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7.37.0 New Features

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This guide lists new features available in *eTapestry* 7.37.0, released on January 28, 2018.

Defined Field Sets: Consent Fields

Defined field sets allow you to create groups of user-defined fields without the need to manually set up each field. Defined field sets are pre-populated according to database management best practices. You can use these sets as they are, or personalize them to better fit the needs of your organization.

Defined Field Sets

Basic

- General Fields
- Art Fields
- Congregation Fields
- Education Fields
- Faith Based Fields
- Health Care Fields

Advanced

- Consent Fields
- Event Fields
- For Impact Fields
- Grant Tracking Fields
- Major Gift Fields
- Membership Fields
- Moves Management Fields
- Planned Giving Fields
- Volunteer Fields

The Consent Fields defined field set was added to help your organization adhere to the General Data Protection Regulation (GDPR), which will require non-profit organizations to make certain that

constituents affirmatively opt-in to the processing of their data and be able to demonstrate they have collected such consent. For more information about GDPR, see [Blackbaud GDPR](#).

Consent Set

[Import Consent Set](#)

Fields and Values to Create

Email Consent

Opt-in Opt-out

Newsletter Consent

Opt-in Opt-out

Phone Consent

Opt-in Opt-out

Consent Channel

DIY Contact Form DIY Donation Form Verbal Written

Consent Message Content

<p>We would like to keep you informed about our projects and fundraising activities and ask you to opt-in to our communication options. We don't share information with any third parties and you can unsubscribe at any time by contacting us.</p>	<p>May we continue to contact you with information about our organization and volunteer opportunities?</p>
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Queries to Create

Email Consent: Opt-in

Find all Constituents that have the account level Email Consent field set to Opt-in.

Newsletter Consent: Opt-in

Find all Constituents that have the account level Newsletter Consent field set to Opt-in.

Under **Management, User Defined Fields**, select **Add Defined Field Sets**. On the Defined Field Sets screen, select **Consent Fields** under **Advanced**. A list of all the defined fields and queries for the Consent Field set appears.

To add the defined field set, click **Import Consent Set**.

eCommerce: Migrate iATS Transactions to BBPS

Note: This functionality is not available to all users. Only Admin users can run this migration.

To migrate iATS transactions to your Blackbaud Payment Services (BBPS) processor, you can now upload credit card numbers to those transactions to **eTapestry** through an Customer List CSV file provided to you by iATS.

To obtain the Customer List CSV file, you will need to contact iATS Payments and ask them to temporarily unmask credit card numbers in your Virtual Terminal. While the credit card numbers are unmasked, log into the iATS Payments Customer Portal. Under Virtual Terminal, select **Customer Database**.

Once the Customer List loads, click **Export Customer List** and wait for the CSV file to download.

Migrate iATS transactions to BBPS

Tasks

Links

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Select iATS "Export Customer List" CSV file

No file selected.

Select BBPS transaction processor

(None Selected) ▼

ATTENTION: You are about to start an intensive update process on your eTapestry data. While this process is running, users may be unable to access the eTapestry records affected by this update. As intensive update processes can affect other users in your organization, you are strongly encouraged to run these processes when other users are not accessing eTapestry, such as at the end of the day. Note: Once started, you may safely log out of eTapestry and the process will continue unattended.

From **Management, My Organization** select the **eCommerce** tab. On the eCommerce page, under **Links**, select **Migrate iATS transactions to BBPS**.

Note: This option is only available for organization with an iATS processor.

Select **Browse** and choose the file you wish to upload.

If you have more than one BBPS processor, select the processor that you will use under **Select BBPS transaction processor**.

To migrate credit card numbers from iATS, select **Run** under the **Tasks** menu. This process will upload credit card numbers from the file to any active iATS auto processing transactions in **eTapestry** and re-assign them to the BBPS processor you selected.

When this process is complete, you will receive a notification with details on the number of lines processed, active transactions updated, inactive transactions skipped, and number of transactions not found.

Once the migration finishes, **eTapestry** will also create a note on the My Organization Journal stating the process was run and its details.