

everydayhero Integration Guide

11/01/2016 eTapestry 7.27.0 everydayhero Integration US

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EDHUS-2016

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eTapestry and *everydayhero* Integration

everydayhero is a peer-to-peer online giving solution that allows your organization to build online fundraising campaigns as part of your existing websites or as a stand-alone fundraising site.

Show Me: [Watch a video](#) about the *everydayhero* integration with *eTapestry* to learn more

With the *everydayhero* integration with *eTapestry*, you can import constituent, participation, and gift information from *everydayhero* to update your database. Constituent records are updated with the information that comes from *everydayhero*, and new accounts are created if necessary. When you import gifts from *everydayhero*, you can create queries and reports of the information imported.

Sign up for *everydayhero*

Before you can begin to transfer information from *everydayhero* into *eTapestry*, you must sign up with *everydayhero*.

> Sign up for *everydayhero*

1. Visit everydayhero.com to sign up for your account.
2. In the top navigation, select **FOR NONPROFITS**.
3. On the everydayhero for nonprofits page, select to join **everydayhero**.

Access the API token for the *everydayhero* integration

When you sign up with **everydayhero**, you receive an **eTapestry** API key. You can then use the API key to establish a connection between **everydayhero** and **eTapestry**.

> Access the API token for the *everydayhero* integration

1. After you have created your **everydayhero** account, sign in to your account.
2. From your **everydayhero** dashboard, select the Settings tab and click **Integrations**. The Integrations page appears.
3. On the Integrations page, under **eTapestry**, select **Copy** to copy the API token to your clipboard. For more information about where to enter your API token, see [Enter basic settings on page 4](#).

Get started with the *everydayhero* integration

Before you begin to import your **everydayhero** historical data, you will need to enter some information about the default options for handling imported information to ensure those settings align with your organization's processes.

Enter basic settings

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

> Enter basic settings

1. From **Management**, select **Integrations**.
2. On the Integrations page, in the **everydayhero integration** tile, select **Set Up**. The Set up **everydayhero** integration screen appears.

Set up everydayhero integration

1. Basic settings 2. Map campaigns 3. Select historical data 4. Finish

API Key *

Send data import notifications to: *

Use commas to separate multiple email addresses.

Previous Next Save and Close Cancel

3. On the Basic settings tab, enter your API Key in the field. For more information about how to retrieve your API key, see [Sign up for everydayhero on page 3](#).
4. In the last field, enter each recipient email address at your organization who should receive a notification when the import completes. If you enter multiple email addresses, use commas or semi-colons to separate them.
5. Click **Next** to go to the next step or **Save and Close** to save your choices and come back to the page later. To return to the previous step, click **Previous**.

Map campaigns

everydayhero campaigns are brought into your **eTapestry** database as **eTapestry** Fundraisers with the Source of **everydayhero**. Once you enter basic settings, you will need to map revenue from **everydayhero** campaigns to an **eTapestry** fund, campaign, and approach.

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

On the Map campaigns tab of the Set up **everydayhero** integration screen, you can select a default fund, campaign, or approach from the drop down menus.

Set up everydayhero integration ✕

1. Basic settings 2. Map campaigns 3. Select historical data 4. Finish

Choose a default Fund, Campaign and Approach for revenue import from *everydayhero* campaigns

Default *eTapestry* Fund *

(None Selected) ▼

Default *eTapestry* Campaign

(None Selected) ▼

Default *eTapestry* Approach

(None Selected) ▼

Previous Next Save and Close Cancel

Note: **Default eTapestry Fund** is a required field. A fund is always a required field when you enter a gift.

Click **Next** to go to the next step or **Save and Close** to save your choices and come back to the page later. To return to the previous step, click **Previous**.

Import historical data

On the Select historical data tab of the Set up *everydayhero* integration screen, select how you want to import previous *everydayhero* data into *eTapestry*. This data will be imported during the first nightly import you schedule.

Set up everydayhero integration ✕


1. Basic settings 2. Map campaigns **3. Select historical data** 4. Finish

Choose the historical data to import from *everydayhero* *

No historical data

All historical data

Historical data created since



Once you start import, this historical data setting can not be changed.

➤ Select historical data to import

Note: Once your import begins, these settings cannot be edited.

1. If you do not want to import data from previous *everydayhero* campaigns, select **No historical data**.
2. To import all data from previous *everydayhero* campaigns, select **All historical data**.
3. To import data from previous *everydayhero* campaigns starting with a specific date, select **Historical data created since** and select the date.
4. Click **Next** to go to the next step or **Save and Close** to save your choices and come back to the page later. To return to the previous step, click **Previous**.

Finish your integration setup

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

If you select to schedule your imports now, your *everydayhero* data will import nightly beginning on the date shown.

If you select to schedule your import at a future date, you can return to this step after you finalize your import settings.

Click **Finish** or **Save and Close** to begin to the import or to save your choices and come back to the page later. To return to the previous step, click **Previous**.

Edit the *everydayhero* import settings

everydayhero Integration

Edit Settings Edit Mappings Pause Integration

Successfully connected

First nightly import scheduled: 9/1/2016

If something goes wrong, email notifications will be sent to:
alps@blackbaud.com

[everydayhero/eTapestry integration user guide](#)

Don't have *everydayhero*? [Sign up here](#)

Once you have completed the steps to set up your *everydayhero* integration with *eTapestry*, the **everydayhero integration** tile now displays details about the import, such as the date and time your import is scheduled for and who will be sent notifications when your import is complete.

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

If you want to import your *everydayhero* data outside of scheduled runs, you can select **import now** next to the date of your next scheduled import. A warning screen appears to notify you that the import is an intensive process. Select **Confirm** to begin importing your *everydayhero* data.

Field mapping between *everydayhero* and *eTapestry*

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

Account Fields

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

If the account does not exist in your database, then two different types of accounts can be created for you: fundraiser accounts and donor accounts.

Fundraiser accounts are created for users who create a Hero page in **everydayhero**. Donor accounts are created for those who donate to your organization. To distinguish between the two account types, **eTapestry** adds a user-defined field, **Account UDF (EDH Account Type)**, to the account.

To search for existing Fundraiser accounts in your database, **eTapestry** checks **everydayhero** ID numbers, name, address, then email. To check for existing donor accounts, **eTapestry** checks by name, address, then email.

If you delete an account in **eTapestry** that was imported through the **everydayhero** integration, it will not be imported the next time you run the integration since the integration will only import new data.

If the account being imported is an organization instead of an individual, then the name of the organization will appear as the account name, and the name format will be set to Business.

This table describes where account information imported from **everydayhero** appears in **eTapestry**.

> Account Fields

everydayhero Field	eTapestry Field
Address	Address, Address Line 1
Address Line 2	Address Line 2
Birthday	Account UDF (Date of Birth)
City/Suburb/Town	City
Country	Country
Email	Email
Further Communication Opt-In	Account UDF (EDH Communication Preferences)
Postcode/Zip Code	Postal Code
State/County/City	State/Province
First Name	First Name
Last Name	Last Name
Phone	Persona Default Phone
Organization Name	Organization Account Name
Supporter ID	Account UDF (EDH Account Id)

Fundraiser Fields

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

Note: For users who have integrated their *everydayhero* account with *eTapestry*, but do not have a subscription to Personal Fundraising, you will not be able to create a new Fundraiser in *eTapestry*. New Fundraisers can only be added through the import process when you import campaign data into your *eTapestry* database.

To edit Fundraiser information imported from *everydayhero*, select the name of the Fundraiser you wish to edit on the Fundraisers page. You can edit information in the **Date, Name, Goal, Status** and **Description** fields. For more information, see [Personal Fundraising on page 12](#).

> Fundraiser Fields

<i>everydayhero</i> Field	<i>eTapestry</i> Field
Campaign Description	Note
Campaign Name	Name
Campaign Start Date	Date
Campaign State	Status

Journal Fields

The *everydayhero* integration imports new journal entries such as transactions and participation journal entries. However, if you delete a journal entry in *eTapestry* that was imported through the *everydayhero* integration, it will not be imported the next time you run the integration since the integration will only import new data.

Transaction Fields

Transactions that have been received online, such as through the Hero page, are automatically imported into *eTapestry* when you schedule your *everydayhero* nightly import.

To import offline transactions, such as donations received through cash or check, see [Offline Transactions on page 12](#).

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

> Transaction Fields

everydayhero Field

Donation Amount, Uplift/Cover
Donation Date
Donation ID
Donor Message
Donation Payment Instrument
Donation Received at (Date)
Donation Receipt Number
Donation Type
Is Recurring Gift?
Supporter

eTapestry Field

Transaction Received Amount
Transaction Date
Transaction UDF (EDH Transaction ID)
Transaction Fundraiser Donation Message
Gift Type
Transaction UDF (EDH Date Gift Received)
Transaction Receipt Number
Transaction UDF (EDH Transaction Type)
Transaction UDF (EDH Recurring Gift)
Soft Credit

Participation Journal Entry Fields

You can use participation journal entries to track information about which accounts participate in your Fundraisers. A participation journal entry is automatically created for each Hero constituent imported from **everydayhero** into your database. You can also manually add participation entries to the account's journal.

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

> Participation Journal Entry Fields

everydayhero Field

Page Id
Page Created Date
Page Name
Page Goal
Page URL
Campaign
Team Position
Team Name
Team Page URL

eTapestry Field

Participation UDF (EDH Page Id)
Date
Display Name
Participant Goal
Participation UDF (EDH Page URL)
Fundraiser
Participation UDF (EDH Team Position)
Participation UDF (EDH Team Name)
Participation UDF (EDH Team URL)

Offline Transactions

Information about offline donations, such as cash and check transactions, does not automatically import along with your online donations. However, you can manually add these gifts directly to your **eTapestry** database.

> Add offline *everydayhero* transactions to **eTapestry**

1. From the donor's account Home page, click **Journal**. The Journal page appears.
2. Click **Add**. The Add Journal Entry screen appears.
3. Select **Gift/Pledge**. The New Gift/Pledge screen appears.
4. Under **Gift Types**, select **Check** or **Cash** for your offline donation. Enter applicable details about the gift.
5. If the donation was given in sponsorship of a participant or **everydayhero** Hero, under **Tribute, Soft Credit, Matching Gift Receipts**, click the magnifying glass under **Soft Credit**. The Find an Account page appears. Search for the account of the participant or Hero. When you locate the correct account in your search results, click the account to select it.

If the account for the soft credit recipient does not exist in your database, you can click **Add Account** to add a new account. Click **Save** to save the new account or select the existing account in the search results.

6. Complete the gift details. For more information about the items on this screen, refer to [Add a Gift Screen](#).
7. Click **Save And** to save the gift to the Fundraiser's account.

Personal Fundraising

After you run the **everydayhero** integration to import your data, you will now have access to a limited version of the Personal Fundraising module in **eTapestry** in order to view, query, and report on Fundraiser data imported from **everydayhero**.

Warning: If you do not have a Personal Fundraising subscription, or if your subscription has lapsed, you will not be able to create or edit Fundraiser information with the Source of **eTapestry**. You will only be able to edit Fundraiser information imported from **everydayhero**.

> Fundraisers Page

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

For users who have integrated their **everydayhero** account with **eTapestry**, but do not have a subscription to Personal Fundraising, you will not be able to create a new Fundraiser in **eTapestry**.

New Fundraisers can only be added through the import process when you import campaign data into your **eTapestry** database.

To edit Fundraiser information imported from **everydayhero**, select the name of the Fundraiser you wish to edit on the Fundraisers page. You can edit information in the **Date, Name, Goal, Status** and **Description** fields.

The date of your Fundraiser is determined by the date you enter in the **Start On** field for the campaign in **everydayhero**. Dates for ongoing campaigns without start dates will be determined by the date the campaign was created in **everydayhero**.

If the name of a campaign from **everydayhero** imported into your database matches an existing **eTapestry** Fundraiser, the date of the campaign will be added to the Fundraiser name. If that naming combination is not unique, a number will be added to the end of the name until a unique name is found.

When you import a campaign with the status of Expired or Deactivated from **everydayhero, eTapestry** sets the status of the Fundraiser to Disabled. All other campaigns will be imported as Fundraisers marked as Active. After the initial import, **eTapestry** cannot change the status of Fundraiser, even if you edit the campaign status in **everydayhero**. However, you can manually edit the status of a Fundraiser on its Fundraiser page.

To set a goal for a Fundraiser, you must edit the **Goal** field in **eTapestry**. You cannot import goal amounts from **everydayhero**. Goals allow you to track the progress of a Fundraiser if you utilize the standard fundraising reports in **eTapestry**.

> Participation Journal Entries

You can use participation journal entries to track information about which accounts participate in your Fundraisers. A participation entry is automatically created for each constituent and team account imported from **everydayhero** into your database. You can also manually add participation entries to the account's journal. For more information, see [Participation Journal Entries](#).

> Query and Query Preview

From the drop menu under **Browse Fields**, select Defined Fields. You can query on fundraising data using the **Fundraisers** field to locate either transactions or participation entries for a specific Fundraiser.

You can select User Defined Fields - Participation from the drop down menu to select Participation user-defined fields for query.

Under Journal Fields in the drop down menu, you can also select **Participation** within the Journal Entry Types category to query for Participation journal entry types.

When previewing a query, select the Fundraiser column to include the name of the Fundraiser in your preview results.

> Standard Reports

Three standard reports can help you monitor personal fundraisers that constituents do on behalf of

your organization.

- [Fundraiser Activity Summary](#)
- [Fundraiser Summary](#)
- [Fundraiser Analysis](#)

> Communications Fields

Data merge tags enable you to merge data from specific fields in accounts or journal entries into documents or emails. When you generate letters or emails, the tag is replaced with the specific data from each entry in your query. The following Personal Fundraising fields now appear as data merge tag options for Communications layouts:

- **Fundraiser**
- **Fundraiser Donation Message**
- **Fundraiser Total Raised**
- **Fundraiser Total Received**
- **Fundraiser Total Pledged**
- **Goal**
- **Participant Display Name**

These fields are also available when you build a custom report to group data. To add these fields to a custom report, select Journal Fields from the **Browse Fields** drop down menu under **Report Columns**. For more information about adding merge tags to Communications layouts, see [TinyMCE HTML Editor](#).

> Transaction Pages

When you integrate **everydayhero** with your database, the Fundraiser drop down menu appears on the Transaction page so you can indicate which Fundraiser is associated with your transaction. The drop down menu will not appear on transactions where a soft credit has been selected.

> User Defined Fields

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

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

Warning: You can use these fields as they are, or personalize them to better fit the needs of your organization. However, we suggest that you do not re-name any user-defined fields created during the **everydayhero** import process. When you re-name the user-defined field, **eTapestry** creates a new field to store the information which can duplicate data and complicate your data tracking.

> Mass Updates

After you integrate **everydayhero** with your database, the Fundraiser drop down will appear under

Transaction Values when running a mass update to Transaction Values.

Multiple Participation Journal Entries

When you import **everydayhero** data, you may have Heroes that have created multiple Hero pages that are linked to a single campaign.

Only one participation journal entry per account can be created for each Fundraiser when the Fundraiser is created in **eTapestry**. You will not be able to select a Fundraiser on a participation journal entry if you have already selected that Fundraiser on another participation journal entry for the same account.

However, if you have integrated **everydayhero** with your database, then Fundraisers created through the **everydayhero** import can support multiple participation journal entries for each account.

> Participation Journal Entry Page

On the Participation Journal Entry page, the **Fundraiser** drop down shows all active Fundraisers, even if the account already has a participation journal entry linked to the Fundraiser imported from **everydayhero**.

You can also save a participation journal entry for an account that already has a participation journal entry for the same Fundraiser if the Fundraiser originated from **everydayhero**.

> Fundraiser Summary Report

When you run the Fundraiser Summary Report, accounts with multiple participation journal entries on a single **everydayhero** Fundraiser will be listed for each participation journal entry in the report.

The **Display Name** field is included in this report so you can distinguish between accounts with multiple fundraisers.

If the gift associated with the Fundraiser imported from **everydayhero** is an offline gift, or a gift of cash or check, then "(Offline)" will appear in the Role column. For more information about offline gifts, see [Offline Transactions on page 12](#).

To see donation information for individuals, click on the account name when the Account role is Participation. For Team accounts, click on the account name to view team participation summary information. On the detail report, click on the individual names to view their information.