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7.29.0 New Features

This guide lists new features available in *eTapestry* 7.29.0, released on March 19, 2017.

Microsoft Outlook Integration: Outlook 2016

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

The *eTapestry* integration with Microsoft *Outlook* now allows you to automatically add email from *Outlook* 2016 to the journal of your constituent accounts.

Before you can take advantage of this integration, you must install a small component on your computer:

- *Outlook* 2010 or higher (32 bit OS)
- *Outlook* 2010 or higher (64 bit OS)

We suggest you verify the version of your operating system to determine which version of the installer to download.

Tip: To integrate eTapestry with versions of Microsoft *Outlook* older than 2010, see Install Microsoft Outlook Integration.

Once the file download window appears, click **Save File**. Locate the file you downloaded and double-click the file to open it.

Select **Run** to open the installer, then click **Next** to access the Select Installation Folder screen. To install the integration to the recommended folder, click **Next**. You can also browse to another folder and then click **Next**. On the Confirm Installation screen, select **Close** to exit the installer.

Note: The first time you use the integration from *Outlook*, you will be prompted to enter your *eTapestry* credentials. You only need to do this the first time you use the integration.

everydayhero: Event Registration

Note: This feature is only available if you have completed the **everydayhero** integration with **eTapestry**.
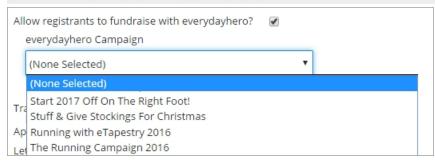
To encourage event registrants to participate in your **everydayhero** campaigns, you can now select to allow event registrants to fundraise for your campaigns on the Choose Your Settings screen of the Event Registration DIY form.

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.

To access the Choose Your Settings screen for a new Event Registration DIY form, select **Create a New Page** on the My Online Forms page. Select the Event Registration page you would like to create and the style you wish to apply, then 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 Event Registration DIY forms, select **Edit** next to the form you wish to edit. The Online Forms Editor page appears. Select **Settings** to access the Choose Your Settings screen.

Tip: 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.

Under **Event Signup Settings**, select **Allow registrants to fundraise with everydayhero**. The **everydayhero Campaign** drop down menu appears. From this menu, you can select the active everydayhero campaign you want to link to the page or choose the None Selected option if you do not want to select a specific campaign.

If you select to use the default confirmation email from **eTapestry**, the **Start Fundraising** link appears automatically in the confirmation email once you select to allow users to fundraise for your campaigns. Users can also access this link from the success page that appears when they complete the Event Registration DIY form.

If you select to use a custom confirmation email template, you must insert the eCommerce Details widget into your custom correspondence. 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.

To add the eCommerce Details widget to your custom confirmation email template, from **Communciations**, click **Manage Communications**. The Correspondence Categories page appears. Select the category where your confirmation email template is stored, then select the template.

In the editor, select the block of the letter section you wish to edit. The Edit Contents window appears. Select where you want to insert the eCommerce Details widget. On the HTML toolbar, select the **Insert Letter Widget** icon. From the Letter Widgets window, click **Select** next to **eCommerce Details**.

When you are done inserting the link, select **Update** on the Edit Contents window. Select Finish in the **Save and** drop down menu, then click **Next**.

After the user clicks **Start Fundraising** from the default or custom confirmation email or from the success page after they have completed the DIY form, they will be directed to *everydayhero* to create an account or sign in as an existing user to fundraise for your specified campaign.

If you did not select a specific campaign in the **Select an everydayhero campaign** drop down when you created the Event Registration DIY form, then the user is directed to your organization's *everydayhero* fundraising page that is not linked to a specific campain.

Import: Address Fields

To improve the Account Information import process experience, address fields are now default fields on the map fields step. Previously, you needed to add address fields manually by selecting **Import Another eTapestry Field** under the **All other fields** section on the **Map Your Import File** step of the

import process. Now, address fields appear in that section by default whenever you import account information.

Default address fields include the following:

- **Address Lines**
- **City**
- **State/Province**
- **Postal Code**

To map to an address field in the import file, click the icon beside the **eTapestry** address field in the Import Data column. The Select Import Field screen appears with a list of all column titles from your import file. To map the import field to the **eTapestry** address field, click the corresponding column title link. The Select Import Field screen closes and you return to the **Map Your Import File** step. For more information on the import process, see General Import Setup.

everydayhero: Fundraiser Performance Tile

You can now select to include the Fundraiser Performance tile on your Home page to view a snapshot of how your fundraisers imported from **everydayhero** are performing after you have run the integration.

From your account Home page, click **Select Tiles and Layout**. Under **Reports**, select **Fundraiser Performance** to add the tile to your Home page. Click **Save** under **Tasks** to save your selections. The Fundraiser Performance tile now appears.

From the Fundraiser Performance tile, you can click **Change** to select a Fundraiser imported from *everydayhero* and view its information. Under the **Event** drop down menu, select the fundraising event. From the **Date Range** drop down menu, select the range of dates you wish to view.

Under the **Goal Progress Calculation** drop down menu, select to see the amount Raised, Received, or Pledged for your Fundraiser in the date range you selected. Select **Update** to save your selections

Once you select the criteria for the fundraiser performance information you wish to view, the Goal, Transactions, and **Progress** fields populate as well as the field you previously selected in the **Goal Progress Calculation** drop down menu.

If you want to see the full report for your fundraising performance activity, select **See Full Report**. To update the information presented in the tile, select **Refresh**.

Note: Campaigns imported from ***everydayhero*** are not imported with a goal. You will need to select **Goal** on the Fundraiser Performance tile and create a goal amount for your Fundraiser. Once your goal is created and saved, select **Refresh** on the Fundraiser Performance tile for it to appear.

To share your fundraiser performance activity with your constituents on social media, select to share on Facebook or Twitter.