

YOUR ETAPESTRY CHECKLIST

This checklist, based on the GPS Portal is a guide to track implementation of your eTapestry database.

GETTING STARTED WITH YOUR ETAPESTRY DATABASE

Here are housekeeping items you will want to complete for your organization.

- Login to your database
- Create new users
- Set User Security Rights
- Customize Dashboard
- Opt-In for Benchmark Reports
- Watch the Training Videos (in your database)
- Create Blackbaud Login ID
- Access the Knowledgebase and Help center in your eTapestry database
- Attend Welcome to eTapestry Webinar

PHASE 1: DATA CONVERSION

If your organization has a conversion per your contract, these are the steps to guide you through the process.

- Prepare and send data via the Drop Zone based on instructions sent by Technical Resource Manager
- Test your data when conversion analyst sends a revised database
- Go Live with your conversion

PHASE 2: IMPLEMENTATION TRAINING

This three day webinar series will provide an overview and navigation of your database, provide instruction on importing records, customizing your database, creating and running reports and engage your DIY eCommerce.

- Enroll in training after receiving email from Consulting Department regarding expectations and registration information.
- Attend Monday's session: Official Kick Off and Overview, including optional program on importing records.
- Attend Wednesday's session: User Defined Fields, Journal Entries, Queries
- Attend Friday's session: Reports and Do It Yourself (DIY eCommerce)
- Graduate from Implementation Training

PHASE 3: IMPORTING DATA

Your organization may choose to import records into your database rather than move forward with a conversion. If you have a conversion and don't plan to immediately import data, you may skip to Phase 4.

- Receive training on importing data into your database during Implementation Consulting.
- Import data into your eTapestry database

PHASE 4: ADD ON MODULES

Per the terms of your contract, you may have elected for additional services as noted below. If the services below do not apply based on terms of your contract, please skip to Step 5.

- Install Outlook Email Integration
- Implement Cart (eStore)
- Implement Personal Fundraising
- Implement Friends Asking Friends
- Implement Moves Management
- Implement Advanced User Security
- Implement Accounting Integration Consulting
- Implement Planned Giving Calculator
- Implement the Matchfinder function

PHASE 5: NOW WHAT?

You will now move forward and begin maximizing use of your database.

- Run your eTapestry Standard Reports
- Access print documentation on best practices and information on technical assistance by accessing the Knowledgebase.
- Create thank you letters, email blasts or prepare for the next annual appeal mailing in the Correspondence section.
- Customize your database by creating user defined fields, create a query, run a report and link couples by relationships.
- Install eTap Mobile
- Attend Freshman Orientation, a webinar series designed to share information on maximizing use and strategy of your database

KEY CONTACTS:

General Account Questions: eTapestry Relationship Managers at eTapRelationshipManagers@Blackbaud.com.

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