

everydayhero Integration Guide

10/25/2017 eTapestry 7.22.0 everydayhero Integration US

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eTapestry and *everydayhero* Integration

everydayhero is a peer-to-peer online giving solution that allows your organisation to build online fundraising campaigns as part of your existing websites or as a stand-alone fundraising site.

Show Me: [Watch a video](#) about the *everydayhero* integration with *eTapestry* to learn more

With the *everydayhero* integration with *eTapestry*, you can import constituent, participation, and gift information from *everydayhero* to update your database. Constituent records are updated with the information that comes from *everydayhero*, and new accounts are created if necessary. When you import gifts from *everydayhero*, you can create queries and reports of the information imported.

Sign up for *everydayhero*

Before you can begin to transfer information from *everydayhero* into *eTapestry*, you must sign up with *everydayhero*.

> Sign up for *everydayhero*

1. Visit everydayhero.com to sign up for your account.
2. In the top navigation, select **FOR NONPROFITS**.
3. On the everydayhero for nonprofits page, select to join *everydayhero*.

Access the API token for the *everydayhero* integration

When you sign up with *everydayhero*, you receive an *eTapestry* API key. You can then use the API key to establish a connection between *everydayhero* and *eTapestry*.

> Access the API token for the *everydayhero* integration

Note: For organisations based in Ireland, access your integration token from the Integrations page from your *everydayhero* dashboard. From the dashboard, select the Settings tab and click **Integrations**. The Integrations page appears.

On the Integrations page, under *eTapestry*, select **Copy** to copy the API token to your clipboard.

1. After you have created your *everydayhero* account, sign in to your account.
2. From your *everydayhero* dashboard, select **Settings**. The Settings page appears.
3. On the Settings page, under **DATABASE/CRM INTEGRATION**, select the **eTapestry integration**

token and copy it to your clipboard. For more information about where to enter your API token, see [Enter basic settings on page 2](#).

Get started with the *everydayhero* integration

Before you begin to import your *everydayhero* historical data, you will need to enter some information about the default options for handling imported information to ensure those settings align with your organisation's processes.

Enter basic settings

On the Basic Settings tab of the *everydayhero* integration wizard, enter your API key to set up a connection between *everydayhero* and your *eTapestry* database.

> Enter basic settings

1. From **Management**, select **Integrations**.
2. On the Integrations page, in the *everydayhero* integration tile, select **Set Up**. The Set up *everydayhero* integration screen appears.

Set up everydayhero integration

1. Basic settings 2. Map campaigns 3. Select historical data 4. Finish

API Key *

Send data import notifications to: *

Use commas to separate multiple email addresses.

Previous Next Save and Close Cancel

3. On the Basic settings tab, enter your API Key in the field. For more information about how to retrieve your API key, see [Sign up for everydayhero on page 1](#).
4. In the last field, enter each recipient email address at your organisation who should receive a notification when the import completes. If you enter multiple email addresses, use commas or semi-colons to separate them.
5. Click **Next** to go to the next step or **Save and Close** to save your choices and come back to the

page later. To return to the previous step, click **Previous**.

Map campaigns

everydayhero campaigns are brought into your **eTapestry** database as **eTapestry** Fundraisers with the Source of **everydayhero**. Once you enter basic settings, you will need to map revenue from **everydayhero** campaigns to an **eTapestry** fund, campaign, and approach.

In **eTapestry**, funds, campaigns, and approaches are the way you organise transactions and activity with your constituents to better analyse information in reports and queries and track your success towards specific goals.

everydayhero campaign mappings

Choose a default Fund, Campaign and Approach for revenue import from **everydayhero** campaigns

Default **eTapestry** Fund *

Annual Fund ▼

Default **eTapestry** Campaign

Annual ▼

Default **eTapestry** Approach

Direct Mail ▼

To edit mappings for a specific **everydayhero** campaign, select another Fund, Campaign, or Approach below.

Search EDH Campaign Include inactive everydayhero campaigns

| everydayhero Campaign | eTapestry Fund * | eTapestry Campaign | eTapestry Approach |
|--|-------------------------|---------------------------|---------------------------|
| Can't Touch This - "Stop, Hammer Time" | Default Fui ▼ | Default Campa ▼ | Default Approach ▼ |
| Start 2017 Off On The Right Foot! | Default Fui ▼ | Default Campa ▼ | Default Approach ▼ |
| Stuff & Give Stockings For Christmas | Default Fui ▼ | Default Campa ▼ | Default Approach ▼ |

[Save and Close](#) [Cancel](#)

On the Map Campaigns step, if you want to select default funds, campaigns, and approaches for all **everydayhero** campaigns, you can select them from the drop down menus.

Note: For customers in Australia, New Zealand, the UK, and Ireland, direct donations imported from **everydayhero**, or donations that are not part of specific **everydayhero** campaigns, will also inherit the default Campaign, Fund, and Approach you select.

For customers in Ireland, direct donations imported from **everydayhero**, or donations that are not part of specific **everydayhero** campaigns, will also inherit the default Campaign, Fund, and Approach you select.

If you do not already have **everydayhero** campaigns, select default mapping options. Once you add **everydayhero** campaigns, you can edit the default options in the table.

Note: For campaigns to appear, it must have an associated donation or hero in your **everydayhero** account

If you want to select default funds, campaigns and approaches for individual **everydayhero** campaigns, in the campaign mappings table, select them from the drop down menus.

Note: Default eTapestry Fund is a required field. A fund is always a required field when you enter a gift. If your organisation makes campaigns and approaches required when you enter a gift in **eTapestry**, then campaigns and approaches will be required when you map revenue from **everydayhero**.

If you do not select a campaign or approach for an individual fundraiser when your organisation requires campaigns and approaches, then the default campaign and approach will apply. For more information about how to require campaigns and approaches, see [Campaigns](#) and [Approaches](#).

To filter which campaigns appear in the table, you can search for campaigns by name. Select **Include inactive everydayhero campaigns** to include inactive campaigns in your results.

Click **Next** to go to the next step or **Save and Close** to save your choices and come back to the page later. To return to the previous step, click **Previous**.

After a new **eTapestry** Fundraiser is created when you import an **everydayhero** campaign, any email addresses entered on the Basic Settings step of the integration set up will receive a notification so that the **eTapestry** Fundraiser can then be mapped to the appropriate campaign, fund, and approach. To return to the Map Campaigns step of the integration wizard after you have begun the nightly import, under **Management, Integrations**, select **Edit Mappings**.

Import historical data

On the Select historical data tab of the Set up **everydayhero** integration screen, select how you want to import previous **everydayhero** data into **eTapestry**. This data will be imported during the first nightly import you schedule.

Set up everydayhero integration
✕

1. Basic settings
2. Map campaigns
3. Select historical data
4. Finish

Choose the historical data to import from *everydayhero* *

No historical data
 All historical data
 Historical data created since

Once you start import, this historical data setting can not be changed.

Previous
Next
Save and Close
Cancel

➤ Select historical data to import

Note: Once your import begins, these settings cannot be edited.

1. If you do not want to import data from previous *everydayhero* campaigns, select **No historical data**.

Note: The day you set up the integration is considered part of this historical time frame. For example, if you choose this option during the integration setup on Monday, only information added to *everydayhero* the following Tuesday and onward will be imported.

2. To import all data from previous *everydayhero* campaigns, select **All historical data**.
3. To import data from previous *everydayhero* campaigns starting with a specific date, select **Historical data created since** and select the date.
4. Click **Next** to go to the next step or **Save and Close** to save your choices and come back to the page later. To return to the previous step, click **Previous**.

Finish your integration setup

On the Finish tab of the Set up *everydayhero* integration screen, select when you want to import your *everydayhero* data into *eTapestry*.

If you select to schedule your imports now, your *everydayhero* data will import nightly beginning on the date shown.

If you select to schedule your import at a future date, you can return to this step after you finalise your import settings.

Click **Finish** or **Save and Close** to begin to the import or to save your choices and come back to the page later. To return to the previous step, click **Previous**.

Edit the *everydayhero* import settings

everydayhero Integration

Edit Settings Edit Mappings Pause Integration

Successfully connected

First nightly import scheduled: 9/1/2016

If something goes wrong, email notifications will be sent to:
[redacted]@blackbaud.com

[everydayhero/eTapestry integration user guide](#)

Don't have *everydayhero*? [Sign up here](#)

Once you have completed the steps to set up your *everydayhero* integration with *eTapestry*, the **everydayhero integration** tile now displays details about the import, such as the date and time your import is scheduled for and who will be sent notifications when your import is complete.

To edit the settings of your integration, click **Edit settings** from the **everydayhero integration** tile. To pause the integration until a later time, click **Pause integration**.

If you want to import your *everydayhero* data outside of scheduled runs, you can select **import now** next to the date of your next scheduled import. A warning screen appears to notify you that the import is an intensive process. Select **Confirm** to begin importing your *everydayhero* data.

Field mapping between *everydayhero* and *eTapestry*

After you complete the integration set up, information from *everydayhero* is imported into your *eTapestry* database.

Account Fields

When you import account data from *everydayhero* into your *eTapestry* database, accounts can be created or participation and transaction information updated if the account already exists in your

database.

If the account does not exist in your database, then two different types of accounts can be created for you: fundraiser accounts and donor accounts.

Fundraiser accounts are created for users who create a Hero page in **everydayhero**. Donor accounts are created for those who donate to your organisation. To distinguish between the two account types, **eTapestry** adds a user-defined field, **Account UDF (EDH Account Type)**, to the account.

To search for existing Fundraiser accounts in your database, **eTapestry** checks **everydayhero** ID numbers, name, address, then email. To check for existing donor accounts, **eTapestry** checks by name, address, then email.

If you delete an account in **eTapestry** that was imported through the **everydayhero** integration, it will not be imported the next time you run the integration since the integration will only import new data.

If the account being imported is an organisation instead of an individual, then the name of the organisation will appear as the account name, and the name format will be set to Business.

This table describes where account information imported from **everydayhero** appears in **eTapestry**.

> Account Fields

| everydayhero Field | eTapestry Field |
|------------------------------|---|
| Address | Address, Address Line 1 |
| Address Line 2 | Address Line 2 |
| Birthday | Account UDF (Date of Birth) |
| City/Suburb/Town | City |
| Country | Country |
| Email | Email |
| Further Communication Opt-In | Account UDF (EDH Communication Preferences) |
| Postcode/Zip Code | Postal Code |
| State/County/City | State/Province |
| First Name | First Name |
| Last Name | Last Name |
| Phone | Persona Default Phone |
| Organisation Name | Organisation Account Name |
| Supporter ID | Account UDF (EDH Account Id) |

Fundraiser Fields

On the Fundraisers page, you can view and edit data about Fundraisers in your database.

Note: For users who have integrated their *everydayhero* account with *eTapestry*, but do not have a subscription to Personal Fundraising, you will not be able to create a new Fundraiser in *eTapestry*. New Fundraisers can only be added through the import process when you import campaign data into your *eTapestry* database.

To edit Fundraiser information imported from *everydayhero*, select the name of the Fundraiser you wish to edit on the Fundraisers page. You can edit information in the **Date**, **Name**, **Goal**, **Status** and **Description** fields. For more information, see [Personal Fundraising on page 10](#).

> Fundraiser Fields

| <i>everydayhero</i> Field | <i>eTapestry</i> Field |
|---------------------------|------------------------|
| Campaign Description | Note |
| Campaign Name | Name |
| Campaign Start Date | Date |
| Campaign State | Status |

Journal Fields

The *everydayhero* integration imports new journal entries such as transactions and participation journal entries. However, if you delete a journal entry in *eTapestry* that was imported through the *everydayhero* integration, it will not be imported the next time you run the integration since the integration will only import new data.

Transaction Fields

Transactions that have been received online, such as through the Hero page, are automatically imported into *eTapestry* when you schedule your *everydayhero* nightly import.

To import offline transactions, such as donations received through cash or cheque, see [Offline Transactions on page 10](#).

Note: For *everydayhero* users in Australia, offline transactions such as cash, cheques, and BPAY payments are automatically imported into your *eTapestry* database when their status is Processed in *everydayhero*.

This table describes where transaction information imported from *everydayhero* appears in *eTapestry*.

An asterisk (*) denotes fields that are unavailable for certain regions. The **Gift Aid Eligible** field is available in the UK only. The **Is Recurring Gift?** field is unavailable in Ireland.

> Transaction Fields

everydayhero Field

Donation Amount, Uplift/Cover
 Donation ID
 Donor Message
 Donation Payment Instrument
 Donation Received at (Date)
 Donation Receipt Number
 Donation Type
 Gift Aid Eligible*
 Is Recurring Gift?*
 Net Amount
 Supporter

eTapestry Field

Transaction Received Amount
 Transaction UDF (EDH Transaction ID)
 Transaction Fundraiser Donation Message
 Gift Type
 Transaction Date, Transaction UDF (EDH Date Gift Received)
 Transaction Receipt Number
 Transaction UDF (EDH Transaction Type)
 Transaction Gift Aid Eligible
 Transaction UDF (EDH Recurring Gift)
 Transaction UDF (EDH Net Amount)
 Soft Credit

Participation Journal Entry Fields

You can use participation journal entries to track information about which accounts participate in your Fundraisers. A participation journal entry is automatically created for each Hero constituent imported from **everydayhero** into your database. You can also manually add participation entries to the account's journal.

This table describes where participation information imported from **everydayhero** appears in **eTapestry**.

> Participation Journal Entry Fields

everydayhero Field

Page Id
 Page Created Date
 Page Name
 Page Goal
 Page URL
 Campaign
 Team Position
 Team Name
 Team Page URL

eTapestry Field

Participation UDF (EDH Page Id)
 Date
 Display Name
 Participant Goal
 Participation UDF (EDH Page URL)
 Fundraiser
 Participation UDF (EDH Team Position)
 Participation UDF (EDH Team Name)
 Participation UDF (EDH Team URL)

Offline Transactions

Note: For *everydayhero* users in Australia, offline transactions such as cash, cheques, and BPAY payments are automatically imported into your *eTapestry* database when their status is Processed in *everydayhero*.

Information about offline donations, such as cash and cheque transactions, does not automatically import along with your online donations. However, you can manually add these gifts directly to your *eTapestry* database.

➤ Add offline *everydayhero* transactions to *eTapestry*

1. From the donor's account Home page, click **Journal**. The Journal page appears.
2. Click **Add**. The Add Journal Entry screen appears.
3. Select **Gift/Pledge**. The New Gift/Pledge screen appears.
4. Under **Gift Types**, select **Cheque** or **Cash** for your offline donation. Enter applicable details about the gift.
5. If the donation was given in sponsorship of a participant or *everydayhero* Hero, under **Tribute**, **Soft Credit**, **Matching Gift Receipts**, click the magnifying glass under **Soft Credit**. The Find an Account page appears. Search for the account of the participant or Hero. When you locate the correct account in your search results, click the account to select it.

If the account for the soft credit recipient does not exist in your database, you can click **Add Account** to add a new account. Click **Save** to save the new account or select the existing account in the search results.

6. Complete the gift details. For more information about the items on this screen, refer to [Add a Gift Screen](#).
7. Click **Save And** to save the gift to the Fundraiser's account.

Personal Fundraising

After you run the *everydayhero* integration to import your data, you will now have access to a limited version of the Personal Fundraising module in *eTapestry* in order to view, query, and report on Fundraiser data imported from *everydayhero*.

Warning: If you do not have a Personal Fundraising subscription, or if your subscription has lapsed, you will not be able to create or edit Fundraiser information with the Source of *eTapestry*. You will only be able to edit Fundraiser information imported from *everydayhero*.

➤ Fundraisers Page

From **Management, Fundraisers**, you can view data about Fundraisers in your database on the

Fundraisers page.

For users who have integrated their **everydayhero** account with **eTapestry**, but do not have a subscription to Personal Fundraising, you will not be able to create a new Fundraiser in **eTapestry**. New Fundraisers can only be added through the import process when you import campaign data into your **eTapestry** database.

To edit Fundraiser information imported from **everydayhero**, select the name of the Fundraiser you wish to edit on the Fundraisers page. You can edit information in the **Date, Name, Goal, Status** and **Description** fields.

The date of your Fundraiser is determined by the date you enter in the **Start On** field for the campaign in **everydayhero**. Dates for ongoing campaigns without start dates will be determined by the date the campaign was created in **everydayhero**.

If the name of a campaign from **everydayhero** imported into your database matches an existing **eTapestry** Fundraiser, the date of the campaign will be added to the Fundraiser name. If that naming combination is not unique, a number will be added to the end of the name until a unique name is found.

When you import a campaign with the status of Expired or Deactivated from **everydayhero**, **eTapestry** sets the status of the Fundraiser to Disabled. All other campaigns will be imported as Fundraisers marked as Active. After the initial import, **eTapestry** cannot change the status of Fundraiser, even if you edit the campaign status in **everydayhero**. However, you can manually edit the status of a Fundraiser on its Fundraiser page.

To set a goal for a Fundraiser, you must edit the **Goal** field in **eTapestry**. You cannot import goal amounts from **everydayhero**. Goals allow you to track the progress of a Fundraiser if you utilize the standard fundraising reports in **eTapestry**.

> Participation Journal Entries

You can use participation journal entries to track information about which accounts participate in your Fundraisers. A participation entry is automatically created for each constituent and team account imported from **everydayhero** into your database. You can also manually add participation entries to the account's journal. For more information, see [Participation Journal Entries](#).

> Query and Query Preview

From the drop menu under **Browse Fields**, select Defined Fields. You can query on fundraising data using the **Fundraisers** field to locate either transactions or participation entries for a specific Fundraiser.

You can select User Defined Fields - Participation from the drop down menu to select Participation user-defined fields for query.

Under Journal Fields in the drop down menu, you can also select **Participation** within the Journal Entry Types category to query for Participation journal entry types.

When previewing a query, select the Fundraiser column to include the name of the Fundraiser in your preview results.

> Standard Reports

Three standard reports can help you monitor personal fundraisers that constituents do on behalf of your organisation.

- [Fundraiser Activity Summary](#)
- [Fundraiser Summary](#)
- [Fundraiser Analysis](#)

> Communications Fields

Data merge tags enable you to merge data from specific fields in accounts or journal entries into documents or emails. When you generate letters or emails, the tag is replaced with the specific data from each entry in your query. The following Personal Fundraising fields now appear as data merge tag options for Communications layouts:

- **Fundraiser**
- **Fundraiser Donation Message**
- **Fundraiser Total Raised**
- **Fundraiser Total Received**
- **Fundraiser Total Pledged**
- **Goal**
- **Participant Display Name**

These fields are also available when you build a custom report to group data. To add these fields to a custom report, select Journal Fields from the **Browse Fields** drop down menu under **Report Columns**.

For more information about adding merge tags to Communications layouts, see [TinyMCE HTML Editor](#).

> Transaction Pages

When you integrate **everydayhero** with your database, the Fundraiser drop down menu appears on the Transaction page so you can indicate which Fundraiser is associated with your transaction. The drop down menu will not appear on transactions where a soft credit has been selected.

> User Defined Fields

To track additional information not captured in standard fields, you can use **everydayhero** user-defined fields. These fields can apply to accounts or to specific transactions.

From **Management**, select **User Defined Fields** under **Database Management**. Select the **everydayhero** category.

Warning: You can use these fields as they are, or personalize them to better fit the needs of your organisation. However, we suggest that you do not re-name any user-defined fields created during the **everydayhero** import process. When you re-name the user-defined field, **eTapestry** creates a new field to store the information which can duplicate data and complicate your data tracking.

> Mass Updates

After you integrate **everydayhero** with your database, the Fundraiser drop down will appear under **Transaction Values** when running a mass update to Transaction Values.

Multiple Participation Journal Entries

When you import **everydayhero** data, you may have Heroes that have created multiple Hero pages that are linked to a single campaign.

Only one participation journal entry per account can be created for each Fundraiser when the Fundraiser is created in **eTapestry**. You will not be able to select a Fundraiser on a participation journal entry if you have already selected that Fundraiser on another participation journal entry for the same account.

However, if you have integrated **everydayhero** with your database, then Fundraisers created through the **everydayhero** import can support multiple participation journal entries for each account.

> Participation Journal Entry Page

On the Participation Journal Entry page, the **Fundraiser** drop down shows all active Fundraisers, even if the account already has a participation journal entry linked to the Fundraiser imported from **everydayhero**.

You can also save a participation journal entry for an account that already has a participation journal entry for the same Fundraiser if the Fundraiser originated from **everydayhero**.

> Participation Summary Report

When you run the Participation Summary Report, accounts with multiple participation journal entries on a single **everydayhero** Fundraiser will be listed for each participation journal entry in the report.

The **Display Name** field is included in this report so you can distinguish between accounts with multiple fundraisers.

If the gift associated with the Fundraiser imported from **everydayhero** is an offline gift, or a gift of cash or cheque, then "(Offline)" will appear in the Role column. For more information about offline gifts, see [Offline Transactions on page 10](#).

To see donation information for individuals, click on the account name when the Account role is Participation. For Team accounts, click on the account name to view team participation summary information. On the detail report, click on the individual names to view their information.

Event Registration DIY Forms

To encourage event registrants to participate in your *everydayhero* campaigns, you can select to allow event registrants to fundraise for your campaigns on the Choose Your Settings screen of the Event Registration DIY form.

➤ Allow event registrants to fundraise for your everydayhero campaigns

1. From **Management**, select **DIY Forms** under **Online Presence**. The My Online Forms page appears.
2. Create a new Event Registration form or edit an existing form:
 - To create a new Event Registration DIY form, select **Create a New Page**. Select the Event Registration page you would like to create and the style you wish to apply. Select **Next**. The Choose Your Settings Screen appears.
 - To edit an existing form, select **Edit** next to the Event Registration DIY form you wish to edit. The Online Forms Editor page appears. Select **Settings** to access the Choose Your Settings screen.

Tip: For an overview of DIY forms, including how to set up your payment processor, confirmation email template, and other form elements, refer to the [Getting Started with Do-It-Yourself Forms](#) guide.

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

Note: You can only select a campaign if it is listed as an active Fundraiser on the Fundraisers page under **Management**. For *everydayhero* campaigns to appear as active, they must have data imported into *eTapestry* through the integration, such as a gift or participation.

Once your users have successfully completed the Event Registration page, they will receive an email that includes the link to begin fundraising. Users can also access this link from the success page that appears when they complete the Event Registration DIY form.

If you select to use the default confirmation email from *eTapestry*, the **Start Fundraising** link appears automatically in the confirmation email once you select to allow users to fundraise for your campaigns.

If you select to use a custom confirmation email template, you must insert the eCommerce Details widget into your custom correspondence. This widget is used for custom eCommerce confirmation emails. It shows the primary details from an eCommerce submission, including the name, address, email, phone, and transaction information.

➤ Add the eCommerce Details widget to your custom confirmation email

1. From **Communciations**, click **Manage Communications**. The Correspondence Categories page

appears.

2. Select the category where your confirmation email template is stored, then select the template.
3. In the editor, select the block of the letter section you wish to edit. The Edit Contents window appears.
4. Select where you want to insert the eCommerce Details widget.
5. On the HTML toolbar, select the **Insert Letter Widget** icon. The Letter Widgets window appears.
6. Next to **eCommerce Details**, click **Select**.
7. When you are done inserting the link, select **Update** on the Edit Contents window.
8. Select Finish in the **Save and** drop down menu and click **Next**.

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

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