Contents

7.28.0 New Features

This guide lists new features available in *eTapestry* 7.28.0, released on February 6, 2017.

SKY UX: Journal Filters

Improvements have been made to streamline how you find and view journal entries.
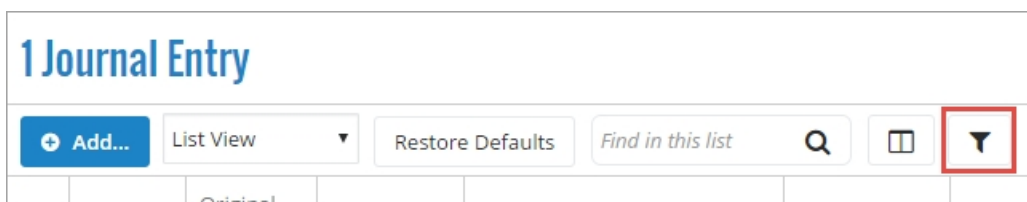
Previously, you could access journal entry filter options when you clicked either the **Filter** icon next to **Choose columns** or the **Filter** panel. Now, view journal filters by simply selecting the **Filter** icon. The Journal Filters screen appears.

Journal Filters ✕

Date

From

m/d/yyyy 📅

To

m/d/yyyy 📅

Transaction

- ☐ **Gift**
- ☐ **Pledge**
- ☐ **Split Transaction**
- ☐ **Payment**
- ☐ **Soft Credit**
- ☐ **Recurring Gift**
- ☐ **Disbursement**
- ☐ **Recurring Gift Schedule**
- ☐ **Upgraded Pledge**
- ☐ **Purchase**

Non Transaction

- ☐ **Note**
- ☐ **Contact**
- ☐ **Participation**
- ☐ **Calendar Item**

Apply filters   Clear all filters   Cancel

You can choose **Transaction** and **Non Transaction** filters to narrow down journal items that appear on the Journal page. Select or clear the checkbox next to the filters you want to add or remove. After you make your selections, click **Apply Filters**.

⊕ **Add...** | List View ▾ | Restore Defaults | Find in this list 🔍 | ▢   ▼

Filter: Gift ✕   Note ✕

Any filters you select appear in the Filter list. Select the **X** beside the filter to remove it or select **Restore Defaults** to remove all filters.

everydayhero: Campaign Mapping

Updates have been made to the Campaign Mapping step of the **everydayhero** integration wizard to improve your ability to track fundraising activity.

Custom Campaign Mapping

In order to better organize transactions and activity with your constituents, analyze information in reports and queries, and track your success towards specific goals for individual campaigns, the Map campaigns step of the **everydayhero** integration wizard has been updated so you can select default funds, campaigns, or appeals for specific fundraisers imported from **everydayhero**.

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

On the Map Campaigns step, if you want to select default funds, campaigns, and approaches for all **everydayhero** campaigns, you can select them from the drop down menus.

Note: For customers in Australia, New Zealand, the UK, and Ireland, direct donations imported from **everydayhero**, or donations that are not part of specific **everydayhero** campaigns, will also inherit the default Campaign, Fund, and Approach you select.

If you want to select default funds, campaigns and approaches for individual *everydayhero* campaigns, in the campaign mappings table, select them from the drop down menus.

To filter which campaigns appear in the table, you can search for campaigns by name. Select **Include inactive everydayhero campaigns** to include inactive campaigns in your results.

If you do not already have *everydayhero* campaigns, select default mapping options above. Once you add *everydayhero* campaigns, you can edit the default options in the table.

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**.

everydayhero Campaign Alerts

After a new *eTapestry* Fundraiser is created when you import an *everydayhero* campaign, any email addresses entered on the Basic Settings step of the integration set up will receive a notification so that the *eTapestry* Fundraiser can then be mapped to the appropriate campaign, fund, and approach. To return to the Map Campaigns step of the integration wizard after you have begun the nightly import, under **Management**, **Integrations**, select **Edit Mappings**.

Required Campaigns and Approaches

If your organization makes campaigns and approaches required when you enter a gift in *eTapestry*, campaigns and approaches will now be required when you map revenue from *everydayhero*.

If you do not select a campaign or approach for an individual fundraiser when your organization requires campaigns and approaches, then the default campaign and approach will apply. For more information about how to require campaigns and approaches, see Campaigns and Approaches.

everydayhero Integration: Net Amount Field

If you have successfully integrated eTapestry with your *everydayhero* account, transactions that have been received online, such as through the Hero page, are automatically imported into *eTapestry* when you schedule your *everydayhero* nightly import.

Information entered into the **Net Amount** field in *everydayhero* will now be automatically imported for all gifts during your next nightly import. If your organization has already set up the everydayhero integration, then this field will only populate for newly added gifts.

The **Net Amount** field displays the total amount received minus any fees to *everydayhero*. The net amount information will appear as the **EDH Net Amount** in *eTapestry*.

You can view the **EDH Net Amount** field under the **User Defined Fields** section from the transaction. The **User Defined Fields** section displays all user-defined fields (UDFs) that are available for transactions. Select **User Defined Fields**, then select **everydayhero**.

To add the **EDH Net Amount** field to your custom report, from **Reports**, select a category to store your newly-created custom report or select the category your existing report is stored under. Select **New Report** to create a new report or select the report you wish to edit.

Under **Report Columns**, with User Defined Fields: Journal selected in the drop down, select the **EDH Net Amount** field to add to your custom report.

Recent Fundraising Activity Tile

If your organization subscribes to the Personal Fundraising module or if your organization integrates your *everydayhero* revenue with *eTapestry*, you now have access to the Recent Fundraising Activity tile to make viewing your recent participation and fundraiser data easier.

To add the tile to the Home page of an account, click **Select Tiles and Layout**. After you select **Recent Fundraising Activity**, click **Save**. The tile now appears on your Home page.

The Recent Fundraising Activity Tile shows the last five participant activities for your fundraising events and includes the **Fundraiser**, **Goal**, **Raised**, **Remaining**, and **Transactions** columns. You can sort information in the tile by clicking the header of the column you wish to sort.

Fundraiser Reports

In order to better track and report on fundraiser and participant progress, improvements have been made to the Fundraiser Summary and Fundraiser Activity Summary reports.

To access Fundraiser reports, from **Reports**, select **eTapestry Standard Reports**.

Participation Summary Reports

The Fundraiser Summary Report has been renamed as the Participation Summary report to better reflect the information provided in the report.
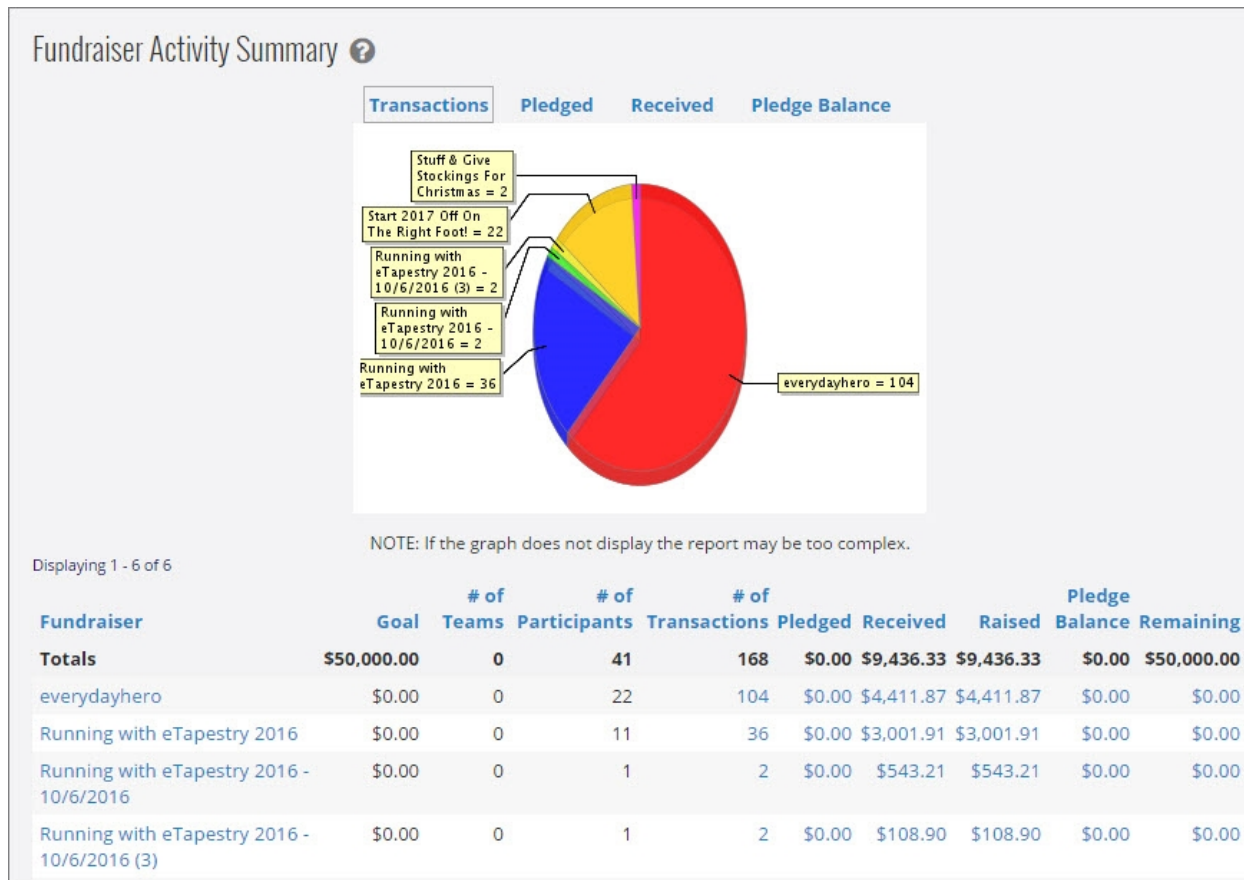
Participation Summary ❓

All Accounts - A

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Name	Display Name	Role	Goal	# of Participants	# of Trans	Total Received	Total Pledged	Total Raised	Remaining
Totals			**$3,000.01**	**0**	**11**	**$1,297.37**	**$0.00**	**$1,297.37**	**$2,256.15**
Bobby	Help Me Support A Great Cause A	Participant	$0.01	-	0	$0.00	$0.00	$0.00	$0.01
Bobby	Bobby	Participant	$1,500.00	-	4	$634.96	$0.00	$634.96	$865.04
Connor	Help Connor Raise Money	Participant	$200.00	-	1	$108.90	$0.00	$108.90	$91.10
Allen		Participant (Offline)	-	-	3	$69.42	$0.00	$69.42	-

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 donors who did not sponsor any team or participant. This enables you to analyze which part of your fundraiser (teams, participants, or the fundraiser itself) was the most successful.

In order to track how much of a fundraising goal remains to be raised, the Participation Summary report now also includes the Remaining column. This column 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.

Fundraiser Activity Summary Reports

Fundraiser Activity Summary ❓

| | Transactions | Pledged | Received | Pledge Balance |

Stuff & Give Stockings For Christmas = 2
Start 2017 Off On The Right Foot! = 22
Running with eTapestry 2016 - 10/6/2016 (3) = 2
Running with eTapestry 2016 - 10/6/2016 = 2
Running with eTapestry 2016 = 36
everydayhero = 104

NOTE: If the graph does not display the report may be too complex.

Displaying 1 - 6 of 6

| Fundraiser	Goal	# of Teams	# of Participants	# of Transactions	Pledged	Received	Raised	Pledge Balance	Remaining
Totals	$50,000.00	0	41	168	$0.00	$9,436.33	$9,436.33	$0.00	$50,000.00
everydayhero	$0.00	0	22	104	$0.00	$4,411.87	$4,411.87	$0.00	$0.00
Running with eTapestry 2016	$0.00	0	11	36	$0.00	$3,001.91	$3,001.91	$0.00	$0.00
Running with eTapestry 2016 - 10/6/2016	$0.00	0	1	2	$0.00	$543.21	$543.21	$0.00	$0.00
Running with eTapestry 2016 - 10/6/2016 (3)	$0.00	0	1	2	$0.00	$108.90	$108.90	$0.00	$0.00

The Fundraiser Activity Summary report now includes the Remaining column. This column 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.

Custom Reports: Participation Goal Remaining Field

To view the remaining goal amounts for Fundraiser participants, the **Participation Goal Remaining** field has been added as an option for custom reports. In addition, the **Goal** field label has been updated to the **Participation Goal** field for label consistency.

The **Participation Goal Remaining** field displays the total amount of the participation goal minus the amount received. If the amount received is greater than the fundraiser goal, the total will appear as zero.

To add the **Participation Goal Remaining** field to your custom report, from **Reports**, select a category to store your newly-created custom report or select the category your existing report is stored under. Select **New Report** to create a new report or select the report you wish to edit.
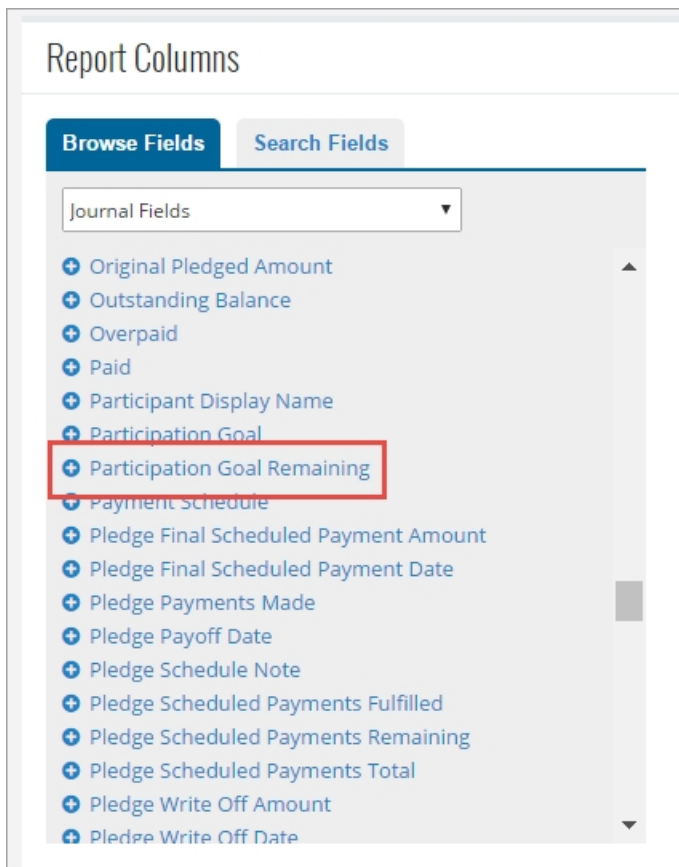
Under **Report Columns**, with Journal Fields selected in the drop down, select the **Participation Goal Remaining** field to add to your custom report.

DIY Forms: Custom Success Message

In order to personalize the information displayed to users when they use Do-It-Yourself forms, you can now create custom success messages during the creation of your DIY forms

From **Management**, select **DIY Forms** under **Online Presence**. From the My Online Forms page, you can create a new DIY form or edit your existing forms.

For an overview of DIY forms, including how to set up your payment processor, confirmation email template, and other form elements, refer to the *Getting Started with Do-It-Yourself Forms* guide.

You can customize your success message from the Choose Your Settings screen. To access this screen from a new DIY form, select **Create a New Page** on the My Online Forms page. Once you have selected what type of page you would like to create and the style you wish to apply, select **Next** on the What do you want your page to look like screen. The Choose Your Settings screen appears.

To access this screen for existing DIY forms, select **Edit** next to the DIY form you wish to edit. The Online Forms Editor page appears. Select **Settings** to access the Choose Your Settings screen.

Under **Online Giving Settings**, select **Edit Message**. The Edit Success Message Text screen appears. On this screen, you can enter a custom message that displays to users who interact with your DIY form. For example, if a donor gives a gift through an Online Giving form you create, you may want to show them a message thanking them for their donation.

You can include the following data merge fields in your custom success message:

- [CN] = Constituent Name
- [RA] = Received Amount
- [EM] = Email
- [ON] = Organization Name

In order to add these data merge fields into your success message, you will need to enter the data merge field names into the message editor exactly as they are listed above or else your data will not merge correctly.

Once you are satisfied with the content of your message, select **Update**.

Note: In order for the custom success message settings to take effect for existing DIY forms, you will need to republish your form. To republish your form, from the Online Forms Editor page, select **Go Live**. We recommend you test your changes to ensure the message appears as you have intended.

DIY Forms: User Defined Fields in Organization Notifications

When you receive a notification email from **eTapestry** after a constituent has completed a Do-It-Yourself form, you can now view any User Defined Field information you include on the form from the

notification every time that form is submitted, in addition to any hidden fields you use to track values in *eTapestry* and the **Campaign**, **Approach**, and **Letter** fields when they are populated.

Mass Update: Account Return Type Queries

When you update existing transactions, notes, or contacts; finalize journal entries; or write off pledges through mass update, Account Return Type queries will no longer appear in the **Query** drop down menu in order to help you avoid updating all journal entries if you accidentally select an Account Return Type query.

From **Management**, select **Mass Update**. You can use the types under **Update Existing Items** to update data in fields for existing accounts, personas, transactions, notes, contacts, journal entries, and write off pledges. For more information on how to mass update existing journal entries, see Mass Updates.

The following Account Return Type queries will no longer appear as options in the **Query** drop down on mass updates for existing journal entries:

- Account
- All Household Accounts
- Head of Household Accounts
- Related Accounts
- Matching Gift Accounts

Payment Processors: Braintree

Note: This payment processor is available for users with a Blackbaud Payment Service account set up with *eTapestry*.

For international users, *eTapestry* now supports Braintree as a payment processor. To add Braintree as a payment processor for your organization, from **Management**, **My Organization**, select **eCommerce** to review your transaction processors. Select **Add BRAINTREE - APAC Processor**.

You must configure the processor before you can accept online donations using Braintree. For more information, see eCommerce.