eTapestry New Features Guide

05/28/2015 eTapestry 7.15 eTapestry New Features US

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eTapestry New Features-2015

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7.15.0 New Features

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Name Enhancements **1**

This guide lists new features available in the ***eTapestry*** 7.15.0, released on June 7, 2015.

Internet Explorer 11

eTapestry now includes browser support for *Internet Explorer 11* (*IE11*).

Note: When you use non-supported browsers, you can still log in and use the program and online forms, but some features may not render correctly.

Name Enhancements

Note: The **Name Format** section and its corresponding features appears when you add an account for all new ***eTapestry*** customers as of the 7.15.0 release. If you used ***eTapestry*** prior to this release, these features appear after you select to use multiple name fields on a name conversion tool that will be released later in 2015. We encourage existing customers to review this section to learn more about name changes and improvements.

To provide a best practice experience for your users and establish consistency in your database, you enter name information in **First Name**, **Middle Name**, and **Last name** fields for individual accounts. Previously, you entered this information in the single **Account Name** field which may not provide enough flexibility for your organization when you process data.

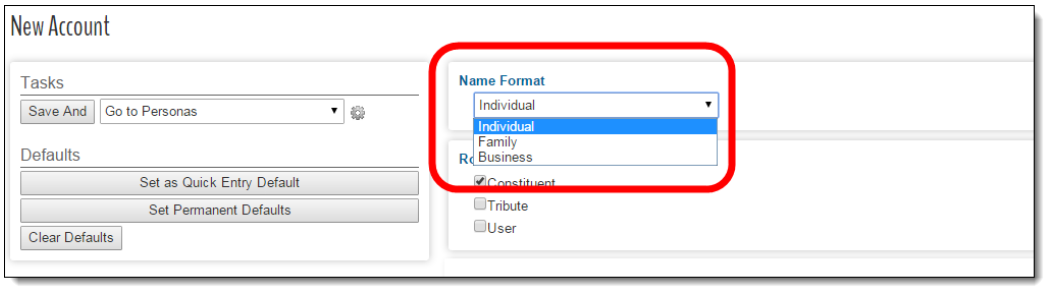
Additional Use Cases

In addition to improving best practices and establishing data entry consistency for your users, these name features benefit your organization in the following ways.

- The user interface includes a more modern look and feel
- You can now create reports with **First Name** and **Last name** information in separate columns
- Salutations are consistent for improved correspondence
- Individual name fields interact better with third party integrations. For example, match rates improve when you use analytics such as NCOA.
- Improved handling of names internationally

Account Record Data Entry

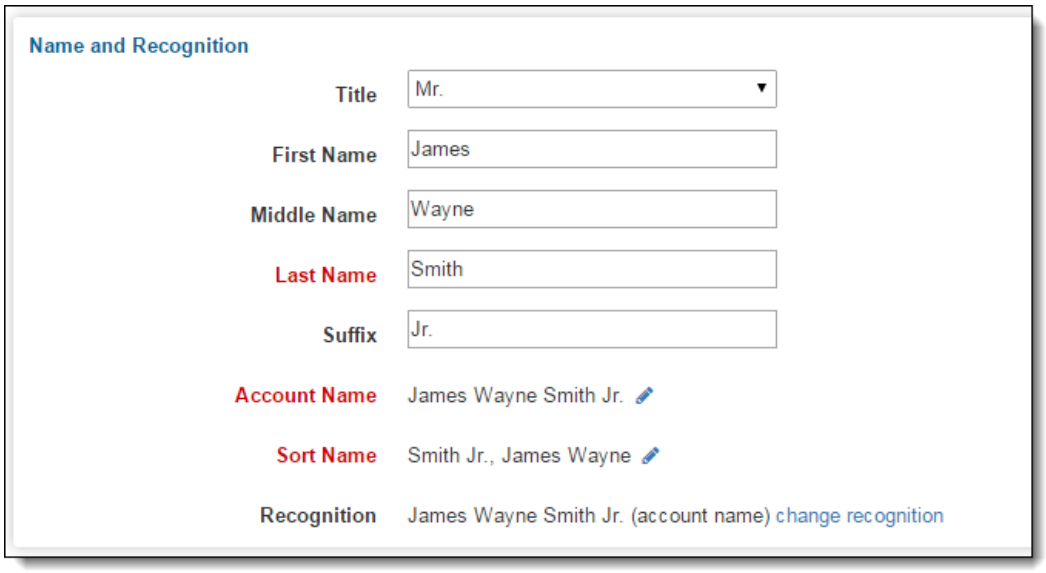
To implement this feature, the new **Name Format** section appears at the top of the page when you add an account. In the drop down field, select whether the record is for an Individual, Family, or Business.



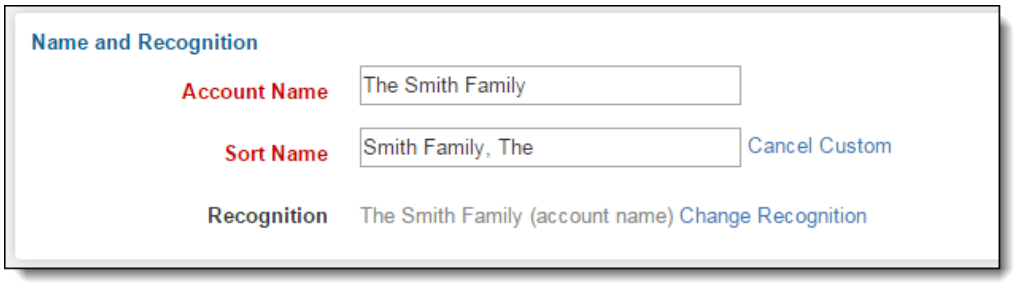
- **Individual:** For example, Jane Johnson Smith or Joseph Michael Smith.
- **Family:** For example, The Smith Family or Jane and James Smith.
- **Business:** For example, AAA Concrete.

Your selection determines the fields that appear in the **Name and Recognition** section. For example, when you select "Individual," the **First Name** and **Last name** fields appear. The complete list of individual fields that appear are:

- **Title**
- **First Name**
- **Middle Name**
- **Last name**
- **Suffix**
- **Account Name**
- **Sort Name**
- **Recognition**

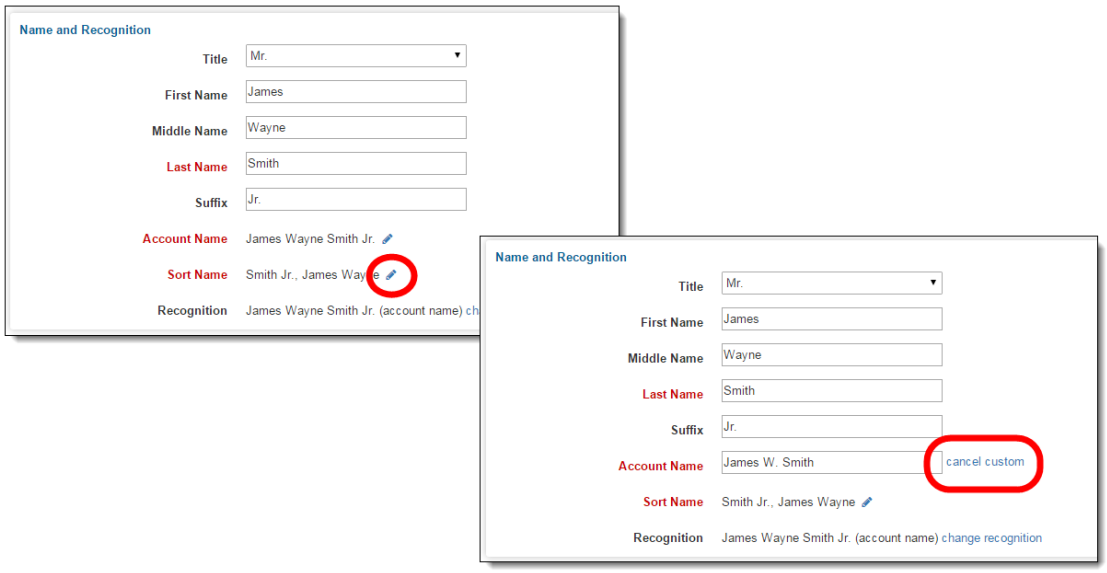


When you select "Family" or "Business," only the **Account Name**, **Sort Name**, and **Recognition** fields appear.



When you select "Individual" for the name format, ***eTapestry*** automatically configures name values in the **Account Name**, **Sort Name**, **Recognition**, **Short Salutation**, **Long Salutation**, and **Envelope Salutation** fields as you enter name information in the **First Name**, **Middle Name**, and **Last name** fields. When you select "Family" or "Business," the program automatically configures name values in the **Sort Name**, **Recognition**, **Short Salutation**, **Long Salutation**, and **Envelope Salutation** fields as you enter it in the **Account Name** field. This data entry process helps you enter data faster and provides name consistency, but you can change the data to enter custom information.

To edit a default name in the **Account Name** and **Sort Name** fields, click the pencil beside the field and enter the name in the text field that appears. When you do this, ***eTapestry*** no longer attempts to automatically populate these fields for an account. To remove the custom entry and return to the default name, click **Cancel Custom** beside the field. The original default name appears in the field.



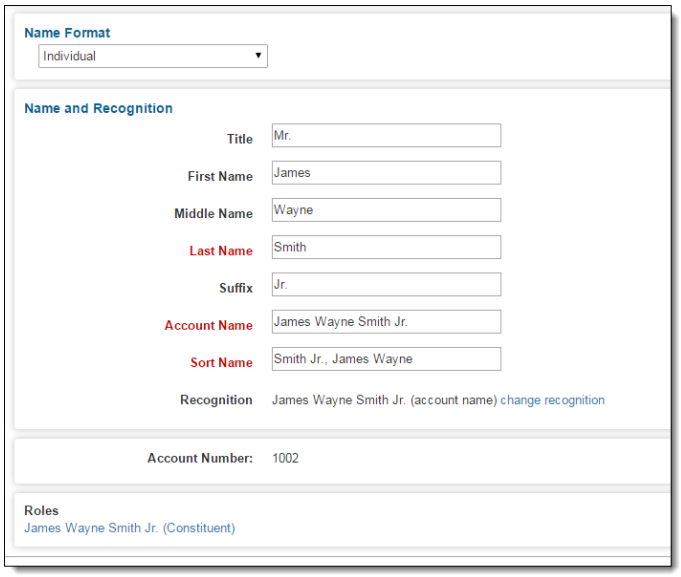
Tip: When you enter the sort name for a Family account that includes "The," make sure you enter the name as you want it to sort. For example, when you enter "The Smith Family" in the **Account Name** field, make sure you edit this in the **Sort Name** field to "Smith Family, The" so the program sorts this in the S section for Smith. *It is likely this functionality evolves later in 2015.*

In the **Recognition** field, click **Change Recognition** to select the recognition type. When you do this, the Change Recognition Type screen appears for you to select one of four options. On this screen, select the type that applies to the constituent's name request for recognitions such as donor walls, donor kiosks, events, or the Annual Report for Board Members.

- **Use account name:** Use this default option to duplicate the name from the **Account Name** field into the **Recognition** field.
- **No recognition:** When a constituent does not want to be recogonized and you need to exclude he or she from Recognition Reports, select this option. When you do this, "{OMIT}" appears when you include the **Recognition** column in a custom report.
- **Anonymous:** When a constituent does not want their name to appear on recognition displays such as a donor wall, select this option. When you do this, their name is replaced with "Anonymous" on recognition displays, in Recognition Reports, and in the **Recognition** column in a custom report.
- **Custom:** When a constituent requests a unique name to appear on your recognition displays, select this option and enter the custom name to appear in the field below it. For example, you can select this when a constituent requests their nickname to appear on recognition displays.

Note: Recognition types are ***eTapestry*** system options, and you cannot add additional types or edit and delete existing types.

When you edit name and recognition information for an account on the Other page of the account record, the **Name Format** section appears at the top of the page so you can change it to an Individual, Family, or Business. Under **Name and Recognition**, the same fields and features appear for you to edit this information the same way you add it.



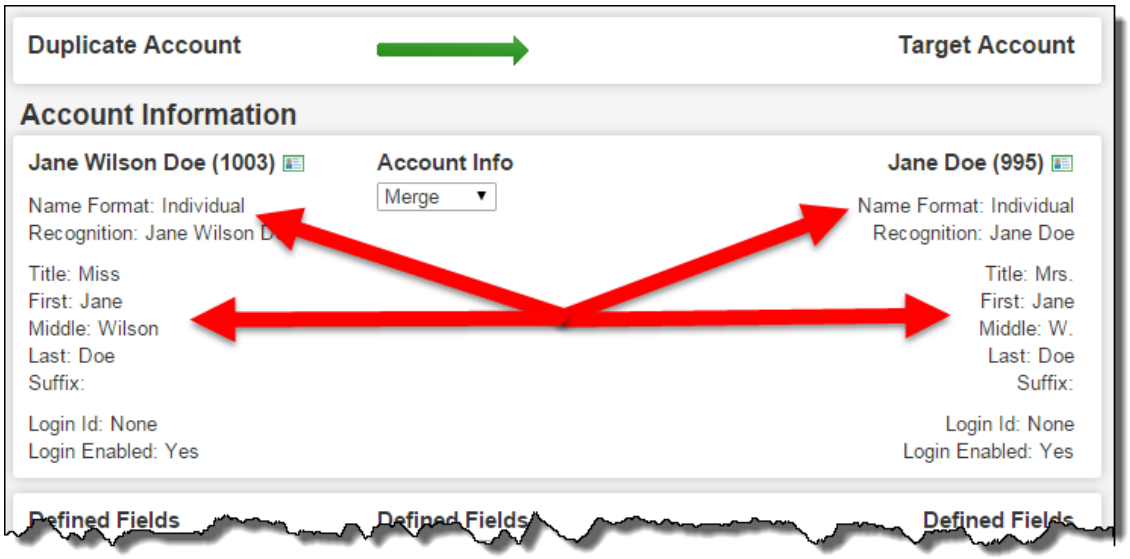
Tip: When you edit the **First Name**, **Middle Name**, and **Last name** fields on the Other page, ***eTapestry*** does not automatically configure name values in the **Account Name**, **Sort Name**, and **Recognition** fields as it does when you add an account. It also does not display the pencil icon and **Cancel Custom** link beside the **Account Name** and **Sort Name** fields. To edit name values in these fields, you must manually enter the information.

Where Do the New First, Middle, and Last names Appear?

The new **First Name**, **Middle Name**, and **Last name** fields appear throughout ***eTapestry*** so you can take advantage of the flexibility the separate name fields provide throughout the program in various processes. Review this section for more details about these enhancements.

Check for Possible Duplicates

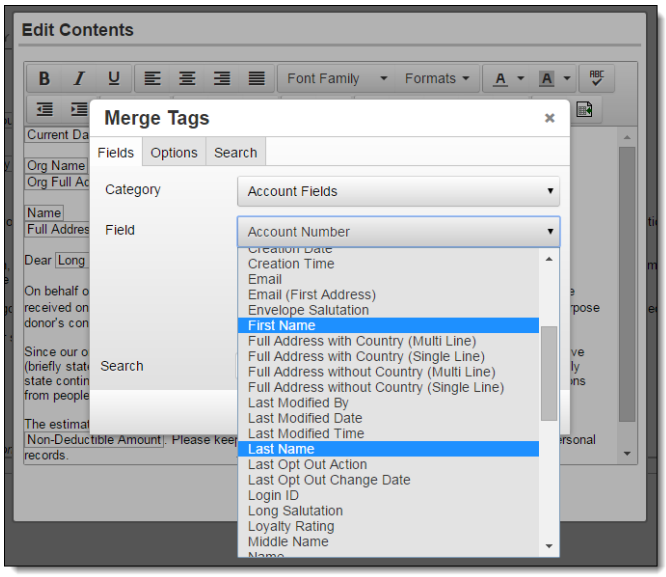
On the Other page for an account record, when you check for possible duplicates and select to merge records, the Merge page displays the **Name Format** for the duplicate and target accounts. Under **Account Information**, when you click **Show More Detail**, individual name information also displays in the **First Name**, **Middle Name**, and **Last name** fields.



When you merge an individual account into another individual account, the name information for the duplicate account appends to the the target account. When you merge an individual account into a family or business account, the name information for the duplicate account removes from the database. During all merges, the name information for the duplicate account appears in a journal entry note on the target account record.

Correspondence

When you create or edit a correspondence template, the **Name Format**, **Title**, **First Name**, **Middle Name**, **Last name**, and **Suffix** merge fields are available for you to use under the **Account Fields** category on the TinyMCE HTML editor.



These individual name fields also appear for the "Entry List" Letter Widget on the TinyMCE HTML editor.

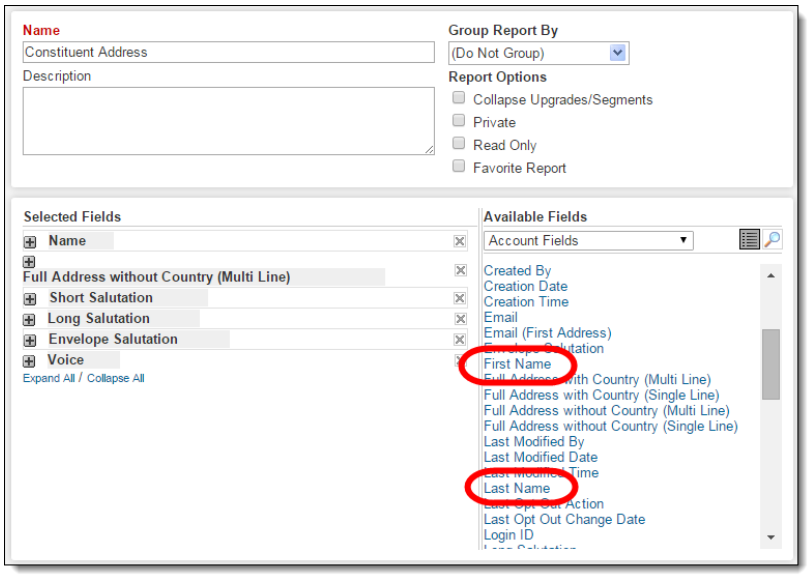
DIY Forms

When a website visitor submits an online form, all new account records are created with an Individual Name Format. Name information in the **Title**, **First Name**, **Middle Name**, and **Last name** fields on the form download to the corresponding fields on the account record.

The **Suffix** field does not appear on DIY forms. If a website visitor enters a suffix in the **Last name** field, it downloads to the **Last name** field on the account.

Reports

When you create or edit a custom report, **Name Format**, **Title**, **First Name**, **Middle Name**, **Last name**, and **Suffix** are available fields for you to report on under the **Account Fields** category.

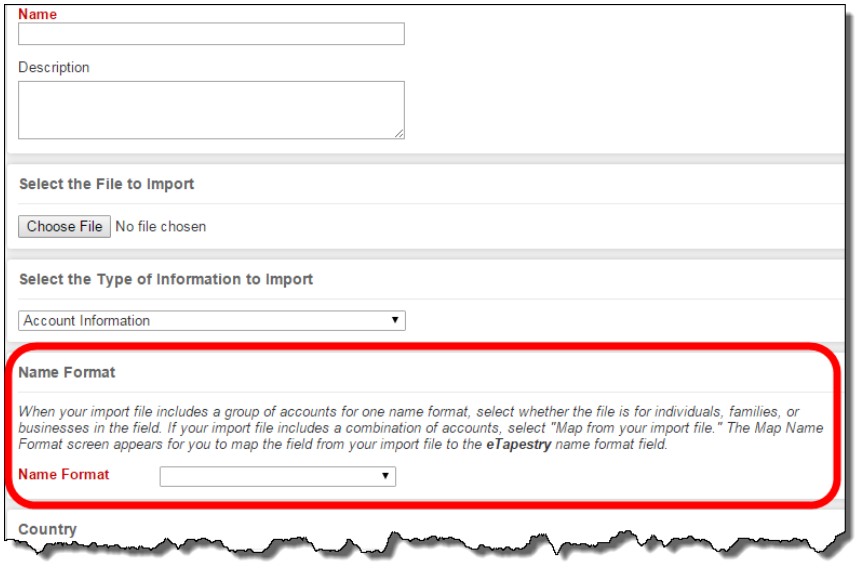


Import

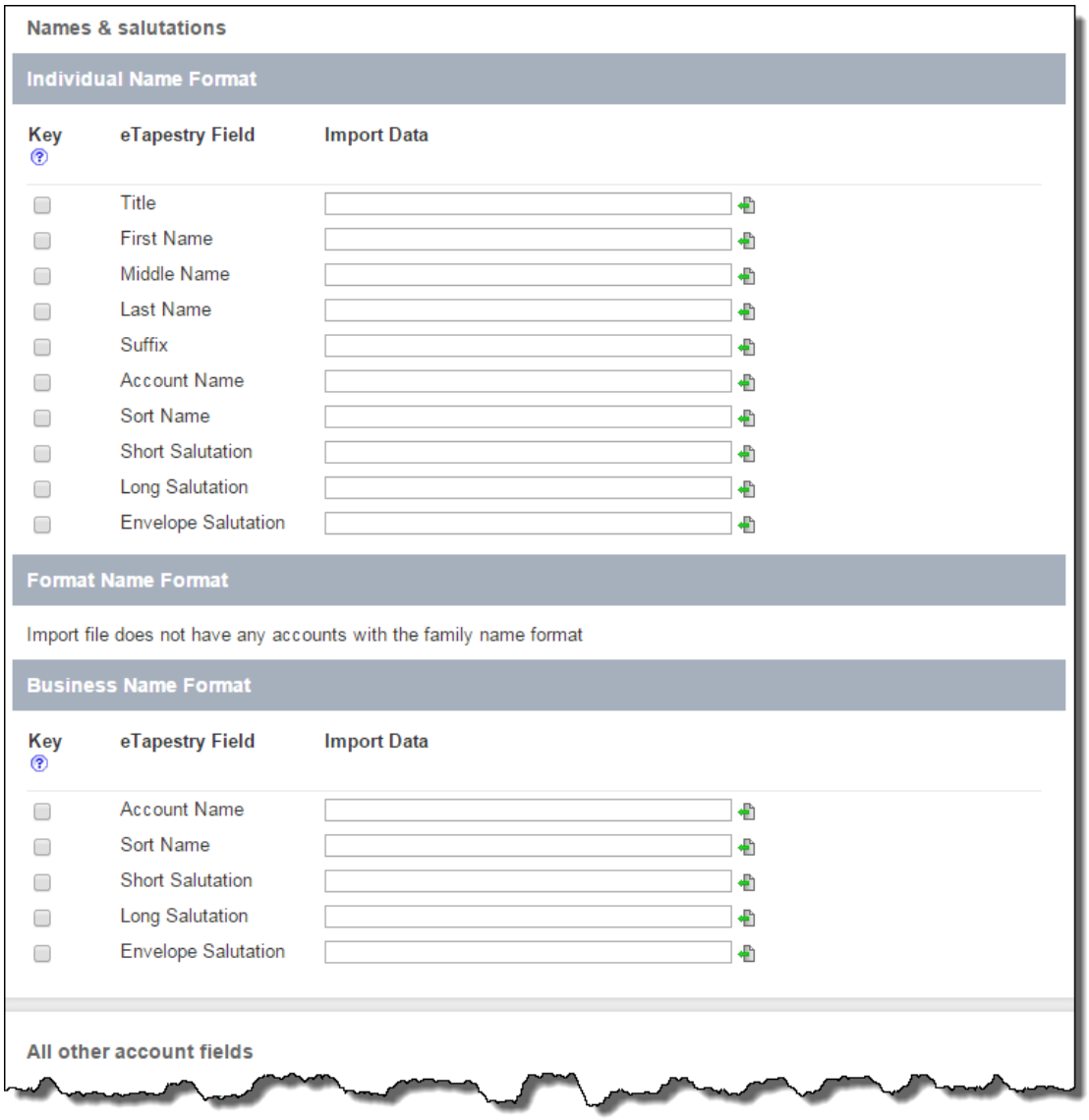
Show Me: Review the New Account Information Import Walkthrough

Step 1, Name and Import Type: When you create an Account Information import type, the **Name Format** section appears. In the **Name Format** field, select whether the file is for individuals, families, or businesses in the field when your import file includes a group of accounts for one name format. If your import file includes a combination of accounts, select "Map from your import file." The Map Name Format screen appears for you to map the field from your import file to the ***eTapestry*** name format field.

Tip: To successfully map your name format field to an ***eTapestry*** name format, your .csv file must include a name format column. In this column, you need to identify each row as Individual, Family, or Business to correspond to the the ***eTapestry*** name formats.



Step 2, Map Your Import File: When you select an Account Information type, additional sections appear for individual, family, and business account fields, in addition to the **All other account fields** section.



API

A new version of the API exists for you to use for **Name Format** options and its corresponding features. In addition, this API includes addresses. To use this API, complete the API registration form to create a sandbox database and refer to the API documentation for name formats, name information, and addresses.

For Existing eTapestry Users

Note: In addition to using the features described in this section, there are other updates that will apply to existing ***eTapestry*** users. Review this section for details that apply when your organization selects to use multiple name fields on a name conversion tool that will be released later in 2015. This information is likely to change and evolve more as we continue to develop the conversion tool. Once it is released, please make sure you review the *New Features* resources for full details that apply to existing ***eTapestry*** users.

Account Record Data Entry

The **Name** field updates to the **Account Name** field. There is no change in functionality for the field. You continue to use it to display the name in the header on the account record and you can also continue to use it for processes such as reports and correspondence templates. However, when you select to use multiple name fields for an Individual account, the **Title**, **First Name**, **Middle Name**, **Last name**, and **Suffix** fields now appear in these processes so you can improve name information in multiple ways. For example, you can include these fields to separate first and last name in report columns.

Also, your current recognition types are replaced with the new type names. This applies to all existing ***eTapestry*** users whether you have completed the conversion tool or not. There is no change in functionality for these types; this has been done to help you more easily identify the purpose of the recognition type.

- "Constituent Name" is now "Use account name"
- "Don't Recognize" is now "No recognition"
- "Anonymous" (no change)
- "Use Recognition Name" is now "Custom"

Check for Possible Duplicates

When you check for possible duplicates on the Other page, the search continues to use values in the **Account Name** field to identify possible duplicates for individual, family, and business accounts. It is important to remember this field was called the **Name** field prior to this release.

Correspondence

You can continue to use the **Name** merge field in your correspondence templates. However, you can now select to replace that field with the **Title**, **First Name**, **Middle Name**, **Last name**, and **Suffix** individual name fields or add them in addition to the **Account Name** field. When you use the individual name fields, you take advantage of providing consistent salutations for all recipients.

Reports

You can continue to report on the **Name** field in your custom reports. However, you can now select to additionally include or replace the field with the **Title**, **First Name**, **Middle Name**, **Last name**, and **Suffix** individual name fields. When you use the individual name fields for your custom reports, you can list the information in separate columns.

Note: eTapestry Standard Reports do not include the individual name fields.

Import

The Step 1: Name and Import Type page for an existing import has been re-arranged so the **Name Format** section appears immediately after you select a file to import. After it, the **Country** section now appears just before **Previously Imported Fields**. The last section on the page continues to be **Multi Select Delimiter**.