everydayhero Integration Guide
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**eTapestry** and **everydayhero** Integration

**Note:** For users in non-US regions, refer to the [everydayhero Integration guide](#) for the UK, Ireland, Australia, and New Zealand.

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](http://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 2](#).
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.

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 1](#).
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 step, if you want to select default funds, campaigns, and approaches for all *everydayhero* campaigns, you can select them from the drop down menus.

For customers in Ireland, direct donations imported from *everydayhero*, or donations that are not part of specific *everydayhero* campaigns, will also inherit the default Campaign, Fund, and Approach you select.

If you do not already have *everydayhero* campaigns, select default mapping options. Once you add *everydayhero* campaigns, you can edit the default options in the table.
Note: For campaigns to appear, it must have an associated donation or hero in your everydayhero account.

If you want to select default funds, campaigns and approaches for individual everydayhero campaigns, in the campaign mappings table, select them from the drop down menus.

Note: Default eTapestry Fund is a required field. A fund is always a required field when you enter a gift. If your organization makes campaigns and approaches required when you enter a gift in eTapestry, then campaigns and approaches will be required when you map revenue from everydayhero.

If you do not select a campaign or approach for an individual fundraiser when your organization requires campaigns and approaches, then the default campaign and approach will apply. For more information about how to require campaigns and approaches, see Campaigns and Approaches.

To filter which campaigns appear in the table, you can search for campaigns by name. Select Include inactive everydayhero campaigns to include inactive campaigns in your results.

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.

After a new eTapestry Fundraiser is created when you import an everydayhero campaign, any email addresses entered on the Basic Settings step of the integration set up will receive a notification so that the eTapestry Fundraiser can then be mapped to the appropriate campaign, fund, and approach. To return to the Map Campaigns step of the integration wizard after you have begun the nightly import, under Management, Integrations, select Edit Mappings.

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

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 cannot be changed.

Previous  Next  Save and Close  Cancel

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.
   
   Note: The day you set up the integration is considered part of this historical time frame. For example, if you choose this option during the integration setup on Monday, only information added to everydayhero the following Tuesday and onward will be imported.

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**

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 11.
Fundraiser Fields

<table>
<thead>
<tr>
<th>everydayhero Field</th>
<th>eTapestry Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign Description</td>
<td>Note</td>
</tr>
<tr>
<td>Campaign Name</td>
<td>Name</td>
</tr>
<tr>
<td>Campaign Start Date</td>
<td>Date</td>
</tr>
<tr>
<td>Campaign State</td>
<td>Status</td>
</tr>
</tbody>
</table>

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 10.

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

Transaction Fields

<table>
<thead>
<tr>
<th>everydayhero Field</th>
<th>eTapestry Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donation Amount, Uplift/Cover</td>
<td>Transaction Received Amount</td>
</tr>
<tr>
<td>Donation ID</td>
<td>Transaction UDF (EDH Transaction ID)</td>
</tr>
<tr>
<td>Donor Message</td>
<td>Transaction Fundraiser Donation Message</td>
</tr>
<tr>
<td>Donation Payment Instrument</td>
<td>Gift Type</td>
</tr>
<tr>
<td>Donation Received at (Date)</td>
<td>Transaction Date, Transaction UDF (EDH Date Gift Received)</td>
</tr>
<tr>
<td>Donation Receipt Number</td>
<td>Transaction Receipt Number</td>
</tr>
<tr>
<td>Donation Type</td>
<td>Transaction UDF (EDH Transaction Type)</td>
</tr>
<tr>
<td>Is Recurring Gift?</td>
<td>Transaction UDF (EDH Recurring Gift)</td>
</tr>
<tr>
<td>Net Amount</td>
<td>Transaction UDF (EDH Net Amount)</td>
</tr>
<tr>
<td>Supporter</td>
<td>Soft Credit</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>everydayhero Field</th>
<th>eTapestry Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Id</td>
<td>Participation UDF (EDH Page Id)</td>
</tr>
<tr>
<td>Page Created Date</td>
<td>Date</td>
</tr>
<tr>
<td>Page Name</td>
<td>Display Name</td>
</tr>
<tr>
<td>Page Goal</td>
<td>Participant Goal</td>
</tr>
<tr>
<td>Page URL</td>
<td>Participation UDF (EDH Page URL)</td>
</tr>
<tr>
<td>Campaign</td>
<td>Fundraiser</td>
</tr>
<tr>
<td>Team Position</td>
<td>Participation UDF (EDH Team Position)</td>
</tr>
<tr>
<td>Team Name</td>
<td>Participation UDF (EDH Team Name)</td>
</tr>
<tr>
<td>Team Page URL</td>
<td>Participation UDF (EDH Team URL)</td>
</tr>
</tbody>
</table>

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.
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*.

### Participation Summary Report

When you run the Participation 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 10](#).

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.

### Event Registration DIY Forms

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

### Allow event registrants to fundraise for your everydayhero campaigns

1. From Management, select **DIY Forms** under **Online Presence**. The My Online Forms page appears.

2. Create a new Event Registration form or edit an existing form:

   - To create a new Event Registration DIY form, select **Create a New Page**. Select the Event Registration page you would like to create and the style you wish to apply. Select **Next**. The Choose Your Settings Screen appears.
   - To edit an existing form, select **Edit** next to the Event Registration DIY form you wish to edit. The Online Forms Editor page appears. Select **Settings** to access the Choose Your Settings screen.

   **Tip:** For an overview of DIY forms, including how to set up your payment processor, confirmation email template, and other form elements, refer to the [Getting Started with Do-It-Yourself Forms](#) guide.

3. Under **Event Signup Settings**, select **Allow registrants to fundraise with everydayhero**. The everydayhero Campaign drop down menu appears.

4. Select the active everydayhero campaign you want to link to the page or choose the None
Selected option if you do not want to select a specific campaign.

*Note:* You can only select a campaign if it is listed as an active Fundraiser on the Fundraisers page under Management. For *everydayhero* campaigns to appear as active, they must have data imported into *eTapestry* through the integration, such as a gift or participation.

Once your users have successfully completed the Event Registration page, they will receive an email that includes the link to begin fundraising. Users can also access this link from the success page that appears when they complete the Event Registration DIY form.

If you select to use the default confirmation email from *eTapestry*, the Start Fundraising link appears automatically in the confirmation email once you select to allow users to fundraise for your campaigns.

If you select to use a custom confirmation email template, you must insert the eCommerce Details widget into your custom communication. This widget is used for custom eCommerce confirmation emails. It shows the primary details from an eCommerce submission, including the name, address, email, phone, and transaction information.

**Add the eCommerce Details widget to your custom confirmation email**

1. From Communications, click Manage Communications. The Communication Categories page appears.
2. Select the category where your confirmation email template is stored, then select the template.
3. In the editor, select the block of the letter section you wish to edit. The Edit Contents window appears.
4. Select where you want to insert the eCommerce Details widget.
6. Next to eCommerce Details, click Select.
7. When you are done inserting the link, select Update on the Edit Contents window.
8. Select Finish in the Save and drop down menu and click Next.

After the user clicks Start Fundraising from the default or custom confirmation email created from your custom template or from the success page, they will be directed to *everydayhero* to create an account or sign in as an existing user to fundraise for your specified campaign.

If you did not select a specific campaign in the Select an everydayhero campaign drop down when you created the Event Registration DIY form, then the user is directed to your organization’s *everydayhero* fundraising page.