Do-It-Yourself Forms Guide

Contents

Do-It-Yourself Forms

Do-It-Yourself (DIY) forms are useful for online giving, event registrations, volunteer registrations, membership, and email signups. These are called DIY forms because you can do everything yourself from set up, design, edit, and then publish. *eTapestry* has five types of online forms.

- **Online Giving Page:** This form allows your page visitors to make one-time and recurring donations.

- **Event Registration Page:** This form allows your page visitors to register for an event.

- **Membership Signup Page:** This form allows your page visitors to purchase memberships.

- **Contact Page:** This form allows your page visitors to sign up to receive regular communications from you. This form cannot accept payments.
- **Volunteer Page:** This form allows your page visitors to register to volunteer with your organization. This form cannot accept payments.

eTapestry provides form templates for you to configure with a similar look and feel to your website.

For an overview of DIY forms, you can review a graphical overview of the functionality. Before you create and publish your forms, consider a few steps to make the process faster and easier.

Set up transaction processor

↓

Set up confirmation email template

↓

Set up user-defined fields

↓

Set up funds, campaigns, and approaches

↓

Create DIY forms
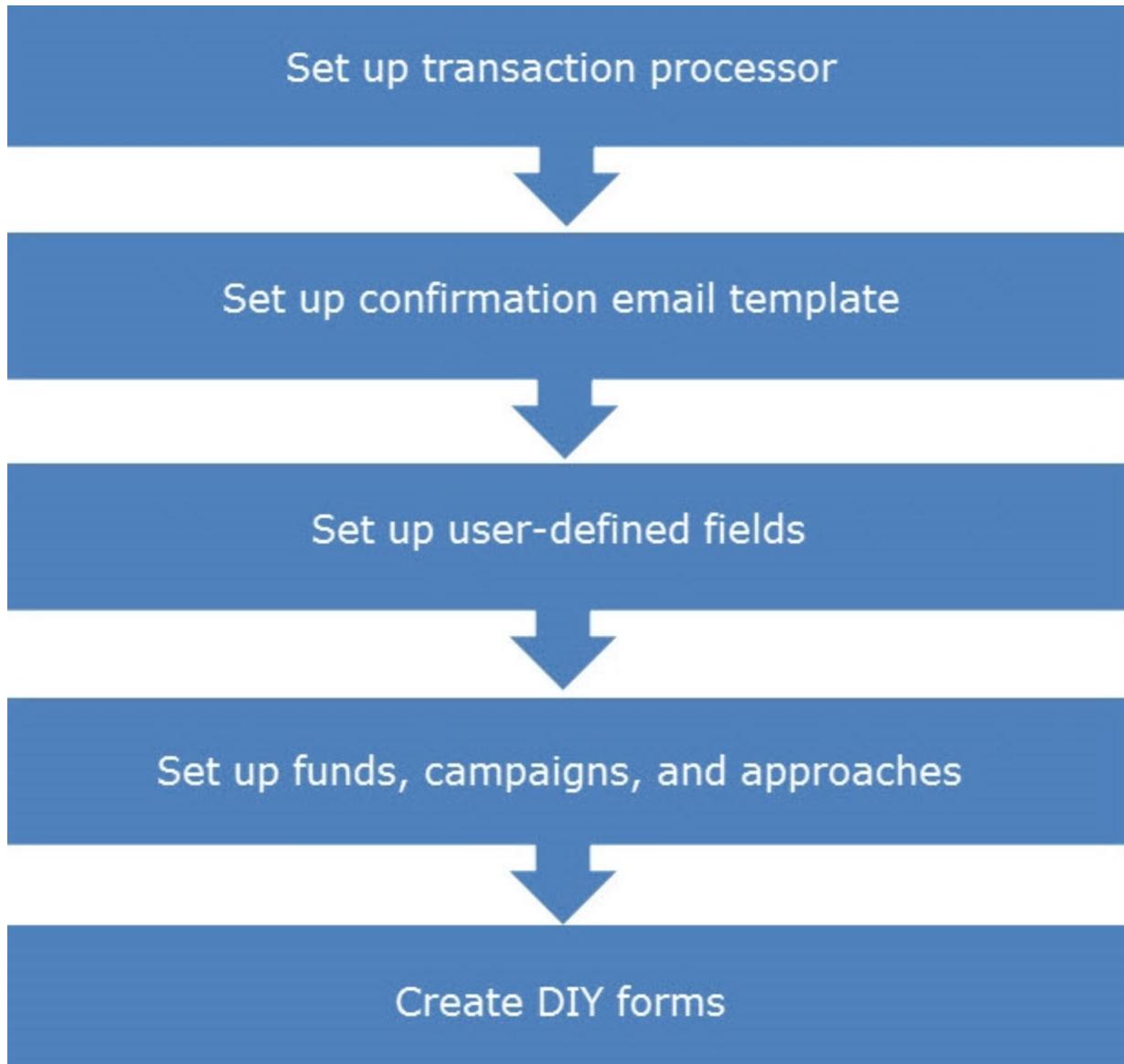
It is possible that some of these steps are currently complete for your organization. For example, if you receive credit card and debit card donations, you already have a payment processor.

Blackbaud Payment Service (BBPS) and Blackbaud Merchant Services (BBMS)

Blackbaud Payment Service (BBPS) is Blackbaud's solution for secure credit/debit card storage. All credit cards in your Blackbaud products are stored in our secure servers at BBPS. This protects the donor's personal information as well as the user from any liability.

BBPS is required by all Blackbaud products to either process or store credit card information. BBPS enables Blackbaud software to adhere to the PCI-DSS security standards of major credit card companies.

Blackbaud Merchant Services (BBMS) is a merchant account available to use with your Blackbaud products. Merchant accounts are responsible for actually processing the credit card transactions and depositing the funds into your bank account.

BBMS also gives you an online portal where you can run reports, refund transactions, and manage chargebacks.
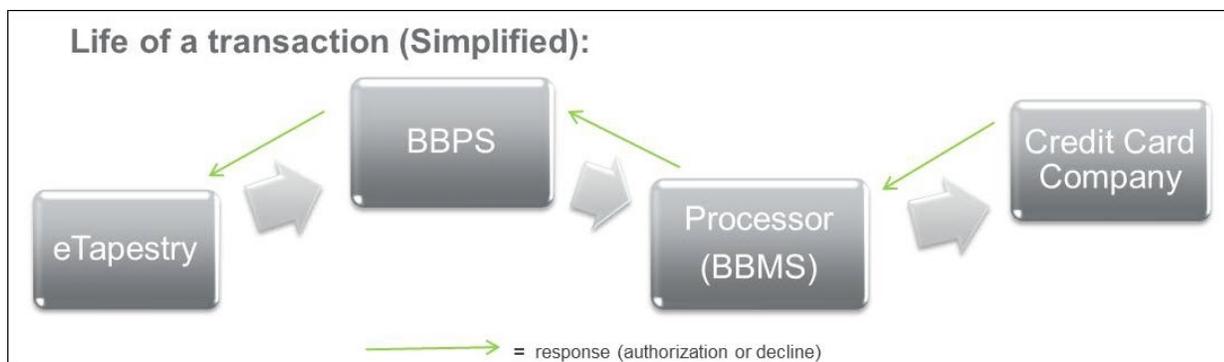
> **Set Up Blackbaud Payment Service (BBPS) and Blackbaud Merchant Services (BBMS)**

1. Go to https://bbmsmerchant.blackbaud.com to access the Blackbaud Merchant Services portal.
   - In the **Site ID** field, enter your organization's Blackbaud site ID.
   - In the **Email** field, enter your email address. To set up an account, you must be Blackbaud's primary contact at your organization.
2. Click **Next**. The Address screen appears.
3. Verify that the information on the screen correctly identifies your organization. If the information is correct, click **Next**. The Terms and Conditions screen appears.
4. Review Blackbaud Payment Service's terms and conditions. Select **I accept the terms** and click **Next**. The Blackbaud Payment Service Login screen appears.
5. Create a user name and password for BBPS. You will need these credentials to link BBPS to your *eTapestry* database, so retain this information for your records.
6. Click **Next**. The Bank Deposit screen appears.

7. In this screen, review payment terms and enter bank information.

- Review the agreement for direct deposits and select **I accept the terms**.
- Enter the information for the bank account where you want to receive payments. Enter the country, currency, bank name, routing and account number, and account type.
- In the **EIN** field, enter you organization's tax identification number. This might be an EIN, CAR, TIN, or ITIN number.
- In the **Account Holder** field, enter the name on the account associated with the tax identification number.

Note: Disbursements are automatically deposited into the bank account you indicate, normally on a weekly basis. You can consult the disbursement schedule in this Knowledgebase solution.

8. Click **Next**. The Statement Descriptor screen appears.

9. In this screen, enter the information that appears on a donor's credit card statements for transactions with your organization.

- In the **Name** field, enter up to 18 characters describing the transaction. We recommend that you enter the name of your organization or an abbreviation if it does not fit.
- In the **Phone number** field, enter a number donors can call if they have questions about their transaction.

10. Click **Next**. The Blackbaud Merchant Services Login screen appears.

11. Create a user name and password for BBMS. You will need these credentials to link BBMS to your *eTapestry* database, so retain this information for your records.

12. Click **Submit** to create your account.

❯ Link your BBPS Account to your *eTapestry* Database

1. From **Management**, click **My Organization**. The My Organization screen appears.

2. Click the **Preferences** tab.

3. In the Preferences tile, enter your BBPS credentials.

- In the **BBPS UserName** field, enter the user name you set up for BBPS.
- In the **BBPS Password** field, enter the password you set up for BBPS.

4. Click **Save And**.

❯ Link your BBMS Account to your *eTapestry* Database

1. From **Management**, click **My Organization**. The My Organization screen appears.

2. Click **eCommerce**.

3. Under **Tasks**, click **Add BBMS Processor**.

4. If this is the default processor to use, select **Default**.

   Enter your BBMS account credentials.

5. If you want to process direct debits (ACH/EFT) from donors who provide bank routing

information, select **Supports EFT**. Donors can make recurring or one-time gifts.

> **Tip:** Be aware that ACH only supports the United States dollar. If you process transactions using another currency, do not select this option.

> **Note:** When you use BBMS, direct debits do not process in real time. These transactions are processed in bulk one time each day for seven days. When transactions do not process successfully within seven days, **eTapestry** automatically generates a gift reversal.

6. Click **Save**.

Make a Test Donation

After you set up a processor, we recommend you make a test donation to make sure everything is working correctly. If you have an online donation page, the easiest test is to make a $2 test donation through the form.

If you do not use online donation forms, select a record in your database such as a staff member and add a $2 gift. When you save the gift, select "Process Transaction" from the Save And menu and click **Save And**.

After you complete either test, verify that the donation appears correctly in your database and in the BBMS web portal. For more information, refer to Blackbaud Merchant Services (BBMS) Web Portal on page 8.

Reset your BBPS or BBMS Password

For your security, only your organization's primary contacts and site administrators can reset BBPS and BBMS passwords through Blackbaud.com.

For details about resetting your password, refer to this Knowledgebase solution.

> **Note:** You must update your passwords in **eTapestry** after you reset your BBPS or BBMS passwords. For more information, refer to Link your BBPS Account to your eTapestry Database on page 7 andLink your BBMS Account to your eTapestry Database on page 7.

Blackbaud Merchant Services (BBMS) Web Portal

After you set up your BBMS account, you must log into the web portal in order to be able to issue refunds and verify that all your settings are correct. We recommend that you log in as soon as you complete your setup.

> **Log into BBMS Web Portal**

1. Go to https://bbms.blackbaud.com. The login screen appears.

2. Enter your BBMS username and password. This is the second set of credentials you created during setup.

3. From Account Management, click **Disbursement information** to verify that your bank account

and contact information is accurate.

4. From Account Management, click **Account configurations**.

5. Enter your BBPS credentials. This is the first set of credentials you created during setup. Entering these credentials allows you to issue refunds if necessary.

6. If you created a test transaction, from Transactions, click **Transaction search**. A search screen appears.

7. Search for an verify your test transaction.

Reconcile BBMS Transactions

You can reconcile transaction in BBMS with the transactions tracked in your database. To reconcile, follow these steps.

1. Run the disbursement report from the BBMS web portal.

2. Query the transactions processed through BBMS in *eTapestry*.

3. Run a report in *eTapestry*.

4. Compare both reports.

> ## Run Disbursement Report from the BBMS Portal

1. Log into the BBMS web portal at https://bbms.blackbaud.com.

2. Under Reports, click **Disbursement**.

3. Click the disbursement you want to export.

4. To see a PDF of the report, click **Reports** and select "Detail." To download an Excel file of the report, click **Export** and select "Detail."

> ## Query Transactions Processed through BBMS in eTapestry

1. From **Queries**, click **Manage Queries**.

2. Select the BBMS query category. If you do not have one, under **Tasks**, click **New Category** to create it.

3. Under **Tasks**, click **New Query**. The Create a New Query screen appears.

4. In the **Query Basics** section, use the disbursement date on your disbursement report to name your query. For example, if the date on the disbursement report is January 15, 2013, name your query "2013-01-15 Disbursement."

5. In the **Starting Criteria** section, set the category and query to Base - All Constituents.

6. In the **Results** section, set the **Data Return Type** to Journal Entries.

7. In the **Criteria Options** section, select **Match each criteria**.

8. From the **Browse Fields** tab, select Commonly Used Fields in the menu.

9. Click **Journal Entry Date**. Set **Range Type** to Custom Range and enter the date range listed on

your disbursement report.

10. From the **Browse Fields** tab, select Journal in the menu.

11. Click **Transaction Processors** and select your BBMS processor.

12. Click **Save And**.

> **Run BBMS Transaction Report in eTapestry**

1. From **Reports**, click **Manage Reports**.

2. Select the BBMS Reports category. If you do not have one, under **Tasks**, click **New Category** to create it.

    Create a category called "BBMS Reports." Click **Save Category** under Tasks.

3. From the BBMS Reports category, click **New Report**. The Create a New Report page appears.

4. In the **Report Basics** section, name the report "BBMS Reconciliation Report."

5. In the **Group Results** section, select a grouping option from the **Group by** field. Grouping options enable you to place accounts or entries that share a common value together. You can also elect to show totals for each group or collapse each group into a single line.

6. In the **Report Columns** section, select Gift Type Fields under the **Browse Fields** tab.

7. Click **Credit/Debit Card Number** and **Credit/Debit Card Type**. You can arrange the columns by dragging them. We recommend you arrange columns in the following order:
    - **Date**
    - **Credit/Debit Card Type**
    - **Account Name**
    - **Credit/Debit Card Number**
    - **Received**

8. Click on the dots icon next to the Date column and change the sort order to ascending.

9. Under **Tasks**, click **Save and Run**.

10. In the **Query** section, select the query you built for the time frame you want to reconcile.

11. In the **Delivery Options** section, select how to display the results of the report in the **Report Format** menu.

12. Click **Submit** to run the report.

Set Up Confirmation Email Template

When a constituent completes an online form, you can choose to send them an automatic email confirmation. You can also choose whether you want to get an email confirmation yourself that a visitor completed the form.

The email you get yourself is standard, but the one you send to your constituents uses an email template you select. Before you create your forms, you should set up the template you want to use. A custom template can be reassuring to constituents, because it confirms that their information was received and gives you a chance to thank them in a familiar way, especially if you include your logo or other touches that identify your organization in a way they recognize.

> **Create a Communication Template**

1. From **Communications**, click **Manage Communications**. The Communication Categories page appears.

2. Click the **Email Templates** category to select it.

3. Under **Tasks**, click **New Email or Document Template**. The Communication Template Wizard appears.

Correspondence Template: (New)

Steps
1 Settings
2 Layouts
3 Edit
4 Save and
Finish ▼

Navigation
Back | Next

Preview
📄 PDF 📄 Word ✉ Email

Advanced Modes

Basic Information

Name * [_____]
Description [_____]
☐ Read Only
☐ Favorite Correspondence Template

Settings

Email Options

Subject [_____]

Advanced Mass Email Options
☐ Include "Forward to a Friend" Link within [Footer ▼]
☐ Include "View as a Web Page" Link
☐ Include Sharing Links

Document Options

			Margins		
Page Size	Letter (8.5in x 11in) ▼				
Units	in ▼		Top	1.0	in
Width	8.5	in	Bottom	1.0	in
Height	11.0	in	Left	1.0	in
Orientation	Portrait ▼		Right	1.0	in

4. On Step 1, enter the basic information for your template.

   - In the **Name** field, enter a unique name, such as "Online Giving Form Confirmation Email".

   - You can enter a description to help you identify the template.

   - To prevent other users in your organization from editing the template, select **Read Only**. We do not recommend that you use this option for online form confirmation emails.

   - To make this template a favorite, select **Favorite Communication Template**. Favorite templates appear in the Favorites tile on your Home dashboard.

   - Since this communication will be used as an email, enter a subject for the email. We recommend that you use a subject that clearly thanks the constituent for their submission, such as "Thank you for your gift."

   - To include a link for recipients to forward the message to a friend, select **Include**

"Forward to a Friend" Link within. Select whether you want this link on the header or footer of the email. Because of the purpose of this message, this link might not make sense for confirmation templates.

- To include a link for recipients to open the message in a web browser, select **Include "View as a Web Page" Link**.

5. Click **Next** to create the template. Step 2 appears.

6. Under Documents, select the eCommerce Confirmation template. You can use any template you choose, but this template is pre-configured to include the information most useful in this situation. The Communication Template page appears.

7. Edit the template to include specific information about your organization, such as the name and logo, signature information, and any other details you want to include. In the middle of the template, you see the eCommerce widget, which allows you to include details about the transaction. We recommend that you use the widget as it appears, but you can double-click it if you want to edit it.

8. Once you are finished making edits, click **Next** to save the template.

Set Up User-Defined Fields

Certain types of forms require that you include user-defined fields to track specific information, such as ticket quantity for even registration pages. You can also choose to include additional user-defined fields in your forms to track information from your constituents. For example, if you include a T-shirt with a certain donation level, you might include a **T-Shirt Size** user-defined field in your donation forms. Or, if you are hosting an even where attendees will receive a meal, you could want to include a **Meal Preference** user-defined field in that event registration form.

Whether you need to include required or optional user-defined fields, it is best to configure them before you begin to create your form.

❯ Add a user-defined field

1. From **Management**, click **User-Defined Fields**.

2. Like queries, reports, and communication templates, defined fields must be placed into categories to help keep your database organized in a meaningful way. *eTapestry* includes only one defined-field category called **Base** by default. However, you can create as many defined-field categories as you need. You can also move fields from one category to another. To create a new category, click **New Category** from the Tasks menu.

3. Once you have chosen the category for your new field, click the category to select it. Click **New Defined Field** under Tasks.

4. On Step 1, complete the following information.

   - On the **Name** field, enter a unique and descriptive name for the field. You can edit the name of the field after you create it.

   - On the **Description** field, it can be helpful to enter a longer description of the field to

help other users in your organization when they use the field.

- On the **Data Type** field, select the type of data you want to track in this field.

    - **Text:** Use this type for fields that will contain letters and numbers. For example, this data type is well-suited for an Account Type field.

    - **Date:** Use this type for fields that contain full dates. Fields with this data type can only accept dates in the mm/dd/yyyy or dd/mm/yyyy (European locales) format. A common field of this type is Membership Expiration Date.

    - **Month, Day (mm/dd):** Use this type for fields that will contain only month and day. Fields with this data type can only accept dates in the mm/dd or dd/mm (European locales) format. Common examples are birthday or other calendar dates where capturing the specific year is not necessary.

    - **Number:** Use number for fields that will contain only numbers. Fields with this data type can accept decimal or whole numbers, which can be positive or negative. Number fields cannot accept text. Common examples include Volunteer Hours or Number of Tickets for ticket purchases. You can query on number fields to find all items with numbers within a certain range, and number fields can be totaled in reports and communication.

- **Currency:** Use currency for fields that will contain currency amounts. Fields with the currency data type can accept only numbers and will display a currency symbol when the data is saved or displayed in a report. Currency fields cannot accept text. You can query on currency fields to find all items with currency amounts within a certain range, and currency fields can be totaled in reports and communication.

    You cannot edit the data type on a field once it has been saved. Be sure that you have chosen the correct data type prior to saving the field.

5. To continue to the next step, click **Next**.

6. On Step 2, select where you want the user-defined field to appear.

    Normally, you should only select one area of application for each field. If you select more than one application area, updating the field in one location does not update it in any other location.

    - **Account Types:** When you select one of these options the defined field appears on the Defined Fields page for the specified account type. Fields with this application should contain data that pertains to the account as a whole and that is unlikely to change much over time or need a historical record of changes. Some examples include Account Type, Gender, Birthdate, and Interests.

    - **Journal Types:** When you select one of these options the defined field appears in the defined-field area of the designated journal entry (calendar items, contacts, notes, or transactions).When you select Transactions, the field appears on all transaction types except for soft credits.

    - **Other:** When you select Personas the user-defined field appears on the Personas page. A user-defined field should only appear on this page when it contains address-related data that varies from one address to another on the account. For example, you can select to display a National Change of Address (NCOA) user-defined field to track whether an account's address has changed, been standardized, or is invalid.

When you select Relationships the user-defined field appears on the Relationships page. User-defined fields on this page should contain data that is relevant to the relationship itself. For example, you can select to display a Notify user-defined field to identify the account to inform when you receive a tribute donation.

You should not apply a defined field to multiple screens in the database. There are very few exceptions to this rule. In most cases, the data really belongs only in one area of the database. Additionally, when a field is set up to appear in multiple areas, updating the field in one location does *not* update it in any other location.

7. To continue to the next step, click **Next**.

8. On Step 3, select the field attributes.

9. To continue to the next step, click **Next**.

10. On Step 4, select the display type.

Once you save a user-defined field has been saved, you cannot change the display type from a selectable type (selection from a set of values and allow assignment of only one item) to a free-form type (text box and note field), or from a free-form type to a selectable type.

- **Selection from a set of values:** Also referred to as a multi-select field, this type of field appears as a set of checkboxes and allows users to select multiple values on the field. For example, you might create a Volunteer Availability field with the values Day, Evening, and Weekend so a volunteer can indicate that they are available at more than one of those times.

- **Allow assignment of only one item:** Also referred to as a single-select field, this type of field appears as a drop-down menu and allows users to select only one value in the field. For example, you might create an Account Type field with the values Individual, Business, and Foundation. An account can only be one of those three choices, so a single-select field works well.

- **Text Box:** A text box allows the user to type in a single line of data. For example, you might create a field on the Journal Contact screen for Volunteer Hours, where the user could type how much time a volunteer worked during a session. Text box fields must obey the data type. For example, if the data type is set to date, only dates in mm/dd/yyyy format can be entered.

- **Note Field:** A note field allows the user to enter large amounts of data with multiple lines. For example, you might create a field on the constituent's Defined Fields page used to record how the constituent came to be involved with your organization. Because this could have several lines of text, you might use a note box display type for that field. Note fields must obey the data type. For example, if the data type is set to date, only dates in mm/dd/yyyy format can be entered.

11. To continue to the next step, click **Next**.

12. If you use advanced security, in step 5 make any necessary security selections to control which users can see the field.

13. To continue to the next step, click **Next**.

14. On Step 6, you add values to fields of selectable types (selection from a set of values and allow assignment of only one item). If you set the display type to one of the free-form displays, you

do not need to create values and can proceed to the Finish step.

A selectable field must have some values listed in it in order to appear on screen for data entry. If you create a selectable field and do not create any values for it, the field will not appear anywhere in the database.

To create a value, type the value name into the **Name** field, enter a Description if you like, and click **Add Value**. Continue adding values following those steps until you have all the values you need for the field. If you make a mistake on a value, click **Delete** underneath the value. Once you save this field, you will not be able to delete any values, although you will be able to rename them or mark them as inactive if needed. To change the order of the values, drag and drop the values from the list to your desired order.

15. To create the field, click **Save and Finish**.

Required User-Defined Fields

Event registration and membership signup forms require certain user-defined fields, which you must configure before you create these forms. Volunteer signup forms do not require any user-defined fields, but we recommend that you consider adding a few fields that are useful for those forms.

❯ Event Registration Pages

If you use event registration forms, you must include a user-defined field to track ticket quantity. The user-defined field must be set up in the following way.

User-Defined Field	Data Type	Field Application	Display Type
Ticket Quantity	Number	Transactions	Text Box

You cannot publish an event registration page without this user-defined field.

❯ Membership Signup Pages

If you use membership signup forms, you must include two user-defined fields. The user-defined fields must be set up in the following way.

User-Defined Field	Data Type	Field Application	Display Type
Membership level	Text	Transactions	Allow assignment of only one item
Membership type	Text	Transactions	Allow assignment of only one item

You cannot publish a membership signup page without these user-defined fields.

❯ Volunteer Signup Page

Volunteer pages do not require any user-defined fields, but we recommend that you create four user-defined fields set up in the following way.

User-Defined Field	Data Type	Field Application	Display Type
Volunteer availability - days of the week	Text	Constituents	Selection from a set of values (make values match the days of the week that volunteers are allowed to select)
Volunteer availability - times of day	Text	Constituents	Selection from a set of values (make values match the hour ranges that volunteers are allowed to select)
Volunteer activity/interest	Text	Constituents	Selection from a set of values (make values match the activities available to volunteers)
Volunteer skills	Text	Constituents	Selection from a set of values (make values match the skills you find desirable in volunteers)

Note: You can select Text Box as the display type for these user-defined fields, but we recommend that you use a selection from a set of values. This allows you to query on membership level and type more easily.

Set Up Funds, Campaigns, and Approaches

When you create an online form that receives payments, such as a donation, membership, or event registration form, you are required to select a fund for transactions received through that form. You can also select a campaign and approach, although those options are only required if they are set as required in your database.

To keep track of donations and payments that come through DIY forms, we recommend that you set up a specific approach for each form. For example, if you have an event registration form for your annual gala, you might add an approach called "Annual Gala 2013 Online Registration." This allows you to query and report on registrations for that event that came through your online form.

If you want to track form transactions using funds or campaigns that already exist in your database, you do not need to configure them before you create your forms, as you are able to select existing ones from the form configuration screen. If the form you want to create is designed to receive donations for a specific purpose that is unique to the form, we recommend that you set up a fund for that purpose before you create the form. For example, if you want to create a form to seek donations for your environmental education project and you do not already have a fund for that project, you can create a fund called "Environmental Education" and select it when you configure your form.

Finally, you can also set up a campaign if the transactions from one of the forms are part of a campaign that does not already exist in your database.

Funds

Funds designate what the purpose of the donation is. A **Fund** is always a required field when you enter a gift. Many organizations create a general fund where unrestricted donations are recorded, and several other funds with specific designations, such as a fund for each event and funds for different projects that you undertake. Each fund may be associated with multiple campaigns and approaches.

If you plan to export your donations to your accounting software, the fund is where you associate a gift with the credit and debit accounts recognized by your accounting package. For each fund that you set up, you can associate only one bank account, one income or revenue account, and one receivables account. So if your accountant needs to allocate some donations to an unrestricted income account and others to a restricted income account, you must create two separate funds.

> ### Add a fund

1. From the **Management**, click **Funds**. The Funds page appears.
2. Under Tasks, click **New Fund**.The New Fund screen appears.
3. In the **Name** field, enter a descriptive name for the fund.
4. In the **Description** field, you can enter a description to better identify the campaign fund.
5. If you intend to export transactions from this fund to your accounting software, enter the appropriate account numbers for this fund in the **Cash Account**, **Receivables Account**, and **Revenue Account** fields.
6. If you intend to use the *Financial Edge* export, enter the project ID In the **Financial Edge Project ID** field.
7. To create the fund, click **Save And**.

> ### Disable a Fund

When you no longer need a fund, you can disable it. When you disable a fund it does not appear on the menu when you enter a gift, but you retain the gift history to that fund. You cannot delete a fund.

To disable a fund, from **Management**, click **Funds**. Under the name of the fund, click the **Enabled** link. The fund disables for your database.

Campaigns

Campaigns are the overall goal of a fundraising project. They have a defined start and end date, and usually have a monetary goal. Typical campaigns include annual campaigns and capital campaigns. Most organizations do not have many campaigns, and not all gifts have to be tied to a campaign.

The **Campaign** field is not required when you add a gift, although your organization can choose to make it required.

> ### Add a Campaign

1. From **Management**, click **Campaigns**. The Campaigns page appears.
2. Under Tasks, click **New Campaign**.The New Campaign screen appears.
3. In the **Name** field, enter a descriptive name for the campaign.
4. In the **Description** field, you can enter a description to better identify the campaign internally.
5. In the **Goal** field, enter the monetary goal for the campaign.
6. In the **Quantity** field, enter the total number of gifts you have set as a goal for this campaign.

7. To create the campaign, click **Save And**.

› Disable a Campaign

When you no longer need a campaign, you can disable it. When you disable a campaign it does not appear on the menu when you enter a gift, but you retain the gift history to that campaign. You cannot delete a campaign.

To disable a campaign, from **Management**, click **Campaigns**. Under the name of the campaign, click the **Enabled** link. The campaign disables for your database.

› Require Campaigns

You can make campaigns required so that when your organization enters gifts a campaign must be linked to each gift. To make the **Campaign** field required in gift entry screens, from **Management**, click **Campaigns**. On the Campaigns page, under **Settings**, select **Require Campaign on Transactions**.

Approaches

Approaches are the means you use to raise money for your organization. They normally track the sources your organization uses to generate gifts and the expenses associated with these sources. They can include any activity, such as a direct mailing, a phonathon, or a special event. Approaches can help you analyze how different types of asks perform with your constituents.

The **Approach** field is not required when you add a gift, although your organization can choose to make it required. When you know what specific approach generated a gift, we recommend that you track it when you enter that gift.

› Add an approach

1. From **Management**, click **Approaches**. The Approaches page appears.
2. Under Tasks, click **New Approach**. The New Approach screen appears.
3. In the **Name** field, enter a descriptive name for the approach.
4. In the **Description** field, you can enter a description to better identify the approach internally.
5. In the **Goal** field, enter the monetary goal for the approach.
6. In the **Quantity** field, enter the total number of gifts you have set as a goal for this approach.
7. To create the approach, click **Save And**.

› Disable an Approach

When you no longer need an approach, you can disable it. When you disable an approach it does not appear on the menu when you enter a gift, but you retain the gift history to that approach. You cannot delete an approach.

To disable or re-enable an approach, from **Management**, click **Approaches**. There is an indicator under the approach name to indicate if it is enabled or disabled. Click it to switch the status of the approach.

> **Require Approaches**

You can make approaches required so that when your organization enters gifts an approach must be linked to each gift. To make the **Approach** field required in gift entry screens, from **Management**, click **Approaches**. On the Approaches page, select **Require Approach on Transactions**.

Create DIY Forms

Once you have set up your payment processor, created a confirmation email template, set up user-defined fields, and configured approaches, funds, and campaigns, you are ready to create you DIY forms. The steps are slightly different depending on the type of form you want to publish.

> **Create an online form**

1. From **Management**, select **DIY Online Forms**. The DIY Forms page appears.
2. Click **Create a New Page**.
3. Click **Online Giving Page**. The *eTapestry* Styles window appears.
4. Select the style you want to use as a template for your page. You can edit the content and design of your form later.
5. Click **Next**. The configuration page appears.
6. Under **General Page Settings**, in the **Page Name** field, enter a name for your page. This is an internal name for your reference and does not appear on the page.
   a. Enter a description for your reference. This is optional and does not appear on the published page.
   b. In the **Title** field, enter a descriptive title for the page. The title appears at the top of the browser when visitors view the page.
   c. In the **URL** field, enter the URL extension you want to use for this page. The extension appears at the end of the web address for the page.
   d. To include a comments box on the form, select **Include comments box**.
   e. In the **Default Country** field, select the default country to display in the address block of the form.
7. Under **Online Giving Settings**, select **Send the donor a confirmation email** to send an email confirmation to donors when the form is submitted.
   a. To edit the text of the success message, select **Edit Message**. The Edit Success Message Text screen appears. On this screen, you can enter a custom message that is sent 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 send 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 Onine Forms Editor page, select **Go Live**. We recommend you test the confirmation email to ensure the message appear as you have intended.

b. In the **From what address** field, enter the email address you want to appear for confirmation emails.

c. In the **Subject** field, enter the subject to appear in the confirmation email to donors.

d. In the **Confirmation Email Template** field, select the template to use for confirmation emails. The options that display from the drop down are the templates available from **Communications**. If a template does not exist that fits your needs, you can create a new template or edit an existing template in **Communications**. For more information, refer to Creating an Email Template.

e. To send an email confirmation to yourself when the form is submitted, select **Send your organization a confirmation email**. You receive the confirmation email every time a visitor submits the form. To learn more about this standard email, refer to Automatic organization notification email.

   i. In the **To what address(es)** field, enter the email address to receive the notification email. This is typically someone in your organization. To enter multiple email addresses, separate each one with a comma.

   ii. In the **Subject** field, enter the subject to appear in the confirmation email to your organization.

f. To generate a receipt number to include on the donation confirmation email, select **Generate receipts on transactions from this page**.

Tip: In *eTapestry*, when you include receipt information as a part of your email confirmations, you are creating an "eReceipt" by definition.

To send the eReceipt, the donor confirmation template you select in the **Confirmation Email Template** field must include the **Generated Receipt Number** merge value or the **eCommerce Details** widget. When you select to generate eReceipts, *eTapestry* automatically includes the next unique receipt number that is available in the database on each receipt.

> *Note:* When (None Selected) appears in the **Confirmation Email Template** field, the default template *eTapestry* uses automatically includes eReceipt information.

g. In the **Transaction Processor** field, select the processor you want to use for transactions received through this form. To allow electronic fund transfers through the form, select the **Include ACH/Direct Debit** checkbox. For information about how to add a transaction processor in *eTapestry*, refer to Set Up Transaction Processor on page 1.

h. In the **Fund** row, click **Select Fund(s)**. The Select Fund(s) screen appears.

   i. To select a fund for the page, click its name. You must select at least one fund for donations to process to from the form. When you select one fund, all transactions default to that fund and the field does not appear on the form. When you select more than one fund, a **Fund** field appears on the form for users to select the fund for the transaction.

   ii. To save your fund selections, click **Update**.

   iii. Repeat these steps for any campaigns, approaches, or letters you want to apply to the page.

   > *Tip:* You can only select one campaign and one approach. These are required if designated as required during configuration. When you select a letter, you can later query on transactions to identify the donors to receive the letter.

i. If you use the optional Advanced Security Module, you can apply page and record security. For information about advanced security, refer to Advanced Security on page 29.

j. To automatically track a field value when a form is submitted, you can add a hidden field to the form that does not appear on the published page. For more information about hidden fields, see Hidden Fields on page 29.

8. To create the page and begin editing it, click **Submit**.

Event Registration Page

> *Tip:* For best practice information about online event registrations, refer to eTapestry Best Practices: Online Events and Ticket Sales.

When you use event registration forms, you must specify the ticket price for the event and you must also include a user-defined field to track ticket quantity. You cannot publish an event registration page until these steps are complete. When you create the user-defined field, it must be set up this way:

User-Defined Field	Data Type	Field Application	Display Type
Ticket Quantity	Number	Transactions	Text Box

> *Note:* Event registration forms are best to use for paid events. For free events, we recommend that you use a contact form that does not require payment fields.

❯ DIY event registration page: Create form and General Page Settings

1. From **Management**, click **DIY Online Forms**. The DIY Forms page appears.

2. Click **Create a New Page**.

3. Click **Event Registration Page**. The *eTapestry* Styles window appears.

4. Select the style you want to use as a template for your page. You can edit the content and design of your form later.

5. Click **Next**. The configuration page appears.

6. In the **Page Name** field, enter a name for your page. This is an internal name for your reference and does not appear on the page.

7. Enter a description for your reference. This is optional and does not appear on the published page.

8. In the **Page Title** field, enter a descriptive title for the page. The title appears at the top of the browser when visitors view the page.

9. In the **URL** field, enter the URL extension you want to use for this page. The extension appears at the end of the web address for the page.

10. To include a comments box in the form, select the **Include comments box?** checkbox.

11. In the **Default Country** field, select the country you want to display as default in the address block of the form.

❯ DIY event registration page: Event Signup Settings

For information about how to create a DIY event registration form, refer to DIY event registration page: Create form and General Page Settings on page 22.

1. In the **From what address?** field, enter the email address from which you want confirmation emails to be sent. This is the email address your event registrants will see when they receive confirmation emails from you after they submit the form.

2. In the **Send Notification to Donor** field, enter the subject you want in the confirmation email to event registrants.

3. In the **Confirmation Email Template** field, select the template you want to use for confirmation emails. If you do not choose to send confirmation emails, leave this field blank. The options that display represent the templates available in the communication area of your database. If you do not see a template that fits your needs, you can create a new template or edit an existing template in communication. For more information, refer to Creating an Email Template.

4. To send an email confirmation to yourself when the form is submitted, select **Send your organization a confirmation email?**. You receive the confirmation email every time a visitor completes and submits the form. To learn more about this standard email, refer to Automatic organization notification email.

5. In the **From what address?** field, enter the email address where you want to send the notification email. This is normally someone in your organization. Separate multiple email addresses with a comma.

6. In the **Subject** field, enter the subject you want in the confirmation email to your organization.

7. If your organization integrates with *everydayhero*, and you would like event registrants to participate in your *everydayhero* campaigns, you can select to allow event registrants to fundraise for your campaigns. For more information, see Event Registration DIY Forms.

8. In the Transaction Processor field, select the processor you want to use for payments received through this form. To allow electronic fund transfers through the form, select the **Include ACH/Direct Debit** checkbox.

   For information about how to add a transaction processor in *eTapestry* , refer to Set Up Transaction Processor on page 1.

> ### DIY event registration page: Select Fund Information

For information about how to create a DIY event registration form, refer to DIY event registration page: Create form and General Page Settings on page 22.

1. Click **Select Fund(s)**. The Select Fund(s) screen appears.

2. Click the name of a fund to select it. You must select at least one fund where donations will be tracked. To select additional funds, click the names of the funds. If you select only one fund, all payments default to that fund and the field does not display on the form. If you select more than one fund, a fund field appears on the form and users select which fund to use.

3. Click **Update** to save your fund selections.

4. You can select a campaign for payments made through this form. Only one campaign can be associated with the form. If you select a campaign, payments made through this form default to the campaign, and no campaign field appears on the form. A campaigns is required only if they are configured as required in the database. To select a campaign, click **Select a Campaign**.

5. You can select a campaign for payments made through this form. Only one campaign can be associated with the form. If you select a campaign, payments made through this form default to the campaign, and no campaign field appears on the form. A campaigns is required only if they are configured as required in the database. To select a campaign, click **Select a Campaign**.

   You can select an approach for payments made through this form. Only one approach can be associated with the form. If you select an approach, payments made through this form default to that approach, but no approach field appears on the form. An approach is required only if they are configured as required in the database. To select an approach, click **Select an Approach**.

   If you use the optional Advanced Security Module, you can add page and record security. For more information, refer to Advanced Security on page 29.

   If you want to track a value for a field automatically when a constituent submits this form, you can add a hidden field to the form, which does not appear on the published form. For more information about hidden fields, refer to Hidden Fields on page 29.

6. Click **Submit** to create the page and begin editing it.

> ### DIY event registration page: Event Tickets

For information about how to create a DIY event registration form, refer to DIY event registration page: Create form and General Page Settings on page 22.

Warning: Custom skins are not compatible with multiple ticket prices for DIY Event forms. We recommend you use embeddable templates instead. For information about embeddable DIY forms, refer to Embed DIY Forms on page 32.

1. Hover your cursor over **Before your page can Go Live, you must set up your event tickets** and click **Edit**. The Edit Ticket Options screen appears.

2. For each ticket, enter a label, price and description. For example, you may want to create separate tickets for students, adults, and seniors.

3. Select a user-defined field to indicate the quantity of tickets and then select how you want the field to apply. For example, you may have a user-defined field called Student Ticket Quantity and you select to apply it to Journal Entry.

   Each ticket requires a unique user-defined field. When you create the field, make sure you select "Number" for **Data Type**, **Transactions** for **Field Application**, and **Text Box** for **Display Type**. For more information about how to create user-defined fields, refer to User-Defined Fields.

4. Enter a non-deductible amount for the ticket. This amount does not display on the event page. It is important you remember to indicate the amount that is tax deductible when you send receipts and thank you letters.

   This field only displays for *eTapestry* users in the United States, Canada, and Australia.

5. To create additional tickets, click **Add another event ticket**.

6. To save your changes, click **Update**.

Create a membership signup page

1. From **Management**, click **DIY Online Forms**. The DIY Forms page appears.

2. Click **Create a New Page**.

3. Click **Membership Signup Page**. The *eTapestry* Styles window appears.

4. Select the style you want to use as a template for your page. You can edit the content and design of your form later.

5. Click **Next**. The configuration page appears.

6. In the **Page Name** field, enter a name for your page. This is an internal name for your reference and does not appear on the page.

7. Enter a description for your reference. This is optional and does not appear on the published page.

8. In the **Page Title** field, enter a descriptive title for the page. The title appears at the top of the browser when visitors view the page.

9. In the **URL** field, enter the URL extension you want to use for this page. The extension appears at the end of the web address for the page.

10. To include a comments box in the form, select the **Include comments box?** checkbox.

11. In the **Default Country** field, select the country you want to display as default in the address block of the form.

12. To send an email confirmation to members when the form is submitted, select **Send the donor**

a confirmation email?

13. In the **From what address?** field, enter the email address from which you want confirmation emails to be sent. This is the email address your members will see when they receive confirmation emails from you after they submit the form.

14. In the **Subject** field, enter the subject you want in the confirmation email to members.

15. In the **Confirmation Email Template** field, select the template you want to use for confirmation emails. If you do not choose to send confirmation emails, leave this field blank. The options that display represent the templates available in the communication area of your database. If you do not see a template that fits your needs, you can create a new template or edit an existing template in communication. For more information, see Creating an Email Template.

16. To send an email confirmation to yourself when the form is submitted, select **Send your organization a confirmation email?**. You receive the confirmation email every time a visitor completes and submits the form. To learn more about this standard email, see Automatic organization notification email.

17. In the **To what address(es)?** field, enter the email address where you want to send the notification email. This is normally someone in your organization. Separate multiple email addresses with a comma.

18. In the **Subject** field, enter the subject you want in the confirmation email to your organization.

19. In the Transaction Processor field, select the processor you want to use for payments received through this form. To allow electronic fund transfers through the form, select the **Include ACH/Direct Debit** checkbox.

    For information about how to add a transaction processor in *eTapestry* , refer to Set Up Transaction Processor on page 1.

20. Click **Select Fund(s)**. The Select Fund(s) screen appears.

21. Click the name of a fund to select it. You must select at least one fund where donations will be tracked. To select additional funds, click the names of the funds. If you select only one fund, all payments default to that fund and the field does not display on the form. If you select more than one fund, a fund field appears on the form and users select which fund to use.

22. Click **Update** to save your fund selections.

23. You can select a campaign for payments made through this form. Only one campaign can be associated with the form. If you select a campaign, payments made through this form default to the campaign, and no campaign field appears on the form. A campaigns is required only if they are configured as required in the database. To select a campaign, click **Select a Campaign**.

    You can select an approach for payments made through this form. Only one approach can be associated with the form. If you select an approach, payments made through this form default to that approach, but no approach field appears on the form. An approach is required only if they are configured as required in the database. To select an approach, click **Select an Approach**.

    If you use the optional Advanced Security Module, you can add page and record security. For more information, see Advanced Security on page 29.

    If you want to track a value for a field automatically when a constituent submits this form, you can add a hidden field to the form, which does not appear on the published form. For more information about hidden fields, see Hidden Fields on page 29.

24. Click **Submit** to create the page and begin editing it.

❯ Enter membership information on a membership form

1. On a membership form, click the white space under the Membership Information heading. The Manage Membership Fields screen appears.

2. The **Membership Level** field is required, and the **Membership Type** field is optional. Price is required and associated with the **Membership Level** field.

   - Under Membership Level or Membership Type, click **Select a field...**. The Select Membership Field screen appears. Select the category where you have a user-defined field to track membership level or type and click on the field name to select it.

   - To edit the label of the field as it will appear on the form, enter your preferred label in the **Label** field.

   - Select whether you want the field to appear as radio buttons or as a dropdown menu, and enter the labels for the values as you want them to appear on the form. Enter a price for each level.

     To hide any of the values, clear the **Show** checkbox.

   - Click **Ok**. You return to the Manage Membership Fields screen.

3. Once you are finished entering a membership level and/or a membership type, click **Update**.

❯ Create a contact page

1. From **Management**, click **DIY Online Forms**. The DIY Forms page appears.

2. Click **Create a New Page**.

3. Click **Contact Page**. The *eTapestry* Styles window appears.

4. Select the style you want to use as a template for your page. You can edit the content and design of your form later.

5. Click **Next**. The configuration page appears.

6. In the **Page Name** field, enter a name for your page. This is an internal name for your reference and does not appear on the page.

7. Enter a description for your reference. This is optional and does not appear anywhere on the published page.

8. In the **Page Title** field, enter a descriptive title for the page. The title appears at the top of the browser when visitors view the page.

9. In the **URL** field, enter the URL extension you want to use for this page. The extension appears at the end of the web address for the page.

10. To include a comments box in the form, select the **Include comments box?** checkbox.

11. In the **Default Country** field, select the country you want to display as default in the address block of the form.

12. To send users a confirmation email upon completion of your form, select **Send the donor a confirmation email**.

13. If you want to edit the success message users will receive when they complete your form, 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 Onine Forms Editor page, select **Go Live**. We recommend you test the your changes to ensure the message appears as you have intended.

14. In the **From what address?** field, enter the email address from which you want confirmation emails to be sent. This is the email address your donors will see when they receive confirmation emails from you after they submit the form.

15. In the **Send Notification to Donor** field, enter the subject you want in the confirmation email to donors.

16. In the **Confirmation Email Template** field, select the template you want to use for confirmation emails. If you do not choose to send confirmation emails, leave this field blank. The options that display represent the templates available in the communication area of your database. If you do not see a template that fits your needs, you can create a new template or edit an existing template in communication. For more information, see Creating an Email Template.

17. To send an email confirmation to yourself when the form is submitted, select **Send your organization a confirmation email?**. You receive the confirmation email every time a visitor completes and submits the form. To learn more about this standard email, see Automatic organization notification email.

18. In the **To what address(es)?** field, enter the email address where you want to send the notification email. This is normally someone in your organization. Separate multiple email addresses with a comma.

19. In the **Subject** field, enter the subject you want in the confirmation email to your organization.

20. If you use the optional Advanced Security Module, you can add page and record security. For more information, see Advanced Security on page 29.

21. If you want to track a value for a field automatically when a constituent submits this form, you can add a hidden field to the form, which does not appear on the published form. For more information about hidden fields, see Hidden Fields on page 29.

22. Click **Submit** to create the page and begin editing it.

> **Create a volunteer page**

1. From **Management**, click **DIY Online Forms**. The DIY Forms page appears.

2. Click **Create a New Page**.

3. Click **Volunteer Page**. The *eTapestry* Styles window appears.

4. Select the style you want to use as a template for your page. You can edit the content and design of your form later.

5. Click **Next**. The configuration page appears.

6. In the **Page Name** field, enter a name for your page. This is an internal name for your reference and does not appear on the page.

7. Enter a description for your reference. This is optional and does not appear anywhere on the published page.

8. In the **Page Title** field, enter a descriptive title for the page. The title appears at the top of the browser when visitors view the page.

9. In the **URL** field, enter the URL extension you want to use for this page. The extension appears at the end of the web address for the page.

10. To include a comments box in the form, select the **Include comments box?** checkbox.

11. In the **Default Country** field, select the country you want to display as default in the address block of the form.

12. When a visitor submits this form, a journal contact is created with the details of the submission. In the **Journal Contact Subject** field, enter the subject you want to use for the journal contact.

13. To send an email confirmation to the volunteer when the form is submitted, select **Send Notification to Donor**.

14. In the **From what address?** field, enter the email address from which you want confirmation emails to be sent. This is the email address your volunteers will see when they receive confirmation emails from you after they submit the form.

15. In the **Subject** field, enter the subject you want in the confirmation email to volunteers.

16. In the **Confirmation Email Template** field, select the template you want to use for confirmation emails. If you do not choose to send confirmation emails, leave this field blank. The options that display represent the templates available in the communication area of your database. If you do not see a template that fits your needs, you can create a new template or edit an existing template in communication. For more information, see Creating an Email Template.

17. To send an email confirmation to yourself when the form is submitted, select **Send your organization a confirmation email?**. You receive the confirmation email every time a visitor completes and submits the form. To learn more about this standard email, see Automatic organization notification email.

18. In the **To what address(es)?** field, enter the email address where you want to send the notification email. This is normally someone in your organization. Separate multiple email addresses with a comma.

19. In the **Subject** field, enter the subject you want in the confirmation email to your organization.

20. If you use the optional Advanced Security Module, you can add page and record security. For more information, see Advanced Security on page 29.

21. If you want to track a value for a field automatically when a constituent submits this form, you can add a hidden field to the form, which does not appear on the published form. For more information about hidden fields, see Hidden Fields on page 29.

22. Click **Submit** to create the page and begin editing it.

Advanced Security

If your organization uses the Advanced Security module, you can take advantage of advanced security for DIY forms. To secure forms individually, you can add a hidden value to each form, and that form will be identified with that security code.

To limit which users can edit your DIY form, click **Select Page Security Fields** and select the appropriate security fields to apply to your form.

To limit which users can view or edit records and transactions generated from your DIY form, click **Record Security Fields** and select the appropriate security fields to apply to your form.

Forms with this advanced security hidden values behave in the following way:

- Transaction and contact data received through the form is marked with the security code that you applied to the specific form.

- When a new constituent who is not on the database fills out the form, that constituent account is marked with the security code of the form. Only users with permission to that security code can see the account.

- When an existing constituent who is already in the database fills out the form, if their account does not have a security code, one will not be added. This ensures that all the users who had access to that account before continue to have access to it.

Hidden Fields

When you create a DIY form, you can choose to include hidden fields, which the constituent does not see, to track values in *eTapestry* every time that form is submitted.

Hidden fields can help you track a variety of information about your constituents that can be useful as you analyze your data. Common uses for hidden fields include:

- Use a hidden field to track different versions of the same form for analytical and comparison purposes. For example, you might use a donation form with a picture representing your mission, and another one with no picture. Or you might want to ask for additional information about the donor in one version, and create another shorter and simpler version of the same form, and then compare them to see which one performs better. In these cases, you can add a hidden field indicating the form's version each time a donor submits it so you can later report on it. In this last example, you could hide a user-defined field called "Form type" and select the value "Long form" for the longer version and a value of "Short form" for the simpler version.

> **Note:** You can only include user-defined fields that are already configured in your database. If you want to include a user-defined field that is not yet created, you can save your online form and edit it once you have the user-defined field available. For information about creating user-defined fields, see User Defined Fields.

- Hidden fields can also help you track additional information about your constituents when they submit the form. For example, if you are using a form to register individuals as volunteers, you can use a hidden field to mark this person as a volunteer in the database. If you have a user-defined field that identifies your constituents as volunteers, when they fill out a form intended for volunteers you can automatically track the appropriate value in this field without requiring the constituent to select it in the form. In this example, you would add your user-defined field as a hidden field and select a positive value for it.

Edit DIY Forms

After you create a DIY form, you can edit it as often as necessary. Edits are not live until you re-publish your page.

> **Note:** Because they are for internal use only, edits to the page name or description appear immediately, even if the page is not saved and re-published. Changes to these two fields cannot be reverted with the **Revert Edits** button.

You can edit different areas of the form.

- **General configuration settings:** This allows you to change the configuration settings like the title of the page and the fund for payments. For more information, refer to Edit DIY Form Configuration Settings on page 30.
- **Design edits:** You can edit colors, pictures, and fonts on your forms. You can also change label names for sections and fields on the form and add parts and fields. For more information, refer to Edit DIY Form Design on page 30.
- **Save and publish:** The online form editor allows you to preview, save, and publish your form. For more information, refer to Save and Publish DIY Forms on page 31.

Edit DIY Form Configuration Settings

You can edit settings on your DIY forms, such as page title and fund, as often as necessary. From the DIY Forms page, locate the page you want to edit and click **Edit**. To edit the configuration settings, click **Settings**. The items on this screen are the same as in the screen for when you create a page. For more information, refer to Create Online Form.

> **Note:** To avoid breaking links to your web page, we recommend that you do not edit the URL.

Edit DIY Form Design

You can edit the design of your DIY forms, such as colors, labels, and fields, as often as necessary. The basic structure of the page, such as where form parts appear, is fixed and cannot be edited. From the

DIY Forms page, locate the page you want to edit and click **Edit**.

You can edit different areas of the form.

- To edit the colors on the form or to swap the style template, click **Edit Style**.
- To add content to the form, click **Add Item**. This enables you to add new sections, images, text, and fields. You can also add content directly from one of the form sections. Hover over the section where you want to add content and click the green plus sign icon. This allows you to add images, text, and fields.
- To edit a label on the form, hover over the content you want to edit and click the pencil icon.

Note: In transaction-based forms (online giving, event registration, and membership signup pages), the content on the Payment Information and Security Code blocks cannot be edited. The Payment Information block is required for forms that receive payments, and the Security Code block is required when captcha is enabled. The fields must be in the pre-defined order for transaction processing purposes.

- To move content within the form, hover over the item you want to move and click the multi-direction arrow icon. Drag and drop the content to the desired location.
- To delete content, hover over the item you want to delete and click **X**.

Note: At any point in the editing process, you can start over by clicking **Revert Edits**. You can select to revert to the latest saved version (published) or the last saved draft (unpublished). If you want to revert the template colors, you can re-apply the style. To do this, click **Swap Style** under Edit Style.

- To save your changes, click **Save**. For details about publishing the form, refer to Save and Publish DIY Forms on page 31

Save and Publish DIY Forms

After you have made your edits to a DIY form, you can save, preview, and publish the changes. If you are replacing an existing form with a new one, you can disable the existing form and immediately publish the new one in its place. This reduces down-time for the DIY form. For information about how to disable online forms, refer to Disable Online Forms.

From **DIY Forms**, locate the page you want to publish and click **Edit**.

- To review your changes and see how your page will look once published, click **Preview**.
- To revert your edits if you no longer want to keep them, click **Revert Edits**.To revert to the last published version, click **Published Version**. To revert to the last saved draft, click **Last Saved Draft**.
- To save your changes, click **Save**. You must save your changes before you can publish your page.
- To publish, click **Go Live**.

Note: If you have reached your page limit, you can disable or delete pages you no longer use to increase your available limit. For more information, refer to Disable Online Forms.

You can also embed forms into your existing website. This preserves the look and feel of your website on the form page. To access the code you need to insert a form into your existing website, from the

DIY forms locate the form you want and click **View code to insert this form into your existing website**. Copy the code into the html for your webpage to embed the form.

Tip: Templates for DIY forms are responsive. When website visitors view your pages that use responsive templates, the page adjusts to respect the size of the visitor's device. This makes it easier for visitors to use the form from tablets and smart phones. However, existing DIY pages created before the 7.12 release (on September 14, 2014) are not automatically responsive. To make an older DIY page responsive, republish the page. If the DIY form is embedded in another website, republish the page, copy the updated embed code, and use the code to update your website. For best results, your website should also be responsive. Templates with custom skins are not responsive. We recommend you use embeddable templates instead.

Tip: If a website visitor notifies you of a submission error for a DIY form that includes a user-defined date field, confirm whether or not the date separator, for example, "-" or "/", matches the standard date format for your *eTapestry* database's locale. To successfully validate a submission , these separators must match.

Embed DIY Forms

You can embed DIY forms into your existing website.

1. Create a DIY form in *eTapestry* and publish it. For details, refer to Create Online Forms.

   Tip: We recommend you use a DIY template that is labeled "Embeddable" because these have minimal styling. The embeddable templates enable your host site's background color to appear. If your webpage's background color clashes with the embedded form's content, consider editing the embeddable DIY page to add a background color.

2. Access your list of online forms, locate the form you want to embed, click **View code to insert this form into your existing website**, and copy the complete embed code.

3. From your website's content management system, paste the embed code where the embedded DIY form should appear and then republish your web page.

   The content of the embedded DIY form appears in an iframe on your web page. The DIY form is responsive; it will adjust to fit the size of the iframe and the viewer's screen size. For best results, ensure your host website is also responsive. If the content of the embedded page doesn't respond in the way you want, adjust the styling of the iframe, which has the id attribute of "etapIframe," to ensure it follows the responsive rules of the host website.

Whenever you update the DIY form, you may need to copy the updated embed code and use it to update the embed code on your host website.

Manage DIY Forms

Once you create your forms, you can copy, disable and delete forms as needed.

> **Disable and Enable DIY Forms**

If you no longer need a DIY form, you can disable it. Since disabled pages do not count towards the limit, you can disable pages if you have reached your limit. Once disabled, the URL for the form becomes inactive, but the form is still available for editing and re-enabling at any time. We recommend that you disable DIY forms instead of deleting them to keep a history of pages.

Note: You cannot disable DIY forms that are not yet published.

To disable a DIY form, from **Management**, click **DIY Online Forms**. From the list of existing forms, locate the form you want to disable and click **Disable**. On the DIY forms page, disabled forms are marked as "disabled."

To enable a form that has been disabled, from the list of existing forms locate the one you want to enable and click **Enable**. This enables the form to its last published version, and the status changes to "Live."

> **Promote DIY Forms**

When you publish a DIY form, you can now select to promote it on *Facebook* and *Twitter*. From your list of online forms, locate the form you want to promote and select a social media option under **Sharing**.

> **Delete DIY Forms**

If you no longer need a DIY form, you can delete it. Only disabled forms can be deleted. To delete a DIY form, from **Management**, click **DIY Online Forms**. From the list of existing DIY forms, locate the form you want to delete and click **Delete**.

Note: We recommend that you disable DIY forms instead of deleting them to keep a history of pages. Once you delete a page, you cannot recover it. For information about disabling DIY forms, refer to Disable Online Form.

> **Copy DIY Forms**

When you create a new DIY form, you can save time by copying an existing form if there is little difference between your new form and one of your existing forms.

To copy a DIY form, from **Management**, click **DIY Online Forms**. From the list of existing forms, locate the form you want to disable and click **Copy**. A confirmation message appears. Select whether you want to create a new form of the same type or you want to switch to a different form type.