Contents

7.26.0 New Features 2
everydayhero Integration 2
Wealth Rating 7
DIY Forms: Additional US Options 11
Custom Reports: Address Fields 12

7.26.0 New Features

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Wealth Rating 7
DIY Forms: Additional US Options 11
Custom Reports: Address Fields 12

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.

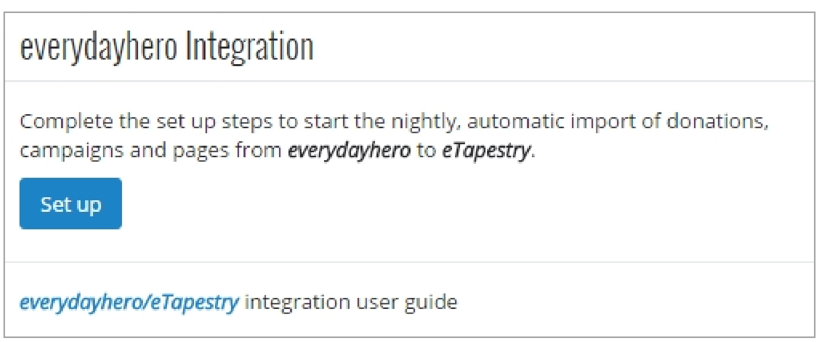
everydayhero is a peer-to-peer online giving solution that allows your organization to build online fundraising campaigns as part of their existing websites or as a stand-alone fundraising site.

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.

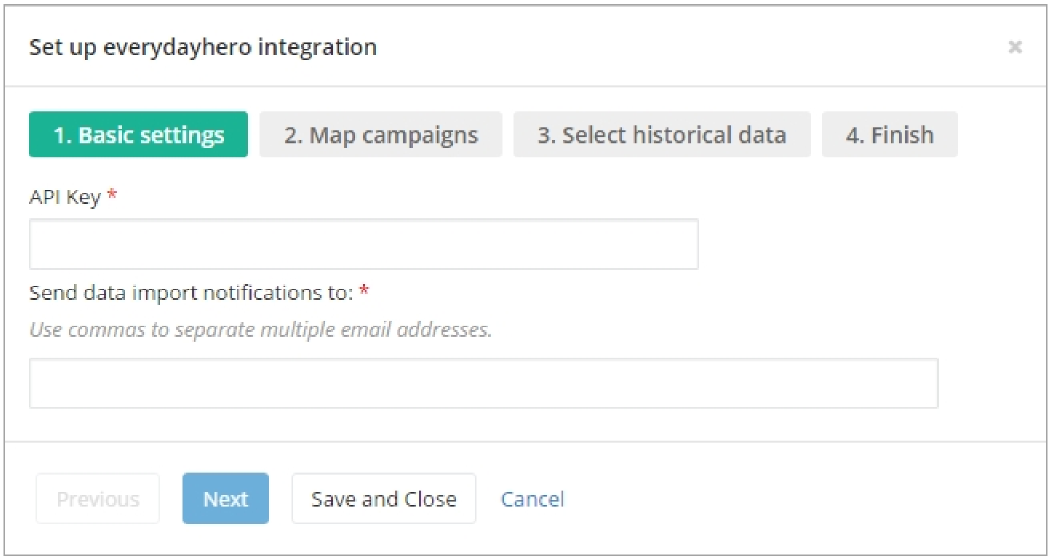
Before you can begin to transfer information from ***everydayhero*** into ***eTapestry***, you must sign up with ***everydayhero***.

For more information, see Sign up for everydayhero.



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.



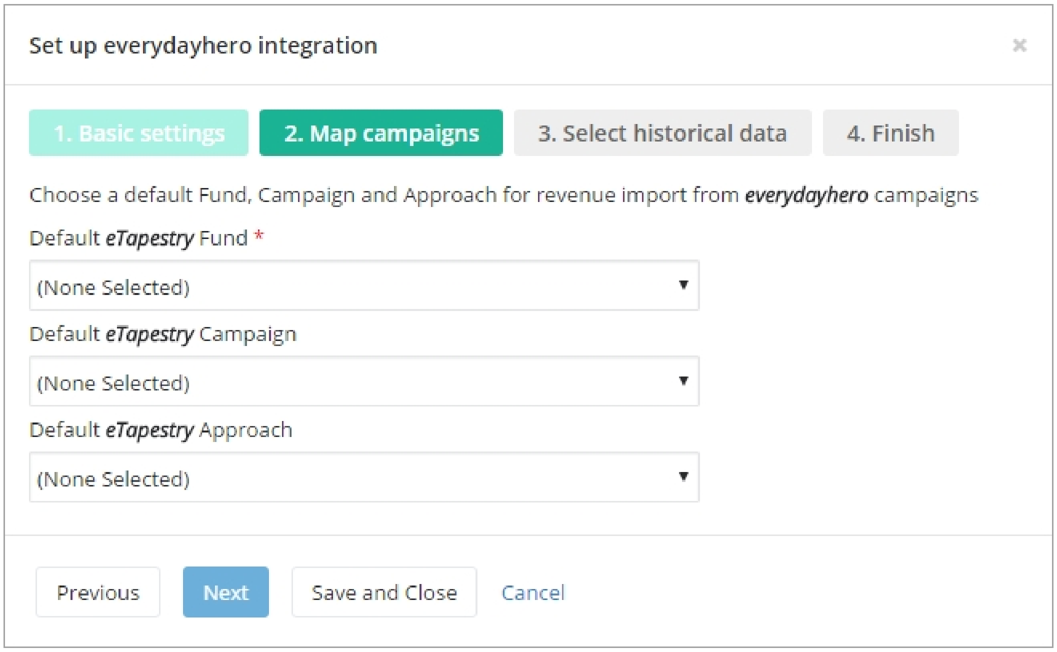
When you sign up with ***everydayhero***, you receive an ***eTapestry*** API key. You can then use the API key to establish a connection between ***everydayhero*** and ***eTapestry***.

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**.



Map campaigns from *everydayhero* to your database

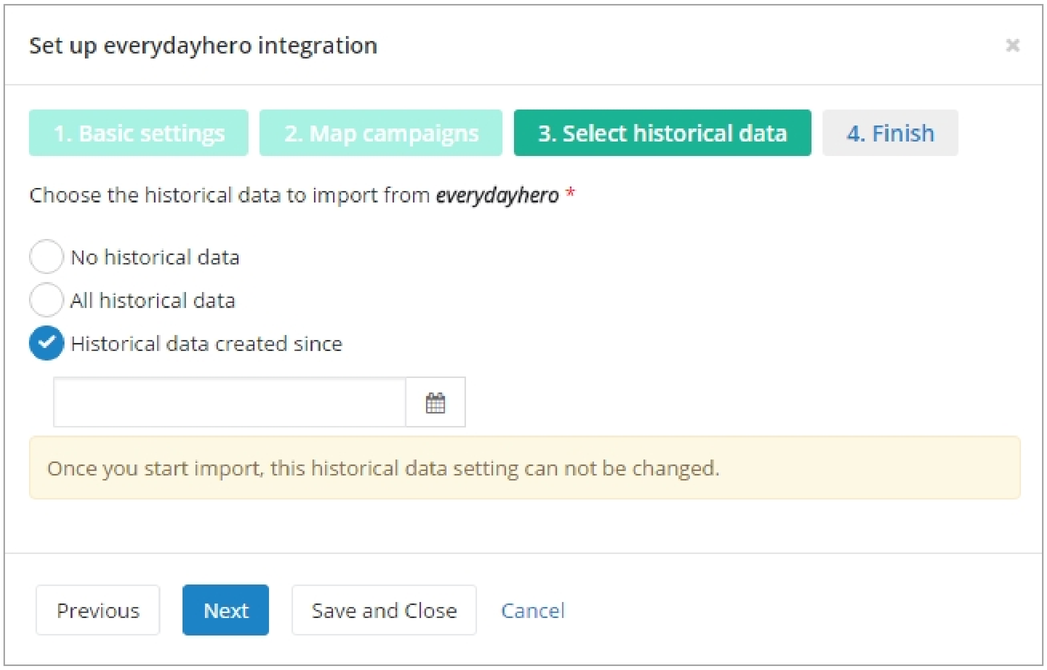
Once you enter basic settings, you will need to map revenue from ***everydayhero*** campaigns to a fund, campaign, and approach.

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**.



Select to import historical data from *everydayhero*

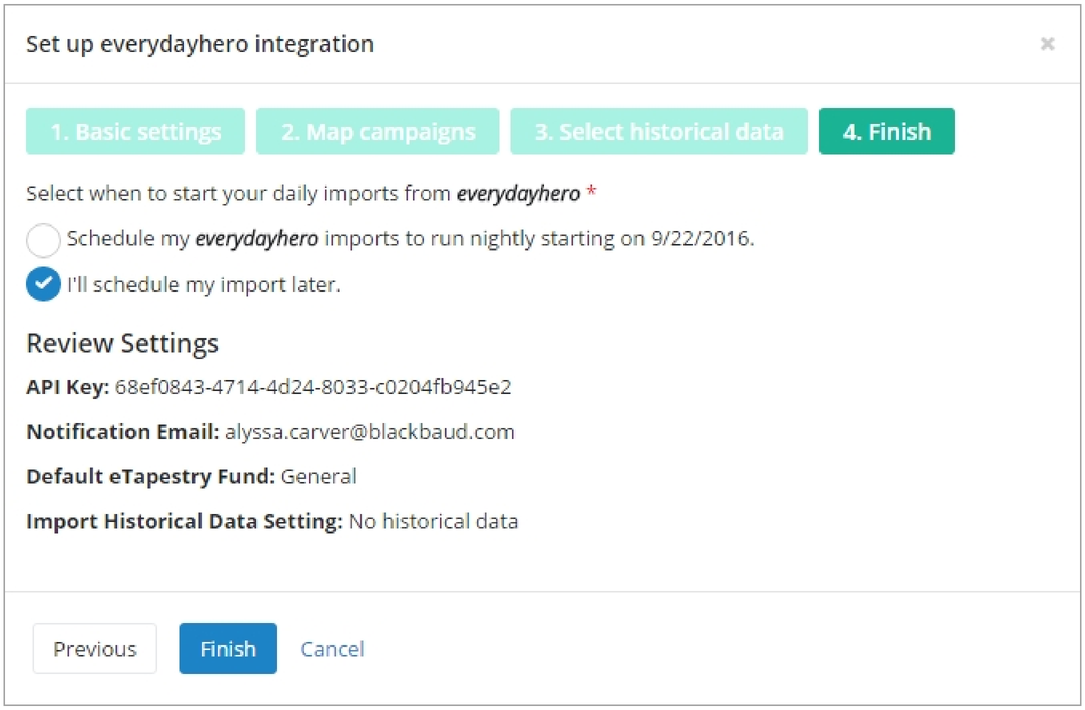
On the Select historical data tab of the Set up everydayhero integration screen, select how you want to import previous ***everydayhero*** data into ***eTapestry***. This data will be imported during the first nightly import you schedule.

- 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.

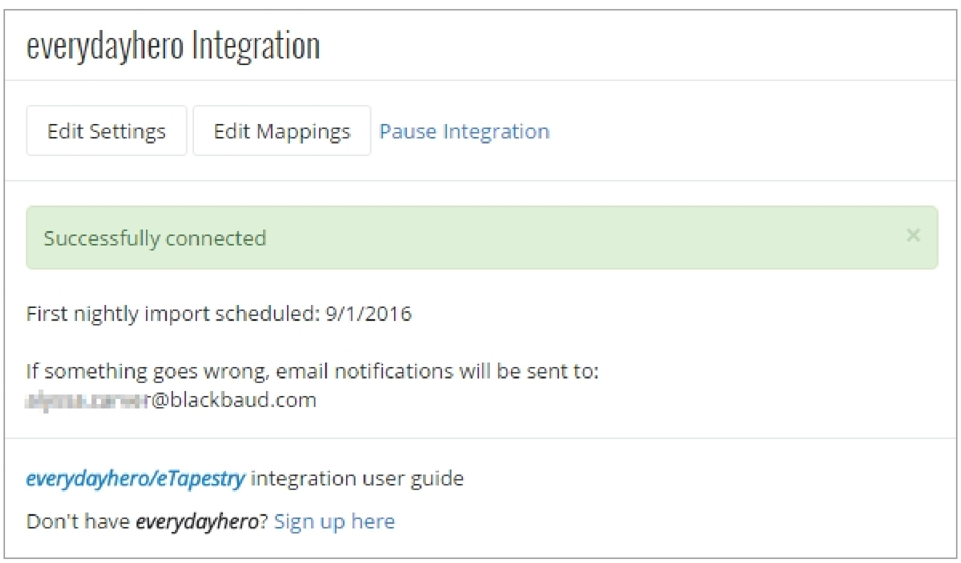
Click **Next** to go to the next step or **Save and Close** to save your choices and come back to the page later. To return to the previous step, click **Previous**.

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***.



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.



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.

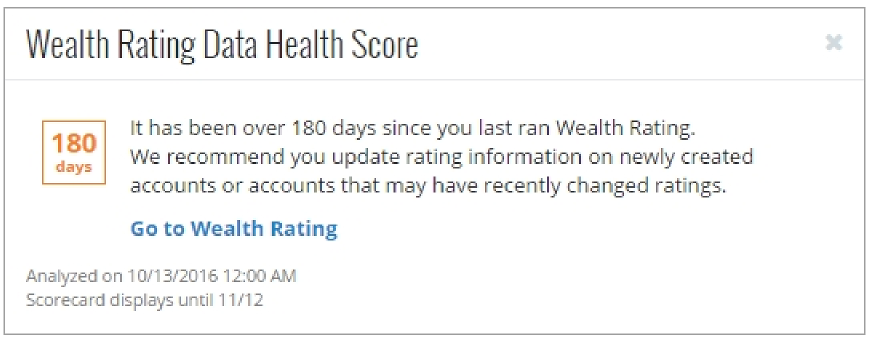
If ***Target Analytics*** cannot accurately identify a constituent or screen their wealth, they appear with No rating.

> ***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.



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.

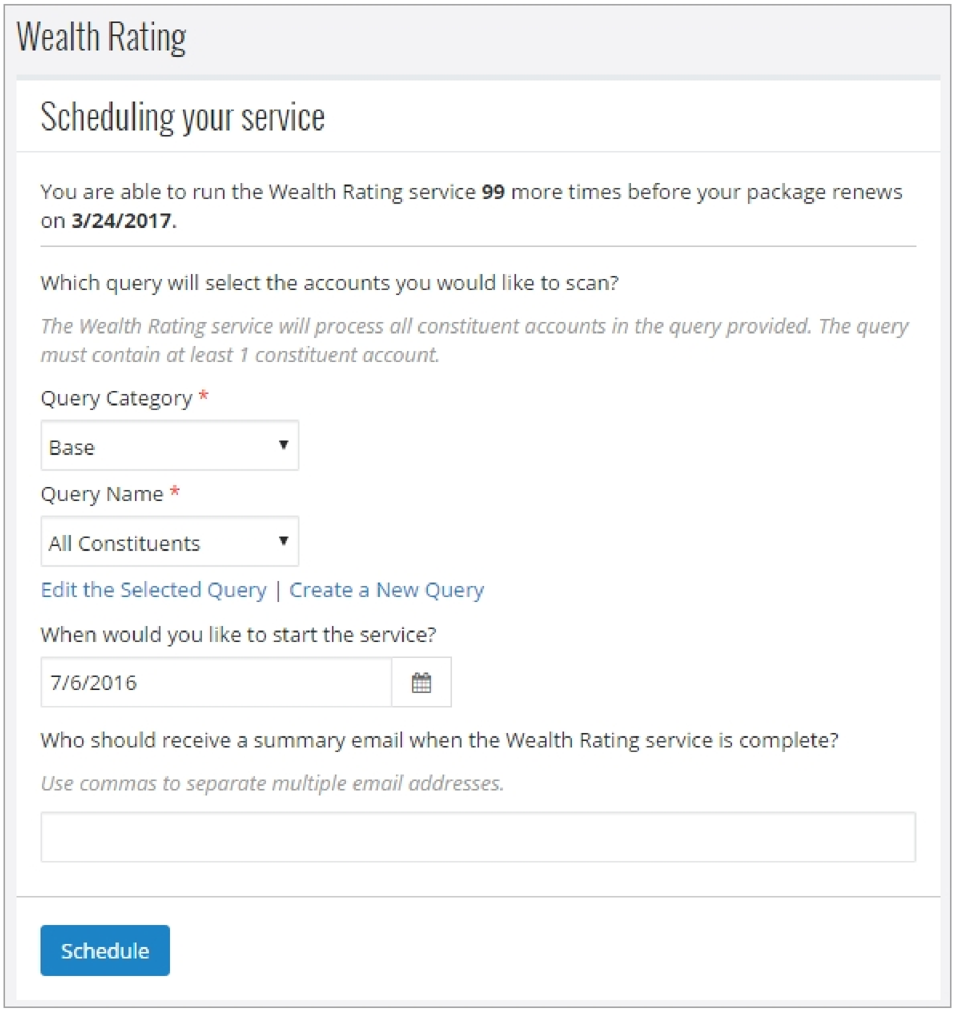
> ***Tip:*** If you are using ***eTapestry*** in the United States, the scorecard tile appears for System Administrators on the Home page dashboard after your database health is analyzed. You can close the tile manually or wait for it to disappear after a few days. The report also appears for System 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.



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

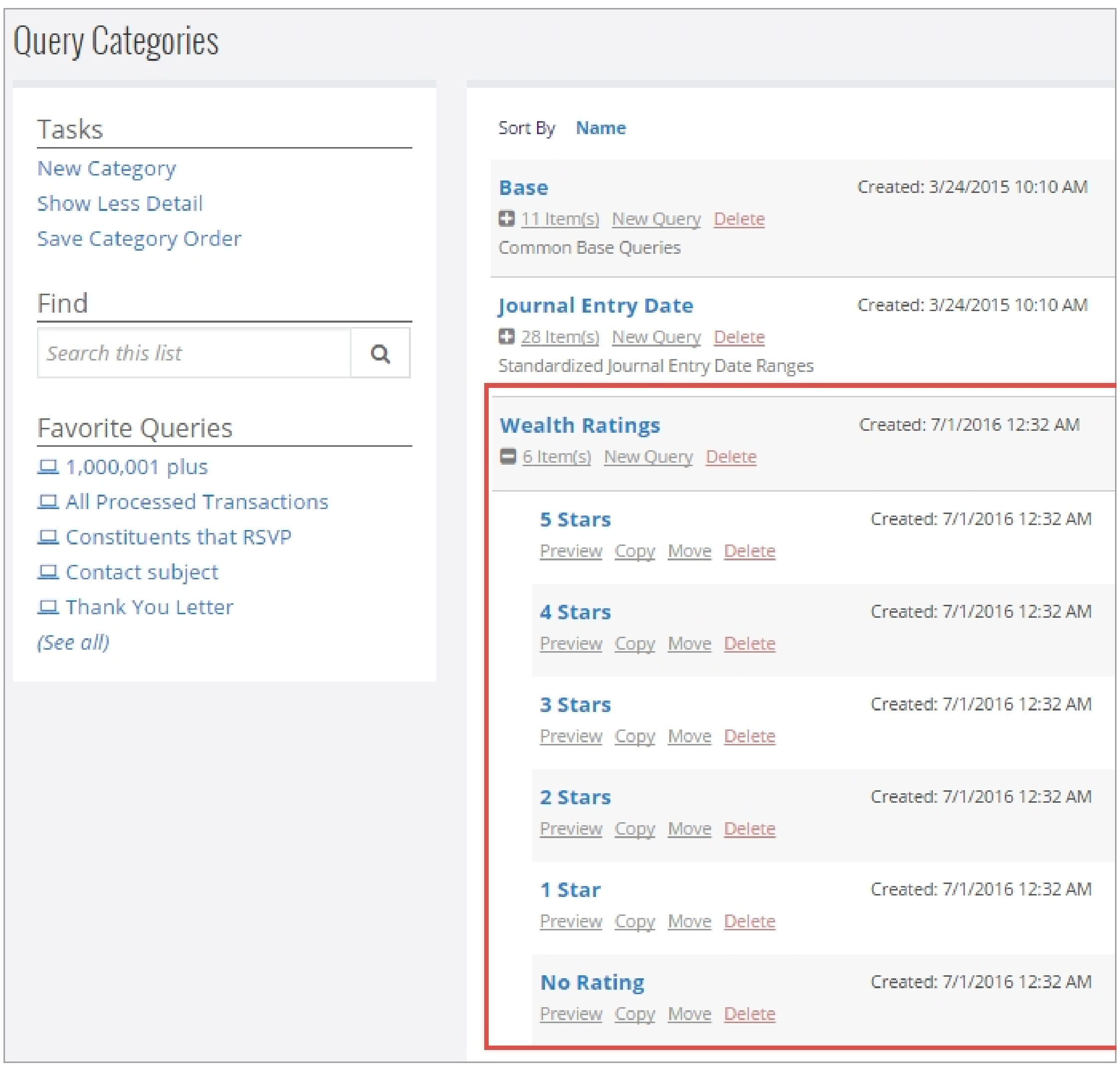
When the wealth rating service returns an overall wealth rating for an account, the rating appears in the **Wealth Rating** tile on the account Home page.

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

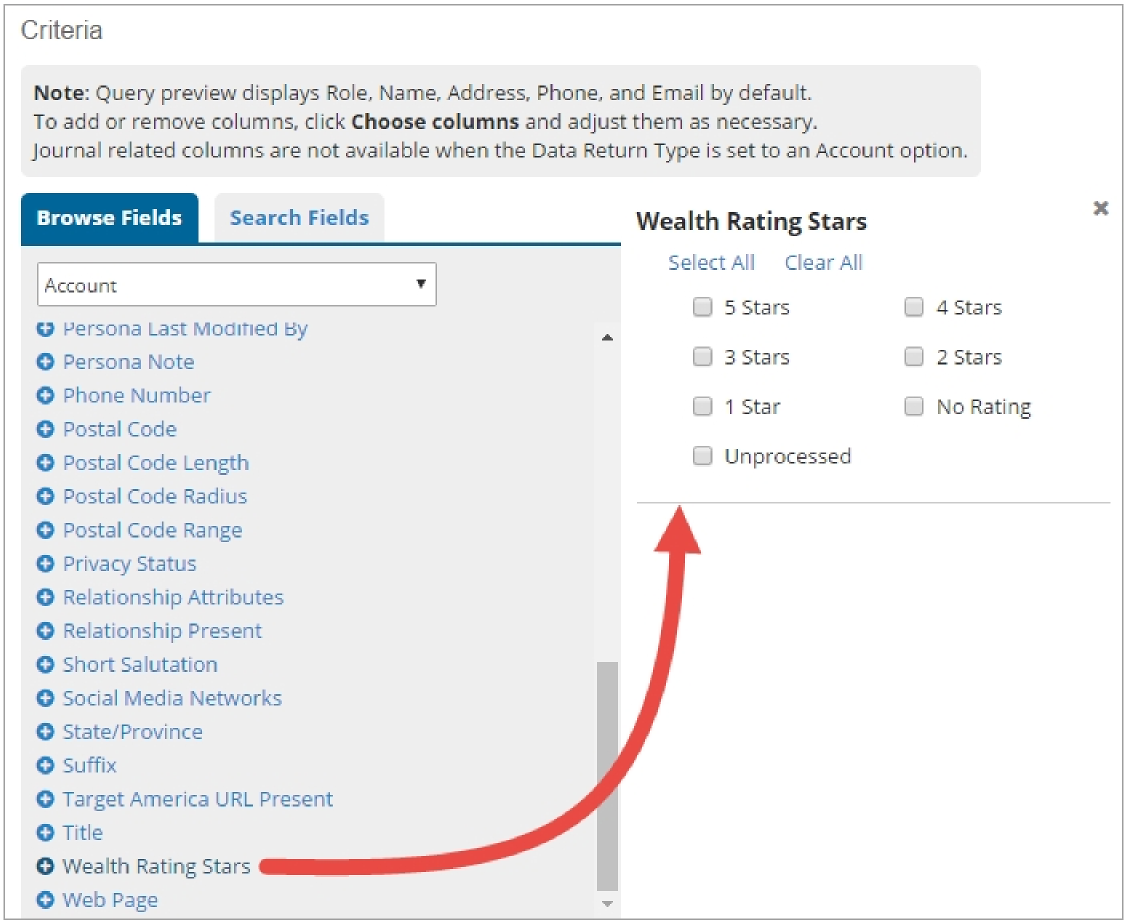
Query

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**.



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.



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.

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

The following states have been added:

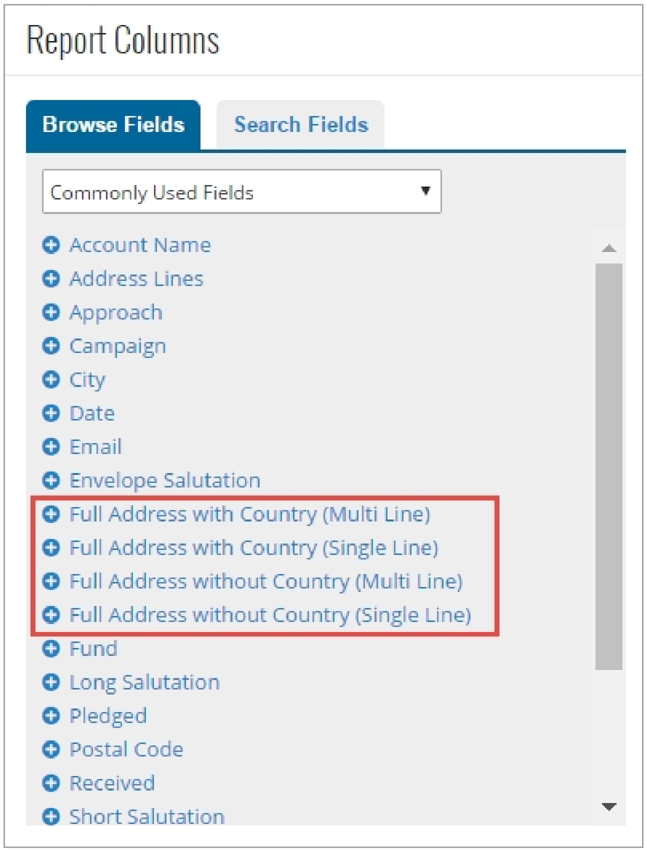
- American Samoa
- Armed Forces Americas
- Armed Forces Europe
- Armed Forces Pacific
- Guam
- Federated States of Micronesia
- Marshall Islands
- Northern Mariana Islands
- Palau
- Puerto Rico
- Virgin Islands

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.



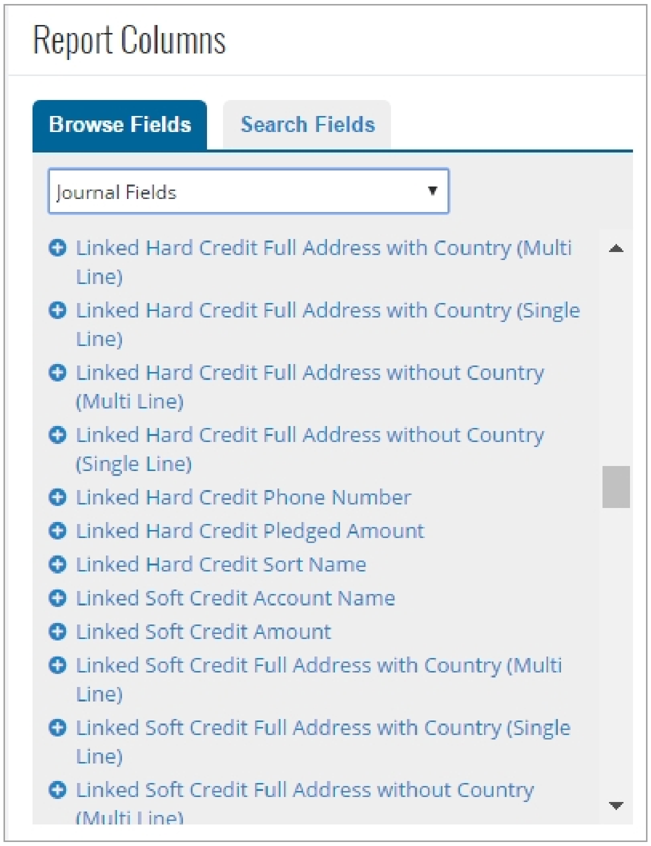
These address fields include:

- **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.