund associated with the transaction. Click this to access the transaction.
- Pledged – This shows the amount that the constituent pledged. Click this to access the pledge.
- Received – This shows the received amount. Click this to access the transaction.
- Soft Credit Amount – This shows the soft credit amount. Click this to access the transaction.

Executive Reports

If you have the Executive Reports module with the eTapestry Essentials or Pro packages, you have access to advanced analytical reports which enable you to cross-reference your constituent and donation data.

Note: Do you also use For Impact? If so, refer to For Impact on page 71.

Aging Pledge Summary Report

Use this report as an arrears report. It shows the amount that is past due based on the pledge schedules created in eTapestry. The results presented in time periods, including 0-30 days, 31-60 days, 61-90 days, 91-120 days, and >120 days past due.

- Fund – This shows all enabled funds in your database that have aging pledges. Click a fund name to edit that specific fund.
- 0-30 days – This shows $ amounts for each fund that has payments in arrears between 0 and 30 days. Click this to view details about the constituents whose pledges are in arrears.
- 31-60 days – This shows $ amounts for each fund that has payments in arrears between 31 and 60 days. Click this to view details about the constituents whose pledges are in arrears.
- 61-90 days – This shows $ amounts for each fund that has payments in arrears between 61 and 90 days. Click this to view details about the constituents whose pledges are in arrears.
- 91-120 days – This shows $ amounts for each fund that has payments in arrears between 91 and 120 days. Click this to view details about the constituents whose pledges are in arrears.
- > 120 days - This shows $ amounts for each fund that has payments in arrears for more than 120 days. Click this to view details about the constituents whose pledges are in arrears.
- Unscheduled – This shows all pledges that do not have a payment schedule. Click this to view details about the constituents whose pledges are unscheduled.

Approach Analysis Report

This report enables you to track goal information, net income, percent return, cost per dollar raised and average gift per approach. When you set up approaches, enter goal and quantity information. Then track cash in and cash out.

- Approach - This shows the name of the approach. Click the approach name to edit information about the specific approach.
- # of Trans – This shows the number of gifts and payments in the query that were applied to each approach. This is also based on the options that you select when you run the report. Click this to view details about the constituent accounts and transactions.

- Number of Donors - This shows the number of unique constituents who made gifts for a specific approach. Click this to view details about the constituent accounts and transactions.
- Raised - This shows the sum of all gifts and pledges for a specific approach. Click this to view details about the constituent accounts and transactions.
- Received - This shows the sum of all gifts and payments for a specific approach. Click this to view details about the constituent accounts and transactions.
- Pledged - This shows the sum of all pledges for a specific approach. Click this to view details about the constituent accounts and transactions.
- Pledge Balance - This shows the total balance remaining on outstanding pledges for a specific approach.Click this to view details about the constituent accounts and transactions.
- Goal - This shows the goal for a specific approach. You enter a goal amount when you edit an approach.
- Quantity - This shows the quantity specified for a specific approach. You enter a quantity when you edit an approach.
- Goal Remaining - This shows the goal amount minus the raised amount for a specific approach.
- % of Goal - This shows the percentage of the goal that an approach reached. This is the received amount divided by the goal, then multiplied by 100.
- Total Cost - This shows sum of the disbursement entries for a specific approach. Click this to view details about the constituent accounts and transactions.
- Net Income - This shows the net amount of income that was gained for an approach.
- % Return - This shows the percent of return for a specific approach. This is the number of transactions divided by the quantity, then multiplied by 100.
- CPDR (Cost Per Dollar Raised) - This shows the amount of money your organization spent to raise $1 for a specific approach. This is the cost divided by the amount raised.
- Average Gift - This shows the average gift for a specific approach. This is the total received amount divided by the number of transactions associated with a specific approach.

Campaign Analysis Report

Use this report to check each of your campaigns. Use it to track goal information, net income, percent return, cost per dollar raised, and average gift. When you set up campaigns, enter goal and quantity information. Then track cash in and cash out for each campaign.

- Campaign - The name of the campaign. Click this to edit information about the specific campaign.

- # of Trans – This shows the number of gifts and payments in the query that were applied to each campaign. This number is based on options that you select when you run the report. Click this to view details about the constituents and transactions.
- Number of Donors - This shows the number of unique constituents who made donations to a specific campaign. Click this to view details about the constituents and transactions.
- Raised - This shows the sum of all gifts and pledges applied to a specific campaign. Click this to view details about the constituents and transactions.
- Received - This shows the sum of all gifts and payments applied to a specific campaign. Click this to view details about the constituents and transactions.
- Pledged - This shows the sum of all pledges applied to a specific campaign. Click this to view details about the constituents and transactions.
- Pledge Balance - This shows the total balance remaining on outstanding pledges for a specific campaign. Click this to view details about the constituents and transactions.
- Goal - This shows the goal the campaign. You specify a goal amount when you edit a campaign.
- Quantity - This shows the quantity for the campaign. You specify a quantity when you edit the campaign.
- Goal Remaining - This shows the goal amount minus the raised amount for a specific campaign.
- % of Goal - This shows the percentage of the goal that a campaign has reached. This is the received amount divided by the goal amount, then multiplied by 100.
- Total Cost - This shows the sum of the disbursement entries applied to a specific campaign. Click this to view details about the constituents and transactions.
- Net Income - This shows the net amount of income gained from a campaign.
- % Return - This shows the number of transactions divided by the quantity, then multiplied by 100. This shows the percent of return for a campaign.
- CPDR (Cost Per Dollar Raised) - This shows the amount of money your organization spends to raise $1 for a campaign. This is the cost divided by the amount raised.
- Average Gift - This shows the average gift for a campaign. This is the total received amount divided by the number of transactions associated with a certain campaign.

Consecutive Months Report

This report shows constituents who gave during the range of consecutive months. For example, the report can show constituents who gave consecutively for the last 12 months, years, who gave consecutively 6 out of the last 12 years, or who gave at any time within a defined range of months.

- Donor – This shows the name of the constituent. Click this to access the constituent's home page.
- # of Transactions – This shows the number of transactions for each constituent. Click this to access the constituent's Journal page to view their giving history.
- Received – This shows the amount received from the constituent within the specified time period.

Consecutive Years Report

This report shows constituents who gave during the range of consecutive years. For example, the report can show constituents who gave consecutively for the last 5 years, who gave consecutively 3 out of the last 5 years, or who gave at any time within a defined range of years.

- Donor – This shows the name of the constituent. Click this to access the constituent's home page.
- # of Transactions – This shows the number of transactions for each constituent. Click this to access the constituent's Journal page to view their giving history.
- Received – This shows the amount received from the constituent within the specified time period.

Donor Renewal Rates Report

This report shows the renewal rates of donors for up to five periods of time. Use it to review which constituents renew from year to year. A constituent is said to have renewed if he was an established or new donor in the previous year, and also gave in the current year.

- New Donors - This field shows the number of new donors for each year. Click this to view details about constituent accounts and how many gifts each gave per year.
- New Donors Renewed - This field shows the number of donors who gave for the first time in the previous year and renewed in the current year. Click this to view details about constituent accounts and how many gifts each gave per year.
- New Donor Renewal Rate - This field shows the percentage of donors who gave for the first time in the previous year and renewed in the current year.
- Established Donors - This field shows the number of donors who were established donors in previous years. Click this to view details about constituent accounts and how many gifts each gave per year.
- Established Donors Renewed - This field shows the number of donors who were established in the previous year, who also renewed in the current year. Click this to view details about constituent accounts and how many gifts each gave per year.
- Established Donor Renewal Rate - This field shows the percentage of donors that were established in the previous year, who also renewed in the current year.

- Total Donors - This field shows the total number of donors who gave in a specific year. Click this to view details about constituent accounts and how many gifts each gave per year.
- Total Donors Renewed - This field shows the total number of donors who renewed during a specific year. Click this to view details about constituent accounts and how many gifts each gave per year.
- Total Donor Renewal Rate - This field shows renewal rate of both new and established donors for a specific year.

For Impact Master Prospect List

For clients in the United States and Canada, this executive report shows constituent Qualified Prospect Index (QPI) ratings, lifetime pledged amounts, and received amounts.

Tip: For information about the eTapestry For Impact module, refer to For Impact on page 71. For more information about For Impact fundraising, refer to http://forimpact.org/.

- Name – Click the constituent name to access the constituent's Home page.
- Qualified Prospect Interest (QPI) Rating – Displays interest level based on a combination of information entered into For Impact fields for the constituent. Click this to access the constituent's Defined Fields page, where the For Impact fields appear.
- Lifetime Pledged Amount – Displays the amount pledged over the lifetime of the constituent.
- Lifetime Received Amount – Displays the amount received over the lifetime of the constituent.
- Total # of Transactions – Displays the total number of transactions this constituent has given over the lifetime association with your organization.

Giving Dynamics Report

This report enables you to compare giving statistics between two periods of time that you select. It includes data about new, upgraded, downgraded, and unchanged accounts.

Note: Always use a query with a data return type of "Accounts" to run this report. Queries with a data return type of "Journal Entries" can result in incorrect data.

You can use a query to split the accounts included in the report. When you set up a query to use with the report, do not include date ranges in the query, as the report allows you to determine date ranges when you run it. The dates you enter in the report must be in consecutive order regardless of the type of date range. You can also select the type of transactions to include.

- Received – Displays all pledge payments and gifts
- Raised – Displays all pledges and gifts but excludes pledge payments

- Gifted – Displays only gifts that were received without a pledge

Note: The Giving Dynamics report does not include a gift in kind donation with a $0 received amount. When a gift in kind's value is $1 or greater in the Received Amount field on the journal entry, it is included in the report.

The report shows the status of the accounts included in your selection.

- New – Donors who gave their first gift after the first time period.
- Recapture – Donors who gave prior to the first period, did not give in the first period, but did give in the second period
- Upgrade – Donors who gave more in the second period than in the first period
- Same – Donors who gave the same amount in both periods
- Downgrade – Donors who gave less in the second period than in the first period
- Lapsed New – Donors who gave for the first time in the first period (new donors to your organization) but did not give in the second period
- Lapsed Other – Donors who gave prior to the first period and also gave in the first period but did not give in the second period

Recency Report

This report enables you to view the number of constituents who gave in a specific year, but not since that year. Use this report to identify constituents who might have been loyal donors, but who stopped giving to your organization.

- Year -You can select the number of years to include in the report.
- Donors whose last gift was this year- This shows the number of constituents whose last gift was in the corresponding year. You can also click this to view a list of the constituents, the date of their last gifts, and the total amount you received from them that year.

Online Giving Reports

Online giving reports provide detailed data from donations received through your website.

Online Journal Entries Report

If your organization uses online donation pages, this report shows information about constituents who registered or gave online. It shows details about the entries in your query that were processed by eCommerce, Cart, or Donor Login.

- Name – This shows the name of the constituent. Click this to access the constituent's Home page.
- Date – This shows the date that the journal entry was entered online.

- Type – This shows the type of journal entry that was received online. Click this to view the transaction.
- Fund – This shows the fund to which the journal entry was applied.
- Pledged – This shows the pledged amount of the journal entry.
- Received – This shows the received amount of the journal entry.

To use the results of this report as a query for the Duplicate report, click Run Duplication Check on All. Use this to identify and resolve potential duplicates that could be created due to online entries. When you use this option, the Duplicate Report launch page includes an additional option to ensure that the duplicate report is only run on accounts that are in the Online Journal Entry Report.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** Running this report will overwrite any existing Duplicate Report.

Cart Reports

If you use the Cart (eStore) module, or have it as part of your eTapestry Pro package, use standard reports to view sales tax liability and the quantity of items remaining.

Tip: When you use the QuickBooks Standard export to process a split transaction as a Sales Receipt, the QuickBooks import creates a single Sales Receipt with one line item per split. If the split transaction contains Order Item splits, the export file includes data related to tracking inventory in QuickBooks.

Tax Liability Report

This report shows the total sales tax collected for purchases included in a query.

The results are summarized by state. It does not enable you to view detailed information per state. To view more information about each purchase, you can run the Tax Liability Detail Report.

Cart Items Quantity Remaining Report

This report shows the available quantity for all enabled items for which your track quantity in Cart.

- To manage the quantity for a specific item, click the Quantity Available.
- To access a specific section of your cart, click the cart name, category name, or item.

Mass Email Reports

This section includes the Opt Out Report. This report is available to all eTapestry users.

Opt Out Report

This report shows the email addresses that have opted out of receiving emails from your organization. The report shows the email addresses, account names, and persona types for each opt out. It also shows the date and subject of the email from which the opt out was processed.

Use this report to view personas that opted out. You can also use the option at the bottom right-hand side of the report to create a custom account query of the accounts. Use the query for mass updates or in compound queries.

To view a persona, such as to update the opt-out settings for the email address, click the link next to the email address.

By default, the date filter at the bottom of the report is set to show you just the opt outs from the past thirty days. To view data from further in the past, edit the date range.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** Never remove the opt out designation on a constituent's persona without the constituent's express permission. If you remove the opt out setting on a constituent who does not want to receive mass emails from your organization and then email that constituent, you would be in violation of the federal CAN-SPAM act.

Advanced Mass Email Reports

In addition to the Opt Out Report available to all eTapestry users, there are three reports available for Advanced Mass Email - the Delivery Report, the Scheduling Report, and the Usage Report. If you subscribe to the Advanced Mass Email module, or have it as part of an eTapestry package, you view these on the eTapestry Standard Reports page.

Tip: For information about the Opt Out Report, refer to Opt Out Report on page 251.

Delivery Report

This report shows details about your organization's mass email jobs, including delivery success rates, tracked opens, and tracked links.

The first level of the report includes the following details:

- Date/Time - This shows the date and time when the mailing was launched.
- Status - This shows the current status of the mailing. This can be active (email is in progress), completed (email has finished), scheduled (email is scheduled for a future date/time), and test or test/spam (for test emails).
- Mailing ID - This shows the unique ID assigned to the mailing. Click this to access the Mailing Delivery Detail report, which shows detailed information about the specific mass email.

- Subject - This shows the subject of the mass email.
- Query - This shows the category and name of the query used to run mass email. Click this to access the query.
- Total Eligible - This shows the number of email addresses in the query that were eligible for the mass email.
- In Progress - This shows the number of emails that are currently in the process of sending.
- Not Attempted - This shows the number of emails that were not attempted for the mass email. Emails may be skipped because of the persona opted out, the email address is a duplicate, the email address is improperly formatted, or the email address failed to deliver in three previous mass email jobs.
- Attempted - This shows the amount of emails that were attempted for the mass email.
- Successes - This shows the amount emails that were successfully sent from the email job.
- Failures - This shows the number of emails that were attempted but were not delivered. Failures can occur when there are issues with the recipient's email server, the recipient's mailbox is full, or the recipient's email provider marked the email as spam.

Mailing Delivery Report

This report shows detailed information about a specific mass email.

Under Basic Information, the report shows following information:

- Date/Time - This shows the date and time when the mailing was launched.
- Status - This shows the current status of the mailing. This can be active (email is in progress), completed (email has finished), scheduled (email is scheduled for a future date/time), and test or test/spam (for test emails).
- Subject - This shows the subject of the mass email.
- Query - This shows the category and name of the query used to run mass email. Click this to access the query.
- Template - This shows the communication template used to format the mass email. Click this to access the template.
- Web Version - If the email was set up to include a web version of the email, click this to access the hosted version.

Under Submitted Email Address Stats, the report shows the number of emails that were Attempted, Not attempted, and In Progress. For each category, click the number to access a report that shows the corresponding email addresses and account names. For emails that were not attempted, the Not Attempted Report shows why each email address was not attempted.

Reasons an email may not be attempted:

- Opted Out - The persona corresponding to the email address has been marked as opted out.
- Held - Email addresses that have failed in three previous advanced mass emails.
- Invalid Email Address - The email address is not a properly formatted.
- Duplicate - The email address exists on multiple personas in your email list. The email is sent to the email address one time. This shows the duplicate entries.

Note: When you have Duplicates, the number for Not Attempted on the Mailing Delivery Detail Report is less that the number in the Not Attempted Report. The Duplicates inflate the number of Not Attempted emails on the Not Attempted Report.

Under Attempted Email Stats, the report shows the number of emails that were attempted, how many were successfully delivered, and how many failed. For each category, click the number to access a report that shows the corresponding email addresses and accounts. For failure, the report shows why the email could not be delivered. Failures occur because:

- Mailbox Temporarily Unavailable - The recipient's mailbox exists, but is full or temporarily unavailable for another reason, such as high volumes of traffic or poor IP reputation.
- Mailbox No Longer Available - The recipient's email account never existed or has been deleted.
- Temporary Connection Failure - None of the registered mail servers are currently accepting emails. The domain is still valid, but no mail servers are available.
- Mail Server Does Not Exist - There is no DNS for the receiving domain. This means that the latter half of the email address (after the @) does not correspond to a real domain.
- Recipient Does Not Exist - The mail server initially accepted the message, but then later determined that there is no mailbox that corresponds to that email address. This is very similar to Mailbox No Longer Available, except that for that failure, the server never accepted the message at all.

Under Tracked Opens, the report shows the number of times an email was opened and the number of recipients who opened it. For each, click the number to access a report that shows the corresponding email addresses and accounts, as well as the date and time they opened the email. You can also choose to show only unique opens and the number of times each recipient opened the email.

Under Click-Through Stats, the report shows the number of times each trackable link within the email was clicked. You can also choose to show only unique click-throughs and the number of times each recipient clicked the link.

- Name - This shows the link name. Click this to view a report that shows which recipients clicked the link and when they clicked the link.

- View All Click-through Clicks - Click this to view a report of all recipients who clicked on trackable links and when they clicked them.

Under Forward to a Friend, the report shows the number of recipients who used the Forward to a Friend link. It also shows how many times the email was forwarded using the Forward to a Friend link. Click the number to view a report that shows which recipients forwarded mail and when they did so. You can also choose to show only unique email addresses and the number of times each recipient use Forward to a Friend link to forward the email.

Note: To protect the privacy of your email recipients and their contacts, the report does not show details regarding to whom the email was forwarded.

Scheduling Report

This report shows mass email jobs which are scheduled for a later time and date. It provides a snapshot the types of emails in your queue to send. If an email has been scheduled but not sent, you can also change the date and time from here. For each of the scheduled advanced mass emails, you can view the following information.

- Subject - The subject of the scheduled email.
- Date - The date that the mass email is scheduled to be sent.
- Time - The time of day that the mass email is scheduled to be sent.
- New Date -To change the date of the scheduled job, enter the date.
- New Time - To change the time of the mass email job, enter the time.
- AM/PM - Select whether the new scheduled time is for the morning or afternoon/evening.

Tip: After you make changes, click Save.

Usage Report

This report shows details about your organization's Advanced Mass Email subscription and usage. It shows the number of days remaining in your subscription, number of emails purchased, number of emails used, and total number of emails remaining.

- Period of Interest - This shows the dates for which the Advanced Mass Email subscription is enabled. Click this to view the delivery report, which includes Advanced Mass Email jobs that have been run within the date range.
- Days Remaining - This shows the number of days remaining in the Advanced Mass Email subscription. You have this many days to send your allotted number of emails.
- Emails Purchased - This shows the number of emails your organization purchased.
- Emails Used - This shows the number of emails that your organization sent during the period of interest.

- Emails Remaining - This shows the number of emails that your organization has can still send.

Fundraiser Reports

Fundraiser reports show detailed data about personal fundraisers that constituents do on behalf of your organization.

Fundraiser Activity Summary

This report shows a snapshot of how well multiple fundraisers are performing. Use this report to determine which fundraisers have been the most successful.

- Fundraiser - This shows the name of the fundraiser. Click this to edit a specific fundraiser.
- Goal - This shows the goal for the fundraiser. You enter a goal when you set up the fundraiser.
- # of Teams - This shows the number of teams who currently participate or previously participated in each fundraiser. This is based on details stored on the fundraiser. This is not affected by the query used to run the report.
- # of Participants - This shows the number of constituents who currently participate or previously participated in each fundraiser. This includes constituents who participated as members of a team and constituents who chose to participate individually.This is based on details stored on the fundraiser. This is not affected by the query used to run the report.
- No. of Transactions - This shows the number of transactions for each fundraiser, included in the query used to run the report. Click this to view details about the transactions for a fundraiser.
- Pledged - This shows the total pledged amount for pledges for each fundraiser, included in the query used to run the report. Click this to view details about the transactions for a fundraiser.
- Received - This shows the total received amount from all transactions for each fundraiser, included in the query used to run the report. Click this to view details about the transactions for a fundraiser.
- Pledge Balance - This shows the total pledge balance remaining for all for each fundraiser, included in the query used to run the report. Click this to view details about the transactions for a fundraiser.
- Remaining - This shows the goal of the fundraiser minus the total amount received from all transactions for the fundraiser. If the amount received is greater than the fundraiser goal, the total will appear as zero.

When you run the report, use the criteria settings to determine which fundraisers should be included in the report.

- Select whether to include a line in the report that only shows fundraisers that have a pledged, received, or raised total that is greater than, or less than/equal to $0.0.
- Select whether to include only current fundraisers (whose status is Active or Registration Closed) or only completed fundraisers (whose status is Completed or Disabled).
- Select whether to exclude fundraisers whose the status is Disabled.

Fundraiser Analysis

This report enables you to analyze the success of each fundraiser. Use it to compare goal information, net income, percent return, cost per dollar raised and the average gift across multiple fundraisers.

Note: For this report, the totals for the cost-related information is calculated based on disbursements that you entered for fees associated with the fundraiser. You can set up a constituent account in your database to use solely for tracking expenditures. On that account, enter disbursements for any fees associated with your fundraisers. Mark the disbursements with the appropriate value in the fundraiser field.

Report column options:

- Fundraiser - This shows the name of the fundraiser. Click this to edit a specific fundraiser.
- # of Trans - This shows the number of transactions for each fundraiser. Only transactions within the query are included. Click this to view details about the transactions.
- # of Donors, # of Teams, or # of Participants - This shows either the number of constituents who have transactions for the fundraiser, the number of teams who have participation entries for the fundraiser, or the number of constituents who have participation entries for the fundraiser. When you run the report, you select which of these options to display.
- Raised, Received, Pledged, or Pledge Balance - This shows the raised, received, pledged, or pledge balance for all transactions in the query for a specific fundraiser. When you run the report, you select whether to display these columns. On the report, click these totals to view details about the transactions for a specific fundraiser.
- Goal - This shows the overall goal for the fundraiser. You enter a goal when you set up the fundraiser.
- Goal Remaining - This shows the goal minus the amount raised. It is the amount that is needed to reach the goal.
- % of Goal - This shows the received amount divided by the goal. It shows how much of the goal has been met.
- Total Cost - This shows the sum of the disbursement entries in the query for a specific fundraiser.

- Net Income - This shows the amount raised minus the cost. It shows the the overall net amount that a fundraiser has raised.
- CPDR - This shows the cost divided by the amount raised. This is the amount that it cost to raise each dollar for the fundraiser.
- Average Gift - This shows the received amount divided by either the number of transactions, number of donors, number of participants, or number of teams. It shows the amount of the average gift given for the fundraiser. When you run the report, you select whether to use transactions, donors, participants, or teams in the calculation.

When you run the report, use the criteria settings to determine which fundraisers should be included in the report.

- Select whether to include a line in the report that only shows fundraisers that have a pledged, received, or raised total that is greater than, or less than/equal to $0.0.
- Select whether to include only current fundraisers (whose status is Active or Registration Closed) or only completed fundraisers (whose status is Completed or Disabled).

Fundraiser Summary

This report shows a complete view of the funds raised in a single fundraiser. Use it to see how much was raised by teams and their members, participants who were not members of teams, and donor who did not sponsor any team or participant. This enables you to analysis which part of your fundraiser (teams, participants, or the fundraiser itself) was the most successful.

Wish List Reports

Wish list reports show data about the wish lists created by your organization.

Wish List Purchasing Report

For organizations that use the Wish List module, this report shows how close you are to receiving everyone on your wish list. It also provides details about the items that have been purchased.

- Date – This shows the date that an item was purchased. Click this to view a note with additional purchase information.
- Sort Name – This shows the sort name of the constituent who purchased the item. Click this to access the constituent's Home page.
- Item Purchased – This shows the name of the item that was purchased. Click this to view a note with additional purchase information.
- Detailed Description – This shows a detailed description of the item that was purchased. Click this to view a note with additional purchase information.

- Vendor Price – This shows the vendor price for the item purchased. Click this to view a note with additional purchase information.
- Wish List Price – This shows the wish list price of the item purchased. Click this to view a note with additional purchase information.
- Quantity – This shows the number of items purchased. Click this to access a note with additional purchase information.
- Total Amt. Of Purchase – This shows the total amount of the purchase. Click this to view a note with additional purchase information.
- Cash Donation – This shows the amount of any cash donation (if any) that is associated with the wish list purchase. Click this to view a note with additional purchase information.
- Category Designation – This shows the category designation for the wish list purchase. Click this to view a note with additional purchase information.

Defined Fields Reports

These reports show data about system-defined fields and user-defined fields in your database.

User Defined Fields Report

This shows a snapshot all user-defined fields in your database. It provides a list of all your user-defined fields categories, fields contained in those categories, the type of each field, whether it is required, and the values (if any) associated with those fields. It also provides links to specific categories and fields within those categories.

- Category – This shows the name of each category. The fields within the category appear under the name. Click this to access the category.
- Field – This shows the names of the user-defined field names for each category. Click this to access a specific field.
- Type – This shows the the user-defined field type.
- Required – This shows whether or not a field is required.
- Value – This shows the values of multi-select and single-select fields. It also indicated is a field is a text box or a note field.

Account User-Defined Fields Report

This shows a snapshot of accounts and their associated defined fields. Use this to view which fields a query of people have in common. This report enables you to link to the specific account, the user-defined field category, and the specific defined field.

- Account – This shows the account names from the constituents within the query. Click this to access a specific constituent's Home page.

- Field – This shows all the user-defined fields used on a constituent's account. Click this to edit the settings for a specific field.
- Value – This shows the value which was selected or entered into each field on the constituent's account.

System-Defined Fields Report

This report shows a snapshot of all system-defined fields in your database. It provides a list of all system-defined fields categories, fields in those categories, field types, whether or not they are required, and the values (if any) associated with those fields. This report also provides links to the specific fields.

- Category – This shows the name of the category for all fields listed under the category name. Click this to access the category.
- Field – This shows the name of all system-defined field for each category. Click this to access the field.
- Type – This shows the system-defined field type.
- Required – This shows whether a specific field is required.
- Value –This shows the values of multi-select and single-select fields. It also indicates if the field is a text box or a note field.

Social Networking Reports

This section contains one report--the Shared Links Report. Any organization can run the Shared Links report. However, the report only contains data when the organization uses Sharing Links on Advanced Mass Emails, Fundraiser Sites, or eCommerce Pages.

Shared Links Report

Note: If you manually added social share buttons to your drag-n-drop template, these shares will not appear on the Shared Links Report. On an email template, select **Include Sharing Links**under **Advanced Mass Email Options** to track shares on the Shared Links Report.

From Reports, eTapestry Standard Reports, under Social Networking Reports, the Shared Links Report shows which of your organization's emails and sites have been shared, which social media outlets they were shared on, and how many times those shared links were clicked per social media outlet. Use this report to analyze how social media sites help raise awareness for various fundraising strategies.

Benchmark Reports

Note: Don't see this report? Benchmark reports are only viewable for admin users.

To participate, access your organization's account and click Personas. Under Other Demographic Information, select Opt in to Benchmark. When you opt in, eTapestry stores summary information about your organization for the current year, previous year, and six quarterly periods. These include the current quarter and the five previous quarters. For each subsequent quarter and year, eTapestry stores more summary information from your organization. Your organization's summary information is aggregated with other participating organizations for use in benchmark reports.

After you select Opt in to Benchmark and complete the report fields, eTapestry automatically pulls the appropriate information from your database to submit to the survey. Information for the “FEP Reports” are aggregated from the collective group of organizations that choose to participate in the survey. Once the data has been collected, the Association of Fundraising Professionals releases the results of the survey. With this information, you are able to compare your organization to the standards of the other nonprofit organizations participating in the survey.

Details about transactions, such as donor names and addresses, are never stored for use in benchmark reports.

Tip: If you change your data after eTapestry collects information for a given period, the aggregated results may not reflect your updates. For example, if you enter a gift in 2013 and delete the gift on February 15, 2014, then the gift will still be used in the 2013 aggregates. Likewise, if a gift originally has a date of December 5, 2013 but you edit the gift on February 2014 so that its new date is January 5, 2014, then the gift is still used in aggregates for 2013. This is because eTapestry stopped refreshing 2013 data at the end of January 2014.

Benchmark Giving Dynamics Report

Note: Don't see this report? Benchmark reports are only viewable for admin users.

Use this report to compare how the current year's giving compare's to the previous year for your organization and other eTapestry customers. This report provides a "big picture" view of overall giving, as well as details about donor behavior. The report shows the following statistics.

Giving Dynamics Report Columns	
Status	This shows the giving dynamics status category. Refer to the table below.
Number of Donors	How many constituents made donations during period 1 and 2 combined? Donations include gifts, recurring gifts, pledges, pledge payments, split gifts, and split pledges.
Percent of Donors	Percent of total donors that appear in the given category.
Total Donations - Date Range 1	Total amount donated during Date Range 1. Gifts are pulled from journal entries for donors, not tributes.

Giving Dynamics Report Columns	
Total Donations - Date Range 2	Total amount donated during Date Range 2. Gifts are pulled from journal entries for donors, not tributes.
$ Change - Date Range 1 to Date Range 2	Total Donations, Date Range 2 - Total Donations, Date Range 1.
% Change - Date Range 1 to Date Range 2	The amount Change divided by Total Donations Date Range 1. If Total Donations Date Range 1 value is 0, the percent change is reported as 0%.

Giving Dynamics Status Values	
Status	**Definition**
New	Donors that gave for the first time in the second time period
Recapture	Donors that gave prior to the first time period that did not give in the first time period by did give in the second time period
Upgrade	Donors that gave more in the second time period than in the first time period
Same	Donors that gave the same amount in both time periods
Total Gains	The sum of New, Recapture, Upgrade and Same values
Downgrade	Donors that gave less in the second time period than in the first time period
Lapsed New	Donors that gave for the first time in the first time period (new donors to your organization) but did not give in the second time period
Lapsed Other	Donors that gave prior to the first period and also gave in the first time period, but did not give in the second time period
Total Losses	The sum of Downgrade, Lapsed New and Lapsed Other values
Net	Total Losses subtracted from Total Gains

Note: In-kind donations, reversed transactions, and transactions with a value less than or equal to zero are excluded from these statistics.

1. From Reports, click eTapestry Benchmark Reports.
2. Under Benchmark Giving Dynamics Report, click a date range. The launch screen appears.

   Note: Most reports require you to select a query. However, benchmark reports always use the Base query category and the All Accounts query.
3. Select whether you want to view information about amounts received or raised.
4. Select which graphs to include.

- Gains
- Losses and Net as a Percentage of Year One Total
- Percentage of Donors and Percent Change

Or select Hide Graphs to exclude all graphs.

5. Select delivery options.
6. Run the report.
7. After you receive the report, you can adjust the display options.
   - To view a list of donors, the amount each gave per period, and the amount and percent of the change from period one to period two, select a Status under My Organization.
   - To view details of the aggregate information provided, select a Status under Aggregate Data. The Aggregate Result Detail page appears. It shows a summary of fundraising information for each of organizations included in the aggregate.
   - To compare your organization to others of similar type, size, or location, use filters. The filter criteria tile appears under the aggregate information.

     You can filter based on a specific NTEE code, revenue range or country. You can select organizations in one or more states. You can also limit the list to organizations within up to 50 miles of a given US postal code.

     After you select filter criteria, click Filter Entries to apply the filters. The aggregate data is recalculated.

     Note: If the filter criteria results in an aggregate list of fewer than organizations, aggregate data does not appear. This ensures the confidentiality of the aggregate organizations.
8. To use the report results off-line or to manipulate it in a spreadsheet program, such as *Microsoft Excel*, export it.
   - To export summary information from both side of the report into a single spreadsheet, select Export at the bottom of the main report results page.
   - To export only summary information about your organization, select Export at the bottom of the My Organization tile on the report. To include detail information in the export, first expand the tile to show detail information. When the tile is not expanded, only summary information is exported.
   - To export only aggregate information, select Export at the bottom of the Aggregate Data tile on the report. To include detail information in the export, first expand the tile to show detail information. When the tile is not expanded, only summary information is exported.

Benchmark Status Report

Note: Don't see this report? Benchmark reports are only viewable for admin users.

Use this report to view a summary of important giving measurements, including average pledge and gift sizes, and the totals for your online giving program. Use this report to compare your database with the following statistics from other eTapestry customers.

Benchmark Statistics	
Number of Donors	How many constituents made donations during the specified time period? Donations include gifts, recurring gifts, pledges, pledge payments, split gifts, and split pledges.
Number of Pledges	Total number of pledges and split pledges with journal entry dates during the extracted time period.
Total Pledged	Total amount pledged during the extracted time period.
Average Pledged	Total Pledged divided by the Number of Pledges.
Number of Gifts	Total number of gifts, recurring gifts and split gifts with journal entry dates during the extracted time period. A split gift that contains only pledge payment splits is excluded from the count of gifts.
Total Gifted	Total gifted amount associated with the gifts, recurring gifts and split gifts with journal entry dates during the extracted time period.
Average Gift	Total gifted divided by the number of gifts.
Total Raised	The amount raised for all gifts and pledges with journal entry dates during the extracted time period.
Total Received	Total amount received from gifts and payments with journal entry dates during the extracted time period.
Number of Online Gifts	Total number of online gifts received during the extracted time period. An online gift is identified using the Data Source user-defined field.
Total Received from Online Gifts	Total received from gifts and payments that are marked as online gifts during the extracted time period. An online gift is identified using the Data Source user-defined field.
Average Online Gift	Total received from Online Gifts divided by the number of Online Gifts.

Note: In-kind donations, reversed transactions, and transactions with a value less than or equal to zero are excluded from these statistics.

1. From Reports, click eTapestry Benchmark Reports.
2. Under Benchmark Status Report, click a date range. The launch screen appears.

   Note: Most reports require you to select a query. However, benchmark reports always use the Base query category and the All Accounts query.
3. Select which graphs to include.
   - Transaction Counts
   - Totals
   - Averagest

   Or select Hide Graphs to exclude all graphs.
4. Select delivery options.
5. Run the report.
6. After you receive the report, you can adjust the display options.
   - To view a list of donors, the number of transactions each donor made, the total amount that each donor pledged, and the total amount you received from each donor, select a Period under My Organization.
   - To view details of the aggregate information provided, select a Period under Aggregate Data. The Aggregate Result Detail page appears. It shows a summary of fundraising information for each of organizations included in the aggregate.
   - To compare your organization to others of similar type, size, or location, use filters. The filter criteria tile appears under the aggregate information.

     You can filter based on a specific NTEE code, revenue range or country. You can select organizations in one or more states. You can also limit the list to organizations within up to 50 miles of a given US postal code.

     After you select filter criteria, click Filter Entries to apply the filters. The aggregate data is recalculated.

     Note: If the filter criteria results in an aggregate list of fewer than organizations, aggregate data does not appear. This ensures the confidentiality of the aggregate organizations.
7. To use the report results off-line or to manipulate it in a spreadsheet program, such as *Microsoft Excel*, export it.
   - To export summary information from both side of the report into a single spreadsheet, select Export at the bottom of the main report results page.
   - To export only summary information about your organization, select Export at the bottom of the My Organization tile on the report. To include detail information in the export, first expand the tile to show detail information. When the tile is not expanded, only summary information is exported.

- To export only aggregate information, select Export at the bottom of the Aggregate Data tile on the report. To include detail information in the export, first expand the tile to show detail information. When the tile is not expanded, only summary information is exported.

Benchmark Status Trend Report

Note: Don't see this report? Benchmark reports are only viewable for admin users.

Use this report to compare your database with the following statistics from other eTapestry customers. This report shows the "direction" of your fundraising program so that you can focus your analysis on appropriate areas.

Benchmark Statistics	
Number of Donors	How many constituents made donations during the specified time period? Donations include gifts, recurring gifts, pledges, pledge payments, split gifts, and split pledges.
Number of Pledges	Total number of pledges and split pledges with journal entry dates during the extracted time period.
Total Pledged	Total amount pledged during the extracted time period.
Average Pledged	Total Pledged divided by the Number of Pledges.
Number of Gifts	Total number of gifts, recurring gifts and split gifts with journal entry dates during the extracted time period. A split gift that contains only pledge payment splits is excluded from the count of gifts.
Total Gifted	Total gifted amount associated with the gifts, recurring gifts and split gifts with journal entry dates during the extracted time period.
Average Gift	Total gifted divided by the number of gifts.
Total Raised	The amount raised for all gifts and pledges with journal entry dates during the extracted time period.
Total Received	Total amount received from gifts and payments with journal entry dates during the extracted time period.
Number of Online Gifts	Total number of online gifts received during the extracted time period. An online gift is identified using the Data Source user-defined field.
Total Received from Online Gifts	Total received from gifts and payments that are marked as online gifts during the extracted time period. An online gift is identified using the Data Source user-defined field.
Average Online Gift	Total received from Online Gifts divided by the number of Online Gifts.

Note: In-kind donations, reversed transactions, and transactions with a value less than or equal to zero are excluded from these statistics.

1. From Reports, click eTapestry Benchmark Reports.
2. Under Benchmark Status Trend Report, click a date range. The launch screen appears.

   Note: Most reports require you to select a query. However, benchmark reports always use the Base query category and the All Accounts query.
3. Select which graphs to include.
   - Number of Donors
   - Total Raised/Received/Gifted
   - Average Gift
   - Number of Online Gifts

   Or select Hide Graphs to exclude all graphs.
4. Select delivery options.
5. Run the report.
6. After you receive the report, you can adjust the display options.
   - To view a list of donors, the number of transactions each donor made, the total amount that each donor pledged, and the total amount you received from each donor, select a Period under My Organization.
   - To view details of the aggregate information provided, select a Period under Aggregate Data. The Aggregate Result Detail page appears. It shows a summary of fundraising information for each of organizations included in the aggregate.
   - To compare your organization to others of similar type, size, or location, use filters. The filter criteria tile appears under the aggregate information.

     You can filter based on a specific NTEE code, revenue range or country. You can select organizations in one or more states. You can also limit the list to organizations within up to 50 miles of a given US postal code.

     After you select filter criteria, click Filter Entries to apply the filters. The aggregate data is recalculated.

     Note: If the filter criteria results in an aggregate list of fewer than organizations, aggregate data does not appear. This ensures the confidentiality of the aggregate organizations.
7. To use the report results off-line or to manipulate it in a spreadsheet program, such as *Microsoft Excel*, export it.
   - To export summary information from both side of the report into a single spreadsheet, select Export at the bottom of the main report results page.

- To export only summary information about your organization, select Export at the bottom of the My Organization tile on the report. To include detail information in the export, first expand the tile to show detail information. When the tile is not expanded, only summary information is exported.
- To export only aggregate information, select Export at the bottom of the Aggregate Data tile on the report. To include detail information in the export, first expand the tile to show detail information. When the tile is not expanded, only summary information is exported.

Benchmark Status Comparison Report

Note: Don't see this report? Benchmark reports are only viewable for admin users.

Use this report to compare your database with the following statistics from other eTapestry customers.

Benchmark Statistics	
Number of Donors	How many constituents made donations during the specified time period? Donations include gifts, recurring gifts, pledges, pledge payments, split gifts, and split pledges.
Number of Pledges	Total number of pledges and split pledges with journal entry dates during the extracted time period.
Total Pledged	Total amount pledged during the extracted time period.
Average Pledged	Total Pledged divided by the Number of Pledges.
Number of Gifts	Total number of gifts, recurring gifts and split gifts with journal entry dates during the extracted time period. A split gift that contains only pledge payment splits is excluded from the count of gifts.
Total Gifted	Total gifted amount associated with the gifts, recurring gifts and split gifts with journal entry dates during the extracted time period.
Average Gift	Total gifted divided by the number of gifts.
Total Raised	The amount raised for all gifts and pledges with journal entry dates during the extracted time period.
Total Received	Total amount received from gifts and payments with journal entry dates during the extracted time period.
Number of Online Gifts	Total number of online gifts received during the extracted time period. An online gift is identified using the Data Source user-defined field.
Total	Total received from gifts and payments that are marked as online

Benchmark Statistics	
Received from Online Gifts	gifts during the extracted time period. An online gift is identified using the Data Source user-defined field.
Average Online Gift	Total received from Online Gifts divided by the number of Online Gifts.

Note: In-kind donations, reversed transactions, and transactions with a value less than or equal to zero are excluded from these statistics.

1. From Reports, click eTapestry Benchmark Reports.
2. Under Benchmark Status Comparison Report, click a date range. The launch screen appears.

   Note: Most reports require you to select a query. However, benchmark reports always use the Base query category and the All Accounts query.
3. Select which graphs to include.
   - Number of Donors
   - Total Raised/Received/Gifted
   - Average Gift
   - Number of Online Gifts

   Or select Hide Graphs to exclude all graphs.
4. Select delivery options.
5. Run the report.
6. After you receive the report, you can adjust the display options.
   - To view a list of donors, the number of transactions each donor made, the total amount that each donor pledged, and the total amount you received from each donor, select a Period under My Organization.
   - To view details of the aggregate information provided, select a Period under Aggregate Data. The Aggregate Result Detail page appears. It shows a summary of fundraising information for each of organizations included in the aggregate.
   - To compare your organization to others of similar type, size, or location, use filters. The filter criteria tile appears under the aggregate information.

     You can filter based on a specific NTEE code, revenue range or country. You can select organizations in one or more states. You can also limit the list to organizations within up to 50 miles of a given US postal code.

     After you select filter criteria, click Filter Entries to apply the filters. The aggregate data is recalculated.

Note: If the filter criteria results in an aggregate list of fewer than organizations, aggregate data does not appear. This ensures the confidentiality of the aggregate organizations.

7. To use the report results off-line or to manipulate it in a spreadsheet program, such as *Microsoft Excel*, export it.
   - To export summary information from both side of the report into a single spreadsheet, select Export at the bottom of the main report results page.
   - To export only summary information about your organization, select Export at the bottom of the My Organization tile on the report. To include detail information in the export, first expand the tile to show detail information. When the tile is not expanded, only summary information is exported.
   - To export only aggregate information, select Export at the bottom of the Aggregate Data tile on the report. To include detail information in the export, first expand the tile to show detail information. When the tile is not expanded, only summary information is exported.

Custom Reports

When you need data from eTapestry that is not available on a standard report, or you need additional data in a specific format, you can use custom reports. Custom reports allow you to extract any information you track in eTapestry in the order that you need.

Create a custom report

1. From Reports, select a category to store your custom report. The Report Categories page appears.
2. Under Tasks, click New Report. The Create a New Report page appears.
3. Under Report Basics, enter a name and description for the report. Enter a description to help other users understand how to use the report and what it contains.
4. Under Group Results, select a grouping option from the Group by field. Grouping options enable you to place accounts or entries that share a common value together. You can also select to show totals for each group or collapse each group into a single line.
5. To mark this report as a favorite, select the Favorite Report checkbox. Links to your favorite reports appear on your eTapestry home page when you use the Favorites tile. For more information about customizing your home page, see Customize Home Page.
6. To hide this report from other users in your organization, select the Private checkbox. Users with administrative rights can still view, edit, and use your report.

7. To prevent other users from changing your report, from editing this report, but allow them to view, copy, and run it, select the Read Only checkbox. Users with administrative rights can still edit your report.
8. To show a total of the values for segments of an upgraded pledge or split transaction, instead of treating each segment as a separate transaction, select Yes - show the total of the values for segments under Collapse Upgrades/Segments. Consider this option if your query includes journal entries.
9. Under Report Columns, to select the information to display on the report, select a set or field name in the drop down field or search for a specific set or field. Next, click the field to display on the report.

   If you plan to use an aggregate on a field, consider adding the field a second time and using the aggregate on the second version.
10. Adjust the report columns as necessary.

Note: When you include Individual accounts name fields, such as First Name and Last name, blank rows may appear in the custom report for Family and Business account. When your report includes a variety of accounts with different Name Formats, we recommend you include the Account Name field to successfully display Family and Business account names.

- To remove a column from the report, click X.
- To reorder columns, select the column. Then drag and drop the column to the preferred location.
- To rename a column, select the column name and enter a new name.
- To sort the report by a particular column, click the dots icon to the column name. The row expands and additional options appear. In the Sort Order field, select whether to use ascending or descending order.

  You can sort by up ten columns. For each column use the Sort Order to control which sort is applied first.

  Note: When you group entries by a particular field, the sorting options apply within the groups. For example, if you group by fund and sort by date, the report will group all of the transactions to a particular fund together, and then sort the transactions within that group by date.
- To hide a column, click the dots icon next to the column name. The row expands and additional options appear. Click the eye icon.

  Tip: If you use the Sort Name field to alphabetize accounts in your report, consider hiding the Sort Name column, so that the accounts are sorted but the sort name doesn't appear on the generated report.

- Apply aggregates to fields as desired. For more information about calculating the sum, average, minimum, maximum, total, count, or order of values in your report, refer to Use Aggregates in Reports on page 274.

11. To save and run the report, click Save and Run.

Custom Relationship Reports

A person's personal network is just as important as their net worth. Therefore, it's important for you to track the associations that constituents have with each other. To do this, use relationship types to indicate meaningful associations. For example, consider tracking employer/employee, university/alumni, parent/child, and spousal relationships.

You can create reports that contain information about both sides of a relationship and data about that relationship. Before you run a relationship report, you need a report definition that specifies the type of information that the report should include, a filter that determines which relationships to include, and a query that determines which accounts or journal entries to include.

Note: eTapestry automatically creates a relationship filter for each relationship type in your database. Additionally, you can create custom relationship filters.

Create a relationship report definition

1. From Reports, select a category to store the report definition. The Edit Report Category page appears.
2. Under Tasks, click New Relationship Report. The Create a New Report page appears.
3. Under Report Basics, enter a name for the report definition.
4. Enter a description to help other users understand how to use the report and what it contains.
5. From the Relationship Filter drop down field, select a filter. Your selection controls the options in the Grouping drop down field. Until you select a relationship filter, the available grouping options are None and Role.
6. To show a total of the values for segments of an upgraded pledge or split transaction, instead of treating each segment as a separate transaction, select Yes - show the total of the values for segments under Collapse Upgrades/Segments. Consider this option if your query includes journal entries.
7. Under Report Columns, select the information to display on the report. On the Browse Fields tab, select a category in the drop down field and then select a field name. You can also search for a specific field.

   To show information about the relationship itself, select a field from the Relationship Fields or from the User-Defined Fields: Relationship category.

Note: You can add the same report column to a report multiple times. For example, consider included the Name column two times so that one you can view the names of the constituents on each side of the relationship.

8. If necessary, adjust the report columns. You can remove, reorder, rename, sort, hide, and apply aggregate data to these columns.

   When your report includes an account or persona field, you can specify which side of the relationship the data should come from. To specify the target account, click +next to the column name. The column details expand. From the Account drop down field, select a side of the relationship (role). The roles are determined by the relationship type and relationship filter. If you haven't selected a filter, the account options are None, (Role 1), and (Role 2).

   Because journal entry information displays for only one side of the relationship, you do not select target account options for fields associated with journal entries, including gifting type, scheduled gift type, and user-defined fields in the journal category. Additionally, you don't select target account options for relationship fields and user-defined fields in the relation category. Data from these fields is associated with the relationship, instead of a side of the relationship.
9. Click Save. You are ready to run the report.

Run a custom relationship report

1. From Reports, select the category that contains the report definition.
2. Under the report name, click Run Report.

   Tip: To quickly run a report you marked as a favorite, from Reports, click the Run Report icon. The launch page for the report appears.
3. Under Query, select a category.
4. Select the query that contains the entries you want to include in your report.

   The query should only contain accounts or journal entries from one side of the relationship. For example, to report on a Parent/Child relationship, the query should contain either the parents or the children, but not both.
5. Under Relationships, the relationship type associated with the relationship filter appears. You determined the filter and relationship type when you set up the report definition.
6. Under The results of my query correspond to which half of the relationship?, select the role corresponding to the query. For example, if your query includes all parents with fifth graders enrolled in your after school program, and your report is based on the parent/child relationship, select the parent role.
7. Select whether to exclude account who do not have any matching relationships.

- When you include these accounts, the report will contain one line for every account in the query regardless of whether the account has a relationship that matches the criteria in the relationship filter. Consider including unmatched accounts to check for missing data. For example, every parent should have at least one parent. If your report shows a child with no parent, you'd know to update the child's information.
- When you exclude these accounts, the report does not show accounts or journal entries, for accounts in the query that don't have a relationship that matches the criteria in the relationship filter.

8. Under Export As, determine how the report data should be selected and displayed. Typically, you'll select Transactions, unless your report is for accounting purposes.
9. Under Personas Reported, specify which persona types should be used and the order in which they should be used.
   - If you select Based on Hierarchy, the primary persona is used by default. Otherwise, specify a persona order. Based on this order, data from the first applicable persona type is used. If an account doesn't have a persona for any of the persona types in your hierarchy, the primary persona is used.
   - If you select All, all persona types for the each account in the query are used. In the report, each persona type is listed on a separate line for each account.
10. Under Export Format, you typically select tab-delimited, unless your mailing house requests fixed-length fields.
11. Under Delivery Options, select how you want to receive the report. If you select an email format, enter you email address and a subject line for the email. For large reports, we recommend you select Archive in Zip File so that the file is compressed for faster transmission to your browser or email account.
12. To run the report immediately, click Submit. If you selected to view the report onscreen or to download the report, you cannot navigate to another page until the report has been generated.

    To run schedule the report to run at another date and time, click Schedule for Off-Hours and determine when the report should run.

Create a custom relationship filter

eTapestry includes a standard relationship filter for each relationship type in your database. The filter determines which relationship to include in a report. You can create a custom filter so that only data about certain relationships with a relationship type is included in the report. This is based on specific information stored on the relationship.

1. From Reports, select Relationship Filters.
2. Select a category in which to store your filter.
3. From the category, click New Relationship Filter.

4. Enter a name for the filter.
5. Enter a description to indicated what the filter includes and how it should be used.
6. Select a relationship type.
7. To include only relationships after a specific date, enter a start date. You can also enter an end date.
8. To exclude relationships which don't match gifts, select Only Matching Gift.
9. To filter based the value of a relationship defined field, select the defined field name and then enter your criteria.
10. Click Save and Preview. The relationships that meet the filter criteria appear.

Use Aggregates in Reports

When you create a custom report, you can aggregate the entries in a field, so that the field shows a calculated value. For example, you can calculate the average received amount per account instead of listing all received values per account.

Aggregates are similar to summary fields in that they both show calculated data for each account, are available for custom reports, and many have the same calculations. However, aggregates only calculate values based on the data available in your query, whereas summary fields are calculated based on all information available on the account. For example, consider using an aggregate on the Received field to calculate an account's year-to-date giving to a particular fund. Conversely, use the summary field Year to Date Received Total to calculate an account's year-to-date giving to all funds.

To include the original entries and the calculated value, add the field to the report twice. Use an aggregate on the second version of the field.

To use an aggregate on a field, add the field to the report definition. Click the toggle button next to the field name. The row expands and additional options appear. Under Aggregate, select a calculation such as "Average." Next, we recommend you rename the column to reflect the calculation. To do so, click the column name, delete the field name, and enter the calculation name, such as "Average Received."

Types of Aggregates:

- Math- Use these on fields that contain number or currency data.
  - Sum - This calculates the total of the values in a field for each account, based on the entries in the query.

    Note: If you group your report by account, and select to show group totals or collapse, the report automatically shows the sum of any currency or number fields, even if you do not set up the sum aggregate.

    - Avg - This calculates the average of the values in a field for each account, based on the entries in the query.
    - Min - This shows the lowest value in a field for each account, based on the entries in the query.
    - Max - This shows the highest value in a field for each account, based on the entries in the query.
- Count - This shows the number of entries in each group, based on the entries in the query. The number one appears in the count column for every entry that has data. If there is no data, the number zero appears. The ones are added together and total lines appear to show the total count for each group.

  For example, if you use the count aggregate on the Approach field, but some transactions don't have an approach, then those transactions would not count towards the count total. If you include transaction and non-transaction entries in the same report, but only want to count transactions, consider using the count aggregate on the Fund field since transactions are associated with funds and non-transactions aren't.
- Date Range - Use these on journal fields that contain number or currency data. The aggregate calculates the total of the values in the query withing the specified data range. The date range depends on the date when the report is run. The data range options include: one year ago, one fiscal year ago, two years ago, two fiscal years ago, three years ago, three fiscal years ago, four years ago, four fiscal years ago, five years ago, five fiscal years ago. Consider setting up a report that shows yearly totals. Then run the report at the start or end of each year.
- Ordinal Number - Use these on journal fields to identify values that have a designated position based on the journal entry dates within the query. The ordinal number aggregate options include: first, second, third, fourth, fifth, and last. For example, consider using this aggregate to show the last received amount for each account or the first fund to which a constituent gave money.

Typically, reports are grouped by account and collapsed, so that the account's data is aggregated and shown on a single line.

When you group by something else, the data is aggregated per group per account. For example, if you create a report with the data grouped by fund and use the average aggregate on the Received field, then if a constituent gave once to the General/Operating fund and twice to the Unrestricted fund, the account's transactions would appear in both groups. The report would show the average of the account's gifts for each fund.

If you group by fund, the report shows the average of each constituent's gifts and gifts from all accounts per fund.

If you group by fund, and collapse the groups, the report only shows the average of gifts from all accounts per fund.

Report Management

As you create and use reports and exports, use the following guidelines to manage them and as best practices.

Create a Database Backup

eTapestry creates a backup of your database nightly. If you want a copy of your database, you can manually create a backup file. To do so, create these two custom exports.

Export all account information

1. From Reports, click System under Categories.
2. Under Tasks, click New Report.
3. Enter a name, such as "Account Export."
4. Enter a description.
5. Do not group the report and do not select any report options.
6. Select the account fields you want to export.
   - Account Fields - Select account number, first name, last name, account name, sort name, persona type, primary persona type, and role, and all other account fields.

     Note: Use the account number that matches account data from this export with journal entry data and role on the journal export. With this information, you can tell whether an account is a constituent, tribute, user or team. Also, export all personas for each account because the persona type field helps you identify a persona for an account.
   - Phone Types - Select all phone types.
   - User-Defined Fields: Account - Select all account user-defined fields.
   - User-Defined Fields: Persona - Select all persona user-defined fields
7. To reorder the information, drag and drop the columns.
8. To sort the export by account number or sort name, click the dots icon beside the field name.
9. Click Save and Run. The launch screen appears.
10. For the Query Category, select Base.
11. For the Query, select All Accounts.
12. For Personas Reported, select All.
13. For Report Format, select an Export File - Excel option.

Tip: If you have a large number of accounts, we recommend you use your Drop Box or receive the file by email, rather than downloading it. If you select to download the export, you cannot navigate away from the screen until after the export and download completes. This may take a significant amount of time.

14. If you have a large number of accounts, select Archive in Zip File.
15. Click Submit.

Export all journal entry information

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** The amount of information you attempt to export will affect the time it takes to run the report. There are some instances where the report may take a long time or will not complete because the file is too large for the export process. The following steps will help you build a more efficient journal entry export.

1. From Reports, click System under Categories.
2. Under Tasks, click New Report.
3. Enter a name, such as "Journal Export."
4. Enter a description.
5. Do not select any report options and do not group the report.
6. Select the fields you want to export.
   - Account Fields - Select account number and any other account fields you want to include, such as first name, last name, account name, and sort name.

     Note: The account export already contains most account details. You do not need to include much account information in this export. You only need the account number to match account data from this export with the first account export.
   - Journal Fields - Select all journal entry fields you want to include. We recommend you select these fields: date, journal entry type, transaction type, received, pledged, non-deductible amount, fund, contact method, contact subject, gift type, gift type information, and note. You can also select specific gift type fields, such as check number, check date, and credit/debit card number.

     If your organization uses these fields, you should also include: campaign, approach, letter, and receipt number.

     If your organization uses eReceipts, you should also include: generated receipt date issued, generated receipt number, generated receipt status, and generated voided receipt number.

Tip: Before adding columns to the report from the User Defined Fields: Journal category, consider if the field is used on the type of transaction you are exporting. Also, you should choose to only export the field name, not each individual value, for multi-select fields.

- User-Defined Fields: Journal - Select all journal user-defined fields.

7. To reorder the information, drag and drop the columns.
8. To sort the export by account number or sort name, click the dots icon beside the field name.
9. Click Save and Run. The launch screen appears.
10. For the Query Category, select Base.
11. For the Query, select All Journal Entries.

Tip: To reduce the size of your export, run multiple exports bases on the type of journal entry. You can create a query using the Journal Entry Types criteria and select transaction types, such as Gifts and Pledges. When you create the report, you only need to include columns that relate to transactions. You can then repeat this process for non-transaction journal entries, such as Notes and Contacts.

12. For Personas Reported, select Personas Reported – Based on hierarchy.
13. For Report Format, select the CSV File - Drop Box option.

Tip: If you have a large number of accounts, we recommend you use your Drop Box or receive the file by email, rather than downloading it. If you select to download the export, you cannot navigate away from the screen until after the export and download completes. This may take a significant amount of time.

14. If you have a large number of accounts, select Archive in Zip File.
15. Click Submit.

Tip: After you create these exports, you can run them any time. From Reports, click System under Categories. Locate the report and click Launch. To schedule the reports to run automatically, from the launch page, click Schedule for Off Hours under Submit.

eTapestry also offers a Final Data Export that your organization can purchase if you are moving to another system. Your eTapestry data will exported into multiple tab-delimited files connected through reference IDs to make it easier for programmers to connect the various files together and reconstruct the information to import it into another system.

Additionally, we will provide a list of all the files of your database export. The files will also be imported for you into a *Microsoft* Access database. The layout of each table is identical to each text file and includes a file that includes the translations for some of the numeric codes found in

the exported data. Please contact your account executive or email sales@Blackbaud.com for more information.

Leading 0s in postal codes

When you export a report from eTapestry into Microsoft *Excel*, postal codes that start with a zero may not appear correctly because *Excel* hides the leading zero.

1. To correct this issue, save the file from *eTapestry* to your desktop.
2. From *Excel*, open the file. A setup wizard appears.
3. For Choose the file type that best describes your data on Step 1, select Delimited.
4. Click Next.
5. On Step 2, verify that the setup information is correct.
6. Click Next.
7. On Step 3, select the column for postal code and then select Text for the Column data format.
8. Click Finish.
9. Save the file. You can now use the file for a mail merge.

Categories

To keep your database organized, create categories for storing items, including query definitions, custom reports definitions, relationship filters, communication templates, import templates, user-defined fields, and cart items.

- To add a category from an area that uses categories, click New Category under Tasks. Enter a name and description to indicate the type of items to store in the category. For some areas, you can mark a category as private. Then click Save Category. Your category appears in a list.
- To edit a category, click its name. You can also move and copy items from one category to another.
- To create a new item within a category, click the category name. Then click New [Item] under Tasks. Or, from the category list, click New [Item] under the category name.
- To delete a category, click Delete next to the category name. If a category contains items, you cannot delete it.
- To delete an item, open the category, locate the item, and click Delete. From the categories list, you can also click the "+" beside a category name to view the items, locate the item, and click Delete.

- To reorder categories or items, select a Sort By option at the top of the page or drag and drop to manually place them into the preferred order. To save the new order, click Save Category Order under Tasks. The new order appears for every user in your database.
- To copy an item within a query, open the category, locate the item, and click Copy. From the categories list, you can also click the "+" beside a category name, locate the item, and click Copy. Enter a category for the copy. Then enter a new name for the copy. Click Copy to save the new version of the item.

  Tip: Consider using copies in areas when you work with queries, reports, exports, and communications. This way, you can make edits to the copied item while preserving the originals.
- To move an item from one category to another, open the category, locate the item, and click Move. From the categories list, you can also click the "+" beside a category name to view the items, locate the item, and click Move. Then select a category and click Move to save the new location.

  To move multiple items, open the category and click Move under Tasks. Then select the items to move, select a category, and click Move to save the new location.
- To quickly find for a category or item, use the search box to enter a search term.
- To quickly find for a category or item, use the search box to enter a search term. You can search by more than just names, including descriptions, data created, and date last used.
- To change how much information appears in the list, use the Show More Detail and Show Less Detail options under Tasks.

Note: Although you can create as many categories and items as necessary, it may take longer to load pages with many items. To reduce loading time when an area has more than 1000 items, eTapestry only displays the category information. It does not display information about the items in the categories. To access information about the items, open the category.

Fast Navigation

Looking for a shortcut? Below the navigation bar, first click any empty place on the screen. To open the Fast Navigation screen using your keyboard, press **ALT** and **N**. Type a command, then press **ENTER**, and eTapestry takes you to the area of that matched that command.

Note: You can only access areas for which you have security rights.

All commands are single compound words and do not include spaces, such as "userdefinedfields." If you include spaces when you type the command, eTapestry removes them for you.

However, when you use search and find commands, the spaces will not be removed. For example, if you type "find john smith", eTapestry searches for "john smith," not "johnsmith."

You can also type the first few letters of a command instead of the full command. For example, if you type "use," eTapestry takes you to the user-defined fields page. If more multiple commands start with the letters you typed, such as myuser, myorg, and mydropbox, and you typed "my" then fast navigation takes you to the first command listed in the table of commands that starts with "my" (in this case "myuser").

Tip: To use fast navigation, your internet browser must allow scripted windows. If you use *Internet Explorer* and it has block this type of window, a message appears in the URL bar. Click the message and then select Temporarily Allow Scripted Windows. To permanently enable Fast Navigation in *Internet Explorer*, from your browser's Tools menu, select Internet options, the Security tab, and then Custom level. In the Settings window, locate the Scripting section. Under Allow websites to prompt for information using scripted windows, select Enable and then click OK. Confirm the change and click OK.

Some commands can be used from anywhere in the database. Others can only be used from an existing account (such as "AddGift").

These general commands can be used from any location in the database.

Command	Goes to
welcome	Home dashboard page
reports	Report and Export Categories page
queries, query	Query Categories page
document, documents, thankyou, communication, emails, massemail, receipt	Communication Categories page
imports, advancedimport, advimport	Import Categories page
userdefinedfields, udfs	User Defined Field Categories page
funds	Funds page
campaigns	Campaigns page
approaches	Approaches page
letters	Letters page
quickgiftentry, quick, qge	Quick Gift Entry page
massupdates, updates	Mass Updates page
myuser	your user account's Home page
myorganization, organization	the org account's Persona page

Command	Goes to
mydropbox, dropbox	your user's Drop Box
myscheduleditems, scheduleditems	Scheduled Items page
securitygroups	Security Groups page
cart	Cart page
personalfundraising,fundraisers, events	Fundraisers page
advfind, advancedfind	Advanced Find page
standardreports, specialreports	eTapestry Standard Reports page
standardexports, specialexports	eTapestry Standard Exports page
duplicatereport	Duplicate Report Launch page
addaccount, account	Add Account
logout	Logs you out of eTapestry
find..., search...	Uses Quick Find to search for whatever text was typed in after find or search
/[account number]	This opens the Home page of account with the corresponding account number.
//[account number]	Uses Quick Find to locate the corresponding account number and opens the search results page.
help	Opens the WikiHelp window with the Main page of Help displayed

When you have an account record open, you can use these account-specific commands.

Command	Goes to
home, homepage	account's Home page
personas	account's Personas page
relationships	account's Relationships page
journal	account's Journal page
accountsettings, other	account's Account Settings page
definedfields	account's Defined Fields page
addgifts, addpledges	New Gift/Pledge screen
addpayments	If account has open pledge, this opens a Payment screen for that pledge. If account has multiple open pledges, this opens the screen that lists out those

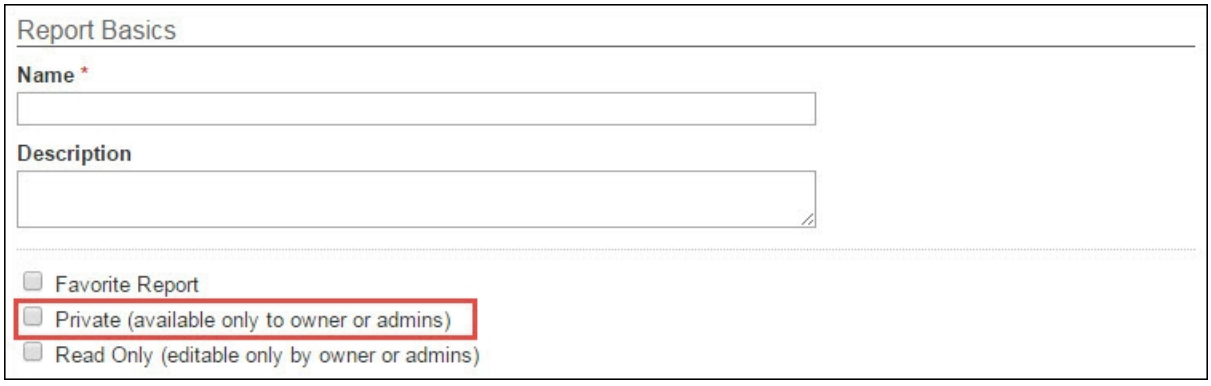
Command	Goes to
	pledges and asks you to choose pledge to which the payment should be applied. If account has no open pledges, this opens a page that indicates no open pledges, and provides links to Add Gift/Pledge or Go to Journal.
addsplitgifts	New Split Transaction screen
addnotes	New Note screen
addcontacts	New Contact screen
addcalendaritem	New Calendar Item screen
addrelationships	Relationship add screen

Make Items Private

You can mark query, report, and communication categories and items as private so that it is hidden from other users in your database. When an item or category is private, the lock icon appears.

Note: Users with administrative rights can still view things marked private. You cannot mark items that other users created as private. However, you can create a copy of the item and mark the copy as private.

To mark an item private, select Private under Report Basics.



Make Items Read Only

To prevent other users from changing or deleting your queries, report definitions, and communication templates, mark them as read only. When you mark an item as read only, other users can still view, use, and copy the item.

Note: Users with administrative rights can change and delete items that users mark as read only. A message warns the administrator that the item is read only.

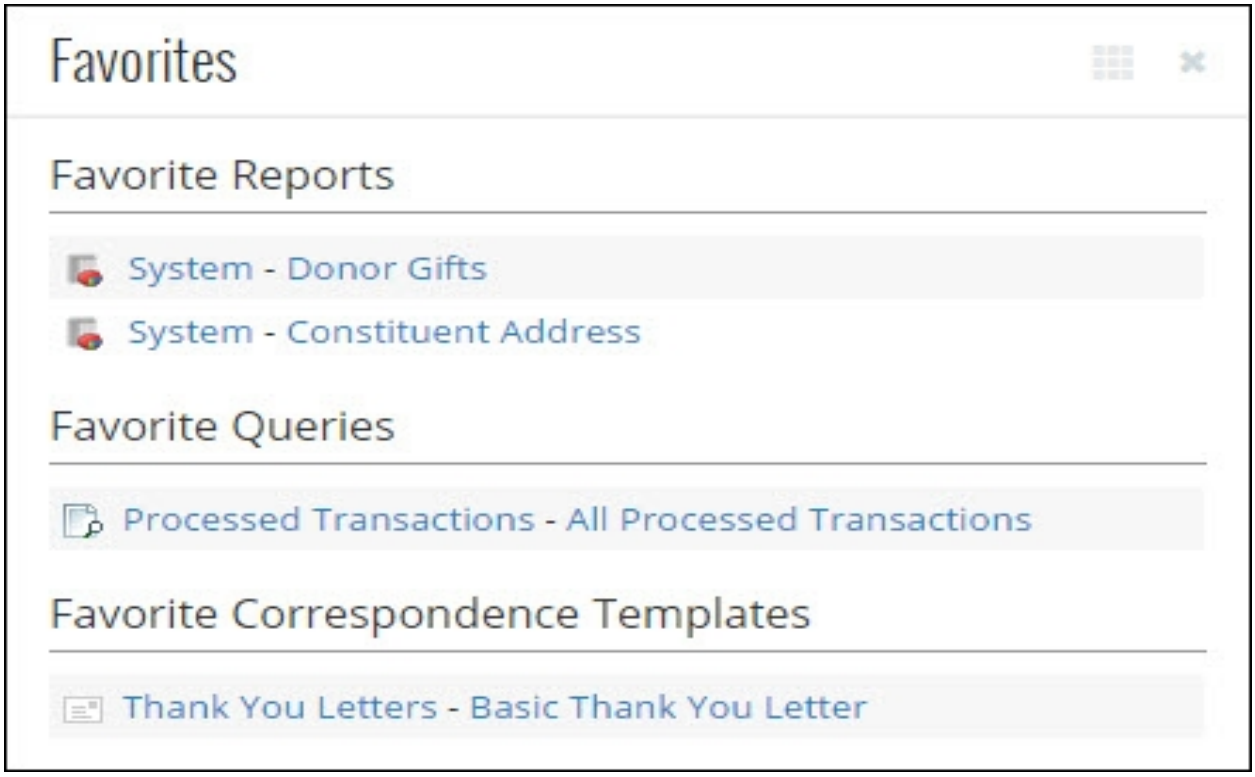
To mark an item as read only, select Read Only under Report Basics.



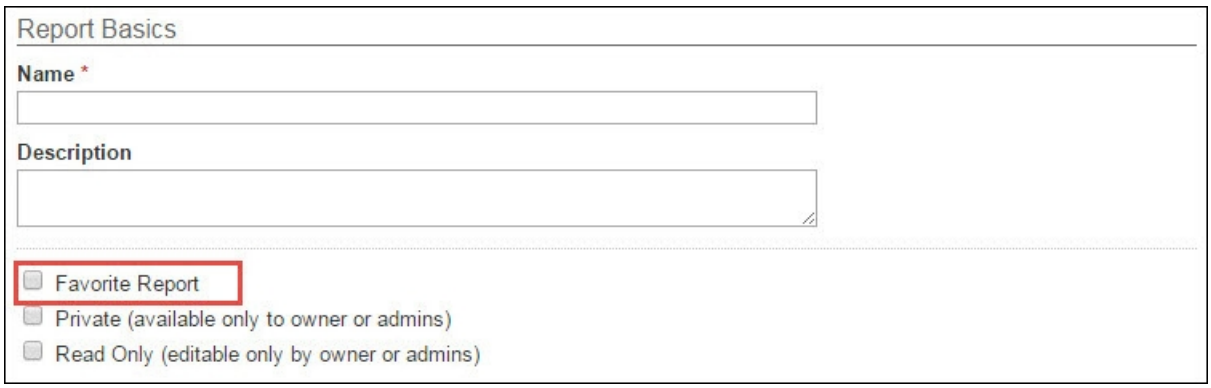
You cannot mark items that other users created as read only. Instead, create a copy of the item and mark your copy as read only.

Favorite Queries and Exports

When you mark a query or report definition as a favorite, it appears in the Favorites tile on the Home page. You can even access and launch your favorite queries and reports directly from the Welcome page.



To mark a query or report as a favorite, from the item's setup screen, use the favorites options under Query Basics and Report Basics.



Use the Report Scheduler

You can select to run reports at a later date. You can also run them automatically on a recurring schedule.

1. Open a standard or custom report.
   For a standard report, the launch page automatically appears.
   For a custom report or relationship report, click Save and Run. The launch page appears.
2. Select the query and other options.
3. In the Report Format field, you must select an email or drop box option.
4. Click Schedule for Off-Hours. The My Scheduled Items page appears and shows the reports currently scheduled for your user account.

Tip: You can also view a list of your scheduled items from your Home page when you click Open My Scheduled Items. When your user account has Administrator rights, you can use the Show Items for field to display and edit all of the scheduled reports for your organization..

The left side of the My Scheduled Items page displays the current scheduled reports.

- Report Name - the name of the report.
- Query Name - the name of the query being used to run the report.
- Next Scheduled - the next date listed on the schedule for this report.
- Last Run - the date and time the report was last generated on the schedule.
- View Schedule - a link to view the upcoming dates on the report schedule.

The right side of the My Scheduled Items page allows you to update the schedule for each report.

- Disabled - allows you to disable the report by placing a check in this box. This allows you to keep your report from running without actually deleting the report.
- Name - the name of the report.
- Schedule - allows you to choose the frequency on which you want your report to run. Your options are: Daily, Every X Day(s), Every Weekday, Weekly, Recur Every X Week(s) on the day of your choice, Monthly, Recur Every X Month(s) on either a specific chosen date or The First/Second/Third/Fourth/LastSunday/Monday/Tuesday/Wednesday/Thursday/Friday/Saturday/day/weekday/weekend day of the month.
- Valid From - allows you to designate the dates your scheduled report is valid. The maximum is date range is one year from the day the report is scheduled. When your report is close to expiring you receive a warning on the Home page. You can click on that message to navigate to the My Scheduled Items page and update the report schedule to a new date range. Expired scheduled items are disabled. One month after the expiration date, they delete from the schedule.

Note: To schedule the report once, enter the same date for the Valid From fields.

- Email - allows you to designate the email address to which the report will be delivered once generated. If this field is blank, then the report will be delivered to your Drop Box.
- Subject - allows you to designate a personalized subject line for the email that will have your report attached to it. This option is only available if you are sending the scheduled report to your email and have filled in the Email field.
- Update - click the button to save changes that you have made to the highlighted scheduled report.
- Update and take ownership - For scheduled items you don't already own, you can select to assign the scheduled report to yourself.

FAQs

- When do my scheduled reports run? - Scheduled reports run between 2:30am and 6:00am, according to your user account's time zone.

Tip: If you want to schedule daily reports, use a query based on a "Yesterday" variable date range rather than a "Today" date range. If you use the Today date range, your report will be run for the day that has not yet been completed.

Tip: When using Last Week and This Week date ranges for your scheduled reports, keep in mind that eTapestry uses a Sunday through Saturday week. For instance, if you schedule an item to run on Saturday 7/19/08 using the Last Week query it will pull Sunday 7/6/08 - Saturday 7/12/08 (the previous week). If what you want in that example is to see

the dates 7/13/08 to 7/19/08, you should either choose a This Week date range, or schedule your report to run on Sunday (the beginning of the new week).

- What happens if I update the query or report that a scheduled report is based on? - If you update the query or report that a scheduled report is based on, then when the scheduled report runs, it will reflect those updates.
- What happens if I delete or disable a user account that has scheduled reports? - If you disable a user that has scheduled reports, those scheduled reports will no longer run as long as the user account is disabled. If you delete a user that has scheduled reports, you will delete all of that user's scheduled reports.

Tip: If you want to be able to view the scheduled reports on a user's account but do not want anyone to log in as that user, do not delete the user - disable their account instead. You can disable a user account by looking up the account, going to the Rights page, unchecking the box next to "User Login Enabled," and clicking Save.

- Can I update the scheduled report's delivery method? - You can always change the delivery option from the My Scheduled Items page. If you originally scheduled your report to be delivered by email, you can change it to leave the report in your Drop Box area by deleting your email address from the Email field. Likewise, if you originally set up the report to go to your Drop Box, you can change it to go out by email by filling in an email address and subject.
- Can I set up my scheduled report to go to multiple email addresses? - You can send your report to more than one email address by typing the email addresses into the Email field on the Scheduled Items page. The addresses should be separated by commas.
- Why didn't I receive my scheduled report?- Possible Cause 1: The scheduled report's valid from date range has expired.

  Check your Scheduled Items page and update the report's "Valid from" date range.

  Possible Cause 2: Your email server or inbox did not accept the email with the report attached.

  Some email servers will not accept emails with attachments over a certain size. Please check your spam folder to see if the email was erroneously flagged as spam. If you do not locate it in your inbox or spam folder, and you do not receive a message indicating why the report did not run, you can check with Support to see if the report was sent out - if it was but you didn't receive it, this may indicate that the email was not accepted by your email server.

  Tip: If you find that your email inbox consistently will not accept your emailed report, please try setting up the report to send to your Drop Box instead.

  Possible Cause 3: The query was deleted.

If you delete a query that a report is scheduled to use, then the report will not generate, and you will receive an email stating why your report could not run.

Possible Cause 4: It encountered an error.

Scheduled reports occasionally encounter errors, such as an error with the query, that prevent the report from running. If this occurs, you should receive an email indicating that your report did not run because it encountered an error.

Tip: Should this occur, please locate the query that your report is scheduled to use and try running a preview of that query. Then try running the report manually using that query. Contact Support for help resolving any errors you receive when previewing the query or running the report.

Possible Cause 5: The Fairness Policy

The Report Scheduler will cycle through all databases one time to allow each organization at least one report to be run. If you schedule multiple reports to be run on the same day, the scheduler will generate the report with the highest priority first, then if time permits your subsequent reports will be generated.

Tip: Tuesday tends to be the day of the week with the greatest number of reports scheduled, and therefore the highest chance that not all reports will be able to run in the scheduled time frame. To avoid this issue, we recommend scheduling your reports on days other than Tuesdays, and also scheduling reports to run on different days rather than running them all on the same day.

Duplicate Report

To maintain your database and identify possible duplicates accounts, run the Duplicate report regularly. When you run this report, eTapestry compares accounts and assigns a score based on similar names (not including titles), email addresses, addresses (not include abbreviations such as Dr. or St.), cities, postal codes, and phone numbers. When the score indicates as least a minimum match, the results appear on the report. Only accounts that you can easily discern or disregard appear. For example, two accounts with same name but different addresses do not appear, since you could not confidently confirm they are duplicates. However, if you access one account's Account Settings page, and use Check for Possible Duplicates, the duplicate would appear.

Tip: This report is intensive. While it runs, you cannot view an accounts journal or perform other query based actions. Therefore, we recommend you schedule this report to run at the end of the day or over a weekend.

If your database contains more than 25,000 accounts, it could take over 5 hours to run the duplicate report. Therefore the query you use for the report is limited to ensure that it will display.

- If your database contains 25,001 - 50,000 accounts, your query must contain less than 10,000 accounts.
- If your database contains more than 50,000 accounts, your query must contain less than 2,500 accounts.

Tip: Although there are strategies you can use if your database is subject to the limits above, the duplicate report is primarily a maintenance tool. If you have a large database and suspect you have many duplicates, we recommend you contact your account executive and ask about our Mass Duplicate Merge data service.

To verify that your query is within the limits for your database, click Preview Query (Optional). If your query is eligible, click Close and run the report. If your query contains too many accounts, a message indicates the query is not eligible. Click close, edit the query or select a new one, then attempt to run the duplicate report again.

- The simplest way to reduce the number of accounts in your query, is to restrict it based on a range of account numbers. In this way, you can split your database, and use a handful of queries, to run the duplicate report iteratively.
- If your database is reasonably duplicate free, you can focus on accounts that have been recently added or modified. To do this on a weekly basis, set up an account query with Base: All Accounts as your starting criteria. For Match, select Any of My Criteria. Then add the following fields to your query: account created date, account last modified date, persona created date, persona last modified date. For Range Type, select 7 Days. Then save your query.

  Use your new query to set up the duplicate report, have the report delivered to your dropbox or email,click Schedule Report for Off-Hours, and schedule the report to run every 7 days (the same interval as your query. For Valid From, enter a date up to six months in the future. Then click Update. Your duplicate report will be delivered to you each week. If any possibly duplicates appear in the weekly report, access the report launch page, view the existing report, and resolve the duplicates.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** If you run this report without validating the size of your query, it will take a long time, a message will indicate that the report did not run, and you will return to the launch report page.

Because it make take awhile for the duplicate report to run and for you to resolve the possible duplicates, you can leave the report onscreen and return to it later, without having to run it again. This is the only report that is cached in this way.

Tip: If the report has been run before, a box at the top of the launch shows when it was last run. Run on Newly Added and Modified Accounts

Link accounts from the Duplicate Report

To help you maintain your database's record health, you can link accounts directly from the Duplicate Report.

After you run the Duplicate Report, select Link these accounts in the list of possible duplicates to create a relationship between the two accounts.

Note: Once you link relationships from the Duplicate Report, the duplicate pairing no longer appears in the report.

Tip: You can also link accounts from an account's Account Settings page. Select Check for Possible Duplicates to view duplicate accounts.

Account Merge

When you view the Duplicate Merge page, eTapestry show which account is the duplicate and which is the target account. The duplicate account will be removed from the database. Based on your selections, information from the duplicate account can be moved to the target account. To swap the accounts, click Switch Duplicate and Target under Tasks.

For each account, information from the account's Account Settings page and Define Fields page appear under Account Information.

For each account, information from the account's persona types appear Personas. To view more information about each persona, click Show More Detail. The target account may contain persona types that do not exist on the duplicate account. In this case, a line appears under the Personas section to show which other persona types are available but not displayed. To view these additional personas, select a persona type from the Persona menu. You can also use this menu to change a persona type and to create new personas. The menu uses an asterisk (*) to indicate which personas exist on the target account.

Use this information to determine how you want to combine the accounts.

Journal items and relationships do not appear on the merge screen. These types of data will always be merged because they provide historical information about the donor. To discard this information, do so from the Relationships or Journal page.

Note: Consent field values will be updated whether you select **Merge**, **Replace**, or **Ignore**. Journal entries on the two accounts will be scanned in order of the most recently created and populate the account level Consent fields until they are all populated or there are no more Journal entries.

- Merge - This option adds values from the duplicate account to the target account, but does not remove any target account data. For fields that can only have one value, if both accounts have values, only the target account value is saved.
- Replace - This option moves all values from the duplicate account to the target account. For fields that can only have one value, the duplicate account value overwrites the target account value.
- Ignore - This option keeps the target account values. The duplicate account values are deleted.

{i class="fa-solid fa-triangle-exclamation"}{/i} **Warning:** If both accounts are in different household relationships, a warning message appears to indicate that you cannot merge them. Click a link from the warning message to access an account's Relationships page, remove the account from the household relationship, and then merge the accounts.

When the merge is complete, a note appears on the Journal page of the target account. It shows which merge options were used, a summary of how many journal entries and relationships were moved, and an archive of the account and persona information for each account before the merge.