

Name Format Conversion Guide

06/25/2018 eTapestry 7.22.0 Name Format Conversion US

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NameConv-2016

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Name Format and Salutation Standards Conversion Tool



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Note: Only System Administrators can complete the Name Format and Salutation Standards Conversion Tool. If you are not a System Administrator, the conversion tool tiles display for you to monitor your organization's progress.

To improve a best practice experience for your users and establish consistency in your database, select to convert name data using the Name Format and Salutation Standards Conversion Tool. When you do this, you progress through a series of steps to confirm salutation rules, assign Name Formats, split full names for individuals from one field to multiple fields, and then generate salutations.

With the 7.16.0 release, your account data entry changes in multiple ways that benefits your organization. For example, you select a Name Format to identify an account as Individual, Family, or Business. When you select Individual, you now enter name information in separate fields for **Title**, **First Name**, **Middle Name**, **Last name**, and **Suffix**. When you previously entered information in the single **Name** field, it is likely you did not always have enough flexibility for processing needs.

In addition to improving best practices and establishing data entry consistency for your users, these name features benefit your organization in the following ways.

- The user interface includes enhanced usability
- You can now create reports with **First Name** and **Last name** information in separate columns
- Salutations are consistent for improved communication
- Individual name fields interact better with third party integrations. For example, match rates improve when you use analytics such as AddressFinder (NCOA).
- International name improvements

The **Name** field also updates to the **Account Name** field for Individual, Family, and Business accounts. There is no change in functionality for the field. You continue to use it to enter Family and Business names, display the name in the header on the account record for all Name Formats, and use it for processes such as reports and communication templates. The following list includes name examples as they may appear in an **Account Name** field for each Name Format.

- **Individual:** For example, Jane Johnson Smith or Joseph Michael Smith.
- **Family:** For example, The Smith Family, Jane and Joseph Smith, or Jane Higgins and Joseph Smith. For more information about Family accounts, refer to the General Features Guide.
- **Business:** For example, AAA Concrete.

To avoid Name Format mismatches and conflicts, complete the conversion tool as soon as possible. After you complete the conversion, your existing data is consistent with new data you enter in 7.16.0 and higher, and you can begin to take advantage of all Name Format new features throughout **eTapestry**.

Begin the Conversion Tool

Show Me: Watch a video about the [Conversion Tool](#).

Only System Administrators can view and process the Name Format and Salutation Standards Conversion Tool. However, it is important that **eTapestry** users at your organization work together to prepare, plan, and make decisions before actually converting your data. This helps keep communication open so everyone understands the upcoming changes to your database and also helps

to make sure your conversion goes smoothly. System Administrators do not have to complete the conversion tool at one time. In fact, that is unlikely due to the high volume of changes to make. The conversion tool design allows you to progress through the steps at your own pace. You can start and stop it as often as necessary. After you complete the last step of the tool, it removes from the Home page and you cannot access it again.

To begin the conversion tool, navigate to the Home page . When you access the page, a series of informative tiles appear for you to learn about the five steps in the conversion tool. As you complete each step, the next step's tile enables. Information about the step appears below to help you complete the task successfully.

Make Name Formats work for you

Step 1	Step 2	Step 3	Step 4	Step 5
<p>Name Format</p> <p>With this release, we improved how you enter account information. Let's get acquainted with the new Name Format features and the conversion tool that helps update existing data.</p> <p>Read more about the tool</p>	<p>Salutation Rules</p> <p>Confirm the salutation rules to apply to new accounts. <i>This step does not take a significant amount of time.</i></p>	<p>Assign Name Format</p> <p>Assign a Name Format of Individual, Family, or Business to each account.</p>	<p>Split Individual Names</p> <p>After you complete Name Format assignments in Step 3, separate account names for the Individual format into the multiple new Name fields.</p>	<p>Generate Salutations</p> <p>Assign a missing Salutation to each account.</p>

More about Step 1

What do Name Formats mean to you?

The new Name Format feature allows you to create accounts with a single **Account Name** field or multiple **Name** fields based on whether the Name Format field is set to Individual, Family, or Business. Salutations are now auto-generated based on the Name Format you select and information you enter into the **Name** fields. These improvements provide a best practice experience for your users and establish consistency in your database. System Administrators should use this conversion tool for guided assistance through the data conversion process of assigning a Name Format to your existing accounts, separating name fields, and generating salutations.

Note: Only System Administrators can complete the Name Format and Salutation Standards Conversion Tool. If you are not a System Administrator, the conversion tool tiles display for you to monitor your organization's progress.

[Learn more about the Name Format and Salutation Standards Conversion Tool](#)

On the Step 1 tile, click **Read more about the tool** to navigate to this step. The Step 1: Name Format page appears for you to review overview information about the conversion tool. For more information, refer to [Step 1: Name Format on page 8](#).

Glossary

As you proceed through the conversion tool, refer to this glossary to help remember the new name terminology in 7.16.0. For complete details about the Name Format functionality, refer to the *7.16.0 New Features Guide*.

Term	Definition
Account Name	<p>In previous releases, this field was called Name. There is no change in functionality for the field. You continue to use it to display the name in the header on the account record and for processes such as queries, custom reports, and communication templates.</p> <p>When you select Individual for the Name Format, <i>eTapestry</i> configures name values in the Account Name as you enter name information in the First Name, Middle Name, Last Name, and Suffix fields.</p> <p>When you select Family or Business, the program configures name values in the Sort Name, Recognition, Short Salutation, Long Salutation, and Envelope Salutation fields as you enter it in the Account Name field.</p>
Name	<p>Prior to the 7.16.0 release, you entered all name values in the Name field. This included title, first name, middle name, last name, and suffix information for individual accounts. This also included name information for joint and business accounts.</p> <p>After the 7.16.0 release, this field is now called the Account Name field. The Name field no longer appears on the account record. Other processes in <i>eTapestry</i>, such as queries, custom reports, and communication templates also now call this field Account Name.</p>
Name Format	<p>The Name Format functionality provides a best practice experience for your users and establishes consistency in your database. When you create an account, you now select whether the Name Format is for an Individual, Family, or Business. As a part of the Name Format enhancement, five new individual name fields appear for Title, First Name, Middle Name, Last Name, and Suffix.</p> <p>This field is <i>not</i> a replacement for tracking the Account Type; we still recommend you use the Account Type user-defined field to do this.</p>
Name Format: Individual	<p>An example of an Individual Name Format is Mr. Joseph Michael Smith, Jr. Using this name, each word appears in the following fields.</p> <p>Title: Mr.</p> <p>First Name: Joseph</p> <p>Middle Name: Michael</p> <p>Last Name: Smith</p> <p>Suffix: Jr.</p>
Name Format: Family	<p>Examples of a Family Name Format include The Smith Family or Jane and Joseph Smith. The full family name appears in the Account Name field.</p> <p>Account Name: The Smith Family</p> <p>Account Name: Jane and Joseph Smith.</p> <p>For information about Family accounts, refer to Family and Couple Accounts on page 1.</p>

Term	Definition
Name Format: Business	An example of a Business Name Format is AAA Concrete. The full business name appears in the Account Name field. Account Name: AAA Concrete

> Step 1: Name Format

From the Step 1: Name Format tile, click **Read more about the tool**. The Step 1: Name Format page appears.

This step is the quickest step in the Name Format and Salutation Standards Conversion Tool process. Step 1 simply provides overview information about the conversion tool for you to refer to any point during the process.

After you review the details on the page, and your organization is ready for you to proceed with the conversion, click **Back to Name Conversion Tool**. On the Name Conversion Tool page, the Step 2: Confirm salutations tile enables and you can begin this step. For more information, refer to [Step 2: Salutations Rules on page 8](#).

> Step 2: Salutations Rules

On Step 2, you select the configurations you want to use to establish name salutation consistency for your existing data.

Tip: To help establish consistent salutations throughout *eTapestry*, the auto-generated configurations you now select on the new Data Entry Rules page automatically update when you change a configuration on Step 2. For more information about the **Configure Auto-generated Field Rules based on Name Format** section on the Data Entry Rules page, refer to [My Organization - Data Entry Rules Page on page 1](#).

1. From the Step 2: Salutation Rules on the Name Conversion Tool page, click **Confirm salutations**. The Step 2: Confirm salutations for new accounts page appears.
2. Under **Individual**, the default configuration to use for Individual fields appears as a link. To change the default configuration for a field, select the link beside it.

Step 2: Confirm salutations for new accounts

Individual
Multiple Field Format
Account Name **First Name + Middle Name + Last Name + Suffix**
Sort Name **Last Name, + First Name**
Salutation **First Name**
Label Name **Title + Last Name**
Envelope Salutation **Title + First Name + Middle Name + Last Name + Suffix**

Family
Single Field Format
Sort Name **Account Name**
Salutation **Account Name**
Label Name **Account Name**
Envelope Salutation **Account Name**

Business
Single Field Format
Sort Name **Account Name**
Salutation **Account Name**
Label Name **Account Name**
Envelope Salutation **Account Name**

Note: Salutations do not automatically generate for existing accounts. [Learn more about Step 2](#)

3. The Edit Rules screen appears. Select the configuration you want to use and click **Continue** to return to the Data Entry Rules page.

Edit Rules for Individual - Sort Name ✕

- Last Name, + First Name
- Last Name, + First Name + Middle Name
- Last Name + Suffix, + First Name
- Last Name, + First Name + Suffix
- Last Name, + First Name + Middle Name + Suffix
- Last Name + Suffix, + First Name + Middle Name

When you change formats for sort names, be aware there is no change to existing sort names. Your changes only apply to sort names for new accounts.

- a. The Individual **Salutation** fields include options for **Friends**, **Blank**, and **Custom**.

Edit Rules for Individual - Salutation ✕

- First Name
- First Name + Last Name
- First Name + Last Name + Suffix
- First Name + Middle Name + Last Name + Suffix
- Title
- Title + Last Name
- Title + Last Name + Suffix
- Title + First Name + Last Name + Suffix
- Title + First Name + Middle Name + Last Name + Suffix
- Friends
- Blank
- Custom

When you change formats for salutations, be aware there is no change to existing salutations. Your changes only apply to salutations for new accounts.

- b. To address recipients as "Friends," select **Friends**. To leave salutation fields empty, select **Blank**. When you do this, *eTapestry* does not populate the field with name values and you can enter any salutation in the field. To use another general term (for example, one that is similar to Friends) as a salutation, select **Custom** and enter your custom salutation to use for all Individual accounts.

Note: When you select **Blank** for an Individual salutation, your selection only applies to manual data entry. When an Individual account is created from an online form with **Blank** selected, salutations default based on *eTapestry's* auto-generated salutation formats. When you select a configuration other than **Blank**, Individual accounts created from online forms generate salutations based on your selected configuration.

4. Under Family and Business, you can select to use **Account Name** or **Blank** for each field.

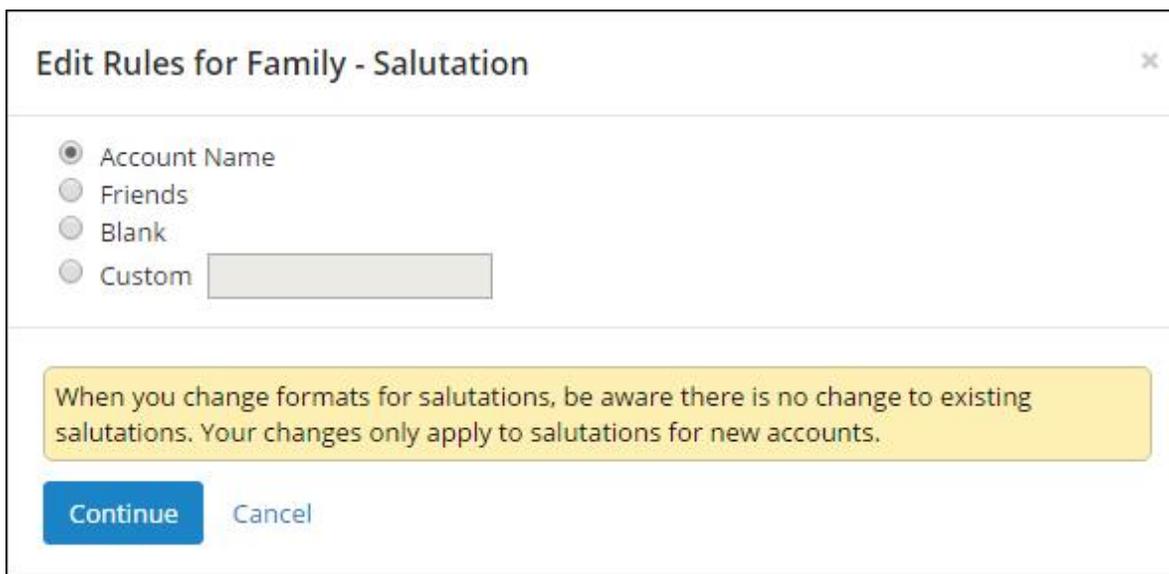
Edit Rules for Business - Sort Name ✕

Account Name
 Blank

When you change formats for sort names, be aware there is no change to existing sort names. Your changes only apply to sort names for new accounts.

- a. To duplicate the name value from the **Account Name** field into the field, select **Account Name**.
- b. To leave salutation fields empty, select **Blank**. When you do this, *eTapestry* does not populate the field with name values and you can enter any salutation in the field.

Note: When you select **Blank** for a Family salutation, your selection only applies to manual data entry. When a Family account is created from an online form with **Blank** selected, salutations generate based on *eTapestry's* auto-generated formats. When you select a configuration other than **Blank**, Family accounts created from online forms generate salutations based on your selected configuration.



Edit Rules for Family - Salutation ✕

Account Name
 Friends
 Blank
 Custom

When you change formats for salutations, be aware there is no change to existing salutations. Your changes only apply to salutations for new accounts.

Continue Cancel

- c. For the **Salutation** fields, you can select to use the salutation option **Friends**.
 - d. To use another general term (for example, one that is similar to Friends) as a salutation, select **Custom** and enter your custom salutation.
5. When you are done selecting your configurations for each field, click **Save and back to Name Conversion Tool** to complete the step. On the Name Conversion Tool page, the Step 3: Assign Name Format tile enables and you can begin this step. For more information, refer to [Step 3: Assign Name Formats - bulk process on page 12](#). and [Step 3: Assign Name Formats - manual process on page 15](#).

➤ Step 3: Assign Name Formats - bulk process

Use the bulk process to assign an Individual, Family, or Business Name Format to large groups of existing records at the same time. When you use the bulk process, you select a query of accounts to assign a Name Format. You can review preview information before you select to make your assignments in bulk.

Warning: Be aware the bulk process can change data for a large number of accounts. If you do not want to assign Name Formats in bulk, you can manually assign them to each account using the manual process for this step. For more information, refer to [Step 3: Assign Name Formats - manual process on page 15](#).

Before you begin this step, we recommend you create multiple queries to group accounts based on the new Name Formats:

- Individual accounts
- Family accounts (for example, "The Smith Family", "Jane and Joseph Smith", or "Jane Higgins and Joseph Smith")
- Business accounts

After you create the queries, you can easily apply formats to each query of accounts.

> Query Tips

- When you create the queries for this step, make sure to select Base for the **Category** and All Accounts for the **Query**.

Warning: Do not select All Constituents for the starting query criteria because this excludes accounts that are not marked with the **Constituent** role.

- If you need to create additional queries during the process, simply navigate to *Query* to create the group of accounts and then return to this step to select the new query and assign Name Formats.
- To segment your accounts into the appropriate groups of records to align with the Individual, Family, and Business Name Format assignments, we recommend you use the **Account Type** user-defined field (UDF) to filter your queries.

To group individual accounts, query on the **Account Type** of Individual.

If you used the **Account Type** of Individual for couple, joint, and family accounts, you can assign the Family Name Format by first using the manual process to filter the account names that include the words "and", "&", or "family." After you complete these assignments manually, you can then return to the bulk process to assign the Individual Name Format to individual accounts.

To group business accounts, query on the **Account Type** of Business, Religious, Foundation, and Organization.

Tip: It is possible your organization edited your Account Type UDF options. You can still use this field to group your accounts, but make sure the types you query on align with the Individual, Family, and Business Name Formats. For example, you may have an Account Type of Joint that you can use to query on couple, joint, or family accounts and then assign the Family Name Format.

- Before you proceed with the bulk process, make sure your queries contain the correct accounts for a specific Name Format assignment. For information about how to create a queries, refer to [Create a basic query on page 1](#).
1. From the Step 3: Assign Name Format tile, click **Assign Name Format to accounts**. The Step 3: Assign Name Format page appears.

If you are on the Manually Assign Name Format screen for Step 3, click **Use Bulk Update**.

Tip: During the bulk process, you can switch to the manual process if you prefer to manually assign some of the Name Formats. To switch to the manual process, click **Use Manual Update**. You may want to do this when you are close to completing this bulk step for all accounts, and only have a few left to assign a Name Format. You can switch back and forth between the two process options as much as you need to until the step is complete.

2. On the Criteria tab, complete these steps.
 - a. Under **Select Query**, select the query of accounts to assign Name Formats in the **Category** and **Query** fields.
 - b. Under **Name Format Assignment**, select whether to assign the group of accounts to the Individual, Family, or Business Name Format.
3. Click **Next**. The Preview tab appears.
 - a. Review the information that appears on the tab to confirm the correct query to convert displays and that you are about to assign the correct Name Format to the group of accounts.
 - b. To return to the Criteria tab to change your Name Format assignment selections, click **Back**.
4. Select **Update Accounts**. The Update Accounts tab appears and **eTapestry** begins the process of assigning the Name Format to the group of accounts in your query.

Warning: When you click **Update Accounts**, an intensive update process begins for your **eTapestry** data. While this runs, users should not access accounts affected by this update. Due to this, we strongly encourage you run the process after hours when users are not accessing **eTapestry**. Once the process begins, you can safely log out of the program. The process continues until it is complete.

5. Repeat these steps for each query of accounts you need to assign Name Formats.
6. To return to the conversion tool tiles, click **Back to Name Conversion Tool**. The Step 4: Split Individual Names tile enables and you can begin this step. To learn more about the bulk process for it, refer to [Step 4: Split Individual Names - bulk process on page 16](#).

➤ Step 3: Assign Name Formats - manual process

When you cannot group accounts into separate queries for bulk Name Format assignments, you can use the manually process to assign Name Formats to accounts that display in a grid on the Manually Assign Name Formats page.

Warning: Be aware the manual process can take a long time depending on the number of accounts that you need to manually assign Name Formats. If you need to do this for every account in your database, it is important to take your time and make sure you correctly assign each account the applicable Name Format. You do not have to do this in one sitting; you can save your assignments and return to the step at a later time to continue your progress until it is complete. To significantly decrease the time you spend on this step, use the bulk process. To do this, you must be able to group your accounts into queries for individuals, families, and businesses. For more information, refer to [Step 3: Assign Name Formats - bulk process on page 12](#).

To assist with this process, *eTapestry* provides filters to help group accounts that share similar patterns and displays them at the top of the page similar to following:

- Accounts with the word "family" in the Account Name field (1,846 accounts)
- Accounts with the word "and" in the Account Name field (74 accounts)
- Accounts with the word "&" in the Account Name field (74 accounts)

Note: The "&" filter only displays when your database has less than 25,000 accounts without a Name Format.

- All 3,296 accounts

To display the accounts from one of these groups in the grid, click its link. Using the above examples, click **Accounts with the word "and" in the Account Name field (74 accounts)**. The accounts in this group appear in the grid. As you save Name Format assignments, the number of accounts refreshes to display the number of accounts that remain unassigned. When you complete each group of assignments, the link disables.

1. From the Step 3: Assign Name Format tile on the Name Conversion Tool page, click **Assign Name Format to accounts**. The Step 3: Assign Name Format page appears.
2. Click **Use Manual Update**. The Manually Assign Name Formats page appears.

Tip: During the manual process, you can switch to the bulk process when you want to bulk assign Name Formats. To switch to the bulk process, click **Use Bulk Update**. You can switch back and forth between the two process options as much as you want to until the step is complete.

71 accounts do not have a Name Format		
Results 1 - 30		Assign Name Format None Selected ▼ Apply to Page
Account Name	Sort Name	Name Format
Ben McAllen	Ben McAllen	None Selected ▼
Ryan Braun	Braun, Ryan	None Selected ▼
David Soul	David Soul	None Selected ▼

3. In the grid:

To assign the same Name Format to all accounts, in the **Assign Name Format** field above the grid, select the Name Format to assign to all accounts. Click **Apply to Page**.

OR

To assign different Name Formats to accounts, in the **Name Format** column, click the drop down to select the applicable Name Format for the row.

4. To complete either of these steps for the next group of accounts, select "next 30" and click **Save and**.
5. When each account in your database has a Name Format assignment, click **Back to Name Conversion Tool** to complete Step 3. On the Name Conversion Tool page, the Step 4: Split Individual Names tile enables and you can begin this step. To learn more about the manual process for it, refer to [Step 4: Split Individual Names - manual process on page 19](#).

➤ Step 4: Split Individual Names - bulk process

Step 4 guides you through the process to move Individual account name values from the single **Name** field to the **Title, First Name, Middle Name, Last name,** and **Suffix** name fields.

Warning: Be aware the bulk process can change data for a large number of individual accounts. Before you proceed with this process, make sure any queries you want to use contain the correct accounts that need individual names split. If you do not want to export and import this data in bulk, you can manually split individual names for each account using the manual process for this step. For more information, refer to [Step 4: Split Individual Names - manual process on page 19](#).

1. From the Step 4: Split Individual Names tile, click **Separate names**. The Step 4: Split Individual Names page appears.

If you are on the Manually Split Individual Names screen for Step 4, click **Use Bulk Name Split**.

The screenshot shows a web interface for exporting data. At the top, there are two tabs: 'Export' (highlighted in blue) and 'Import'. Below the tabs, the 'Export Options' section contains two radio buttons. The first radio button, labeled 'Export all 68 accounts that require splitting the Account Name', is selected. The second radio button is labeled 'Select a query for export'. Below this is the 'Delivery Options' section, which includes three input fields: 'Report Format' (a dropdown menu currently showing 'CSV File - Download'), 'Delivery Email' (a text box containing 'Alyssa.Carver@Blackbaud.com'), and 'Delivery Email Subject' (an empty text box). At the bottom of the form is a 'Submit' button.

2. On the Export tab, complete these steps.

- a. To split all individual names in one bulk process, select **Export all [] accounts that require splitting the Account Name**.

Note: *eTapestry* cannot export more than 25,000 records at the same time. If you select **Export all [] accounts** and your database contains more than 25,000 records, the first 25,000 records exports to the .csv file. After you make the necessary changes to the file and import it back in to *eTapestry*, you can select this option again to export and split the next group of records from your database. Repeat this process until all records have been split using the bulk process.

- b. To split a smaller group of records, select **Select a query for export**. Under **Select Query**, select the query of accounts to export in the **Category** and **Query** fields.
- c. Under **Delivery Options**, select how you want to export the comma separated file (.csv) file. You can download it to your computer, put it in your *eTapestry* drop box, or receive it by email. When you select email, enter email information for the users who need to receive the export.
- d. Click **Export**. The export generates. Make sure you wait for it to complete before you navigate away from the page. You cannot start additional queries, reports, or exports until it does.
- e. On your computer, open the export .csv file from *eTapestry*. You can verify names appear correctly in the columns and change any incorrect names. However, to avoid errors and problems when you import the data back into *eTapestry*, do *not* make adjustments to the .csv file format.

Note: If Microsoft *Excel* saves the file as Unicode by default, change the file type to .csv.

➤ **Review the following .csv file details before you verify and make changes to data in it.**

- To view examples of names in various formats that depict how **eTapestry** splits names between the multiple name fields, click [here](#) to view a Microsoft *Excel* file with examples based on your locale.
- The names that appear in the file are sorted based on the word count in each name. For example, the name Jane Elizabeth Johnson Doe has four words and likely appears in one of the first rows in the file.
- To help prevent importing duplicates back in to **eTapestry**, the conversion tool exports the **Entity Reference** column so you can verify each row has a unique account ID. Do not edit the data in this column.
- When the **Title** column is blank, you can add one in the row for the individual. The conversion tool attempts to populate this column based on data from the primary persona. During this process, the tool scans the following fields, in this order, to help identify the title for the account.

1. **Account Name**

2. **Long Salutation**

3. **Envelope Salutation**

- If the name that appears is not an Individual account, you can change it in the **Name Format** column. When you do this, do not adjust the name split data in the file because **eTapestry** only imports the Name Format change. It does not import the split name, so the Family or Business name correctly appears in the **Account Name** field on the account record.
- The export removes text that appears between parentheses or double quotes in the name. For example, if Joseph "Joe" Smith appeared in the old **Name** field, "Joe" does not appear in the account row for Joseph Smith in the .csv file.

Tip: If text appears in parentheses or double quotes in the **Account Name**, **Long Salutation**, or **Envelope Salutation** fields, it remains in place after this step is complete. This export does not impact data in these fields.

- Do not add additional columns of data to the .csv file. If you want to add new data to these accounts, you must process a separate import or mass update.
- Do not add additional rows of new accounts to the .csv file. If you want to add new accounts, you must process an Account Information import. If you want to split a couple or joint account in this export into individual accounts, you can change the account to Individual in the **Name Format** column in the file, but you must manually create a new relationship, add a new individual account, and update the existing Individual account after you complete the conversion.

3. After you verify the data is correct in the .csv file, select the Import tab.

Warning: To avoid errors when you import name data on the Import tab, make sure you select the file created from the Export tab.

- a. Under **Select the File to Import**, click **Browse** to select the .csv file generated from the Export tab.
 - b. To import the data back in to *eTapestry*, click **Run** to start the import process. After it completes, a confirmation message appears to inform you the number of accounts that have been updated.
4. Click **Back to Name Conversion Tool** to complete the step. On the Name Conversion Tool page, the Step 5: Generate Salutations tile enables and you can begin this step. To learn more information, refer to [Step 5: Generate Salutations on page 21](#).

> Step 4: Split Individual Names - manual process

Step 4 guides you through the process to move Individual account name values from the single **Name** field to the **Title**, **First Name**, **Middle Name**, **Last name**, and **Suffix** name fields.

Warning: Be aware the manual process for this step can take a long time depending on the number of accounts that need individual names split. If you need to complete this process for every account in your database, it is important to take your time and make sure you correctly divide each name into the correct fields. You do not have to do this in one sitting; you can save your names and return to the conversion tool at a later time to continue your progress until the step is complete. To significantly decrease the time you spend on this step, use the bulk process. For more information, refer to [Step 4: Split Individual Names - bulk process on page 16](#).

1. From the Step 4: Split Individual Names tile, click **Separate names**. The Step 4: Split Individual Names page appears.
2. Click **Use Manual Name Split**.

Results 1 - 30

	Title	First Name	Middle Name	Last Name *	Suffix	Account Name *	Name Format *
	choose title ▾	Ben		McAllen		Ben McAllen	Individual
	choose title ▾	David		Soul		David Soul	Individual
	choose title ▾	Ed		Smith		Ed Smith	Individual
	choose title ▾	Cinder		Ella		Cinder Ella	Individual
	choose title ▾	Eva		Huggins		Eva Huggins	Individual

3. For each row that appears in the grid, view the name in each column to verify all name data is correct. To change incorrect names, click the pencil icon for the row in the **Edit** column. The row enables for you to correct the information.

Tip: To view examples of names in various formats that depict how *eTapestry* splits names between the multiple name fields, click [here](#) to view a Microsoft *Excel* file with examples based on your locale.

- In the grid, a random group of 30 records appears. They are sorted based on the word count in each name. For example, the name Jane Elizabeth Johnson Doe has four words and likely appears in one of the first rows in the file.
- When the **Title** column is blank, you can add one in the row for the individual. The conversion tool attempts to populate this column based on data from the primary persona. During this process, the tool scans the following fields, in this order, to help identify the title for the account.
 - Account Name**
 - Long Salutation**
 - Envelope Salutation**
- If the name that appears is not an Individual account, select the correct account in the **Name Format** column. The row removes from the grid, and the Name Format change saves to the database. The Family or Business name appears correctly in the **Account Name** field on the account record because *eTapestry* ignores the split name that appeared in the row.
- When an account row's last name value is blank, "Unknown Name" appears in the **Last Name** column. To improve data health, we suggest you enter the last name of the individual.
- The grid removes text that appears between parentheses or double quotes in the name. For example, if Joseph "Joe" Smith appeared in the old **Name** field, "Joe" does not appear in the account row for Joseph Smith.

Tip: If text appears in parentheses or double quotes in the **Account Name**, **Long Salutation**, or **Envelope Salutation** fields, it remains in place after this step is complete. The manual update does not impact data in these fields.

- To progress to the next group of names, select "next 30" in the drop down field at the bottom of the page and click **Save and**.
- When each individual name in your database has been split, click **Back to Name Conversion Tool** to complete Step 4. The Step 5: Generate Salutations tile enables and you can begin this step. To learn more information, refer to [Step 5: Generate Salutations on page 21](#).

> Step 5: Generate Salutations

The last step of the conversion tool guides you through generating salutations for accounts without them by applying the salutation configurations you selected on Step 2. To do this, you select a persona type for each Name Format. When the applicable records appear in the grid on the page, you need to verify the salutations that appear in the columns and make corrections when necessary.

Note: You are not required to complete this step of the conversion tool. However, if you select to skip it, you risk leaving salutation fields blank which allows for inconsistent salutations throughout **eTapestry**. This decision is important for your organization, so we recommend you discuss this with others before a final decision is made. To skip the step, click the **skip this step** link in the text at the top of the page. The Skip generating salutations screen appears for you to select **Skip step** or **Cancel** to return to the page and generate salutations. When you skip the step, you cannot return to Step 5.

- From the Step 5: Generate Salutations tile, click **Assign empty Salutations**. The Generate Salutations page appears.

Step 5: Generate Salutations

Generate Salutations

Now that name data is consistent, you can create salutations for accounts without them based on your salutation preferences. If you do not want to generate salutations, you do not have to complete this step. If you do this, you risk leaving many salutation fields blank which allows for inconsistent salutations throughout your database. This is important for your organization so we recommend you discuss this with others before you make your final decision. Please be aware that after you progress through this step, the migration completes and the conversion tool is no longer accessible. If you skip this step, you cannot return to it.

Note: This step only generates salutations for blank salutation fields. It does not overwrite existing salutations.

Select a Name Format to work with to create and approve each salutation:

- Individual (65)
- Family (salutations complete)
- Business (salutations complete)

65 accounts have at least one empty salutation field.

- In the Name Format list that appears on the page, click **Individual**. The **Persona Type** field appears for you to filter the list of personas to view.

Individual Format personas with blank salutations (65)

Persona Type: None Selected ▼

Please select a persona type in order to view accounts and create salutations.

None Selected
 Business (1)
Personal (64)

3. After you select a persona type, such as "Personal," the applicable accounts appear in the grid.

Tip: Italics indicate an existing salutation. You can change the salutation or you can leave it and generate salutations for the remaining fields for the account.

Individual Format personas with blank salutations (65)

Persona Type: Personal (64) ▼

Results 1 - 30 *Italics indicate previously existing salutation*

	Salutation	Label Name	Envelope Salutation	Account Name *
	Ben	Ben McAllen	Ben McAllen	Ben McAllen
	Paul	Paul James	Paul James	Paul James
	Cinder	Cinder Ella	Cinder Ella	Cinder Ella
	Stephen	Stephen Chambers	Stephen Chambers	Stephen Chambers
	John	John Carr	John Carr	John Carr

4. For each account row that appears, view the salutation in each column to verify all salutations are correct. To change incorrect salutations, click the pencil icon for the row in the **Edit** column. The row enables for you to correct the information.
5. To progress to the next group of salutations, select "next 30" in the drop down field at the bottom of the page and click **Save and**.
6. After you complete and save the salutation information for the persona type, return to the **Persona Type** field to display the next list of personas you want to view, verify, and make changes for in the grid.
7. After you complete this for all Individual accounts, return to the top of the page and click **Family** or **Business**. Repeat these steps for those Name Formats until all salutations have been saved.
8. After you verify salutations for all personas, click **Back to Name Conversion Tool** to return.

This completes the conversion tool for your organization! On the Home page, checks appear on each tile to confirm the conversion is complete. All **eTapestry** users view this on their Home page to make them aware you have completed each step. Congratulations!

Note: At this time, you can no longer access the steps in the conversion tool.

You did it!

Congratulations! Your updated name format and fields are ready to use.

Name Format	Salutation Rules	Assign Name Format	Split Individual Names	Generate Salutations
				