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7.26.0 New Features

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This guide lists new features available in **eTapestry** 7.26.0, released on October 23, 2016.

everydayhero Integration

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

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

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

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

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

For more information, see [Sign up for everydayhero](#).

everydayhero Integration

Complete the set up steps to start the nightly, automatic import of donations, campaigns and pages from **everydayhero** to **eTapestry**.

[Set up](#)

[everydayhero/eTapestry integration user guide](#)

Set up the *everydayhero* Integration

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

Set up everydayhero integration

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

API Key *

Send data import notifications to: *

Use commas to separate multiple email addresses.

Previous Next Save and Close Cancel

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

For more information, see [Access the API token for the everydayhero integration.](#)

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

In the last field, enter each recipient email address at your organization who should receive a notification when the import completes. If you enter multiple email addresses, use commas or semi-colons to separate them.

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

Set up everydayhero integration
✕

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

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

Default *eTapestry* Fund *

(None Selected) ▼

Default *eTapestry* Campaign

(None Selected) ▼

Default *eTapestry* Approach

(None Selected) ▼

Previous
Next
Save and Close
Cancel

Map campaigns from *everydayhero* to your database

Once you enter basic settings, you will need to map revenue from *everydayhero* campaigns to a fund, campaign, and approach.

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

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

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

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

The screenshot shows a dialog box titled "Set up everydayhero integration" with a close button (x) in the top right corner. At the top, there are four tabs: "1. Basic settings", "2. Map campaigns", "3. Select historical data" (which is highlighted in green), and "4. Finish". Below the tabs, the text reads "Choose the historical data to import from *everydayhero* *". There are three radio button options: "No historical data", "All historical data", and "Historical data created since" (which is selected with a blue checkmark). Below the "Historical data created since" option is a date input field with a calendar icon. A yellow warning box below the date field contains the text "Once you start import, this historical data setting can not be changed.". At the bottom of the dialog, there are four buttons: "Previous", "Next" (highlighted in blue), "Save and Close", and "Cancel".

Select to import historical data from *everydayhero*

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

- If you do not want to import data from previous *everydayhero* campaigns, select **No historical data**.
- To import all data from previous *everydayhero* campaigns, select **All historical data**.
- To import data from previous *everydayhero* campaigns starting with a specific date, select **Historical data created since** and the date from which you want to import information.

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

Finish and schedule your *everydayhero* import

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

Set up everydayhero integration ✕

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

Select when to start your daily imports from **everydayhero** *

Schedule my **everydayhero** imports to run nightly starting on 9/22/2016.

I'll schedule my import later.

Review Settings

API Key: 68ef0843-4714-4d24-8033-c0204fb945e2

Notification Email: alyssa.carver@blackbaud.com

Default eTapestry Fund: General

Import Historical Data Setting: No historical data

Previous
Finish
Cancel

If you select to schedule your imports, your **everydayhero** data will import nightly beginning on the date shown. If you select to schedule your import at a later time, you can return to this step after you finalize your import settings and select to schedule the import.

everydayhero Integration

Edit Settings
Edit Mappings
Pause Integration

Successfully connected
✕

First nightly import scheduled: 9/1/2016

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

[everydayhero/eTapestry integration user guide](#)
 Don't have **everydayhero**? [Sign up here](#)

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

For more information on where information from **everydayhero** appears in **eTapestry**, see [Field mapping between everydayhero and eTapestry](#).

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

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

Personal Fundraising

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

For more information, see [Personal Fundraising](#).

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

Wealth Rating

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




You can now view overall wealth rating information of accounts in your database from **Target Analytics**, a division of Blackbaud Inc.



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

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

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

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

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

-  — A two-star constituent has public assets between \$500,000 and \$1,000,000 USD.
-  — A one-star constituent has public assets up to \$500,000 USD.

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

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

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

Wealth Rating Data Health Score Tile

The Wealth Rating Data Health Score tile displays on the Home page when you open **eTapestry**. The information that appears in this section varies depending on your wealth rating data's current state. For example, basic wealth rating information displays with a link to learn more details about the service before you run it for the first time.

Wealth Rating Data Health Score ×

180
days

It has been over 180 days since you last ran Wealth Rating.
We recommend you update rating information on newly created accounts or accounts that may have recently changed ratings.

[Go to Wealth Rating](#)

Analyzed on 10/13/2016 12:00 AM
Scorecard displays until 11/12

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

Tip: 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.

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

Schedule the Service

You can schedule the wealth rating service to run twice a year. To schedule the service, you can select a query of accounts, select a date to run the service, and enter email addresses for those at your organization who should receive summary information after the service completes.

For more information, see [Schedule and run the Wealth Rating service](#).

Wealth Rating

Scheduling your service

You are able to run the Wealth Rating service **99** more times before your package renews on **3/24/2017**.

Which query will select the accounts you would like to scan?

The Wealth Rating service will process all constituent accounts in the query provided. The query must contain at least 1 constituent account.

Query Category *


Base ▼

Query Name *

All Constituents ▼

[Edit the Selected Query](#) | [Create a New Query](#)

When would you like to start the service?

7/6/2016 

Who should receive a summary email when the Wealth Rating service is complete?

Use commas to separate multiple email addresses.

[Schedule](#)

Note: You can edit your schedule to change each selection on this page. You can also cancel a schedule to prevent it from running.

Account Home Page

When the wealth rating service returns an overall wealth rating for an account, the rating appears in the **Wealth Rating** tile on the account Home page.

Wealth Rating ☰ ✕

Last updated 7/1/2016

★☆☆☆☆

Overall wealth rating

To view this information, click **Select Tiles and Layout** on the account Home page and select to include the **Wealth Rating** tile.

Query

To group **eTapestry** accounts together with the same overall wealth rating, **eTapestry** generates a query for each ratings level. For example, if you want to see which accounts in your database have a four- or five-star rating, you can generate a query to find accounts with four or five stars.

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

Query Categories

Tasks

- [New Category](#)
- [Show Less Detail](#)
- [Save Category Order](#)

Find

🔍

Favorite Queries

- [1,000,001 plus](#)
- [All Processed Transactions](#)
- [Constituents that RSVP](#)
- [Contact subject](#)
- [Thank You Letter](#)
- [\(See all\)](#)

Sort By **Name**

Base	Created: 3/24/2015 10:10 AM
➕ 11 Item(s) New Query Delete Common Base Queries	
Journal Entry Date	Created: 3/24/2015 10:10 AM
➕ 28 Item(s) New Query Delete Standardized Journal Entry Date Ranges	
Wealth Ratings	Created: 7/1/2016 12:32 AM
➕ 6 Item(s) New Query Delete	
5 Stars	Created: 7/1/2016 12:32 AM
Preview Copy Move Delete	
4 Stars	Created: 7/1/2016 12:32 AM
Preview Copy Move Delete	
3 Stars	Created: 7/1/2016 12:32 AM
Preview Copy Move Delete	
2 Stars	Created: 7/1/2016 12:32 AM
Preview Copy Move Delete	
1 Star	Created: 7/1/2016 12:32 AM
Preview Copy Move Delete	
No Rating	Created: 7/1/2016 12:32 AM
Preview Copy Move Delete	

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

Criteria

Note: Query preview displays Role, Name, Address, Phone, and Email by default. To add or remove columns, click **Choose columns** and adjust them as necessary. Journal related columns are not available when the Data Return Type is set to an Account option.

Browse Fields | Search Fields

Account ▾

- + Persona Last Modified By
- + Persona Note
- + Phone Number
- + Postal Code
- + Postal Code Length
- + Postal Code Radius
- + Postal Code Range
- + Privacy Status
- + Relationship Attributes
- + Relationship Present
- + Short Salutation
- + Social Media Networks
- + State/Province
- + Suffix
- + Target America URL Present
- + Title
- + **Wealth Rating Stars**
- + Web Page

Wealth Rating Stars ×


Select All Clear All

5 Stars 4 Stars

3 Stars 2 Stars

1 Star No Rating

Unprocessed



Reports

When you create a custom report, wealth ratings now appear as available fields you can report on under the **Account Fields** category.

DIY Forms: Additional US Options

Additional options now appear from the State/Province drop down menu on DIY forms when you select the United States in the **Country** field.

The screenshot shows a form with the following fields:

- City*
- State/Province*
- Postal Code*
- Email*
- Confirm Email*
- Phone*

Below these fields is a section titled "Payment Information" with the following fields:

- Amount* \$
- Card Type*
- Name on Card*
- Card Number*

The "State/Province*" dropdown menu is open, showing a list of states and territories. The list includes:

- (None Selected)
- Alabama
- Alaska
- American Samoa
- Arizona
- Armed Forces Americas
- Armed Forces Europe
- Armed Forces Pacific
- Arkansas
- California
- Colorado
- Connecticut
- Delaware
- District of Columbia
- Federated States Of Micronesia
- Florida
- Georgia
- Guam
- Hawaii
- Idaho

Note: You will need to republish previously created DIY forms in order for the additional states to appear.

The following states have been added:

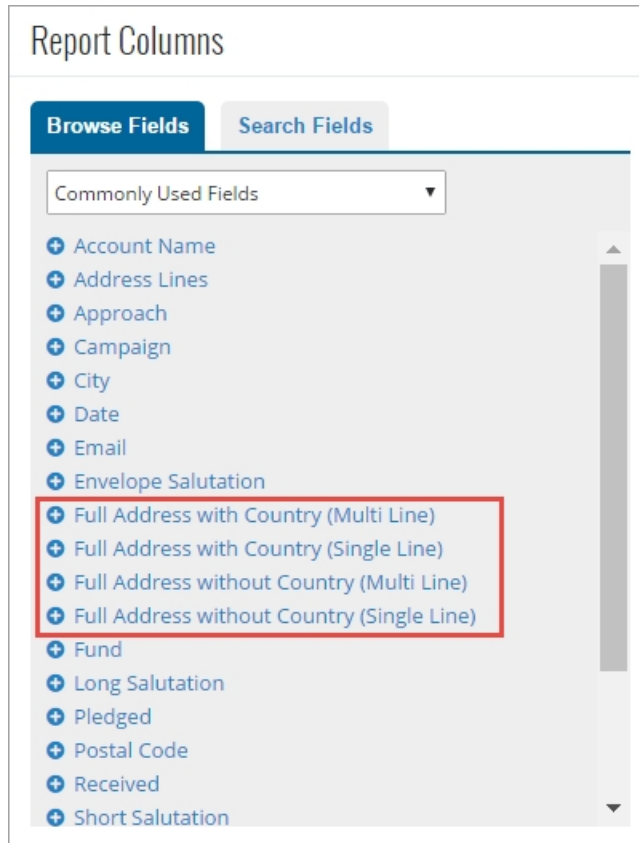
- American Samoa
- Armed Forces Americas
- Armed Forces Europe
- Armed Forces Pacific
- Guam
- Federated States of Micronesia
- Marshall Islands
- Northern Mariana Islands
- Palau
- Puerto Rico
- Virgin Islands

Custom Reports: Address Fields

When you create a custom report, you can now easily access full address fields when you select the Commonly Used Fields drop down option and export more address information for linked soft credits, linked hard credits, and gift aid declarations with the addition of new fields for those transactions in custom reports.

Commonly Used Address Fields

When you select Commonly Used Fields in the drop down menu under **Report Columns** on the Create a New Report page, options for full address fields now appear. Previously, these fields were only located under the Address Fields category.



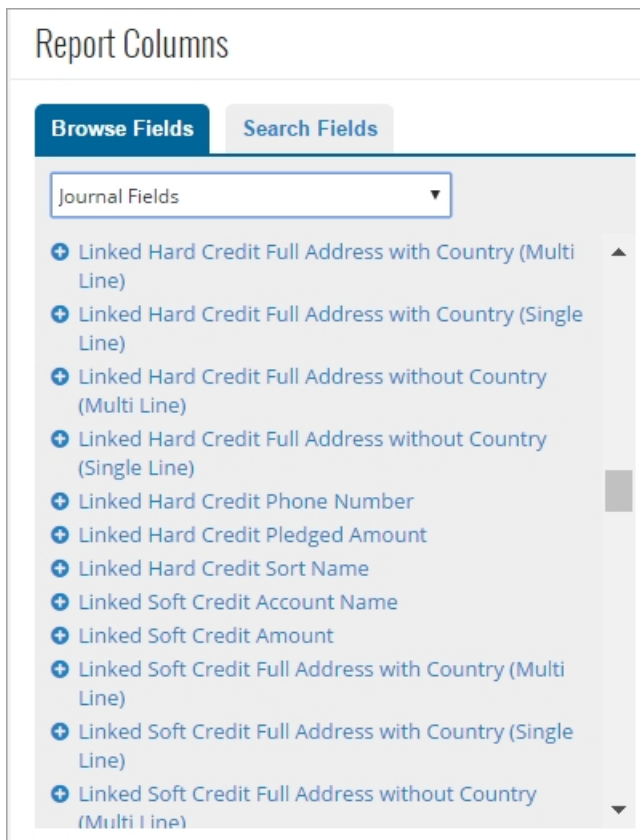
These address fields include:

- **Full Address with Country (Multi Line)**
- **Full Address with Country (Single Line)**
- **Full Address without Country (Multi Line)**
- **Full Address without Country (Single Line)**

Additional Address Fields

You can now add full address fields to custom reports for linked soft credit, linked hard credit, and gift aid declaration (for UK customers only) transactions to your custom reports.

From **Reports**, select a category to store your custom report. On the Create a New Report Page, enter details about your report. For more information, see [Create a custom report](#).



Under **Report Columns**, with Journal Fields selected in the drop down, select which full address fields to add to your custom report.