Contents

7.44.0 New Features

This guide lists new features available in *eTapestry* 7.44.0, released on September 30, 2018.

JustGiving Integration

With the *JustGiving* integration with *eTapestry*, you can import donations, campaigns, events, and pages from *JustGiving* to update your database.

JustGiving Integration

Complete the set up steps to start the nightly, automatic import of donations, campaigns and pages from *JustGiving* to *eTapestry*.

Set up

JustGiving/eTapestry integration user guide

Don't have *JustGiving*? Sign up here

To integrate *JustGiving* with your *eTapestry* database, from **Management**, select **Integrations**. On the Integrations page, in the **JustGiving Integration** tile, select **Set Up**. The Set up JustGiving integration screen appears.

Step One: Basic settings

Once you obtain your API key from *JustGiving*, you can then use the API key to establish a connection between *JustGiving* and *eTapestry*.

API Key *

Send data import notifications to: *
Use commas to separate multiple email addresses.

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

In the last field, enter each recipient email address at your organization who should receive any notifications about your import. If you enter multiple email addresses, use commas or semi-colons to separate them.

Click **Next** to go to the next step or **Save and Close** to save your choices and come back to the page later.

Step Two: Events Mapping

Once you enter basic settings, you will need to map revenue from *JustGiving* events to a fund, campaign, and approach.

Funds, campaigns, and approaches are the way you organize transactions and activity with your constituents to better analyze information in reports and queries and track your success towards specific goals.

Choose a default Fund, Campaign and Approach for revenue import from *JustGiving* events

Default *eTapestry* Fund *

General

Default *eTapestry* Campaign

Annual

Default *eTapestry* Approach

Personal Solicitation

On the **Map events** tab of the Set up JustGiving integration screen, you can select a default fund, campaign, or approach 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.

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

Search JustGiving Event 🔍	☐ Include inactive JustGiving events		
JustGiving Event	***eTapestry* Fund ***	***eTapestry* Campaign**	***eTapestry* Approach**
TrekFest the Peaks 2018	Default Fund ▾	Default Campaign ▾	Default Approach ▾
Prudential RideLondon-Surrey 100 2018	Default Fund ▾	Default Campaign ▾	Default Approach ▾
Great Weston Ride 2018	Default Fund ▾	Default Campaign ▾	Default Approach ▾

In the mappings table, you can select funds, campaigns, or approaches for specific events. To filter which events appear in the table, you can search for them by name. Select **Include inactive JustGiving events** to include inactive events in your results.

If you do not already have *JustGiving* events, select default mapping options above. Once you add events, you can edit the mappings in the table.

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**.

Step Three: Import Historical Data

On the **Select historical data** tab of the Set up JustGiving integration screen, select how you want to import previous *JustGiving* data into *eTapestry*.

Choose the historical data to import from *JustGiving* *

- ◯ No historical data
- ✔ All historical data
- ◯ Historical data created since

This data will be imported during the first nightly import you schedule.

- If you do not want to import any existing *JustGiving* donations or fundraiser pages, select **No historical data**. Only data added after the initial nightly import will be added into *eTapestry*.
- To import all existing *JustGiving* donations and fundraising pages, select **All historical data**.
- To import existing *JustGiving* donations and fundraising pages starting with a specific date, select **Historical data created since** and the date from which you want to import information.

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**.

Step Four: Finish

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

If you select to schedule your imports, your *JustGiving* data will import nightly beginning on the date shown. If you select to schedule your import at a later time, you can return to this step after you finalize your import settings and select to schedule the import.

Edit the JustGiving import

Once you have completed the steps to set up your *JustGiving* integration with *eTapestry*, the *JustGiving* **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 if a problem occurs during the import.

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

JustGiving Field Mapping

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

Account Fields

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

If the account does not exist in your database, then a new Constituent account will be created.

Fundraiser accounts are created for users who create a fundraising page in **JustGiving**. Donor accounts are created for those who donate to your organization. To distinguish between the two account types, **eTapestry** adds a user-defined field, **Account UDF (JustGiving Account Type)**, to the account. Individuals that both fundraise and donate with **JustGiving** will map to a single Constituent account within eTapestry.

This table describes where account information imported from **JustGiving** appears in **eTapestry** For existing accounts, the **JustGiving** address does not override an account's existing address in **eTapestry**; instead, a Journal Note is created that captures the existing and the JustGiving address and highlights differences between the two.

Note: The mapping of **JustGiving** address fields to **eTapestry** is dependent upon the country.

> **Account Fields**

JustGiving Field	eTapestry Field
Fundraiser or Donor Address Line 1	Persona Address (Line 1)
Fundraiser or Donor Address Line 2	Persona Address (Line 2)
Fundraiser or Donor Town/City	Persona City
Fundraiser or Donor Country	Persona Country
Fundraiser or Donor Email	Persona Email
Fundraiser or Donor Post/Zip Code	Persona Postal Code
Fundraiser or Donor County/State	Persona State
Fundraiser or Donor First Name	Individual First Name
Fundraiser or Donor Last Name	Individual Last Name
Fundraising or Donor User ID	Account UDF (JustGiving Account Id)

Fundraiser Fields

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

Note: For users who have integrated their **JustGiving** 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 events into your *eTapestry* database.

All *JustGiving* events marked Customer Created will be aggregated into a single *eTapestry* fundraiser named "JustGiving". This helps avoid an abundance of *eTapestry* Fundraisers for smaller events created and organized by your supporters.

To edit Fundraiser information imported from *JustGiving*, 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.

❯ Fundraiser Fields

JustGiving Field	*eTapestry* Field
Event Name	Fundraiser Name
Event Start Date	Fundraiser Date
Event Expiry Date	Fundraiser Status

Journal Fields

The *JustGiving* 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 integration, it will not be imported the next time you run the integration since the integration will only import new data.

Transaction Fields

Note: If you select to only import historical data created after a specific date during the integration set up, donations made before that date will not be imported.

Transactions that have been received online are automatically imported into *eTapestry* when you schedule your nightly import.

Transactions are linked to existing accounts if *eTapestry* has previously imported the *JustGiving* account, or if an *eTapestry* account is found based upon a name, address, or email search. When no existing account is found, a new Constituent account is created. Donations marked as anonymous, or those with no associated donor record (for example, SMS donations), will be added to a single Constituent account with an Account Name of "JustGiving Anonymous Donor".

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

❯ Transaction Fields

JustGiving Field	eTapestry Field
Donation Date	Transaction Date
Campaign ID	Transaction UDF (JustGiving Campaign)
Fundraising Page ID	Transaction UDF (JustGiving Page Id)/Transaction Fundraiser
Donation Amount	Transaction Received Amount
Donation ID	Transaction UDF (JustGiving Transaction ID)
Donation Payment Instrument	Transaction Gift Type
Donation Receipt Number	Transaction Receipt Number
Donation Source	Transaction UDF (JustGiving Donation Type)
Message from Donor	Transaction Fundraiser Donation Message or Note
Payment Type	Transaction Gift Type or Transaction Credit Card Type
Payment Type - Credit Card	Transaction Gift Type
Is a recurring gift?	Transaction UDF (JustGiving Recurring Gift)
Donation Auth Amount Including Donation Boost	Transaction UDF (JustGiving Amount with Boost)
Donation Has Donation Boost?	Transaction UDF (JustGiving Donation Boost Provided)
Is Donation GA Eligible	Transaction UDF (JustGiving Gift Aid Eligible)
Net Donation Amount	Transaction UDF (JustGiving Net Amount)
Donation Consent	Transaction UDF (JustGiving Consent)
Donation Privacy Notice Version/Donation Consent Statement	Transaction UDF (JustGiving Consent Statement)

Note: JustGiving donations with a payment type that is not directly supported within **eTapestry** (for example Paypal, SMS, and EveryDay Giving) will be marked as "Cash" with the unsupported payment type set within the Transaction UDF "JustGiving Other Gift Type".

Participation Journal Entry Fields

You can use participation journal entries to track information about which accounts participate in your Fundraisers. A new participation journal entry is created for each **JustGiving** fundraising page. Existing participation journal entries are updated if a supporter edits their **JustGiving** fundraiser page (for example, if they edit page title or target amount).

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

❯ Participation Journal Entry Fields

JustGiving Field	eTapestry Field
Fundraising Page ID	Participation UDF (JustGiving Page Id)
Event ID	Participation Fundraiser
Page Created Date	Participation Date
Fundrasing Page Title	Participation Display Name
Fundraiser Target Amount	Participation Participant Goal
Fundraising Page URL	Participation UDF (JustGiving Page URL)
Campaign ID	Participation UDF (JustGiving Campaign)
Fundraiser Page Consent	Participation UDF (JustGiving Consent)
Fundrasier Page Privacy Notice Version	Participation UDF (JustGiving Consent Statement)

Personal Fundraising

After you run the ***JustGiving*** 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 ***JustGiving***.

> ***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 ***JustGiving***.

❯ Fundraisers Page

> ***Note:*** For users who have integrated their ***JustGiving*** 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 event data into your ***eTapestry*** database.

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

Events in ***JustGiving*** are brought over to ***eTapestry*** as Fundraisers. ***JustGiving*** events marked as **Customer Created** will be grouped within ***eTapestry*** as a single ***JustGiving*** Fundraiser.

To edit Fundraiser information imported from ***JustGiving***, 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.

To set a goal for a Fundraiser, you must edit the **Goal** field in ***eTapestry***. You cannot import goal amounts from ***JustGiving***. 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 or updated for each Fundraiser account imported from ***JustGiving*** into your database. 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.

You can also select the **Search Fields** tab and search for ***JustGiving*** UDF fields to query on.

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 organization.

- 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 *JustGiving* with your database, the Fundraiser drop down menu appears on the Transaction page so you can indicate which Fundraiser is associated with your transaction.

> ## User Defined Fields

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

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

Warning: You can use these fields as they are, or personalize them to better fit the needs of your organization. However, we suggest that you do not re-name any user-defined fields created during the *JustGiving* 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 *JustGiving* with your databse, the Fundraiser drop down will appear under **Transaction Values** when running a mass update to Transaction Values.

Event Registration DIY Forms

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

❯ Allow event registrants to fundraise for your events

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 and choose 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 to allow registrants to fundraise with *JustGiving*.

4. Select the active event you want to link to the page or choose the No specific JustGiving event option if you do not want to select a specific event.

   Note: You can only select an event if it is listed as an active Fundraiser on the Fundraisers page under **Management**.

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 events.

If you select to use a custom confirmation email template, you must insert the eCommerce Details widget into your custom communication. 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 Communication 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 confirmation emai lor from the success page, they will be directed to create an account or sign in as an existing user to fundraise for your specified event.

If you did not select a specific event when you created the Event Registration DIY form, then the user is directed to your organization's fundraising page.