eTapestry Glossary

A

Account
An account is a record in your database. This can be a constituent, donor, event attendee, organization, tribute recipient, fundraising team, or an eTapestry user in your organization.

Approach
A solicitation strategy such as email, direct mail, event, or phone solicitation. Approaches track what method you used to collect each donation you receive.

Arrears
The amount past-due on a pledge.

B

Batch target
A special target that lets you build and/or publish multiple other targets in a single group (or "batch"). You can schedule batches to run at any time.

BBMS
Blackbaud Merchant Services. The preferred payment processor for use in your eTapestry database. BBMS processes credit/debit card payments and deposits the funds into your bank accounts.

BBPS
Blackbaud Payment Services. The secure technology that stores encrypted credit/debit card information in compliance with PCI DSS and PA DSS standards. BBPS ensures that credit/debit card information is not stored in your database, and provides a secure way for the payment processor to access that information when a payment is processed.

Block snippet
A snippet that is created out of one or more paragraphs.

C

Campaign
An umbrella fundraising strategy with a specific focus that usually includes different approaches to solicit donations. Examples include annual campaigns and capital

campaigns.

Compound query
A query that combined two other queries to add, subtract, or intersect data between the two queries.

Condition tag
A marker that you can apply to different areas of your content so that some sections show up in some of your outputs but not in others.

Constituent
A constituent is any person or organization that you have a relationship with and could be included in your eTapestry database. Constituents can include members, donors, prospective donors, event attendees, volunteers, staff, organizations, and any other person or entity that you interact with as an organization.

CRM
Constituent Relationship Management (CRM) usually refers to a database that allows you to track information about your constituents, including contact information, donations, and event attendance and other interactions. eTapestry is a CRM program.

Cross-reference
A navigation link that lets you connect text in one topic to another topic (or a bookmark within a topic). Cross-references let you create "automated" links that are based on commands you provide. This allows you to keep links consistent and change them in just one place by using the "xref" style.

Custom account query
A query in which you manually add specific accounts one by one. This is an alternative to traditional queries when you need to create a list of records that do not have criteria in common that you can include in a regular query.

Custom report
A report that you configure to include fields that you select. You may use any query you want to generate a custom report.

D

Data merge value
A field that from your database that you enter as a merge field in a communication template. This field is replaced with the value from each account included in the mailing, generating a mail merge. For example, if you use the Name field as a data merge value in a letter, each letter will be created with the name of each constituent you send it to.

Data return type
The type of data that you want to see in the results of a query. For example, if you are looking for a group of donors who live in a certain area you would want a data return type of accounts, and if you are looking for donors who gave in the last year, you would want a data return type of journal entries to look for transactions.

Disbursement
Disbursements track expenses. For example, you can use this in connection with an approach to track both expenses and income from an event.

Drop-box
A repository for files such as reports within your database.

Drop-down text
A feature that lets you collapse content in your topic. The content is expanded (and therefore displayed) when the end user clicks a link.

Dynamic
Results for dynamic queries change as your database changes. The data they include represents a snapshot at the time that you run the query, and not necessarily when the query was first created. Changes in your database are reflected in the query when you run it again.

E

EFT
Electronic Funds Transfer (EFT) is a way to receive payments through a deduction from a donor's bank account.

eReceipts
You can now automatically generate a receipt number to include on donation confirmation email messages for transactions submitted through any eTapestery online forms. In eTapestry, when you include receipt information as a part of your email confirmations, you are creating an "eReceipt."

Export
A list of records with specific data to be entered into another system, such as an accounting software package.

F

Footnote
A comment that is used to explain a specific area of the text. Both the area in the text and the comment contain a number or symbol that ties the two together. A footnote (or endnote) comment can be placed at the end of a page, document, chapter, section, or book.

Fund
A designation for how donation money will be spent in your organization. Most organizations have a general fund for unrestricted donations, as well as funds for specific purposes and projects.

G

Gift
A gift is any donation your organization received from an individual or organization. Gifts can include financial donations, as well as gifts in kind.

Gifted
Money collected through regular donations, excluding pledges.

I

Import
A mass addition of records into your database, based on an import file in .csv format.

In-kind
A donation of goods or services that is not monetary but can be assigned an estimated monetary value.

J

Journal
The page in an account where you track all activity with that account, including mailings, donations, pledges, notes, and other contacts.

L

Letter
The type of acknowledgement of thank-you letter that you want to include for a specific donation. Letter codes allow you to query donations and generate mailings by the type of message you want to send.

Long salutation
Captures a formal way to refer to the constituent in formal communications such as receipts. Common examples are “Mr. Johnson” or “Mr. Matthew Johnson.”

M

Mass update
A common change to a group of records in your database, as defined by a query.

Matching gift
Some companies offer their employees matching gift programs for charitable donations that employees choose to make. Each company might have different criteria for donations that qualify for matching and for the matching ratio. When a donor who works at a matching company makes a donation, they can complete paperwork at their company to trigger the matching gift to your organization.

N

Non-deductible

Donations to nonprofit organizations are tax deductible in the United States. When a donor gets a benefit from the donation, such as a T-shirt or a magazine subscription, the portion of the donation that goes towards paying for that benefit is non-deductible. For example, if your membership dues are $50, and you give members a T-shirt worth $20 when they join, then the amount received is $50, and the non-deductible amount is $20. eTapestry uses this information to create tax receipts for your donors.

P

Persona

A persona is used as an address type for a constituent. You can have as many personas as you need. The most common personas are home and business. Use different personas to track different contact information for constituents.

Planned gift

When donors make arrangements for your organization to receive a gift of money or property when they pass away, that gift is called a planned gift. You can track planned gifts in eTapestry when the donor makes you aware of their plan, and manage that expected gift until it is realized.

Pledge

A pledge is a promise to make a donation to your organization at a later time. Pledges can be paid in a single payment or in installments. Pledges are different from recurring gifts because they have a pre-determined monetary limit. For example, a donor might pledge to donate $1,000 in four payments of $250.

Pledged

Amount that a donor has committed to give to your organization at a later date. A pledge can be paid in installments or in a lump sum.

Q

Query

A way to create a list of accounts or journal entries that meet a set of criteria you define. Queries only create a list, which can then be used to create a report or mailing.

R

Raised

Raised money is any amount promised to your organization, whether it has been collected or not. This includes gifts, pledges, and recurring gifts. To avoid double counting, it does not include payments towards a pledge.

Received
Money that you have received from a donor. Only payments already made count towards received amounts. Pledges and pending payments are not included.

Recognition name
The name that the constituent wants you to use in public recognition such as an annual report or a list of donors on your website. This might be different from their legal name.

Recognition type
Use this field to indicate that a constituent uses a recognition name that is different from their full legal name, or prefers to give anonymously or without any recognition of any kind.

Recurring gift
A recurring gift is a commitment to make the same donation to your organization on a recurring basis. While the most common kind of recurring gifts are monthly, the schedule can vary for different donors. There is no pre-defined end date or monetary limit to a recurring gift. Once it is established, it continues until the donor indicates that they wish to stop making the gift.

Recurring gift schedule
When a donor wishes to establish a recurring gift, you first create a recurring gift schedule in their eTapestry journal. This schedule indicates the amount and frequency of the gift, as well as other details such as the fund, payment method, and date of the first installment. A recurring gift schedule is not a payment towards that recurring gift. Once you set up the schedule, you must then create a recurring gift for each payment received.

Relationship
Denotes a connection between accounts. For example, it can connect an organization's account with one of its employers, or two members of a family.

Report
A detailed statement about a group of accounts or journal entries. Normally, you first define a query of the accounts or entries you want to include in a report, and then generate a report using that query.

Role
The role that an account plays in your database. An account can have more than one role. For example, an employee of your organization who also gives would be a constituent as well as a user of your database.

S

Security group
A set of rules about the access to the database for a group of users in your organization. Security groups are often configured by role. For example, you might have a security group for data-entry users, and one for management users.

Short salutation
Captures an informal way to refer to the constituent in informal communications such as email. A common example is a first name.

Single-Sourcing
Reusing content and producing multiple outputs from the same set of source files. Flare lets you single-source your projects in many ways, using various features. This includes features such as topic-based authoring, conditions, snippets, variables, multiple tables of contents, and more.

Snippet
A pre-set chunk of content that you can use in your project over and over. Snippets are similar to variables, but snippets are used for longer chunks of content that you can format just as you would any other content in your topic. In snippets, you can also insert tables, pictures, and whatever else can be included in a normal topic.

Soft credit
Sometimes, one person or company makes a gift to your organization, but you want to give other people indirect credit for that gift. In these situations, it can be helpful to soft credit the other individual who is connected with the gift to have a more comprehensive understanding of the donations generated directly and indirectly by that person. For example, the CEO of a company might authorize a gift that is made in the company's name. In this situation, you would create a gift record for the organization, and soft credit the CEO.

Span
A tag that is used to group inline elements to format them with styles. A span tag doesn't perform any specific action; it simply holds the attributes (e.g., font size, color, font family) that you apply to inline content.

Standard report
A report that is pre-configured by eTapestry to include certain data and sometimes graphics. You may use any query you want to generate a standard report.

Starting criteria
The starting query for a new query that you create. The starting criteria defaults to the All Constituents query, which includes all records in your database, but you can use another query to limit the records that the new query consults in its results.

Static
Results for static queries remain the same even when your database changes. The data they include represents a snapshot of your database at the time that the query was created, and new data does not affect the results.

Style
An element to which you assign a certain look and/or behavior. You can then apply that style to your content. Different kinds of styles are available in a stylesheet, to be used for various purposes in your content.

System-defined field
Fields that are built into eTapestry but can be configured to better fit your organization's needs. For example, Fund is a system-defined field that you can adjust to your needs.

T

Table
A group of intersecting columns and rows that you can add to a topic for various purposes, such as comparing one thing with another or giving field descriptions for a software dialog.

Target
One "instance" of an output type. When you build your final output, you are essentially building one or more of the targets in your project.

Team
An account type used with the personal fundraising module. These accounts are automatically created for each team registered through your team fundraising site, and can also be manually created.

Text snippet
A snippet that is created out of a portion of one paragraph.

Tiles
The boxes that appear in your home page, which you can select and rearrange according to your preference.

Topic
A chunk of information about a particular subject. Topics are the most important part of a project. Everything else is contained within topics (e.g., hyperlinks, text, pictures) or points toward topics (e.g., table of contents, index, browse sequences). The very reason end users open a Help system is to find information, a little direction. They find that help within individual topics.

Tribute
A tribute in eTapestry is used for donations received in honor or memory of someone. The tribute is the person or entity in whose name donations are received, not the name of the donor making the donation. When you accept donations in honor or memory of someone, you must first create a tribute account so you can later link donations received in honor or memory of that person to that tribute.

U

User
A user account is used to any person in your organization who needs to access your eTapestry database. This can include your staff, volunteers, and anyone who needs access to the database, either permanently or temporarily. It is important that each person using the database has their own user account with their unique user name and

password. This ensures the security of your data. You can limit and inactivate user accounts for individuals who should no longer have access, such as previous staff, volunteers, or temporary employees, as necessary.

User-defined field

A field that your organization creates to capture information that does not fit into any existing fields in eTapestry. You can add as many user-defined fields as you need.

V

Variable

A pre-set term or content that you can use in your project over and over. Variables are similar to snippets, but variables are used for brief, non-formatted pieces of content (such as the name of your company's product or your company's phone number).

W

Write-off

You write off a pledge when you do not think that you will realistically collect payment and no longer want to include that pledge in your financial reports as expected income.

X

XML Editor

The window in the Flare interface where you can add content and formatting to elements such as topics and snippets.