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7.22.0 New Features

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This guide lists new features available in the **eTapestry** 7.22.0, released on June 5, 2016.

Query Preview

To make data entry and export easier, we have made enhancements to functionality on the Query Preview page.

With new query preview options, you can now customize query previews. Previously, query preview only allowed you to view query results. Now, you can choose which columns appear in the preview grid, drag and drop columns, and export your results.

Query Preview last modified by kim.ateam.us 3 day(s) ago

AddressFinder (NCOA) Codes : Move Identified, Address Updated

12 Accounts displaying 1 to 12

	Role	Account Name ▲	Address (Full)	Phone
⋮	Constituent	Shronda Allen	PO Box 32012 Oakland, CA 94604-3312	(510) 534-4810
⋮	Constituent	David & Marsha Arens	2912 Eula Dr Urbandale, IA 50322-6868	515/270-6881
⋮	Constituent	Kenneth and Teresa Armstrong	PO Box 101 Festus, MO 63028-0101	636.933.2429
⋮	Constituent	Betty & Byron Augspurger	1301 Wesley Ln Indianola, IA 50125-1177	515/243-3521
⋮	Constituent	Dennis & Debra Ausenhus	7967 Matera Ct Bradenton, FL 34202-2157	515/965-2505

Enhancements to query preview functionality are not intended to replace custom reports. While query preview allows you to add commonly used columns to the preview grid, you can report on any

information you track in **eTapestry** with custom reports. Also, you will still use custom reports to apply multiple sorts, group, aggregate, and subtotal columns.

When you generate a query preview, you can use the query preview toolbar to select which columns appear in the preview grid, export query preview results, run a report or generate correspondence with your query results, and edit your query.

To choose which columns will appear on the Query Preview page, click **Choose columns** on the toolbar. The Choose columns to show in the list screen appears. The Query Preview page includes the most commonly used columns in **eTapestry**.

You can select a column category, such as **Account Fields**, or search for a column in the search bar at the top of the menu to filter available columns.

Select or clear the checkbox next to the columns you want to appear or remove. To quickly clear all the values for these fields, click **Clear all**. Click **Apply Changes** after you make your column selections to return to the Journal page.

You can change the order of the columns by selecting a column header and dragging.

When you resize a column width in the grid, the adjusted width now remains in place until you resize it again. You can click **Restore Defaults** to return default column settings.

To verify your query results, you can now use the query preview search to find a particular account. The search returns results that match any terms you enter. For example, if you search for "John Smith," the results will include anyone in your query with "John" or "Smith" in the account name. To remove criteria entered for the search, click **Clear Search**. This does not perform a new search. It only removes your criteria from the page.

Note: If you search for accounts in your query preview results and then choose to export results, all results will be exported.

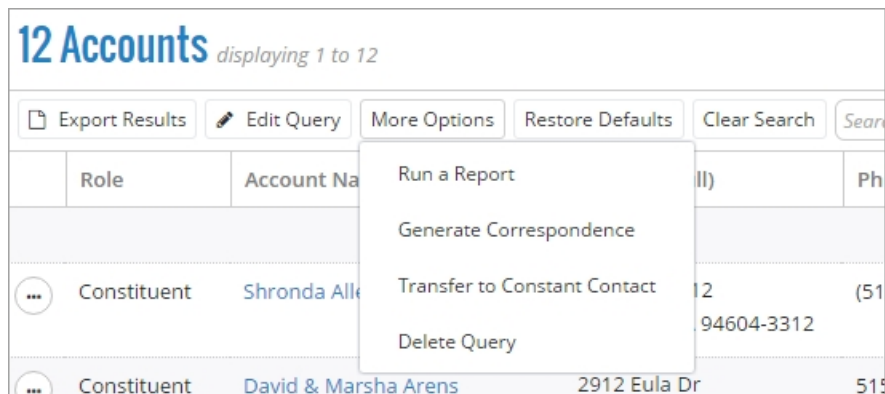
From the toolbar on the Query Preview page, select **Export Results** to export all of the results that appear in the Query Preview grid. The Export Results screen appears.

Under **Format**, select how you want to receive your query preview results. For example, if you want a PDF sent to you, select PDF Document - Email in the drop down menu.

If you select an email format, enter your email address and a subject line for the email. If you have a large amount of query preview results, we recommend you select **Archive in Zip File** so that the file is compressed for faster transmission. To begin the export process, click **Export**.

Note: Once a query-based process starts, the process continues until completion on the **eTapestry** server. You will be unable to start additional queries, reports, or exports until the process completes.

To edit your query, click **Edit Query**. The Edit Query page appears for you to make changes to your query.



From the **More Options** drop down menu, select Run a Report to run a report using your query results. The Report Categories page appears. From this page, you can select which report you want to run.

To generate correspondence, such as a thank-you letter or a receipt, with your query results, select Generate Correspondence. The Correspondence Categories page appears. From this page, you can select which correspondence you want to create.

If your database is linked to a *Constant Contact* account, you can transfer your query preview results to use with *Constant Contact*. Select Transfer to Constant Contact. The Constant Contact - Transfer Email Addresses page appears.

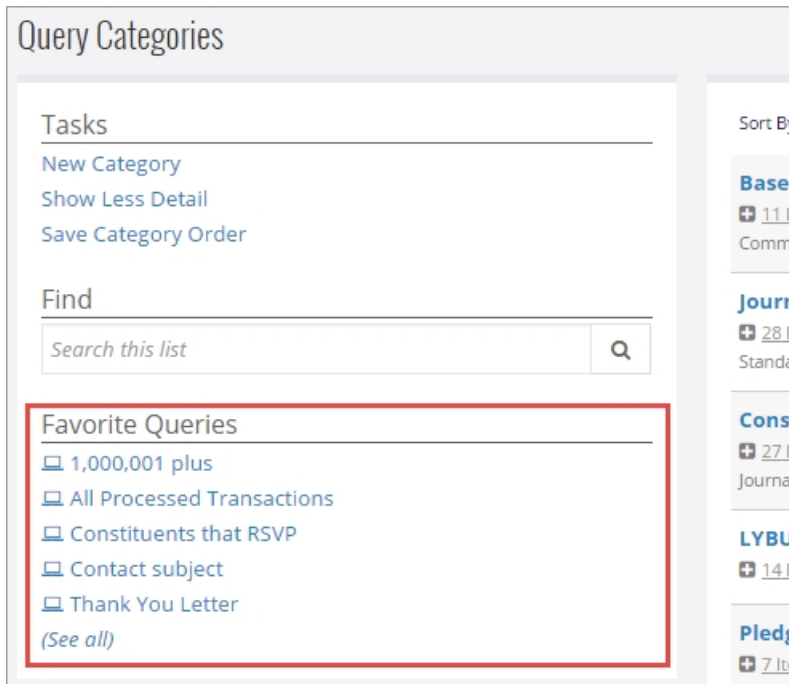
To delete your query, select Delete Query.

Favorite Queries

To make accessing your favorite queries easier, enhancements have been made to favorite query functionality.

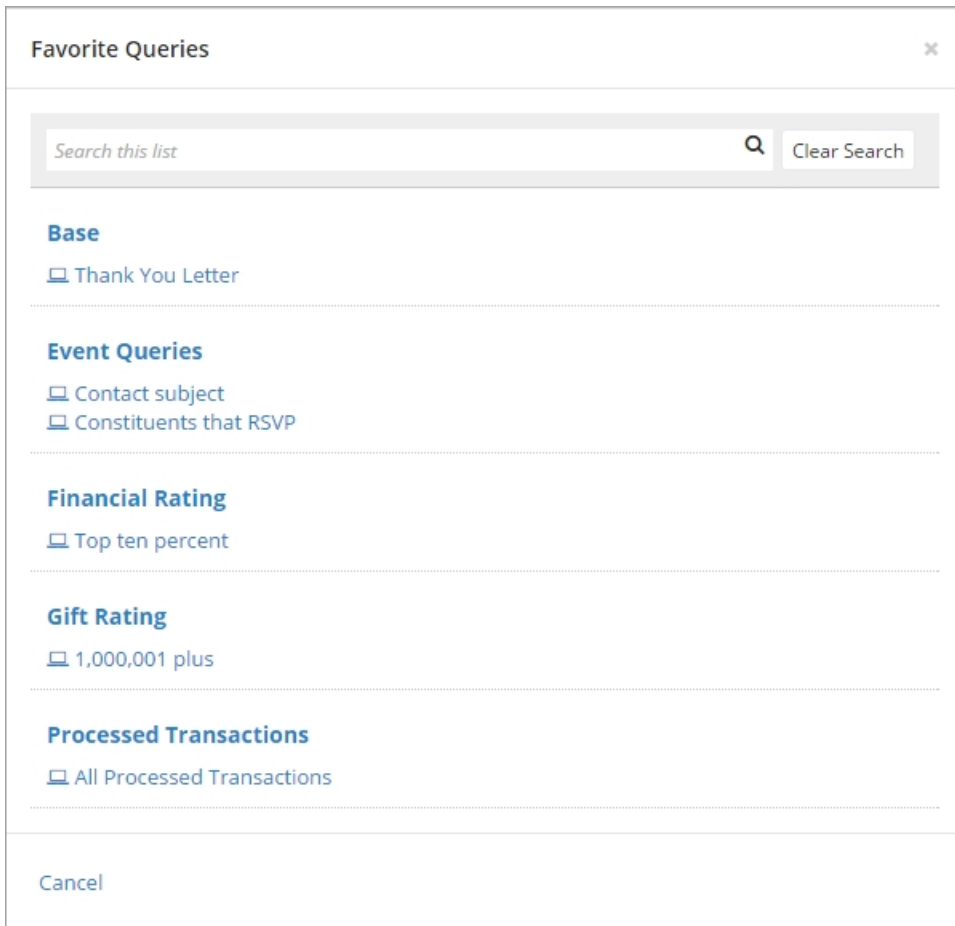
Favorite Queries Tile

In addition to the Favorites tile on the Home page, you can now access query preview results and the edit query page of queries you have marked **Favorite** from the Favorite Queries tile on the Query Categories page. For more information about how to mark a query as **Favorite**, see [Mark a system-defined query as a favorite on page 1](#).



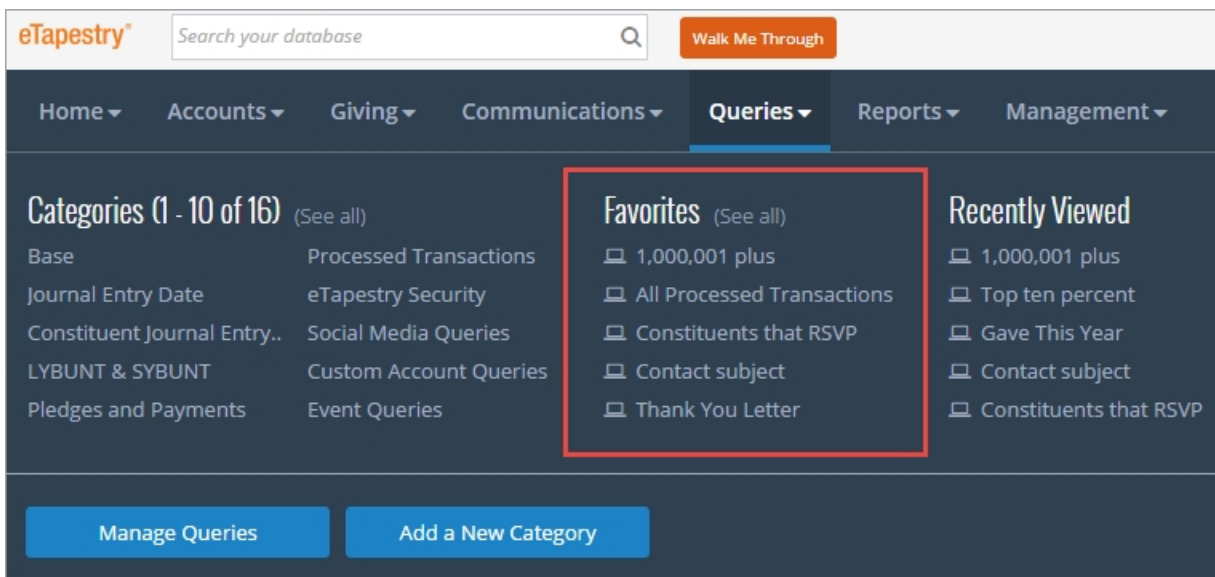
The screenshot shows the 'Query Categories' interface. On the left, there are sections for 'Tasks' (with links for 'New Category', 'Show Less Detail', and 'Save Category Order') and a 'Find' search box. The 'Favorite Queries' section is highlighted with a red border and contains a list of queries: '1,000,001 plus', 'All Processed Transactions', 'Constituents that RSVP', 'Contact subject', and 'Thank You Letter', with a '(See all)' link below. On the right, a sidebar lists various categories like 'Base', 'Journ', 'Cons', 'LYBU', and 'Pledg' with associated counts and icons.

From the Query Categories page, in the Favorite Queries tile, click the preview icon next to the query to see query preview results. To edit the query, select the query name. The Edit Query page appears.



If you favorite more than five queries, click **See All** to view more queries. The Favorite Queries screen appears. To find a specific favorite query, you can enter search terms in the search bar.

Queries Tab



From the Queries tab, you can now click the preview icon next to the query to see query preview results. To edit the query, select the query name. The Edit Query page appears. If you favorite more than five queries, select **See All** to view all favorite queries on the Favorite Queries screen.