

eTapestry New Features

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This guide lists new features in *eTapestry* 7.9.0, released on June 30th, 2013.

Friends Asking Friends Integration

Friends Asking Friends is a Blackbaud product that enables peer-to-peer event fundraising. Event participants use *Friends Asking Friends* to fundraise on behalf of your organization.

You can now integrate your *Friends Asking Friends* data with *eTapestry*. When you set up the integration, you choose whether to synchronize all historical data or only data entered after a certain date. To minimize duplicates, we recommend that you choose a date after any data services were completed for the initial integration. After the initial setup, data is automatically synchronized weekly using an import process.

The import synchronizes account, transaction, soft credit, and event participation records. To avoid duplicates, the import looks for matching records and updates them. To determine a match, *eTapestry* looks first at the *Friends Asking Friends* account ID. If that is not available, *eTapestry* looks for a match by name, email address, and address, where two of the three must match. When a match is not found, the import creates a new record.

To import the data to *eTapestry*, from the *Management* tab, click **Friends Asking Friends** under Online Presence and follow the instructions on the screen.

Navigation Menu and User Interface

With this release, the legacy navigation menu is no longer available. The new menu streamlines navigation and is more intuitive to help you find what you need. The new tabs house relevant areas of the program and highlight the most commonly-used options in each area to make it faster and easier to move through the program.

For a detailed comparison of the legacy and new menus, see the [New Menu Quick Reference Sheet](#).

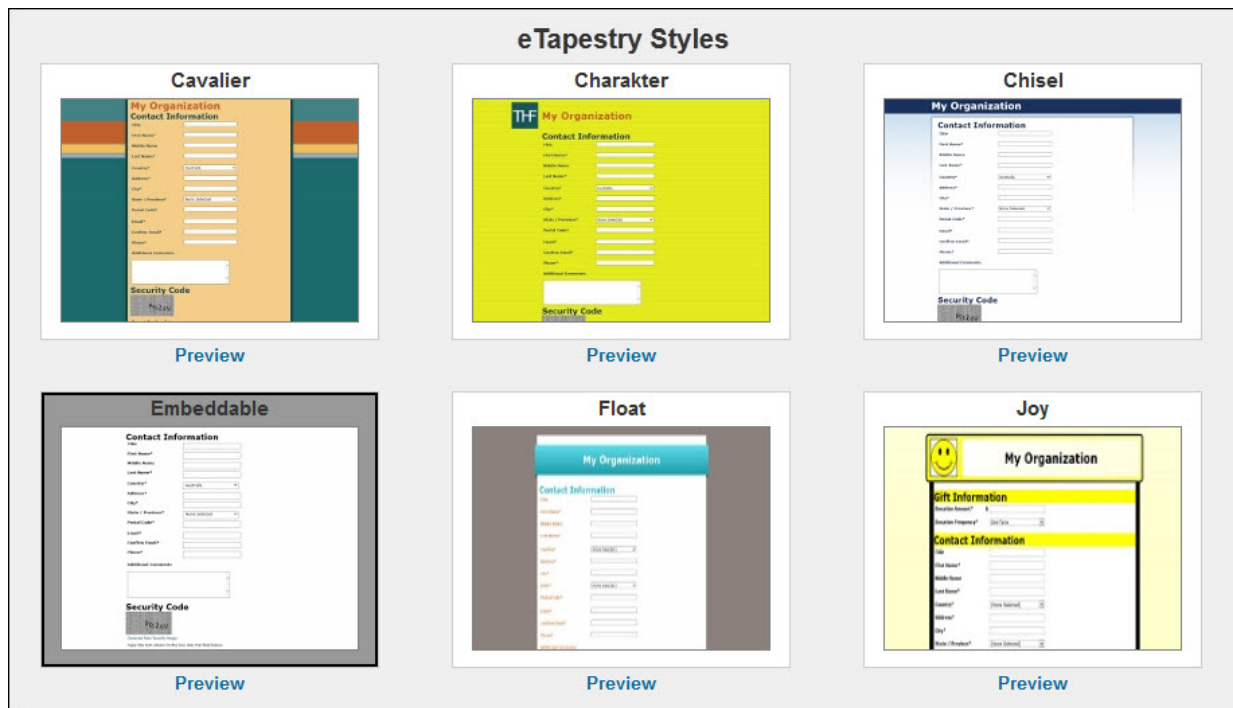
In an effort to improve usability, we also continue to make enhancements to the user interface, including font and color changes.

Enhancements to DIY Forms

We made the following enhancements to DIY forms. To access DIY Forms, from the *Management* tab, click **DIY Forms** under Online Presence.

New Style Templates Available for DIY Forms

You now have additional template options for DIY forms. The new templates are similar to the templates available for eStore pages and you can edit and customize them to fit your needs.



To create a DIY form, from the *Management* tab, click **DIY Forms** under Online Presence. From the My Online Forms page, click **Create a New Page** and select a form type. The Templates screen appears and you can select one of the new or existing templates.

To apply a new template to an existing form, find the form you want to edit on the My Online Forms page and click **Edit**. In the forms editor, click **Edit Style** and then **Swap Template**.

Embed DIY Forms into Your Existing Website

You can now embed DIY forms into your existing website. You can embed forms created with any template, but using the **Embeddable** style template preserves the look and feel of your website on the form page. To access the html code you need to insert a form into your existing website. From the DIY forms page 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.

Select Default Country for DIY Forms

You can now select a default country for each DIY form. The default country appears in the **Country** field on the form when constituents fill it out. However, constituents can select a different country if needed when filling out the form.

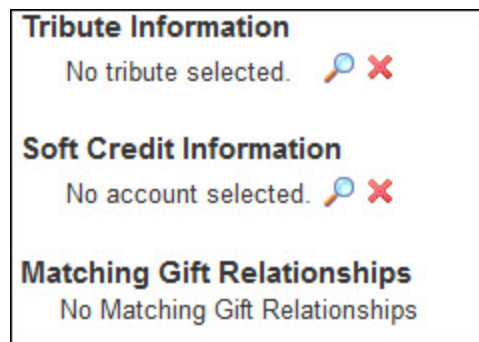
You configure the default country on the Settings page for each form. To access DIY forms, from the *Management* tab click **DIY Forms**. To create a new form, from the DIY forms page click **Create a New Page**. To edit an existing form, from the form editor click **Settings**.

Dynamic Address Fields in DIY Forms Based on Country Selection

In published DIY forms, when a constituent selects a country in the address block, the other address fields now dynamically change to reflect address formats for that country. For example, an address format for the United States includes **Address**, **City**, **State**, and **Postal Code** fields, and an address format for the United Kingdom includes **Address**, **City**, **County**, and **Postcode** fields.

Updates to Segmented Transactions

When you enter a segmented transaction, the Tribute, Soft Credit, Matching Gift Relationships tab now looks the same as it does for single donations.



To add a tribute or soft credit, click the magnifying glass icon and search for the related account. When you select an account to soft credit, the **Amount** and **Note** fields appear.

User-Defined Field Set for Grant Tracking

We have pre-populated user-defined fields to use for grant tracking. These fields can help you track information about your grants and are based on best practices for managing grants in *eTapestry*. Unlike other field sets, you cannot choose which grant tracking fields are included when you select this set. When you add it, the entire list of grant fields are added automatically. In addition, when you add this field set, *eTapestry* creates a new query category and a new report category with queries and reports for information tracked in these fields.

To access field sets, from the *Management* tab, click **User-Defined Fields** under Database Configuration. Under Defined Field Sets, click **Add Defined Field Sets**. To see the new set, click **Grant Tracking Fields**. To add it, click **Import Grant Tracking Set**.

Support YouTube Channel Has Moved

Support's YouTube channel has moved to the main [Blackbaud YouTube channel](#), to make it easier for you to find instructional videos about all **Blackbaud** products. **eTapestry** has a dedicated playlist with support videos related to the product. You can also access the playlist directly from the Support Resources tile on the **eTapestry** dashboard.

The training videos included in the product are not located on this channel, and you can still access them in the application. From the *Help & Support* drop-down, click **Recorded Training**.

New Gift Aid Export Online Submission in the United Kingdom

HM Revenue & Customs (HMRC) has implemented a new online submission process which will eventually replace the filing of paper-based R68 claim forms. Customers in the United Kingdom can now use the Gift Aid Export for Charities Online when submitting Gift Aid claims electronically through the new Gift Aid schedule spreadsheet method. After you run the Gift Aid mass update in **eTapestry**, you can now submit the claims online to HMRC. To access the new export, from the *Management* tab, click **Standard Exports** and select the Gift Aid Export for Charities Online. To submit, paste the data from the export into the Gift Aid schedule spreadsheet, which you can download from the [HM Revenue & Customs website](#).