

Online Presence Guide

04/19/2019 eTapestry 7.22.0 Online Presence US

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eTapestry includes several features to help you with your online presence. You can use the eStore functionality to create a shopping cart, allow supporters to create personal fundraising pages, and create online forms to manage giving, event registration, membership, volunteer registration, and contacts.

Online Duplicate Checking

When a constituent submits a transaction through your Cart, eCommerce, or Personal Fundraising web page, **eTapestry** searches your database to check for an existing account. The duplicate check is based on the account name, street address, and email address information and begins when the website visitor clicks **Submit** on the page.

- The match does not need to be exact. For example, the name "Bob Smith" matches the account name "Bob and Mary Smith" because "Bob" and "Smith" are found within "Bob and Mary Smith".
- When a name field contains one character, the field is skipped. For example, "Bob J Smith," matches "Bob Smith" because "J" is skipped.
- **eTapestry** skips punctuation. For example, "Bob Smith Sr." matches "Bob Smith Sr" because the period is skipped.
- Within an address field, items that indicate the type of road are skipped. These include "ave", "avenue", "av", "avenue", "blvd", "boulevard", "cir", "circle", "ct", "court", "dr", "drive", "hwy", "highway", "ln", "lane", "lp", "loop", "pk", "park", "pt", "point", "rd", "road", "rt", "route", "sq", "square", "st", "street", "wy", and "way." For example, "123 Oak Dr" will match "123 Oak Drive" and "123 Oak."
- All searches and comparisons are based on blocks of text. For example, "bob@example.com" matches "bob@example.com, mary@example.com" because "bob@example.com" is included in "bob@example.com, mary@example.com."

When a duplicate is merged based on a transaction from a Cart, eCommerce, or Personal Fundraising page, **eTapestry** adds a note to the constituent's journal. The note includes persona information the website visitor entered on your web page, but the information does not add to the database. Also, the existing account name and the submitted account name both appear in the note. We recommend you regularly run a query and report to review these duplicate merges and identify personas and name changes you may want to update. To do this, create a query for the note content. Next, create a report that shows the information you want to review, such as the first name, last name, account number, persona fields, and the note content.

To improve duplicate matching for your constituents, we recommend the following.

- When an eCommerce page asks for a middle name, change it to ask for the middle initial. Alternatively, you can eliminate the middle name field.
- When you run the Online Journal Entries Report, select the option to check for duplicates. This may identify duplicates that were overlooked by this automatic duplicate checking process.
- To encourage website visitors to enter information consistently, include verbiage on your web page that asks them to enter the same name and address information that is on file with their bank.
- If a specific website visitor consistently enters name and address information differently than how it appears in your database, update your database to reflect the information the constituent uses on your web page.

eCommerce

The eCommerce functionality allows your organization to have customized online giving and registration pages that not only process transactions, but also update your **eTapestry** database automatically with the constituent and transaction details collected on the page. If you need to make any changes to your custom eCommerce web page, please complete an edit request on the [eCommerce Edit Request Form](#).

Note: Custom eCommerce web pages do not include DIY, eStore, or Personal Fundraising pages.

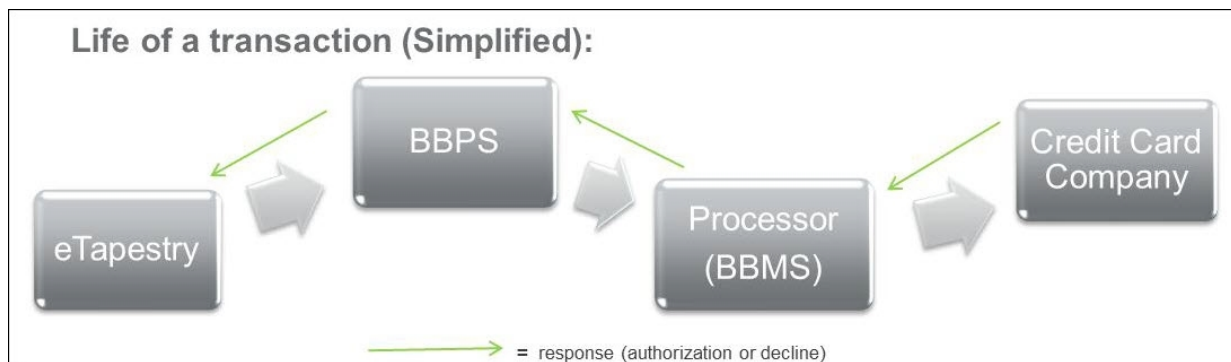
Blackbaud Payment Service (BBPS) and Blackbaud Merchant Services (BBMS)

Blackbaud Payment Service (BBPS) is Blackbaud's solution for secure credit/debit card storage. All credit cards in your Blackbaud products are stored in our secure servers at BBPS. This protects the donor's personal information as well as the user from any liability.

BBPS is required by all Blackbaud products to either process or store credit card information. BBPS enables Blackbaud software to adhere to the PCI-DSS security standards of major credit card companies.

Blackbaud Merchant Services (BBMS) is a merchant account available to use with your Blackbaud products. Merchant accounts are responsible for actually processing the credit card transactions and depositing the funds into your bank account.

BBMS also gives you an online portal where you can run reports, refund transactions, and manage chargebacks.



➤ Set Up Blackbaud Payment Service (BBPS) and Blackbaud Merchant Services (BBMS)

- Go to <https://bbmsmerchant.blackbaud.com> to access the Blackbaud Merchant Services portal.
 - In the **Site ID** field, enter your organization's Blackbaud site ID.
 - In the **Email** field, enter your email address. To set up an account, you must be Blackbaud's primary contact at your organization.

2. Click **Next**. The Address screen appears.
3. Verify that the information on the screen correctly identifies your organization. If the information is correct, click **Next**. The Terms and Conditions screen appears.
4. Review Blackbaud Payment Service's terms and conditions. Select **I accept the terms** and click **Next**. The Blackbaud Payment Service Login screen appears.
5. Create a user name and password for BBPS. You will need these credentials to link BBPS to your **eTapestry** database, so retain this information for your records.
6. Click **Next**. The Bank Deposit screen appears.
7. In this screen, review payment terms and enter bank information.
 - Review the agreement for direct deposits and select **I accept the terms**.
 - Enter the information for the bank account where you want to receive payments. Enter the country, currency, bank name, routing and account number, and account type.
 - In the **EIN** field, enter you organization's tax identification number. This might be an EIN, CAR, TIN, or ITIN number.
 - In the **Account Holder** field, enter the name on the account associated with the tax identification number.

Note: Disbursements are automatically deposited into the bank account you indicate, normally on a weekly basis. You can consult the disbursement schedule in this [Knowledgebase solution](#).

8. Click **Next**. The Statement Descriptor screen appears.
9. In this screen, enter the information that appears on a donor's credit card statements for transactions with your organization.
 - In the **Name** field, enter up to 18 characters describing the transaction. We recommend that you enter the name of your organization or an abbreviation if it does not fit.
 - In the **Phone number** field, enter a number donors can call if they have questions about their transaction.
10. Click **Next**. The Blackbaud Merchant Services Login screen appears.
11. Create a user name and password for BBMS. You will need these credentials to link BBMS to your **eTapestry** database, so retain this information for your records.
12. Click **Submit** to create your account.

➤ Link your BBPS Account to your eTapestry Database

1. From **Management**, click **My Organization**. The My Organization screen appears.
2. Click the **Preferences** tab.
3. In the Preferences tile, enter your BBPS credentials.
 - In the **BBPS UserName** field, enter the user name you set up for BBPS.
 - In the **BBPS Password** field, enter the password you set up for BBPS.
4. Click **Save And**.

Link your BBMS Account to your *eTapestry* Database

1. From **Management**, click **My Organization**. The My Organization screen appears.
2. Click **eCommerce**.
3. Under **Tasks**, click **Add BBMS Processor**.
4. If this is the default processor to use, select **Default**.
Enter your BBMS account credentials.
5. If you want to process direct debits (ACH/EFT) from donors who provide bank routing information, select **Supports EFT**. Donors can make recurring or one-time gifts.

Tip: Be aware that ACH only supports the United States dollar. If you process transactions using another currency, do not select this option.

Note: When you use BBMS, direct debits do not process in real time. These transactions are processed in bulk one time each day for seven days. When transactions do not process successfully within seven days, *eTapestry* automatically generates a gift reversal.

6. Click **Save**.

Make a Test Donation

After you set up a processor, we recommend you make a test donation to make sure everything is working correctly. If you have an online donation page, the easiest test is to make a \$2 test donation through the form.

If you do not use online donation forms, select a record in your database such as a staff member and add a \$2 gift. When you save the gift, select "Process Transaction" from the Save And menu and click **Save And**.

After you complete either test, verify that the donation appears correctly in your database and in the BBMS web portal. For more information, refer to [Blackbaud Merchant Services \(BBMS\) Web Portal on page 10](#).

Reset your BBPS or BBMS Password

For your security, only your organization's primary contacts and site administrators can reset BBPS and BBMS passwords through Blackbaud.com.

For details about resetting your password, refer to this [Knowledgebase solution](#).

Note: You must update your passwords in *eTapestry* after you reset your BBPS or BBMS passwords. For more information, refer to [Link your BBPS Account to your eTapestry Database on page 8](#) and [Link your BBMS Account to your eTapestry Database on page 9](#).

Blackbaud Merchant Services (BBMS) Web Portal

After you set up your BBMS account, you must log into the web portal in order to be able to issue refunds and verify that all your settings are correct. We recommend that you log in as soon as you complete your setup.

> Log into BBMS Web Portal

1. Go to <https://bbms.blackbaud.com>. The login screen appears.
2. Enter your BBMS username and password. This is the second set of credentials you created during setup.
3. From Account Management, click **Disbursement information** to verify that your bank account and contact information is accurate.
4. From Account Management, click **Account configurations**.
5. Enter your BBPS credentials. This is the first set of credentials you created during setup. Entering these credentials allows you to issue refunds if necessary.
6. If you created a test transaction, from Transactions, click **Transaction search**. A search screen appears.
7. Search for an verify your test transaction.

Reconcile BBMS Transactions

You can reconcile transaction in BBMS with the transactions tracked in your database. To reconcile, follow these steps.

1. Run the disbursement report from the BBMS web portal.
2. Query the transactions processed through BBMS in **eTapestry**.
3. Run a report in **eTapestry**.
4. Compare both reports.

Run Disbursement Report from the BBMS Portal

1. Log into the BBMS web portal at <https://bbms.blackbaud.com>.
2. Under Reports, click **Disbursement**.
3. Click the disbursement you want to export.
4. To see a PDF of the report, click **Reports** and select "Detail." To download an Excel file of the report, click **Export** and select "Detail."

Query Transactions Processed through BBMS in eTapestry

1. From **Queries**, click **Manage Queries**.
2. Select the BBMS query category. If you do not have one, under **Tasks**, click **New Category** to create it.
3. Under **Tasks**, click **New Query**. The Create a New Query screen appears.
4. In the **Query Basics** section, use the disbursement date on your disbursement report to name your query. For example, if the date on the disbursement report is January 15, 2013, name your query "2013-01-15 Disbursement."
5. In the **Starting Criteria** section, set the category and query to Base - All Constituents.
6. In the **Results** section, set the **Data Return Type** to Journal Entries.
7. In the **Criteria Options** section, select **Match each criteria**.
8. From the **Browse Fields** tab, select Commonly Used Fields in the menu.
9. Click **Journal Entry Date**. Set **Range Type** to Custom Range and enter the date range listed on your disbursement report.
10. From the **Browse Fields** tab, select Journal in the menu.
11. Click **Transaction Processors** and select your BBMS processor.
12. Click **Save And**.

Run BBMS Transaction Report in eTapestry

1. From **Reports**, click **Manage Reports**.
2. Select the BBMS Reports category. If you do not have one, under **Tasks**, click **New Category** to create it.
Create a category called "BBMS Reports." Click **Save Category** under Tasks.
3. From the BBMS Reports category, click **New Report**. The Create a New Report page appears.
4. In the **Report Basics** section, name the report "BBMS Reconciliation Report."
5. In the **Group Results** section, select a grouping option from the **Group by** field. Grouping options enable you to place accounts or entries that share a common value together. You can also elect to show totals for each group or collapse each group into a single line.
6. In the **Report Columns** section, select Gift Type Fields under the **Browse Fields** tab.
7. Click **Credit/Debit Card Number** and **Credit/Debit Card Type**. You can arrange the columns by dragging them. We recommend you arrange columns in the following order:
 - **Date**
 - **Credit/Debit Card Type**
 - **Account Name**

- **Credit/Debit Card Number**
- **Received**

8. Click on the dots icon next to the Date column and change the sort order to ascending.
9. Under **Tasks**, click **Save and Run**.
10. In the **Query** section, select the query you built for the time frame you want to reconcile.
11. In the **Delivery Options** section, select how to display the results of the report in the **Report Format** menu.
12. Click **Submit** to run the report.

Do It Yourself Online Forms

Tip: Templates for DIY forms are responsive. When website visitors view your pages that use responsive templates, the page adjusts to respect the size of the visitor's device. This makes it easier for visitors to use the form from tablets and smart phones. However, existing DIY pages created before the 7.12 release (on September 14, 2014) are not automatically responsive. To make an older DIY page responsive, republish the page. If the DIY form is embedded in another website, republish the page, copy the updated embed code, and use the code to update your website. For best results, your website should also be responsive. Templates with custom skins are not responsive. We recommend you use embeddable templates instead.

You can create and edit Do It Yourself (DIY) Online Forms to use for online giving, event registrations, volunteer registrations, membership, and email sign-ups.

You can create several types of DIY forms and publish them yourself.

- **Online Giving Page:** This form allows your page visitors to make one-time and recurring donations.
- **Event Registration Page:** This form allows your page visitors to register for an event.
- **Membership Sign-up Page:** This form allows your page visitors to purchase memberships.
- **Contact Page:** This form allows your page visitors to sign up to receive regular communications from you. This form cannot accept payments.
- **Volunteer Page:** This form allows your page visitors to register to volunteer with your organization. This form cannot accept payments.

You can access the DIY forms page from **Management**. On the My Online Forms page, you can see all of your existing forms, their statuses, and relevant statistics.

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.

Note: If your organization uses the Advanced Security module, you can only edit forms assigned to sites you have access to.

My Online Forms ?

Your organization has **1 live** form. (You have a subscription to publish **10** forms)

Need to be able to publish more forms? [Contact a representative](#) to learn more about subscriptions.

Create a New Page
Graphical Overview
Make a Suggestion

Annual Fund 2015 *live*

Edit Copy Delete Disable

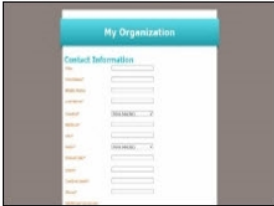
Basic Info

Title: Annual Fund 2015

Description:
Betsy's page

Last Edited: 5/13/2015 3:40 PM

Last Published: 9/22/2015 11:38 AM



Sharing

Link
<https://etap-cdev-sfweb.blackbaudhosting.com/onlineforms/HammersSocial1 Database/AF2015.html>

Share Tweet

Embed Code
View code to insert this form into your existing website

Statistics

Last updated: 3/2/2016 10:31 AM [Refresh](#) Statistics since 12/9/2012

| Number of Gifts | Total Received | Average Gift |
|-----------------|----------------|--------------|
| --- | --- | --- |

Annual Gala *draft*

Edit Copy Delete


Basic Info

Title: Annual Gala

Description:

Last Edited: 1/21/2016 4:31 PM

Last Published:



Sharing

Link
<https://etap-cdev-sfweb.blackbaudhosting.com/onlineforms/HammersSocial1 Database/annualgala.html>

Embed Code

You must publish your page in order to see the code to insert the form into your existing website. To publish, click **Edit** and then click **Go Live** in the form editor.

Forms with a status of "draft" have not been published. After you publish a form, the status changes to "live."

Note: By default, only users in the Admin security group have access to online forms. To grant rights to online forms to other users, your administrator can change the permissions in their security group. For information about how to change security permissions, refer to [Create a security group on page 1](#).

You can use online forms to create new pages to fit your organization's needs. To help you design professional pages, use pre-configured templates to get started. You can edit these templates to better match your website's colors, fonts, and images. Using the editing options, you can usually create a design that resembles the look and feel of your website, even if it is not an exact match.

Note: Contact Blackbaud design services if you want your page to match your current website exactly, or you have any additional needs that cannot be accommodated by the standard online forms.

Consider the capabilities of online forms when deciding if they will work for you.

| Capability | Online Forms | Online Forms with Custom Styles | Custom Forms |
|---|--------------|---------------------------------|--------------|
| Accept donations, event registrations, and membership payments | Yes | Yes | Yes |
| Design can be customized by users to resemble your website | Yes | No | No |
| Design can be customized by <i>Blackbaud</i> to resemble your website | No | Yes | Yes |
| Design can be customized to match your website exactly | No | No | Yes |
| Content (parts, fields, etc.) can be edited and published without assistance from <i>Blackbaud</i> | Yes | Yes | No |
| Design (colors, fonts, etc.) can be edited and published without assistance from <i>Blackbaud</i> | Yes | No | No |
| Pre-configured templates and parts | Yes | Yes | No |
| Can perform more than one action, such as online giving and event registration on the same form | No | No | Yes |
| Allow hidden values, such as tracking different form versions for comparison purposes or adding an advanced security code | Yes | Yes | Yes |
| Custom styles available on request | Yes | Yes | Yes |

Create Do It Yourself Online Forms

You can use DIY forms to interact with your website visitors. These forms allow you to receive donations, register people for events, sell memberships, register new volunteers, or just keep in touch with your constituents by allowing them to sign up for email communications. If you need to create more, you must delete existing pages before you can create additional ones.

Note: You can create and edit up to five DIY forms without a DIY forms subscription, but you must have an active subscription to publish any DIY forms. To view your subscription information, click **My Organization** under the Manage tab and then click **Subscriptions**. For information about activating the module, contact your Blackbaud representative.

Before you create a DIY form, it is best that you have at least one email template in communication. This template is used to send confirmation emails to visitors when they fill out the form and to your organization when a submission is received. For more information about how to create an email template in communication, refer to [Creating an Email Template](#).

You can create specific email templates for any forms you intend to use to tailor the email content for each situation. For example, if you plan to publish a volunteer registration page, you can create a volunteer confirmation email template with the appropriate language, volunteer instructions, and contact information.

You can change your confirmation email template selection after you create the DIY form. For information about how to change the confirmation email template for an existing form, refer to [Edit Do It Yourself Online Form Configuration Settings on page 29](#).

Tip: Templates for DIY forms are responsive. When website visitors view your pages that use responsive templates, the page adjusts to respect the size of the visitor's device. This makes it easier for visitors to use the form from tablets and smart phones. However, existing DIY pages created before the 7.12 release (on September 14, 2014) are not automatically responsive. To make an older DIY page responsive, republish the page. If the DIY form is embedded in another website, republish the page, copy the updated embed code, and use the code to update your website. For best results, your website should also be responsive. Templates with custom skins are not responsive. We recommend you use embeddable templates instead.

➤ Create an online form

1. From **Management**, select **DIY Online Forms**. The DIY Forms page appears.
2. Click **Create a New Page**.
3. Click **Online Giving Page**. The *eTapestry* Styles window appears.
4. Select the style you want to use as a template for your page. You can edit the content and design of your form later.
5. Click **Next**. The configuration page appears.
6. Under **General Page Settings**, in the **Page Name** field, enter a name for your page. This is an internal name for your reference and does not appear on the page.
 - a. Enter a description for your reference. This is optional and does not appear on the published page.
 - b. In the **Title** field, enter a descriptive title for the page. The title appears at the top of the browser when visitors view the page.
 - c. In the **URL** field, enter the URL extension you want to use for this page. The extension appears at the end of the web address for the page.
 - d. To include a comments box on the form, select **Include comments box**.
 - e. In the **Default Country** field, select the default country to display in the address block of the form.
7. Under **Online Giving Settings**, select **Send the donor a confirmation email** to send an email confirmation to donors when the form is submitted.
 - a. To edit the text of the success message, select **Edit Message**. The Edit Success Message Text screen appears. On this screen, you can enter a custom message that is sent to users who interact with your DIY form. For example, if a donor gives a gift through an Online Giving form you create, you may want to send them a message thanking them for their donation.

You can include the following data merge fields in your custom success message:

- [CN] = Constituent Name
- [RA] = Received Amount

- [EM] = Email
- [ON] = Organization Name

In order to add these data merge fields into your success message, you will need to enter the data merge field names into the message editor exactly as they are listed above or else your data will not merge correctly.

Once you are satisfied with the content of your message, select **Update**.

Note: In order for the custom success message settings to take effect for existing DIY forms, you will need to republish your form. To republish your form, from the Onine Forms Editor page, select **Go Live**. We recommend you test the confirmation email to ensure the message appear as you have intended.

- In the **From what address** field, enter the email address you want to appear for confirmation emails.
- In the **Subject** field, enter the subject to appear in the confirmation email to donors.
- In the **Confirmation Email Template** field, select the template to use for confirmation emails. The options that display from the drop down are the templates available from **Communications**. If a template does not exist that fits your needs, you can create a new template or edit an existing template in **Communications**. For more information, refer to [Creating an Email Template](#).
- To send an email confirmation to yourself when the form is submitted, select **Send your organization a confirmation email**. You receive the confirmation email every time a visitor submits the form. To learn more about this standard email, refer to [Automatic Notification Email on page 28](#).
 - In the **To what address(es)** field, enter the email address to receive the notification email. This is typically someone in your organization. To enter multiple email addresses, separate each one with a comma.
 - In the **Subject** field, enter the subject to appear in the confirmation email to your organization.
- To generate a receipt number to include on the donation confirmation email, select **Generate receipts on transactions from this page**.

Warning: If you select to generate receipts on transactions from the page, all gifts will be marked as final. However, if your Database Language Locale is en_GB, **eTapestry** will not automatically mark any gifts or recurring gifts created from DIY forms as final so that any gift aid eligible gifts will not be missed.

Warning: If you select to generate receipts on transactions from the page, all gifts will be marked as final.

Tip: In **eTapestry**, when you include receipt information as a part of your email confirmations, you are creating an "eReceipt" by definition.

To send the eReceipt, the donor confirmation template you select in the **Confirmation Email Template** field must include the **Generated Receipt Number** merge value or the **eCommerce Details** widget. When you select to generate eReceipts, **eTapestry** automatically includes the next unique receipt number that is available in the database on each receipt.

Note: When (None Selected) appears in the **Confirmation Email Template** field, the default template **eTapestry** uses automatically includes eReceipt information.

- g. In the **Transaction Processor** field, select the processor you want to use for transactions received through this form. To allow electronic fund transfers through the form, select the **Include ACH/Direct Debit** checkbox. For information about how to add a transaction processor in **eTapestry**, refer to [Set Up Transaction Processor on page 1](#).
- h. In the **Fund** row, click **Select Fund(s)**. The Select Fund(s) screen appears.
 - i. To select a fund for the page, click its name. You must select at least one fund for donations to process to from the form. When you select one fund, all transactions default to that fund and the field does not appear on the form. When you select more than one fund, a **Fund** field appears on the form for users to select the fund for the transaction.
 - ii. To save your fund selections, click **Update**.
 - iii. Repeat these steps for any campaigns, approaches, or letters you want to apply to the page.

Tip: You can only select one campaign and one approach. These are required if designated as required during configuration. When you select a letter, you can later query on transactions to identify the donors to receive the letter.

- i. If you use the optional Advanced Security Module, you can apply page and record security. For information about advanced security, refer to [Advanced Security on page 26](#).
 - j. To automatically track a field value when a form is submitted, you can add a hidden field to the form that does not appear on the published page. For more information about hidden fields, see [Hidden Fields on page 27](#).
8. To create the page and begin editing it, click **Submit**.

Process Direct Debit transactions from Online Giving pages

Note: This functionality is only available for users in the United Kingdom.

Direct Debit allows you to collect payments from a constituent's account when they commit to giving regularly to your organization. **eTapestry** uses the GoCardless payment processor to process Direct Debit payments, and your access to certain features depends on what GoCardless plan your organization subscribes to.

➤ Process Direct Debit transactions from Online Giving pages

1. From **Management**, select **DIY Forms** under **Online Presence**. The My Online Forms page appears.
2. From the My Online Forms page, you can create a new DIY form or edit your existing forms.

To create a new online giving page, select **Create a New Page** on the My Online Forms page. Once you have selected the Online Giving page and the style you wish to apply, select **Next** on the What do you want your page to look like screen. The Choose Your Settings screen appears.

To access this screen for existing DIY forms, select **Edit** next to the Online Giving page you wish to edit. The Online Forms Editor page appears. Select **Settings** to access the Choose Your Settings screen.

- From the Choose Your Settings screen, under **Online Giving Settings**, select GoCardless in the **Transaction Processor** drop down menu.

Note: Once you select GoCardless as your transaction processor, you will not be allowed to process one time gifts through your form.

- Once you are finished editing your DIY form settings, select **Update**.
- When you select to edit the **Gift Information** section of your form, **Allow Recurring Gifts** will remain selected on the Edit Gift Information screen, and the **One Time** value will not be available for you to select.
- After you publish your Online Giving form, donors will be able to make Direct Debit recurring gifts to your organization. Once their donation has successfully been submitted, the donor will be redirected to a confirmation page with the following information:
 - Confirmation of a successful Direct Debit transaction
 - Name of the organization that appears on the bank statement
 - Notification that the donor will receive a confirmation email within 3 business days
 - Link to a PDF of the Direct Debit transaction

➤ Create a contact page

- From **Management**, click **DIY Online Forms**. The DIY Forms page appears.
- Click **Create a New Page**.
- Click **Contact Page**. The *eTapestry* Styles window appears.
- Select the style you want to use as a template for your page. You can edit the content and design of your form later.
- Click **Next**. The configuration page appears.
- In the **Page Name** field, enter a name for your page. This is an internal name for your reference and does not appear on the page.
- Enter a description for your reference. This is optional and does not appear anywhere on the published page.
- In the **Page Title** field, enter a descriptive title for the page. The title appears at the top of the browser when visitors view the page.
- In the **URL** field, enter the URL extension you want to use for this page. The extension appears at the end of the web address for the page.
- To include a comments box in the form, select the **Include comments box?** checkbox.
- In the **Default Country** field, select the country you want to display as default in the address

block of the form.

12. To send users a confirmation email upon completion of your form, select **Send the donor a confirmation email**.
13. If you want to edit the success message users will receive when they complete your form, under **Online Giving Settings**, select **Edit Message**. The Edit Success Message Text screen appears. On this screen, you can enter a custom message that displays to users who interact with your DIY form. For example, if a donor gives a gift through an Online Giving form you create, you may want to show them a message thanking them for their donation.

You can include the following data merge fields in your custom success message:

- [CN] = Constituent Name
- [RA] = Received Amount
- [EM] = Email
- [ON] = Organization Name

In order to add these data merge fields into your success message, you will need to enter the data merge field names into the message editor exactly as they are listed above or else your data will not merge correctly.

Once you are satisfied with the content of your message, select **Update**.

Note: In order for the custom success message settings to take effect for existing DIY forms, you will need to republish your form. To republish your form, from the Online Forms Editor page, select **Go Live**. We recommend you test the your changes to ensure the message appears as you have intended.

14. In the **From what address?** field, enter the email address from which you want confirmation emails to be sent. This is the email address your donors will see when they receive confirmation emails from you after they submit the form.
15. In the **Send Notification to Donor** field, enter the subject you want in the confirmation email to donors.
16. In the **Confirmation Email Template** field, select the template you want to use for confirmation emails. If you do not choose to send confirmation emails, leave this field blank. The options that display represent the templates available in the communication area of your database. If you do not see a template that fits your needs, you can create a new template or edit an existing template in communication. For more information, see [Creating an Email Template](#).
17. To send an email confirmation to yourself when the form is submitted, select **Send your organization a confirmation email?**. You receive the confirmation email every time a visitor completes and submits the form. To learn more about this standard email, see [Automatic Notification Email on page 28](#)
18. In the **To what address(es)?** field, enter the email address where you want to send the notification email. This is normally someone in your organization. Separate multiple email addresses with a comma.
19. In the **Subject** field, enter the subject you want in the confirmation email to your organization.
20. If you use the optional Advanced Security Module, you can add page and record security. For more information, see [Advanced Security on page 26](#).
21. If you want to track a value for a field automatically when a constituent submits this form, you

can add a hidden field to the form, which does not appear on the published form. For more information about hidden fields, see [Hidden Fields on page 27](#).

22. Click **Submit** to create the page and begin editing it.

Event Registration Page

Tip: For best practice information about online event registrations, refer to [eTapestry Best Practices: Online Events and Ticket Sales](#).

When you use event registration forms, you must specify the ticket price for the event and you must also include a user-defined field to track ticket quantity. You cannot publish an event registration page until these steps are complete. When you create the user-defined field, it must be set up this way:

| User-Defined Field | Data Type | Field Application | Display Type |
|--------------------|-----------|-------------------|--------------|
| Ticket Quantity | Number | Transactions | Text Box |

Note: Event registration forms are best to use for paid events. For free events, we recommend that you use a contact form that does not require payment fields.

➤ DIY event registration page: Create form and General Page Settings

1. From **Management**, click **DIY Online Forms**. The DIY Forms page appears.
2. Click **Create a New Page**.
3. Click **Event Registration Page**. The *eTapestry* Styles window appears.
4. Select the style you want to use as a template for your page. You can edit the content and design of your form later.
5. Click **Next**. The configuration page appears.
6. In the **Page Name** field, enter a name for your page. This is an internal name for your reference and does not appear on the page.
7. Enter a description for your reference. This is optional and does not appear on the published page.
8. In the **Page Title** field, enter a descriptive title for the page. The title appears at the top of the browser when visitors view the page.
9. In the **URL** field, enter the URL extension you want to use for this page. The extension appears at the end of the web address for the page.
10. To include a comments box in the form, select the **Include comments box?** checkbox.
11. In the **Default Country** field, select the country you want to display as default in the address block of the form.

➤ DIY event registration page: Event Signup Settings

For information about how to create a DIY event registration form, refer to [DIY event registration page: Create form and General Page Settings on page 20](#).

1. In the **From what address?** field, enter the email address from which you want confirmation emails to be sent. This is the email address your event registrants will see when they receive confirmation emails from you after they submit the form.
2. In the **Send Notification to Donor** field, enter the subject you want in the confirmation email to event registrants.
3. In the **Confirmation Email Template** field, select the template you want to use for confirmation emails. If you do not choose to send confirmation emails, leave this field blank. The options that display represent the templates available in the communication area of your database. If you do not see a template that fits your needs, you can create a new template or edit an existing template in communication. For more information, refer to [Creating an Email Template](#).
4. To send an email confirmation to yourself when the form is submitted, select **Send your organization a confirmation email?**. You receive the confirmation email every time a visitor completes and submits the form. To learn more about this standard email, refer to [Automatic Notification Email on page 28](#)
5. In the **From what address?** field, enter the email address where you want to send the notification email. This is normally someone in your organization. Separate multiple email addresses with a comma.
6. In the **Subject** field, enter the subject you want in the confirmation email to your organization.
7. If your organization integrates with **everydayhero**, and you would like event registrants to participate in your **everydayhero** campaigns, you can select to allow event registrants to fundraise for your campaigns. For more information, see [Event Registration DIY Forms](#).
8. In the Transaction Processor field, select the processor you want to use for payments received through this form. To allow electronic fund transfers through the form, select the **Include ACH/Direct Debit** checkbox.

For information about how to add a transaction processor in **eTapestry**, refer to [Set Up Transaction Processor on page 1](#).

➤ **DIY event registration page: Select Fund Information**

For information about how to create a DIY event registration form, refer to [DIY event registration page: Create form and General Page Settings on page 20](#).

1. Click **Select Fund(s)**. The Select Fund(s) screen appears.
2. Click the name of a fund to select it. You must select at least one fund where donations will be tracked. To select additional funds, click the names of the funds. If you select only one fund, all payments default to that fund and the field does not display on the form. If you select more than one fund, a fund field appears on the form and users select which fund to use.
3. Click **Update** to save your fund selections.
4. You can select a campaign for payments made through this form. Only one campaign can be associated with the form. If you select a campaign, payments made through this form default to the campaign, and no campaign field appears on the form. A campaign is required only if they are configured as required in the database. To select a campaign, click **Select a Campaign**.
5. You can select a campaign for payments made through this form. Only one campaign can be

associated with the form. If you select a campaign, payments made through this form default to the campaign, and no campaign field appears on the form. A campaign is required only if they are configured as required in the database. To select a campaign, click **Select a Campaign**.

You can select an approach for payments made through this form. Only one approach can be associated with the form. If you select an approach, payments made through this form default to that approach, but no approach field appears on the form. An approach is required only if they are configured as required in the database. To select an approach, click **Select an Approach**.

If you use the optional Advanced Security Module, you can add page and record security. For more information, refer to [Advanced Security on page 26](#).

If you want to track a value for a field automatically when a constituent submits this form, you can add a hidden field to the form, which does not appear on the published form. For more information about hidden fields, refer to [Hidden Fields on page 27](#).

6. Click **Submit** to create the page and begin editing it.

➤ **DIY event registration page: Event Tickets**

For information about how to create a DIY event registration form, refer to [DIY event registration page: Create form and General Page Settings on page 20](#).

Warning: Custom skins are not compatible with multiple ticket prices for DIY Event forms. We recommend you use embeddable templates instead. For information about embeddable DIY forms, refer to [Embed Do It Yourself Online Forms on page 30](#).

1. Hover your cursor over **Before your page can Go Live, you must set up your event tickets** and click **Edit**. The Edit Ticket Options screen appears.
2. For each ticket, enter a label, price and description. For example, you may want to create separate tickets for students, adults, and seniors.
3. Select a user-defined field to indicate the quantity of tickets and then select how you want the field to apply. For example, you may have a user-defined field called Student Ticket Quantity and you select to apply it to Journal Entry.

Each ticket requires a unique user-defined field. When you create the field, make sure you select "Number" for **Data Type, Transactions** for **Field Application**, and **Text Box** for **Display Type**. For more information about how to create user-defined fields, refer to [User-Defined Fields](#).

4. Enter a non-deductible amount for the ticket. This amount does not display on the event page. It is important you remember to indicate the amount that is tax deductible when you send receipts and thank you letters.

This field only displays for **eTapestry** users in the United States, Canada, and Australia.

5. To create additional tickets, click **Add another event ticket**.
6. To save your changes, click **Update**.

Membership Signup Page

If you use membership signup forms, you must include two user-defined fields. The user-defined fields must be set up in the following way.

| User-Defined Field | Data Type | Field Application | Display Type |
|--------------------|-----------|-------------------|-----------------------------------|
| Membership level | Text | Transactions | Allow assignment of only one item |
| Membership type | Text | Transactions | Allow assignment of only one item |

You cannot publish a membership signup page without these user-defined fields. When you insert user-defined fields into a membership form, the only available fields will be the ones that meet these criteria. For information about how to create user-defined fields, refer to [User Defined Fields](#).

➤ Create a membership signup page

1. From **Management**, click **DIY Online Forms**. The DIY Forms page appears.
2. Click **Create a New Page**.
3. Click **Membership Signup Page**. The *eTapestry* Styles window appears.
4. Select the style you want to use as a template for your page. You can edit the content and design of your form later.
5. Click **Next**. The configuration page appears.
6. In the **Page Name** field, enter a name for your page. This is an internal name for your reference and does not appear on the page.
7. Enter a description for your reference. This is optional and does not appear on the published page.
8. In the **Page Title** field, enter a descriptive title for the page. The title appears at the top of the browser when visitors view the page.
9. In the **URL** field, enter the URL extension you want to use for this page. The extension appears at the end of the web address for the page.
10. To include a comments box in the form, select the **Include comments box?** checkbox.
11. In the **Default Country** field, select the country you want to display as default in the address block of the form.
12. To send an email confirmation to members when the form is submitted, select **Send the donor a confirmation email?**
13. In the **From what address?** field, enter the email address from which you want confirmation emails to be sent. This is the email address your members will see when they receive confirmation emails from you after they submit the form.
14. In the **Subject** field, enter the subject you want in the confirmation email to members.
15. In the **Confirmation Email Template** field, select the template you want to use for confirmation emails. If you do not choose to send confirmation emails, leave this field blank. The options that display represent the templates available in the communication area of your database. If you do not see a template that fits your needs, you can create a new template or edit an existing template in communication. For more information, see [Creating an Email Template](#).
16. To send an email confirmation to yourself when the form is submitted, select **Send your organization a confirmation email?** You receive the confirmation email every time a visitor

completes and submits the form. To learn more about this standard email, see [Automatic Notification Email on page 28](#)

17. In the **To what address(es)?** field, enter the email address where you want to send the notification email. This is normally someone in your organization. Separate multiple email addresses with a comma.
18. In the **Subject** field, enter the subject you want in the confirmation email to your organization.
19. In the Transaction Processor field, select the processor you want to use for payments received through this form. To allow electronic fund transfers through the form, select the **Include ACH/Direct Debit** checkbox.

For information about how to add a transaction processor in **eTapestry**, refer to [Set Up Transaction Processor on page 1](#).
20. Click **Select Fund(s)**. The Select Fund(s) screen appears.
21. Click the name of a fund to select it. You must select at least one fund where donations will be tracked. To select additional funds, click the names of the funds. If you select only one fund, all payments default to that fund and the field does not display on the form. If you select more than one fund, a fund field appears on the form and users select which fund to use.
22. Click **Update** to save your fund selections.
23. You can select a campaign for payments made through this form. Only one campaign can be associated with the form. If you select a campaign, payments made through this form default to the campaign, and no campaign field appears on the form. A campaign is required only if they are configured as required in the database. To select a campaign, click **Select a Campaign**.

You can select an approach for payments made through this form. Only one approach can be associated with the form. If you select an approach, payments made through this form default to that approach, but no approach field appears on the form. An approach is required only if they are configured as required in the database. To select an approach, click **Select an Approach**.

If you use the optional Advanced Security Module, you can add page and record security. For more information, see [Advanced Security on page 26](#).

If you want to track a value for a field automatically when a constituent submits this form, you can add a hidden field to the form, which does not appear on the published form. For more information about hidden fields, see [Hidden Fields on page 27](#).
24. Click **Submit** to create the page and begin editing it.

> Enter membership information on a membership form

1. On a membership form, click the white space under the Membership Information heading. The Manage Membership Fields screen appears.
2. The **Membership Level** field is required, and the **Membership Type** field is optional. Price is required and associated with the **Membership Level** field.
 - Under Membership Level or Membership Type, click **Select a field...** The Select Membership Field screen appears. Select the category where you have a user-defined field to track membership level or type and click on the field name to select it.
 - To edit the label of the field as it will appear on the form, enter your preferred label in the

Label field.

- Select whether you want the field to appear as radio buttons or as a dropdown menu, and enter the labels for the values as you want them to appear on the form. Enter a price for each level.

To hide any of the values, clear the **Show** checkbox.

- Click **Ok**. You return to the Manage Membership Fields screen.

3. Once you are finished entering a membership level and/or a membership type, click **Update**.

Volunteer Signup Page

Volunteer pages do not require any user-defined fields, but we recommend that you create four user-defined fields set up in the following way.

| User-Defined Field | Data Type | Field Application | Display Type |
|---|-----------|-------------------|---|
| Volunteer availability - days of the week | Text | Constituents | Selection from a set of values (make values match the days of the week that volunteers are allowed to select) |
| Volunteer availability - times of day | Text | Constituents | Selection from a set of values (make values match the hour ranges that volunteers are allowed to select) |
| Volunteer activity/interest | Text | Constituents | Selection from a set of values (make values match the activities available to volunteers) |
| Volunteer skills | Text | Constituents | Selection from a set of values (make values match the skills you find desirable in volunteers) |

Note: You can select Text Box as the display type for these user-defined fields, but we recommend that you use a selection from a set of values. This allows you to query on membership level and type more easily.

For more information about how to create user-defined fields, refer to [User Defined Fields](#).

➤ Create a volunteer page

1. From **Management**, click **DIY Online Forms**. The DIY Forms page appears.
2. Click **Create a New Page**.
3. Click **Volunteer Page**. The **eTapestry** Styles window appears.
4. Select the style you want to use as a template for your page. You can edit the content and design of your form later.
5. Click **Next**. The configuration page appears.
6. In the **Page Name** field, enter a name for your page. This is an internal name for your reference and does not appear on the page.
7. Enter a description for your reference. This is optional and does not appear anywhere on the

published page.

8. In the **Page Title** field, enter a descriptive title for the page. The title appears at the top of the browser when visitors view the page.
9. In the **URL** field, enter the URL extension you want to use for this page. The extension appears at the end of the web address for the page.
10. To include a comments box in the form, select the **Include comments box?** checkbox.
11. In the **Default Country** field, select the country you want to display as default in the address block of the form.
12. When a visitor submits this form, a journal contact is created with the details of the submission. In the **Journal Contact Subject** field, enter the subject you want to use for the journal contact.
13. To send an email confirmation to the volunteer when the form is submitted, select **Send Notification to Donor**.
14. In the **From what address?** field, enter the email address from which you want confirmation emails to be sent. This is the email address your volunteers will see when they receive confirmation emails from you after they submit the form.
15. In the **Subject** field, enter the subject you want in the confirmation email to volunteers.
16. In the **Confirmation Email Template** field, select the template you want to use for confirmation emails. If you do not choose to send confirmation emails, leave this field blank. The options that display represent the templates available in the communication area of your database. If you do not see a template that fits your needs, you can create a new template or edit an existing template in communication. For more information, see [Creating an Email Template](#).
17. To send an email confirmation to yourself when the form is submitted, select **Send your organization a confirmation email?** You receive the confirmation email every time a visitor completes and submits the form. To learn more about this standard email, see [Automatic Notification Email on page 28](#)
18. In the **To what address(es)?** field, enter the email address where you want to send the notification email. This is normally someone in your organization. Separate multiple email addresses with a comma.
19. In the **Subject** field, enter the subject you want in the confirmation email to your organization.
20. If you use the optional Advanced Security Module, you can add page and record security. For more information, see [Advanced Security on page 26](#).
21. If you want to track a value for a field automatically when a constituent submits this form, you can add a hidden field to the form, which does not appear on the published form. For more information about hidden fields, see [Hidden Fields on page 27](#).
22. Click **Submit** to create the page and begin editing it.

Advanced Security

If your organization uses the Advanced Security module, you can take advantage of advanced security for DIY forms. To secure forms individually, you can add a hidden value to each form, and that form will be identified with that security code.

To limit which users can edit your DIY form, click **Select Page Security Fields** and select the appropriate security fields to apply to your form.

To limit which users can view or edit records and transactions generated from your DIY form, click **Record Security Fields** and select the appropriate security fields to apply to your form.

Forms with this advanced security hidden values behave in the following way:

- Transaction and contact data received through the form is marked with the security code that you applied to the specific form.
- When a new constituent who is not on the database fills out the form, that constituent account is marked with the security code of the form. Only users with permission to that security code can see the account.
- When an existing constituent who is already in the database fills out the form, if their account does not have a security code, one will not be added. This ensures that all the users who had access to that account before continue to have access to it.

Hidden Fields

When you create a DIY form, you can choose to include hidden fields, which the constituent does not see, to track values in **eTapestry** every time that form is submitted.

Hidden fields can help you track a variety of information about your constituents that can be useful as you analyze your data. Common uses for hidden fields include:

- Use a hidden field to track different versions of the same form for analytical and comparison purposes. For example, you might use a donation form with a picture representing your mission, and another one with no picture. Or you might want to ask for additional information about the donor in one version, and create another shorter and simpler version of the same form, and then compare them to see which one performs better. In these cases, you can add a hidden field indicating the form's version each time a donor submits it so you can later report on it. In this last example, you could hide a user-defined field called "Form type" and select the value "Long form" for the longer version and a value of "Short form" for the simpler version.

Note: You can only include user-defined fields that are already configured in your database. If you want to include a user-defined field that is not yet created, you can save your online form and edit it once you have the user-defined field available. For information about creating user-defined fields, see [User Defined Fields](#).

- Hidden fields can also help you track additional information about your constituents when they submit the form. For example, if you are using a form to register individuals as volunteers, you can use a hidden field to mark this person as a volunteer in the database. If you have a user-defined field that identifies your constituents as volunteers, when they fill out a form intended for volunteers you can automatically track the appropriate value in this field without requiring the constituent to select it in the form. In this example, you would add your user-defined field as a hidden field and select a positive value for it.

Automatic Notification Email

When you select the option to **Send your organization a confirmation email** on DIY forms, you receive a confirmation email every time a visitor completes and submits the form. You can view any User Defined Field information you include on the form from the notification every time that form is submitted, in addition to any hidden fields you use to track values in **eTapestry** and the **Campaign**, **Approach**, and **Letter** fields when they are populated.

This email follows a standard format. Refer to the following example of a confirmation email for a membership signup.

Congratulations [Organization Name]! You have just received an online entry. The following record has been automatically added to your **eTapestry** database.

First Name: Susan

Last Name: Member

Address: 123 Organization Lane

City: Greenfield

State: ID

Postal Code: 12423

Email: Susan.Member@email.com

Phone: 555-555-1234

Amount: \$20.00

Fund: General

Tip: For a quick review of all online entries you can run the Online Giving Report in your **eTapestry** database. You may also want to run a Duplicate Donor Report to ensure that duplicate records have not been input.

Address Formats by Country

When a constituent selects a country in the address block of a DIY form, some country selections dynamically change the address options available to reflect formats used in that country. For information about the address fields present for each country, refer to [Addresses on page 1](#).

Edit Do It Yourself Online Forms

After you create a DIY form, you can edit it as often as necessary. Edits are not live until you re-publish your page.

Note: Because they are for internal use only, edits to the page name or description appear immediately, even if the page is not saved and re-published. Changes to these two fields cannot be reverted with the **Revert Edits** button.

You can edit different areas of the form.

- **General configuration settings:** This allows you to change the configuration settings like the title of the page and the fund for payments. For more information, refer to [Edit Do It Yourself Online Form Configuration Settings on page 29](#).
- **Design edits:** You can edit colors, pictures, and fonts on your forms. You can also change label names for sections and fields on the form and add parts and fields. For more information, refer to [Edit Do It Yourself Online Form Design on page 29](#).
- **Save and publish:** The online form editor allows you to preview, save, and publish your form. For more information, refer to [Save and Publish Do It Yourself Online Forms on page 30](#).

Edit Do It Yourself Online Form Configuration Settings

You can edit settings on your DIY forms, such as page title and fund, as often as necessary. From the DIY Forms page, locate the page you want to edit and click **Edit**. To edit the configuration settings, click **Settings**. The items on this screen are the same as in the screen for when you create a page. For more information, refer to [Create Do It Yourself Online Forms on page 14](#)

Note: To avoid breaking links to your web page, we recommend that you do not edit the URL.

Edit Do It Yourself Online Form Design

You can edit the design of your DIY forms, such as colors, labels, and fields, as often as necessary. The basic structure of the page, such as where form parts appear, is fixed and cannot be edited. From the DIY Forms page, locate the page you want to edit and click **Edit**.

You can edit different areas of the form.

- To edit the colors on the form or to swap the style template, click **Edit Style**.
- To add content to the form, click **Add Item**. This enables you to add new sections, images, text, and fields. You can also add content directly from one of the form sections. Hover over the section where you want to add content and click the green plus sign icon. This allows you to add images, text, and fields.
- To edit a label on the form, hover over the content you want to edit and click the pencil icon.

Note: In transaction-based forms (online giving, event registration, and membership signup pages), the content on the Payment Information and Security Code blocks cannot be edited. The Payment Information block is required for forms that receive payments, and the Security Code block is required when captcha is enabled. The fields must be in the pre-defined order for transaction processing purposes.

- To move content within the form, hover over the item you want to move and click the multi-direction arrow icon. Drag and drop the content to the desired location.
- To delete content, hover over the item you want to delete and click **X**.

Note: At any point in the editing process, you can start over by clicking **Revert Edits**. You can select to revert to the latest saved version (published) or the last saved draft (unpublished). If you want to revert the template colors, you can re-apply the style. To do this, click **Swap Style** under Edit Style.

- To save your changes, click **Save**. For details about publishing the form, refer to [Save and Publish Do It Yourself Online Forms on page 30](#)

Save and Publish Do It Yourself Online Forms

After you have made your edits to a DIY form, you can save, preview, and publish the changes. If you are replacing an existing form with a new one, you can disable the existing form and immediately publish the new one in its place. This reduces down-time for the DIY form. For information about how to disable online forms, refer to [Disable Online Forms](#).

From **DIY Forms**, locate the page you want to publish and click **Edit**.

- To review your changes and see how your page will look once published, click **Preview**.
- To revert your edits if you no longer want to keep them, click **Revert Edits**. To revert to the last published version, click **Published Version**. To revert to the last saved draft, click **Last Saved Draft**.
- To save your changes, click **Save**. You must save your changes before you can publish your page.
- To publish, click **Go Live**.

Note: If you have reached your page limit, you can disable or delete pages you no longer use to increase your available limit. For more information, refer to [Disable Online Forms](#).

You can also embed forms into your existing website. This preserves the look and feel of your website on the form page. To access the code you need to insert a form into your existing website, from the DIY forms locate the form you want and click **View code to insert this form into your existing website**. Copy the code into the html for your webpage to embed the form.

Tip: Templates for DIY forms are responsive. When website visitors view your pages that use responsive templates, the page adjusts to respect the size of the visitor's device. This makes it easier for visitors to use the form from tablets and smart phones. However, existing DIY pages created before the 7.12 release (on September 14, 2014) are not automatically responsive. To make an older DIY page responsive, republish the page. If the DIY form is embedded in another website, republish the page, copy the updated embed code, and use the code to update your website. For best results, your website should also be responsive. Templates with custom skins are not responsive. We recommend you use embeddable templates instead.

Tip: If a website visitor notifies you of a submission error for a DIY form that includes a user-defined date field, confirm whether or not the date separator, for example, "-" or "/", matches the standard date format for your **eTapestry** database's locale. To successfully validate a submission, these separators must match.

Embed Do It Yourself Online Forms

You can embed DIY forms into your existing website.

1. Create a DIY form in **eTapestry** and publish it. For details, refer to [Create Do It Yourself Online Forms on page 14](#).

Tip: We recommend you use a DIY template that is labeled "Embeddable" because these have minimal styling. The embeddable templates enable your host site's background color to appear. If your webpage's background color clashes with the embedded form's content, consider editing the embeddable DIY page to add a background color.

2. Access your list of online forms, locate the form you want to embed, click **View code to insert this form into your existing website**, and copy the complete embed code.
3. From your website's content management system, paste the embed code where the embedded DIY form should appear and then republish your web page.

The content of the embedded DIY form appears in an iframe on your web page. The DIY form is responsive; it will adjust to fit the size of the iframe and the viewer's screen size. For best results, ensure your host website is also responsive. If the content of the embedded page doesn't respond in the way you want, adjust the styling of the iframe, which has the id attribute of "etaplframe," to ensure it follows the responsive rules of the host website.

Whenever you update the DIY form, you may need to copy the updated embed code and use it to update the embed code on your host website.

Manage Do It Yourself Online Forms

Once you create your forms, you can copy, disable and delete forms as needed.

➤ Disable and Enable DIY Forms

If you no longer need a DIY form, you can disable it. Since disabled pages do not count towards the limit, you can disable pages if you have reached your limit. Once disabled, the URL for the form becomes inactive, but the form is still available for editing and re-enabling at any time. We recommend that you disable DIY forms instead of deleting them to keep a history of pages.

Note: You cannot disable DIY forms that are not yet published.

To disable a DIY form, from **Management**, click **DIY Online Forms**. From the list of existing forms, locate the form you want to disable and click **Disable**. On the DIY forms page, disabled forms are marked as "disabled."

To enable a form that has been disabled, from the list of existing forms locate the one you want to enable and click **Enable**. This enables the form to its last published version, and the status changes to "Live."

➤ Promote DIY Forms

When you publish a DIY form, you can now select to promote it on *Facebook* and *Twitter*. From your list of online forms, locate the form you want to promote and select a social media option under **Sharing**.

➤ Delete DIY Forms

If you no longer need a DIY form, you can delete it. Only disabled forms can be deleted. To delete a

DIY form, from **Management**, click **DIY Online Forms**. From the list of existing DIY forms, locate the form you want to delete and click **Delete**.

Note: We recommend that you disable DIY forms instead of deleting them to keep a history of pages. Once you delete a page, you cannot recover it. For information about disabling DIY forms, refer to [Disable Online Form](#).

➤ Copy DIY Forms

When you create a new DIY form, you can save time by copying an existing form if there is little difference between your new form and one of your existing forms.

To copy a DIY form, from **Management**, click **DIY Online Forms**. From the list of existing forms, locate the form you want to disable and click **Copy**. A confirmation message appears. Select whether you want to create a new form of the same type or you want to switch to a different form type.

Enable Captcha Security

Note: Once you enable Captcha Security, you will need to re-publish all of your live Do It Yourself (DIY) Online Forms.

If Captcha Security is disabled on your DIY forms, you can now manually enable it from your organization's Subscriptions page.

To enable Captcha Security, a database admin will need to navigate to **Management, My Organization** and select **Subscriptions**.

| DIY Online Forms | |
|--------------------------|---|
| Status: | Enabled |
| Captcha Security: | No <input type="button" value="Enable Captcha Security"/> |
| Live Page Limit: | 10 |
| Max Page Limit: | 50 |

On the DIY Online Forms tile, the admin can select **Enable Captcha Security**. On the screen that appears, select **Yes** to enable Captcha Security.

eStore (Cart)

This module allows you to directly manage the content of your eStore webpages from **eTapestry**. This allows you to sell items on your website directly to your constituents and integrate the payment information with your database.

Get Started with eStore

Before you set up your eStore, you must make sure a few items are configured in your system so that you can send confirmation emails and track transactions.

Set Up User-Defined Fields

As you plan your eStore, you may want to use user-defined fields to track information about cart transactions. The information stored in these fields may be answers to questions to the purchaser when they check out, or they may be static fields associated with the specific Items that appear on the order.

To simplify the process of setting up your cart, create any necessary user-defined fields before you configure your eStore. For more information about setting up user-defined fields, refer to [User Defined Fields](#).

Customize Order Confirmation Email Template

Your database has a basic default template for confirmation emails to purchasers when they complete a transaction in your eStore. You can modify this template to better fit your needs. If you prefer, you can also create a new template in the Communication area.

Note: The finished template must contain the order details widget to be usable as an order confirmation email.

1. From **Communications**, click **Manage Communications**. The Communication Categories page appears.
2. Click **Cart Templates**. The Cart Templates page appears.
3. Click **Order Details** to select the default template for editing. To create a new template instead, click New Document or Classi under Tasks.
4. Select Create New Template on the Tasks Pane.
5. On the Basic Information step, give the new template a name, then click Next on the Navigation pane.
6. Select a Layout on the Layout step. If in doubt, you can always start with the Blank template.
7. Insert an Order Details widget in your template.
8. Open the **eTapestry** Widget
9. Select the Order Details Widget
10. Click on Insert
11. This will insert the Order Details widget into your template.
12. You can add any other content that you like to your template. Remember, the Order Details Widget must remain somewhere in the template!
13. You can accept the defaults on the Document Options page.
14. On the Email Options page, you must fill out the Subject field and the Plain Text Version. To

copy the verbiage that you set up on the Edit step into the Plain Text Version, click the button at the bottom of the Plain Text Version section.

15. Click Next or Save and Finish to save your template.

Note: You must select this template in the Email Options page of the Cart Preferences dialog before the Cart will automatically send the email to a purchaser.

Set Up Funds for eStore Transactions

When a purchase is made on the Cart, a transaction is created in **eTapestry**. This transaction will usually have multiple splits - one for each Item sold, one for the Shipping fee, and one for Sales Tax.

Each of these splits must be associated with a Fund. Depending on how you have your database set up, the Campaign, Approach and/or Letter fields may also be required. When you set up your Cart, you will have the opportunity to select the value that will be assigned to each of these fields on each split of the purchase transaction.

You may need to create new Funds, Campaigns, Approaches and Letters in **eTapestry** to correctly track your purchases. For example, you may want to create Funds for "Shipping Fees," "Sales Tax" and "Cart Items," or Approaches for "Cart Purchase" or "Web Sales." You can use whatever names make sense to your organization.

The Transaction Options page of the Cart Preferences dialog allows you to specify the default Fund, Campaign, Approach and Letter to be used for Item, Shipping and Tax splits. You can override this default by setting a different Fund, Campaign, Approach or Letter on an individual Item, however, all Shipping and Tax splits will be created using the values set up on the Transaction Options page.

If you do not specify the Fund values to be used for a transaction, **eTapestry** will create a new Fund in your database and will apply that fund to the transaction. **eTapestry** will create separate Funds for Items, Shipping and Tax.

eTapestry does not automatically create Campaign, Approach or Letter values, even if those are required fields in your database.

Set eStore Preferences

Before you begin using the eStore functionality, you must first set up preferences for your cart. To access the main eStore page, go to **Management, eStore (Cart)**. To manage cart preferences, under **Customize Cart**, click **Edit Cart Preferences**.

> Welcome

The Welcome screen introduces the eStore preferences wizard. Click **Next** to continue.

> Online Options

1. In the **Cart Name** field, enter a unique name for your cart. This name will appear on each page of your cart on your website.
2. In the **Category Header** field, enter a header to appear on your cart as the heading above your

main categories of items.

3. In the **No Quantity Label** field, enter the legend that you want to display when an item is not in stock.
4. In the **Welcome Message** field, you can enter some text to welcome your visitors to the cart and explain how they can use it to help your organization.
5. In the **Order Success Message** field, enter the text you want to display to your website visitors when their order processes successfully.
6. Select "Hide Search Feature" if you do not want to include a search field that your website visitors can use to search for items in your inventory.
7. You can add questions to the checkout process. These questions must be associated with an existing user-defined field. To add a question, complete the Add Question section on this page.
 - In the **Field Name** field, select a user-defined field from your database.
 - In the **Display Text** field, write the question as you want it to appear during the checkout process.
 - The **Apply To** field defaults to the application selected for that user-defined field. For user-defined fields that have more than one application, select where you want this information to be tracked in your database.
 - Select "Required" if you want this question to be required before your website visitors can complete their transaction.
 - To add this question to your cart checkout process, click **Add**. You can repeat this process to include additional questions in the checkout process.
8. To continue to the next section, click **Next**.

➤ Cart Template

On the Cart Template page, select the template design you want to use for your cart. To continue to the next step, click **Next**.

➤ Email Options

1. In the **Email Template** field, select the email template you want to use to send confirmation emails to users of your cart after they complete a transaction. The default email Order Details is provided for you. You can modify this template, or create a new one and select it on this step.
2. In the **Notification Email** field, enter the email address where you want to send a copy of the order confirmation email. Usually, this would be someone in your organization who monitors cart purchases. To enter multiple email addresses, separate them with a semi-colon. An email will also be sent to this address when an item sells out.
3. In the **Confirmation Sender** field, enter the email address you want to display as the sender of the order confirmation email sent to the purchaser. If you leave this field blank, **eTapestry** does not send a confirmation email to purchasers.
4. To continue to the next section, click **Next**.

> Transaction Options

To generate a receipt number to include on the email confirmation to purchasers, select **Generate receipts on transactions from this page**.

Tip: In *eTapestry*, when you include receipt information as a part of your email confirmations, you are creating an "eReceipt" by definition.

To include eReceipt information, the template you select in the **Email Template** field on Step 4: Email Options uses the required **Order Details** widget. You must also enter the email address you want to display as the sender in the **Confirmation Sender** field. When *eTapestry* sends each eReceipt, it automatically includes the next unique receipt number that is available in the database.

Set the default fund, campaign, approach and letter for all items you sell. Default order item transaction values become the default for items that do not have assigned values at the item level. Shipping and tax splits use the values you indicate on this page.

If you do not specify fund values, *eTapestry* creates new funds and applies them to the transactions. *eTapestry* create separate funds for items, shipping, and tax. *eTapestry* does not automatically create campaign, approach, or letter values, even if those are required fields in your database.

To continue to the next section, click **Next**.

> Tax Options

Note: You can apply sales tax to purchases for shopping cart web pages for the United States, Australia, and New Zealand.

On the **Identifier** field, select whether you want to collect sales tax for the billing or the shipping state. If your organization is required to collect sales tax in any state, enter the particulars sales tax rates on this page.

Shipping fees are not taxable through the cart. If you are required to collect taxes on shipping fees, you must combine those fees with the price of the item.

To continue to the next section, click **Next**.

> Shipping Options

You can set up your cart to calculate the shipping fee to be charged for each order. The fee is based on a per-item fee that you set up when you create an item in your cart. On this screen, set up shipping fees that apply to all items.

1. On the **Base Fee** field, enter the amount in shipping that you want to charge for any order. This could be used to cover handling cost, packaging, etc., and is a fixed amount that any order requires in addition to other shipping fees based on quantity, weight, or amount purchased.
2. On the **Express Surcharge** field, enter the flat fee you want to charge to expedite shipping, if you offer this option.
3. On the **International Surcharge** field, enter the flat rate you want to charge as an add-on for international shipping, if you offer this option.

4. On the **Free Order Base Fee** field, enter the amount you want to charge for orders that total \$0. This amount replaces the base fee for free orders.
5. In the **Country** field, select the country of origin for shipping. The international surcharge is added to an order when the country in the shipping address does not match this selection.
6. To continue to the next section, click **Next**.

➤ Other Options

1. In the **Time Zone** field, enter the time zone of where shipping originates. This affects shipping estimate calculations.
2. In the **Transaction Processor** field, select how you want to process transactions from your eStore. If you leave this field blank, **eTapestry** uses your default transaction processor.
For information about how to add a transaction processor in **eTapestry**, refer to [Set Up Transaction Processor on page 1](#).
3. To complete your cart setup, click **Save and Finish**.

Put Items in your eStore

To manage your eStore (Cart), from **Management**, click **eStore (Cart)**.

- For information about how create categories and subcategories to organize items in your eStore, refer to [Create categories to organize items on page 37](#).
- For information about how to create items, refer to [Create items on page 38](#).
- For information about how to copy items, refer to [Create a Copy of an Item on page 39](#).
- For information about how to re-categorize items, refer to [Move Items to Another Category on page 39](#).

You can drag and drop to reorder the categories, subcategories, and items.

➤ Create categories to organize items

To manage your eStore (Cart), from **Management**, click **eStore (Cart)**.

1. To create a category, click **New Category** under Tasks.
2. Enter a name and description for the category.
3. If you want the category to appear in the eStore as soon as it contains an Item, then do not enter a **Start Date** under Publish Information.
 - To ensure that a category and all its items won't appear until a specific date, enter a **Start Date**.
 - To hide a category and its items after a specific date, enter an end date. Consider using Dates for promotional or season items that are only available for limited time.
4. You can select an image to represent the category in your eStore. Under Category image, click

Choose file. Then browse to and select the image from your local computer. The image is resized to fit the web page.

5. Click **Save Category** under Tasks.
 - To create a subcategory, click New Subcategory on the category row, enter details, and click **Save Category** under Tasks.
 - If a category doesn't have subcategories and doesn't include items, you can delete it.

> Create items

To manage your eStore (Cart), from **Management**, click **eStore (Cart)**.

1. To add an item to a category, click **New item** on the category or subcategory row. To add a item without a category, click **New Item** under Tasks.
2. Enter the item name.
3. Enter a short description of the item.
4. Enter an optional long description. This appear on the item page in the online cart.
5. Select whether this item is fully non-deductible or at least partially deductible.

If an item is fully non-deductible, enter the regular price. Then indicate whether the item is shippable. If an item can be shipped, enter the shipping fee. Next, indicate whether the item is taxable so that sales tax can be calculated when the item is purchased.

If an item is at least partially deductible, select whether to allow the donor to specify the donation amount. If you don't allow donors to specify donation amounts, enter the regular price, enter the non-deductible amount for the item, enter the shipping fee if applicable, and indicate whether the item is taxable so that sales tax can be calculated when the item is purchased.

Note: If you allow the donor to specify the donation amount, you do not need to enter a price for the item. The donation is considered fully deductible.

6. Select **Manage Quantity** to track the available quantity for the item and then enter the initial quantity. Whenever the item is purchased, the available quantity automatically decreases.

Note: If you allow the donor to specify the donation amount for an item, you can't manage quantity for that item. For more information about managing quantity, refer to [Manage Quantities on page 40](#).

- To inform website visitors how much of the item remains, select **Publicize Quantity**.
 - To receive an email when an item is sold out, select **Zero Notification**. The email will be sent to the notification email address based on your cart preferences. When the quantity of an item is zero, it can no longer be purchased from the eStore (Cart).
7. If you want the item to appear in the eStore as soon as it contains an Item, then do not enter a **Start Date** under Publish Information.

To ensure that an item won't appear until a specific date, enter a **Start Date**.

To hide an item after a specific date, enter an end date. Consider using Dates for promotional or season items that are only available for limited time.

8. Click **Next**.

9. You can choose two images for the item. The thumbnail image appears on the list of items in the category. The regular image appears on the item page. The images are automatically resized to fit the web page. To upload an image, click Choose File. Then browse to and select a PNG, JPG, JPEG, or GIF file from your computer.
10. Click **Next**.
11. Under Internal Information, enter information about your purchase of the item, such as the vendor and vendor price. For ID, enter an identifier used in your accounting system for the item. The ID can be used in reports and exports. All other internal information is only used on this page.
12. Under Transaction Details, specify the fund, campaign, approach, and letter associated with order item transactions for this item. If these values differ from the values you set up on Transaction Options page of the your Cart Preferences, then the item values will overwrite those defaults.
13. Click **Next**.
14. Set up user-defined fields specific to the item for purchaser to answer during check out. The purchaser is asked to answer the question for each instance of the item purchased.
15. Set up user-defined fields for static transactions. The values you select are stored on each transaction associated with the item. The purchasers will not see these values.
16. Click **Save and**. The item is added to your eStore (Cart).

> Create a Copy of an Item

To manage your eStore (Cart), from **Management**, click **eStore (Cart)**.

1. To create a copy of an item, open the original category.
2. On the item row, click **Copy**.
3. Select a category for the copy.
4. Enter a name for the copy.
5. Determine whether to manage the quantity of the copied item and enter any quantity information.
6. Click **Copy**. After the item is copied, you can edit the item to make changes.

Move Items to Another Category

To manage your eStore (Cart), from **Management**, click **eStore (Cart)**.

To move an item to a different category, open the original category. On the item row, click **Move**, select a category for the item, and click **Move**.

To move items to a different category in bulk, open the original category and then click **Move Items** under Tasks. Select items to move and then select a category to move them into. Click **Move** under Tasks. The items are moved. You return to the original category.

Manage Quantities

When you create or edit items for your eStore, you determine whether to manage the quantity of the item, whether to publicize the amount available, and whether to receive notifications when the item is sold out. Whenever the item is purchased, the available quantity automatically decreases. For more information, refer to [Create items on page 38](#).

Note: If you allow the donor to specify the donation amount for an item, you can't manage quantity for that item.

After you save the initial quantity, you can return to the item page to update the quantity. For example, if you receive a another shipment of coffee mugs, move a class to a larger room, or give away t-shirts at a conference, you may need to manually update the amount of "item" available. From the item page, click **Manage**. Select whether to increase or decrease the quantity and enter the amount by which to add or subtract. Then enter a description to explain the change and click **Save and**. The quantity is updated and information about the change appears in the Manual Change History for future reference.

To report on the quantity of items available, run the Cart Items - Quantity Remaining standard report.

Discounts

You can offer discounts for individual items, but not for the entire cart purchase.

➤ Manage Cart Discounts

1. From the Cart page, click **Manage Cart Discounts** under Customize Cart. The Manage Cart Discounts page appears.
2. To add a discount, click **New Discount** under Tasks.
3. Enter a name and optional description for the discount.
4. Under Criteria, select whether you want everyone to get the discount or only people with access to a discount code. If you select "Those that enter the specific code" you must enter the discount code in the field.
5. Under Criteria, select whether you want the discount to be always available, or only available in a specific date range that you indicate.
6. Under Discount Type, select if it should be a fixed amount regardless of the sale price or a percentage.
7. Under Applicable Items, click **Add/Remove Items** to add items eligible for the discount.
8. Once you are finished adding items, enter the flat discount or percentage and click **Update All**.
9. Click **Save** under Tasks to commit your discount.

Note: If an item has more than one discount, the active discount that provides the best price is honored for a transaction.

Returns

A purchaser may send a item back to your organization for a refund. In order for the return to appear on the purchaser's credit card or debit card, you must work directly with your transaction processor, such as BBPS. Next, update the transaction in **eTapestry** to reflect the return.

> Update transaction to reflect a return

1. Open the journal entry.
2. Select **Reverse Order Items**. The items in the order appear, but the shipping and sales tax information does not appear.
3. Indicate which items have been returned.
 - If an item is associated with a donation for which the purchaser determined the amount, you must reverse the entire donation.
 - For other Items, you select how many of the item were returned and whether to also return the shipping fee associated with those items.

Tip: To quickly select all items for reversal or to mark all items for restock, use the Entire Order Options at the top of the page. You can also reverse all shipping fees.

4. If you manage quantity, you can also specify how many of the returned items will be placed back into the inventory to be resold.
5. Click **Save**. The items on the transaction are reversed and eTapestry creates a journal entry to track the return. The journal entry date for the return is the same of the date of the original transaction. The journal entry for the reversal shows which splits were returned.

Tip: To open the return transaction, click **Partially Offsetting Transaction** at the top of the page.

View Your eStore

To view your eStore (Cart), from the Management tab, click **eStore (Cart)** under Online Presence. Then click **View Online Cart** under Links.

To access your eStore, constituents click a link on your website to access the eStore's URL.

Your eStore's URL is assigned by **eTapestry** when the eStore is created. This URL is not set up by your organization.

Online Cart

When the Online Cart is opened, it starts at the Cart Home page.

Tip: For information about how to set up the cart name, welcome message, and other headings, refer to [Set eStore Preferences on page 34](#). For information about how to add or edit items into your eStore, refer to [Put Items in your eStore on page 37](#).

- To view a category, the web page visitor clicks **View this Category**. The items and subcategories appears, along with any associated images.
- To view an item, the web page visitor clicks **View this Item**. The items, the short or long description, any associated images, and publicized quantity information appears.
- To select an item to purchase, the web page visitor clicks **Add to Cart** on the item or category page. A list of all items in the purchaser's cart appears. The purchase can choose to continue shopping or checkout.
- To purchase items in the cart, the web page visitor clicks **Checkout**.
 1. For step one, the purchaser enters his contact information. If any of the items are shippable, the purchaser also enters shipping information or copies the contact information to the shipping section. The purchaser can also enter comments, which will appear in the Journal Entry Note for the transaction in **eTapestry**. If you setup check out questions, the purchaser enters his answers. Then the purchaser clicks **Proceed**.
 2. For step two, the purchasers enters payment information. If your organization uses the Sage Transaction Processor, the purchaser has the option to enter either credit/debit card or EFT information. Shipping and sales tax is calculated based on information the purchaser entered in step 1. Taxes appear on the right side of the page. Then the purchaser clicks **Proceed**.

Note: If the entire order is free, the purchaser is not prompted to enter payment information.

3. For step 3, the purchaser review the order and the information entered. If necessary, the purchaser clicks **Edit** to make corrections. To submit the purchase transaction to the credit/debit card company, the purchaser clicks **Process Order**. The Order Success page appears.

If you set up cart preferences to include an email template and confirmation sender fields, then an order confirmation email is sent to the email address the purchaser provided. If you also set up an email address at your organization to receive notifications, a copy of the email is also sent to that email address.

To customize the content of the Order Confirmation Email, edit the communication template. The template must contain the Order Details widget and an email subject. You must also set up the plain text version of the email.

Online Orders

When a Cart Order processes, **eTapestry** checks to determine whether the purchaser already has a constituent record in your database as it adds the new transaction for the purchaser.

> New Constituent Records

A new constituent record is created for the purchaser when the Billing Address does not match any primary persona in the database. When a new constituent record is created, the transaction adds to the new record. To update an existing constituent record with a transaction from a purchase, the program verifies that two of the following three Billing Address values match values for a primary persona.

- Name
- (Address Line 1 + Address Line 2 + City + State + Postal Code)
- Email address

➤ New Order Transactions

When a transaction includes a gift and a purchase, a purchase with more than one line item, or a purchase line item plus shipping or sales tax, it appears with the journal entry type Split Transaction.

On the Journal page, the **Received amount** column contains the total amount received for the transaction. The **Purchased** column displays the portion of the amount that came from a purchase, and the **Gifted** column displays the portion of the amount that was made as a gift. To view the purchased item, open the journal entry. The segment heading displays the item name.

Tip: To also help distinguish a donation from a purchase, online orders appear with different journal entry descriptions, such as Purchase, Shipping, or Sales Tax. A purchase from eCart is a non-deductible transaction.

When you view a segment for a split transaction, the **Order Information** section displays the item quantity for the purchase. It also includes shipping and billing information. You cannot change the amount, quantity, and other information on this section. This ensures the purchase in **eTapestry** matches the credit/debit card billed amount. **Order Information** also appears on the Shipping and Sales Tax segments. For these segments, the state's sales tax appears with the applicable tax rate.

If you associate your eCart with user-defined fields (UDFs), you can view the values a purchaser enters for **Item Specific Checkout Questions** on the **User Defined Fields** section of the segment. This section also shows the values for **Static User Defined Fields** for the item.

Tip: If the **Item Specific Checkout Questions** and **Static User Defined Fields** UDFs do not exist in the database, you must add them to **eTapestry** from **Management, User Defined Fields**. For more information about UDFs, refer to [User-Defined Fields](#).

Fulfill Orders

To track when you sent ordered items to the purchaser, use the system-defined field called **Fulfillment Date** which is associated with each eStore transaction.

- For unsplit eStore transactions, the **Fulfillment Date** field appears under **Gift Date** field.
- For split transactions, the **Fulfillment Date** field appears in the top pane of the journal entry, so you cannot record separate fulfillment dates for individual items within an eStore transaction.

To identify eStore transactions which have not been fulfilled, create a query based on the **Transaction Order Item Fulfilled** criteria in the "Journal" category of query criteria.

Personal Fundraising

eTapestry's Personal Fundraising enables your constituents to raise funds for your organization. You create a site where constituents can register to create their own personalized fundraising page. Participants can then invite friends and family to view their page and join them in supporting your organization.

Fundraiser Sites

Fundraiser sites allow your constituents to create their own personal fundraising pages to raise money on your organization's behalf. To access the Personal Fundraising module, from the Management tab click **Fundraisers** under Online Presence.

To indicate the base web address to use for all your fundraiser sites, enter the beginning of the address in the **https://** field.

To create a fundraiser site, click **New Fundraiser** under **Tasks**.

Step 1: Fundraiser Details

These fields appear on step 1 of the Fundraiser wizard.

| Field | Details |
|--------|---|
| Date | Set the date for your fundraiser. If your fundraiser is an event, set it to the date of the event. If your fundraiser does not lead up to an event, enter the date when you begin the fundraiser. This date is for your reference only and does not appear on the fundraiser site. |
| Name | The name for the fundraiser appears in the Fundraiser field on participation and transaction journal entries associated with this fundraiser. It also appears in the browser title bar of your fundraiser page. |
| Status | Select a status for your fundraiser site. <ul style="list-style-type: none">• Setup/Preview: In this status, your site does not accept registrations or donations.• Active: In this status, your site can accept registrations and donations.• Registration closed: In this status, your site does not accept registrations, but it can accept donations.• Complete: In this status, your site does not accept registrations or donations. Use this status when the fundraiser has finished and you no longer want to accept any transactions.• Disabled: In this status, your site does not accept registrations or donations, and the fundraiser does not appear in your database for manual entry of gifts or registrations. |

| Field | Details |
|-------|---|
| Goal | Set an overall fundraising goal for your site. This goal is displayed on the site's main page, together with progress towards the goal. You must enter an amount greater than zero to create your site. |
| Note | In this field, you can enter internal notes about your site for your reference. |

Step 2: Site Options

These fields appear on step 2 of the Fundraiser wizard.

| Field | Details |
|------------------------------|--|
| Site Name | Enter the final part of the URL for your site. The first part of the URL is pre-defined by eTapestry . The address is case-sensitive and cannot include any spaces or special characters. You cannot edit the URL once you save your site. |
| Administrative Contact Name | Enter the name you want to show in the From field in emails automatically sent to donors. This name also appears in the To field of email sent to the site administrator from the Email Us link on the site. |
| Administrative Contact Email | Enter the email address you want to send confirmation emails from to donors. This is also the email address that receives email sent from the Email Us link on the site. |
| Transaction Processor | Select a transaction processor to use for transactions on the site. You must have at least one transaction processor configured in your database to publish a fundraiser site. For information about how to add a transaction processor in eTapestry , refer to Set Up Transaction Processor on page 1 . |
| Sharing Options | Visitors to your fundraiser site can share a link to your site on social networking sites. Enter a description for that link and click Browse... to upload the image you want to display when a link is shared. |
| Template | Select a template for your fundraiser site. |

Step 3: Main Page Options

In this step, use the HTML editor to create the content for the home page of your fundraiser site. For example, you may include details and images about your cause, event details, or prompts to tell site visitors how to register or donate.

Step 4: Registration Options

These fields and options appear on step 4 of the Fundraiser wizard.

| Field | Details |
|-----------------------------|--|
| Recommended Team Goal | Set the amount to appear as default for each team's goal. Participants can edit the goal when they register. |
| Recommended Individual Goal | Set the amount to appear as default for each individual's goal. Participants can edit the goal when they register. |
| Confirmation Email Text | Enter the text for the confirmation email sent to registrants. |
| Registration Questions | <p>You can select additional fields for participants to complete during registration. By default, the fundraiser site requires participants to enter name, email, address, city, state/province, postal code, and phone number.</p> <p>You can only use user-defined fields to add to the registration form. For each field, select the name, whether you want it to be required, what area of the account it applies to, and how you want the field or question displayed in the form. Enter this information and click Add to add the field to the form. You can add as many fields as you want.</p> |
| Registration Fee Levels | <p>If your fundraiser has fees associated with it, set up those levels here. You can add as many registration fee levels as you need.</p> <ul style="list-style-type: none"> • Name: Enter the name for the registration level, such as "Individual Registration." • Amount: Enter the fee for that registration level. • Non-Deductible: If there is a portion of the fee that is non-deductible, enter it here. For example, if registration is \$50 but participants receive a \$15 T-shirt, only \$35 is deductible. In this example, enter \$15 in the Non-Deductible field. This information does not appear on the fundraiser site, but is included in the confirmation email sent to participants. • Fund: Select a fund for transactions made through this form. The fund does not appear on the fundraiser site. • Campaign, Approach, and Letter: You can select a campaign, approach, and letter for transactions received through the site. These fields do not appear on the fundraiser site. • Defined Values: You can add any transaction user-defined fields from your database. For example, if you have more than one registration level it could be helpful to use a user-defined field to indicate which level the transaction is associated with. These fields do not appear on the fundraiser site. • Add: Click Add to create a registration fee level. Repeat the steps to include additional fee levels. |

Step 5: Fundraising Center Options

The Fundraising Center is the first page that participants see each time they log into the fundraiser site. Use the HTML editor to create the content that appears at the top of the Fundraising Center. For

example, you can include encouraging messages to participants, ideas for gathering sponsorship donations, and important deadlines for the fundraiser.

Step 6: Participant Pages Options

In this step, set up default text and upload images to appear on the participant and team pages on your fundraiser site. Participants and team captains can edit this text and upload a different image once they log into the site.

Note: Images cannot exceed 2MB per image. Images larger than 380 pixels in width are automatically scaled down.

Step 7: Email Options

Warning: To protect the Email page of your fundraiser site from spam and abuse, *eTapestry* has disabled this functionality. When registered participants log into your fundraising site and navigate to the Emails page, they will no longer be able to access this option.

On this step, you create up to three default email templates for participants in your fundraiser to use when they send email from the fundraiser site.

| Field | Details |
|----------------------------|---|
| Enabled | Templates are enabled by default. Uncheck this box if you do not want to include a template option on your fundraising site. |
| Preview This Template link | To view a preview of your template in a separate window, click Preview This Template . |
| Template Name | Enter a template name. Participants see this name when they select a template to use. |
| Subject | Enter the default subject for the email. Participants can edit the subject after they select the template. |
| Contents | Enter the default text for the template. Participants can edit the content after they select the template. Emails sent through the fundraiser site automatically include links to the participant and team fundraising pages. |

Step 8: Donation Options

These fields and options appear on step 8 of the Fundraiser wizard.

| Field | Details |
|-------|--|
| Fund | Select the fund to apply to donations. This field does not display on the fundraiser site. |

| Field | Details |
|--|--|
| Campaign | Select the campaign to apply to donations. This field is only required if it is configured as required in your database. This field does not display on the fundraiser site. |
| Approach | Select the approach to apply to donations. This field is only required if it is configured as required in your database. This field does not display on the fundraiser site. |
| Letter | Select the letter to send to acknowledge donations from the fundraiser. This field is only required if it is configured as required in your database. This field does not display on the fundraiser site. When you are ready to send letters, you can query based on this field. |
| Generate receipts on transactions from this page | <p>To generate a receipt number to include on the email confirmation to donors and registrants, select the checkbox.</p> <p>Tip: In <i>eTapestry</i>, when you include receipt information as a part of your email confirmations, you are creating an "eReceipt" by definition.</p> <p>To send the eReceipt, the confirmation template you select in the Confirmation Email Template field must include the Generated Receipt Number merge value. <i>eTapestry</i> automatically includes the next unique receipt number that is available in the database on each receipt.</p> <p>Note: When (None Selected) appears in the Confirmation Email Template field, the default template <i>eTapestry</i> uses automatically includes eReceipt information.</p> |
| Security Rights | <p>When you use the Advanced Security module, you can select a security option. This field does not display on the fundraiser site. When an individual submits a form on a page with a security code, the new account for that individual includes that security code.</p> <p>Note: When you add a security code to a fundraising page, existing accounts with no security code are not updated with the new security code. Existing accounts that already have a security code are updated with the additional security code.</p> |
| User-Defined Fields | You can add any of your transaction user-defined fields to your form. These fields do not appear on the fundraiser site. |
| Email Options | Select the email template to use for confirmation email sent from the site. |
| Recommended Giving Levels | <p>You can enter recommended giving levels for the fundraiser site. These levels appear on the donation page, along with an "Other" field that allows the donor to enter any other amount.</p> <p>To add a giving level, enter a name for the level in the Name field and the amount and click Add. You can enter as many levels as you need.</p> <p>If you do not include recommended giving levels, donors can enter their donation amount on the form.</p> |

At the end of step 8, click **Next** or **Save and Finish** to create your fundraiser site. Changes are not saved until you do this.

Register Participants

We recommend you add a link to your primary website to link website visitors to the main page of your fundraiser site. The main page of the fundraising site shows the progress meter for your organization's overall goal, a list of the top five teams and the top five individuals who have raised the most so far, a list of all donations made so far, and any additional content that you created for the main page during setup.

To search for a team or individual participant, website visitors can click Find a Team/Participant and search for the participant. Visitors can also browse through an alphabetical listing of teams and participants.

1. To register as an individual participant, the website visitor clicks **Register**.

To register by joining an existing team, the website visitor opens the team's page and then clicks **Join My Team**.

2. The participant indicates whether he has previously participated in one of your online fundraisers. If yes, the participant logs in with his existing information. Otherwise, the participant creates a new account.
3. When a participant creates a new account, he enters his name, email address, contact information, password, a security question and answer.

If the participant's information matches a constituent account in your database, the constituent account is used. If that account already has an ID and password, the site informs the participant that they already have a login ID and password; it prompts him to log in with his existing information.

4. After the participant has logged in, the participant enters a goal for the fundraiser.
5. If the participant doesn't want his actual name to appear on his fundraiser page, he can enter a display name.
6. The participant answers any additional registration questions you set up.
7. The participant selects whether to participate as an individual or as part of a team.

- **Not join a team** - Participants are not required to join a team. If they want, they can choose to join a team later. To join a team later, the participant logs in, click Join a Team, and then either creates a new team or searches for an existing team.
- **Join an existing team** - The participant searches for and select the team. The names of the team captain and other team members appear. If the team is private, the participant is prompted to enter the team password.
- **Create a team** - The participant is the team captain. The participant enters the team name and fundraising goal. To control who can join the team, the participant can create an optional team password. The team captain can edit the team's page and profile.

Note: After a participant joins a team, the participant can click Change Teams to switch teams, create a new team, or participate individually.

8. If the fundraiser has registration fees, the participant selects a registration level. If the level has a fee greater than \$0, the participant enters payment information.

9. The participant reviews a summary of the registration information. After verifying the data, the participant clicks **Next**. The registration is processed. When the registration is complete, the participant can log in to the fundraiser site and edit his personal fundraising page.

Fundraiser Data

The data that constituents and donors enter into Personal Fundraiser sites is automatically stored in your eTapestry database. Existing gift and soft credit transaction types are also added to your database. You can also manually edit and enter this data.

Information about each team is stored on the team account. A team account is automatically created for each team that registers through your fundraiser site. They are similar to tribute and constituent accounts. You can also manually add a team account. To locate a team account, use Find Account.

From the team's journal, you can track contacts, notes, calendar items, and participation. To customize the information that you track about teams, create user-defined fields. For information about participation entries, refer to [Participation Journal Entries](#).

You can also create queries and reports to monitor the fundraisers. Refer to [Query and Report on Fundraisers](#).

Although you can't add transactions directly to the team account, you can track linked soft credit for the team. For more information about transactions for fundraisers, refer to [Fundraiser Transactions](#).

Warning: Each participant and team's fundraising page on the fundraiser site is linked to their constituent or team participation entry. If you delete a constituent or team's participation entry, their page, text, and image is also deleted from your fundraiser site.