Legacy Music Alliance

eTapestry Procedures Manual

Updated 7.23.15

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1. **Complying to Privacy Policies**

1.1. Privacy Policy Notice

The privacy of the Legacy Music Alliance's members is of utmost importance. Review the privacy policy from our website and remember that it is the responsibility of every staff member to protect the information collected through the website and entered into the CRM (Customer Relationship Management) database, eTapestry.

1.2. Privacy Policy

Personal information collected on this site will never be sold or shared with any entity. Any payment information, including credit card numbers, is collected through a separate site with extra security and encryption in place to protect against loss, misuse, and unauthorized access or alteration specifically engineered for processing payments. We cannot guarantee that the information will not be lost or misused, but we make every effort to ensure that it is secured to avoid such problems.

By submitting your contact information, you are granting permission to Legacy Music Alliance, Inc. to send you information about the event for which you have registered, events related to that event which we deem you may be interested, and other activities, programs, and opportunities sponsored or promoted Legacy Music Alliance. If you wish to be removed from future communications, send an email to General Manager, info@legacymusicalliance.org. Your email address will be removed from our communications list within ten business days, in compliance with federal law.

The website is made available by Legacy Music Alliance, Inc. ("Legacy Music Alliance" or "LMA" or "we" or "us" or "our"). This privacy policy sets out how we use and protect any information that you provide when you use this website.

We are committed to ensuring that your privacy is protected. Should we ask you to provide information by which you can be identified when using this website, you can be assured it will only be used in accordance with this privacy statement.

We may change this policy from time to time by updating this page. You should check this page from time to time to ensure that you are happy with any policy changes. This policy is effective from January 1, 2012.

What we collect

We may collect the following information for product and project recordkeeping:

Name, contact information including your postal or email address and phone, demographic information such as postcode and organizational affiliation, other information relevant to events or programs.

What we do with the information we gather

We require this information to understand your needs and provide you with a better service. We may contact you by email, phone, fax, or mail for the following reasons: to contact you for research purposes related to your user experience at our website to verify your use, registration, comments, or otherwise address direct technical issues

Security

We are committed to ensuring that your information is secure. In order to prevent unauthorized access or disclosure, we have put in place suitable physical, electronic, and managerial procedures to safeguard and secure the information we collect online.

How we use cookies

A cookie is a small file that asks permission to be placed on your computer's hard drive. Once you agree, the file is added and the cookie helps analyze web traffic or lets you know when you visit a particular site. Cookies allow web applications to respond to you as an individual. The web application can tailor its operations to your needs, likes and dislikes by gathering and remembering information about your preferences.

Links to other websites

Our website may contain links to enable you to visit other websites of interest easily. However, once you have used these links to leave our site, you should note that we do not have any control over other websites and cannot be responsible for protection or privacy of information at sites not governed by this privacy statement. You should exercise caution and look at the privacy statement applicable to the website in question.

You may choose to restrict the collection or use of your personal information in the following ways:

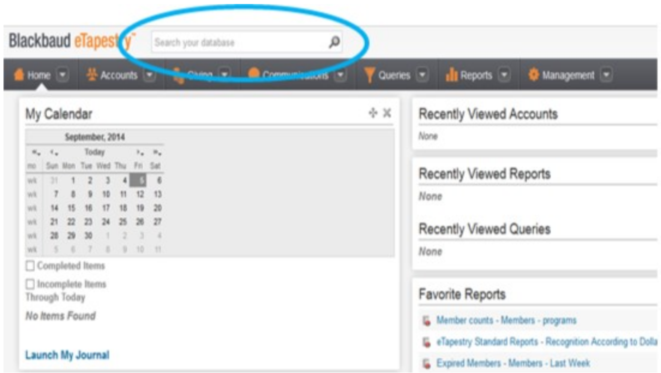
Whenever you are asked to fill in a form on the website, look for the box that you can click to indicate that you do not want the information to be used by anybody for research purposes if you have previously agreed to us using your personal information for these purposes, you may change your mind at any time by writing to or emailing us at General Manager, info@legacymusicalliance.org.

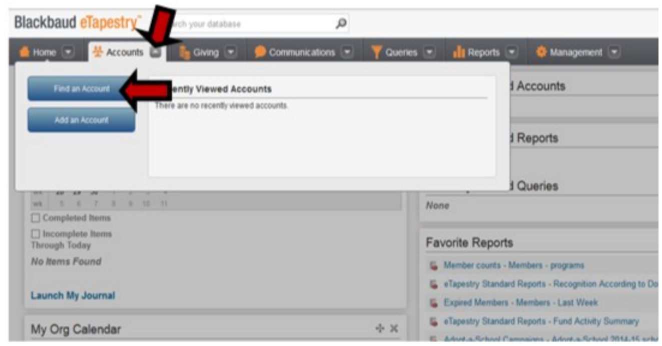
We will not sell, distribute or lease your personal information to third parties unless we have your permission or are required by law to do so.

If you believe that any information we are holding on you is incorrect or incomplete, please email us as soon as possible, at the above address. We will promptly correct any information found to be incorrect

2. Creating Accounts

Before adding an account, search the database to see if the account already exists. There are two ways to do this:





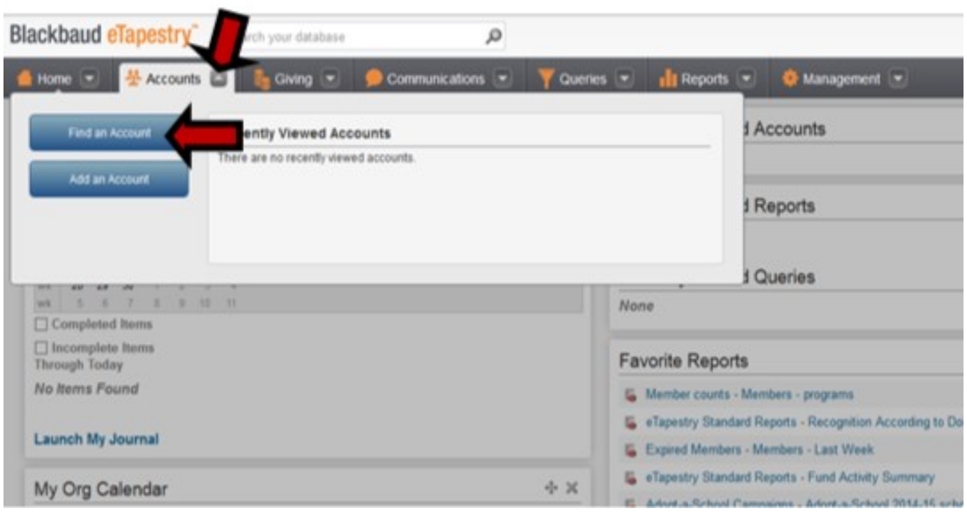
1. Type the account name in the search bar with gray text that says, "Search your database"
   a. Click on the account name to open it
2. Click on the "Accounts" drop-down menu from the navigation bar
   a. Click on the "Find an Account" blue button
   b. Type the account name in the "Search For" field

Notes:

- **A Quick Find** will yield any accounts with a partial or full match. Specific searches yield fewer results, but may also give you a false negative result.
- **An Advanced Find** will provide the option to enter information in more search fields, but it is more time consuming than a Quick Find.

2.1. School music program memberships

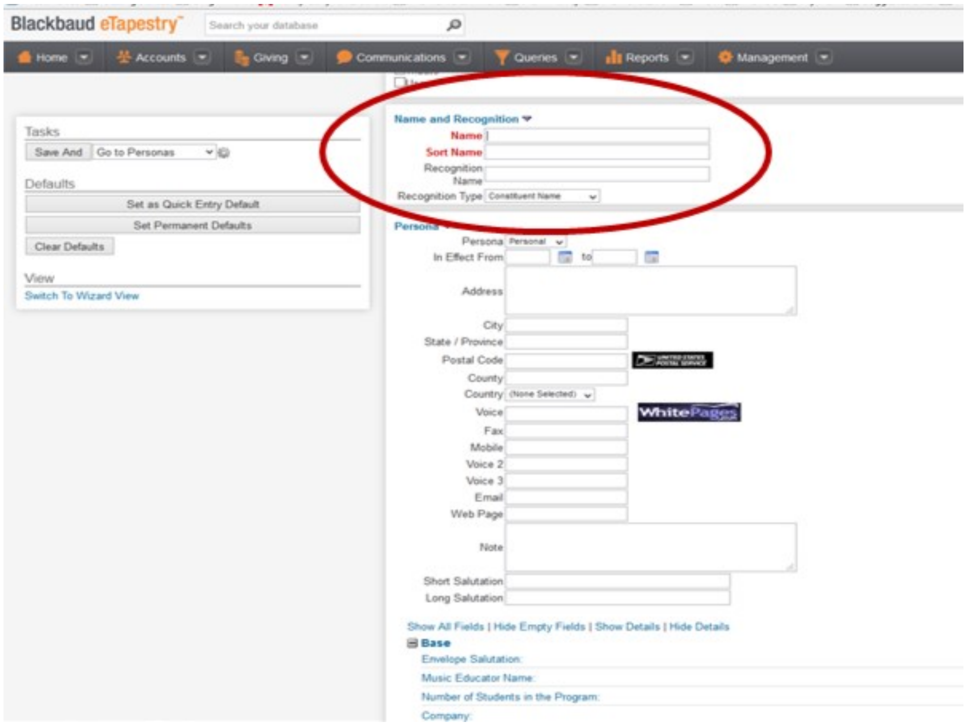
If the school music program is not in the system, create an account:



- Select the "Accounts" drop-down menu from the navigation bar
- Click on the "Add an Account" blue button

School music programs will be “Name and Recognition” or “Persona.”

Name and Recognition



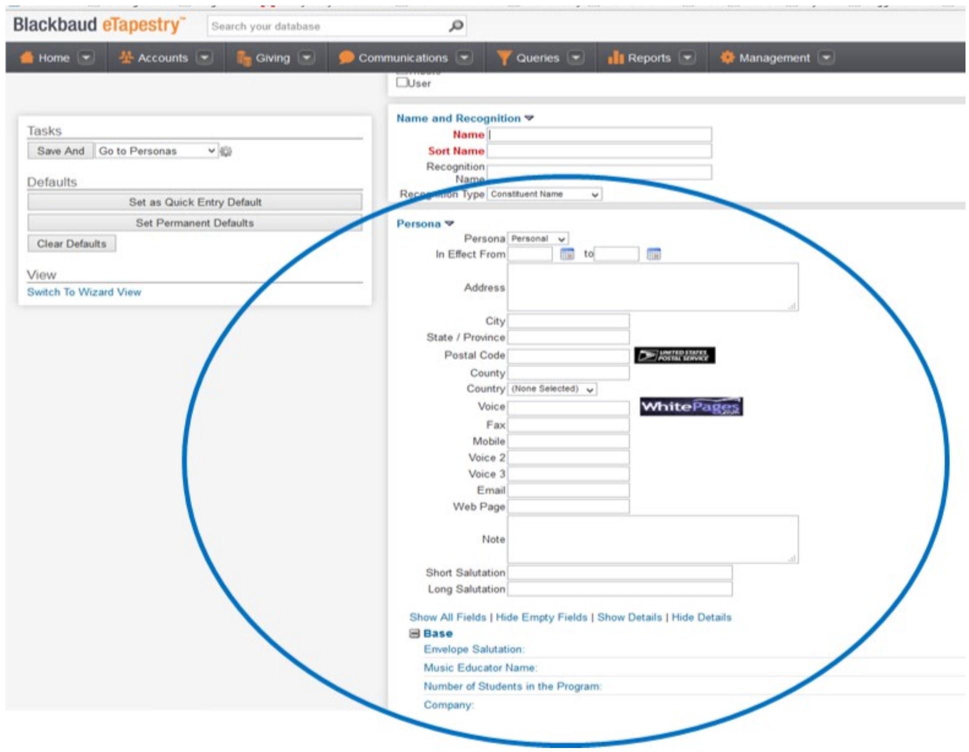
- Fill in the “Name” field with the school’s name and music program (choir, orchestra, band)

  Note: Don’t add *school,* use quotation marks around page titles, links, buttons, and fields. Use quotation marks around page titles, links, buttons, and fields to the music program name. Only old accounts (prior to 2014–2015 membership changes) have the word *school* in the account.

- Click on the “Sort Name” field, or whichever field is preferred, and it should automatically appear in search format
- Skip the “Recognition Name” field

  Note: The “Recognition Name” field applies to individual members and constituents such as donors, clinicians, and volunteers.

Persona



- Click on the “Personal” drop-down menu next to the “Persona” field
- Select “Business”

Note: Account personas will be a “Business” persona.

Address

- Fill in the “Address Lines,” “City,” “State/Province,” and “Postal Code” fields
- Fill in the “County” field (if applicable)
- Click on the “Change Country” link (if applicable) and select the country from the “Select Country” drop-down menu

Contact Information

- Fill in the “Voice” field with the phone number
    - If a second phone number is provided, enter it in the “Voice 2” field
    - If Voice or Voice 2 fields are a cell phone number, copy it in the “Mobile” field
- Fill in the “Email” field

Salutation

- Fill in the “Short Salutation” field with Mr./Ms./Dr./etc. followed by their last name

- Fill in the “Long Salutation” field with Mr./Ms./Dr./etc. followed by their full name

Note

- Fill in the “Note” field with any pertinent information needed before contacting the member (i.e., “Only call Voice during 8am–1pm,” or “Do not call this clinician for clinics after 1pm.”)

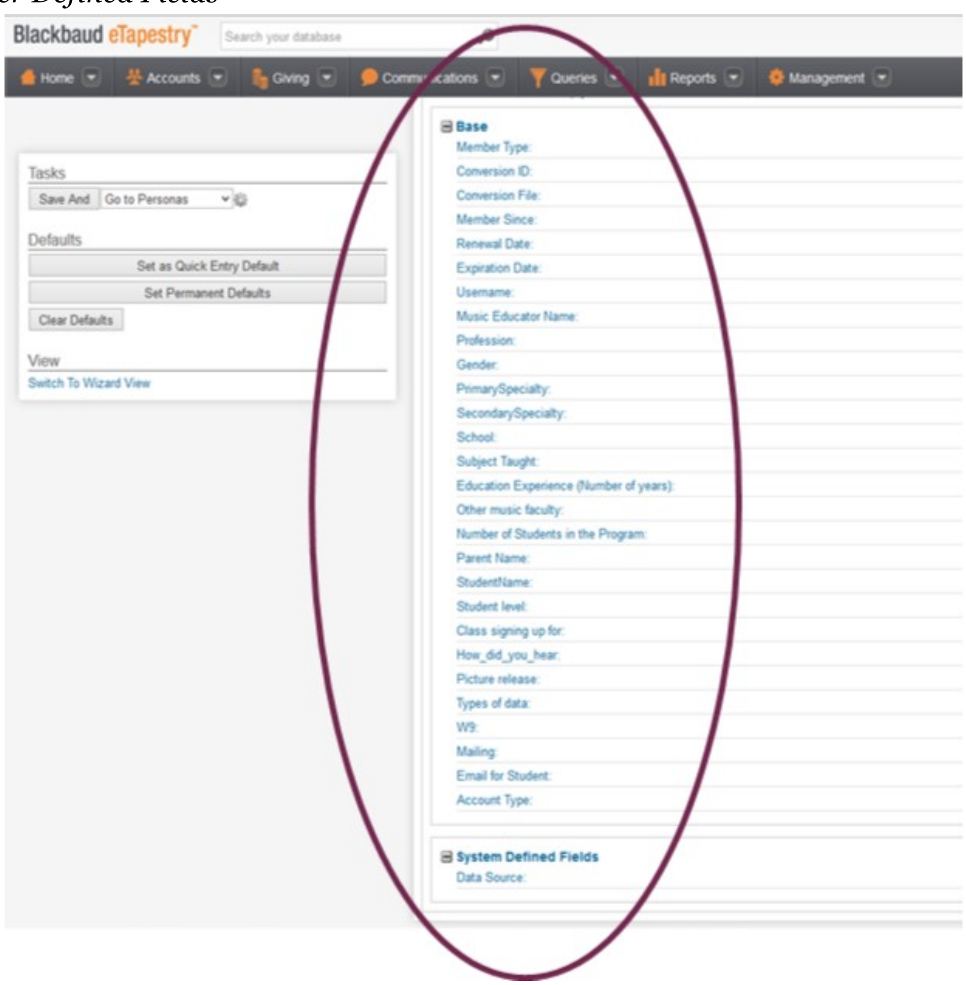
Base

The “Base” fields are for any specific salutation(s) that would need to be included on an envelope if a letter was sent to that member.

- Click on the “Base” link to expand the menu options
- Click on the “Title,” “Music Educator Name,” or “Number of Students in the Program,” fields and fill in applicable information

  Note: Include any title for mailings – e.g. Mr./Ms./Mrs./Dr./etc.

User Defined Fields



- Click on the “User Defined Fields: Account” link to expand the menu options
  - The fields below this section (ex., “Membership Type”) have boxes to check, additional drop-down menus, and fillable fields.
- Click on the “Member Since” field
- Fill in the “Member Since” field with the account activation date by typing in the date or using the calendar button to the right of the field
- Fill in the “Date Renewed” field (if applicable) with the account activation date by typing in the date or using the calendar button to the right of the field

  Note: Enter the most current date and leave the “Member Since” field as the date they signed up for Legacy Music Alliance (LMA).

- Click on the “Expiration Date” field
- Fill in the “Expiration Date” field with the expiration date by typing in the date or using the calendar button to the right of the field

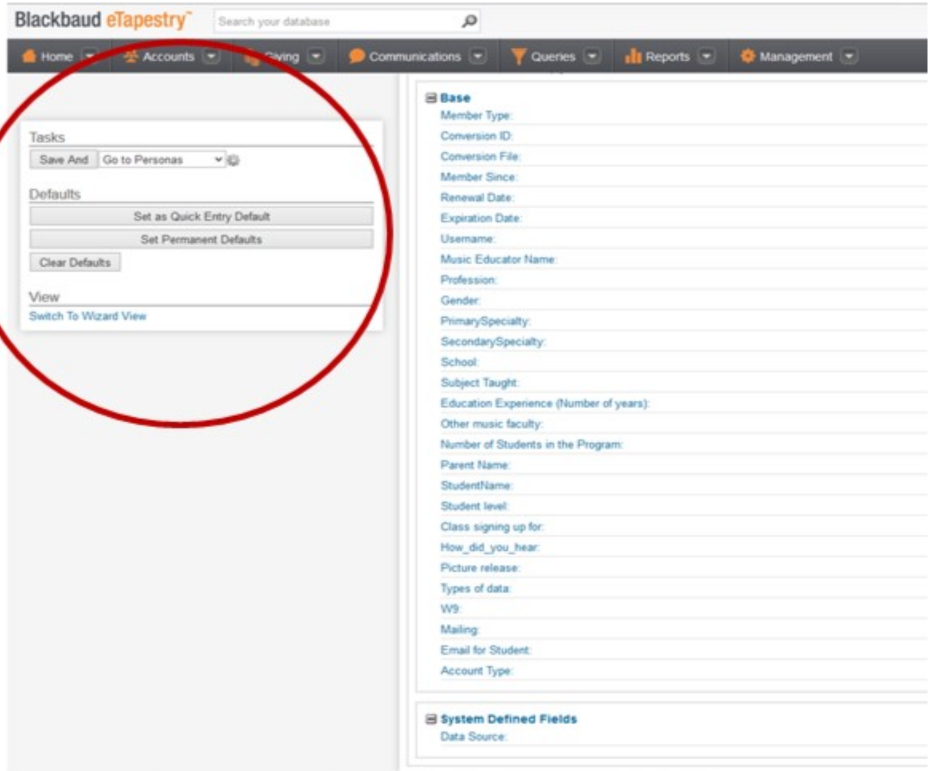
  Note: The account will always expire on June 30.

Tips

- Enter information that is applicable to the type of account
- Double-check your work. It is CRITICAL to include all pertinent information from the website order provided by the LMA data manager.
- Hover over the field name for a pop-up containing additional instructions

  Note: For musicians, it is crucial that either the “Professional Musician” or the “Clinician” box is checked in the “Membership Type” field. If one of the above is not checked, their account will not show up in our report of available clinicians.

Saving Account Info

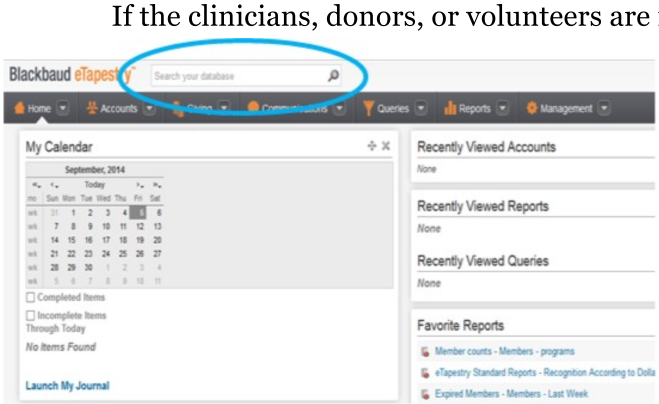


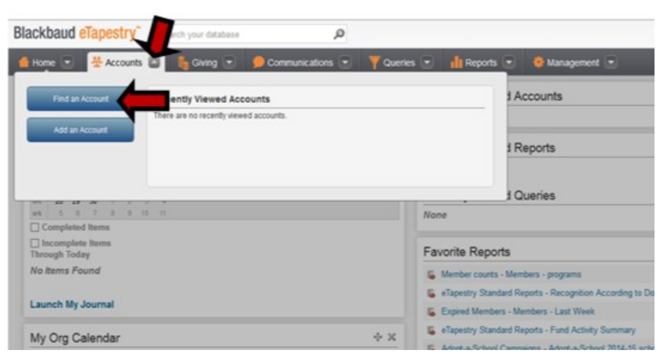
After all information has been entered, look at the "Tasks" box in the top left corner (under the "Accounts" drop down menu) and find the "Save And" button. Next to the "Save And" button is a drop down menu of options of different screens after saving the account. After clicking the preferred screen option, press the "Save And" button.

Note: This step is all about individual preference.

2.2. **Boosters, donors, volunteers**

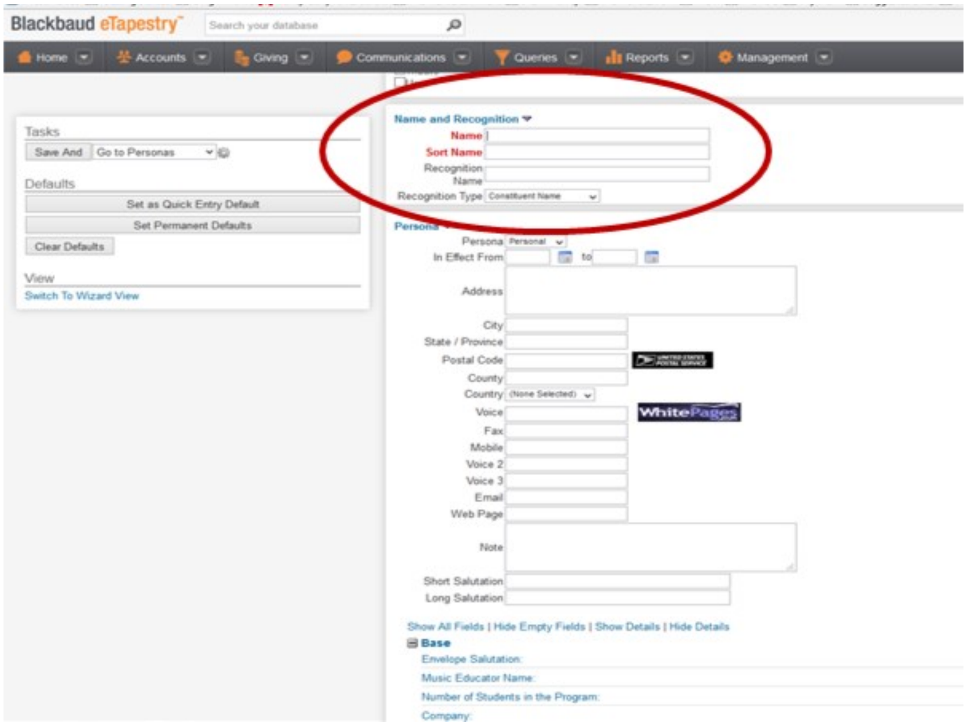
If the clinicians, donors, or volunteers are not in the system, create an account:





- Select the "Accounts" drop-down menu from the navigation bar
- Click on the "Add an Account" blue button

Name and Recognition



- Fill in the "Name" field with the clinician, donor, or volunteer name

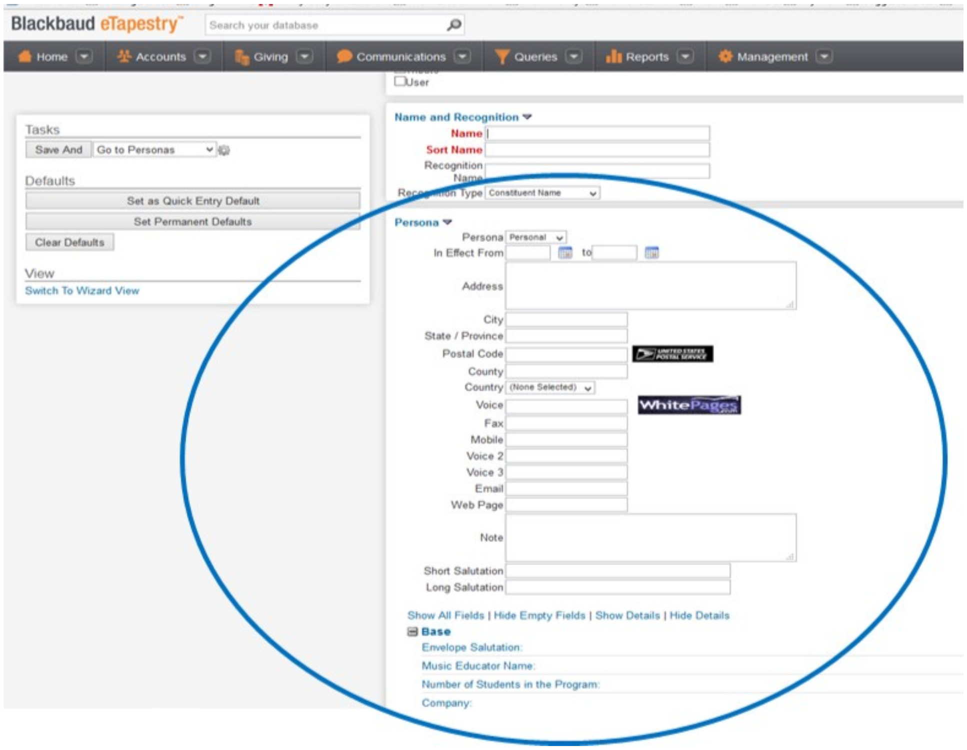
  Note: Don't add *school* to the music program name. Only old accounts (prior to 2014–2015 membership changes) have the word *school* in the account.

  - Click on the "Sort Name" field (or whichever field is preferred) and it should automatically appear in search format
  - Fill in the "Recognition Name" field (if applicable) with the member's preferred name or nickname
    - Click on the "Recognition Type" drop-down menu and select "Use Recognition Name" if the member prefers to be referred to by the "Recognition Name"

    Notes:
    - After saving the account, this information will show up on the homepage of the account "Recognition" box.
    - If they do not have a preferred name, leave it as "Constituent Name" in the drop-down menu and leave the "Recognition Name" empty.

Persona

The persona for a clinician, donor, or volunteer account will be a Personal persona.



Address

- Fill in the "Address Lines," "City," "State/Province," and "Postal Code" fields
- Fill in the "County" field (if applicable)
- Click on the "Change Country" link (if applicable) and select the country from the "Select Country" drop-down menu

Contact Information

- Fill in the "Voice" field with the phone number
  - If a second phone number is provided, enter it in the "Voice 2" field
  - If Voice or Voice 2 fields are a cell phone number, copy it in the "Mobile" field
- Fill in the "Email" field with the email address

Salutation

- Fill in the "Short Salutation" field with Mr./Ms./Dr./etc. followed by their last name
- Fill in the "Long Salutation" field with Mr./Ms./Dr./etc. followed by their full name

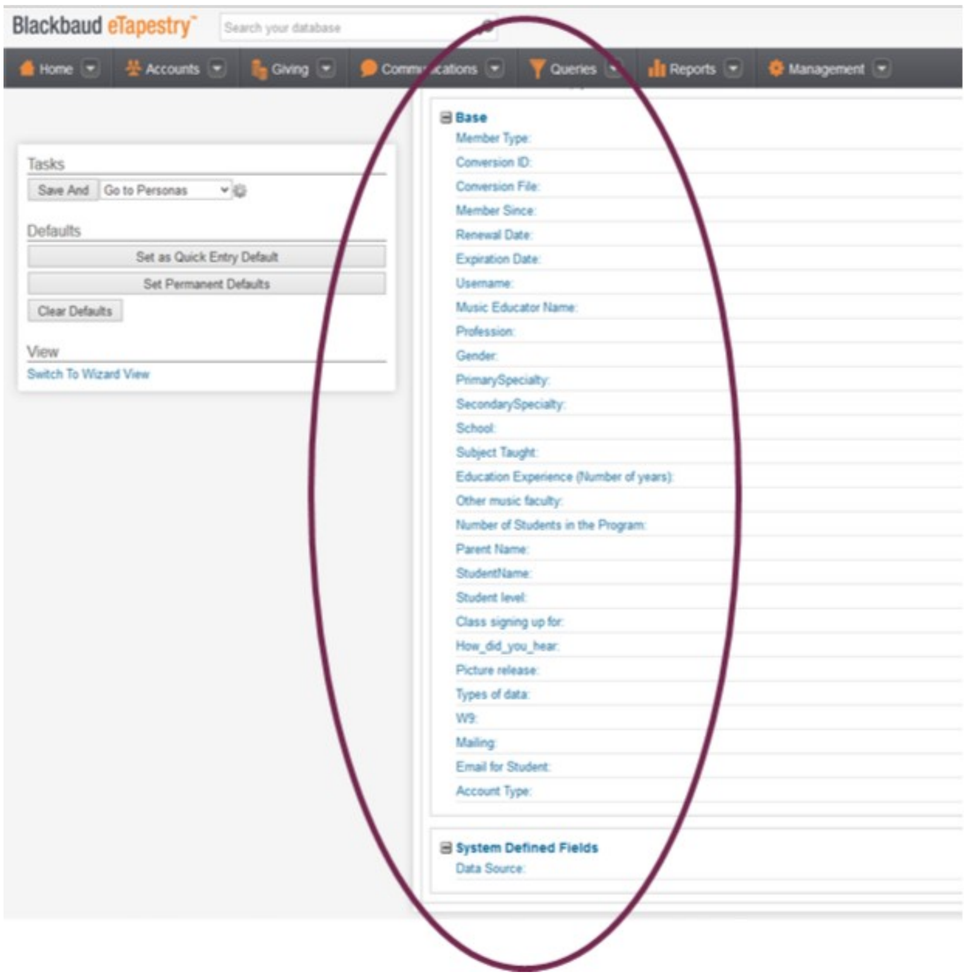
Base

The “Base” fields are for any specific salutation(s) that would need to be included on an envelope if a letter was sent to that member.

- Click on the “Base” link to expand the menu options
- Click on the “Title,” “Music Educator Name,” or “Number of Students in the Program” fields and fill in applicable information

  Note: Include any title for mailings – e.g. Mr./Ms./Mrs./Dr./etc.

User Defined Fields

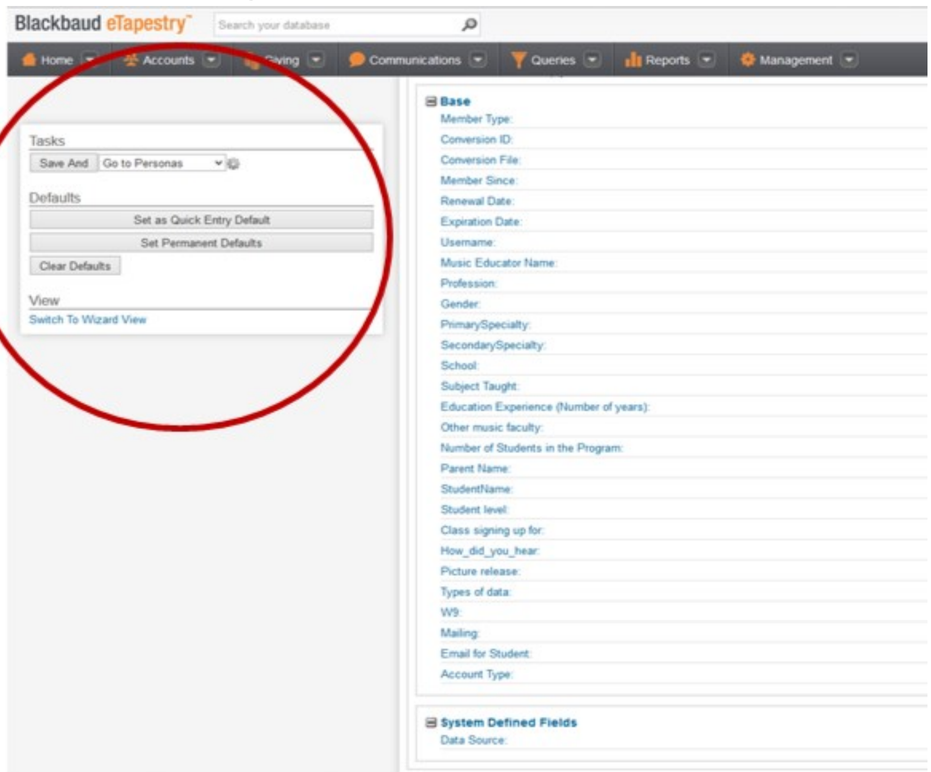


- Click on the “User Defined Fields: Account” link to expand the menu options
  - The fields below this section (ex. “Membership Type”) have boxes to check, additional drop down menus, and fillable fields.

Tips

- Enter information that is applicable to the type of account
- Double-check your work. It is CRITICAL to include all pertinent information from the website order provided from the LMA data manager.
- Hover over the field name for a pop-up containing additional instructions
- See the “Management” if a field does not include an option that needs to be added

Saving Account Info

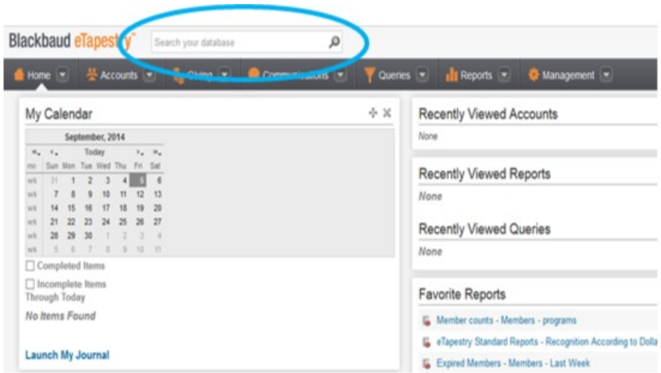


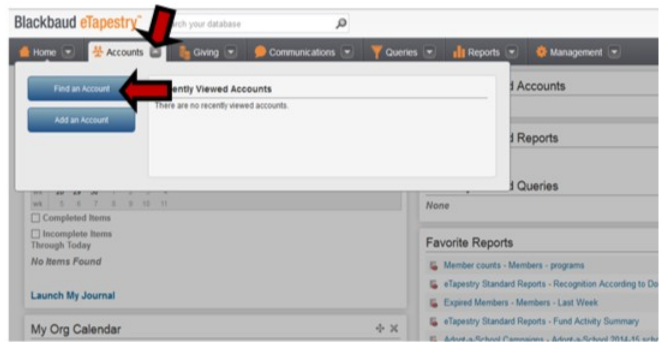
After all information has been entered, look at the “Tasks” box in the top left corner (under the “Accounts” drop down menu) and find the “Save And” button. Next to the “Save And” button is a drop down menu of options of different screens after saving the account. After clicking the preferred screen option, press the “Save And” button.

Note: this step is all about preference.

2.3. **Vendors and events**

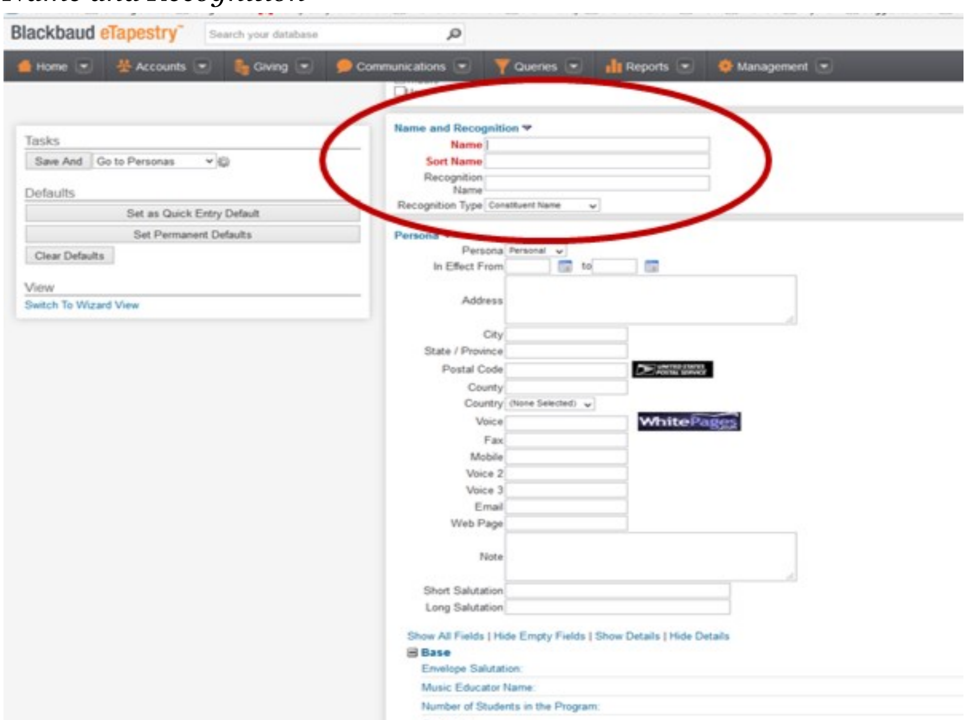
Vendors and events are treated the same as school music programs memberships. After searching for an existing account,





- Click the down arrow next to “Accounts” on the menu bar
- Click the “Add an Account” blue button.

Name and Recognition

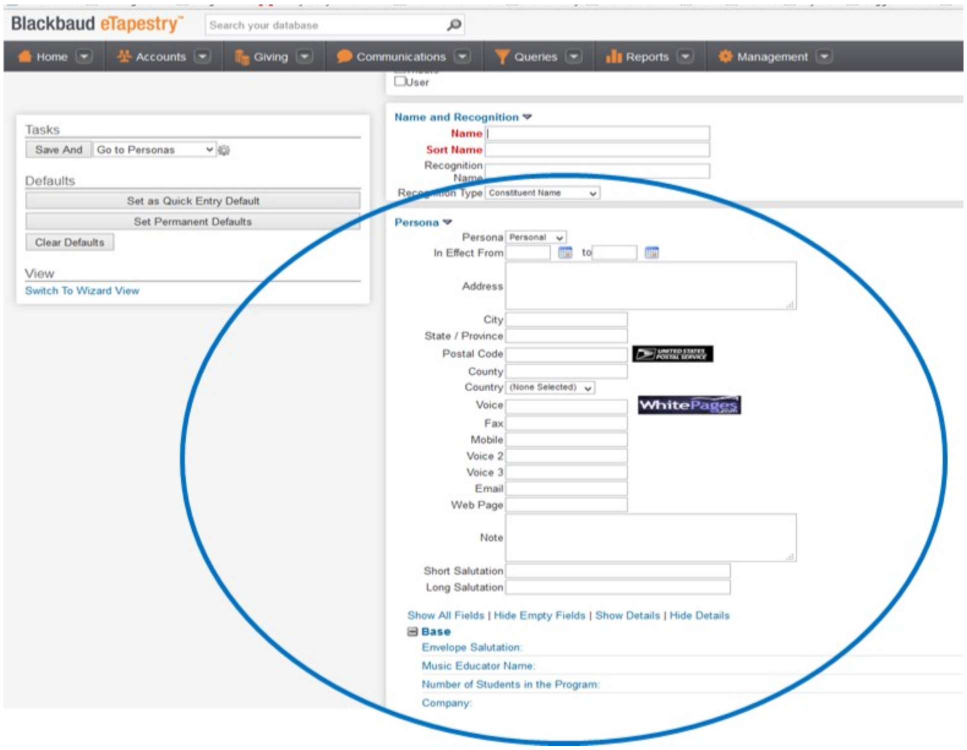


This is the first section of information to be entered.

- Type in the name for the account in the “Name” line that is provided.
- Enter the name of the school and which music program (choir, orchestra, band) and then
- Click on the “Sort Name” line (or whichever line is preferred) and it should automatically appear in search format.
- Skip the next line “Recognition Name.”

Note: This step applies to individual members such as donors, clinicians, and volunteers – not vendor/events accounts.

Persona



The persona for a booster, donor or volunteer account will be a personal persona.

Address

- Enter in the address provided.
- Enter the address, city, state, zip code, county (if the county is applicable, usually it's not), and select the country in the drop-down menu.

Contact Info

- Then, enter the other contact information they have provided.
- The "Voice" line is for the phone number they have provided.
- If they have provided a second phone number, put it in "Voice 2."
- If either "Voice 1" or "Voice 2" are a cell phone copy that number into the "Mobile" line.
- Enter in their email and any notes they may have provided about best times to contact them.

Salutation

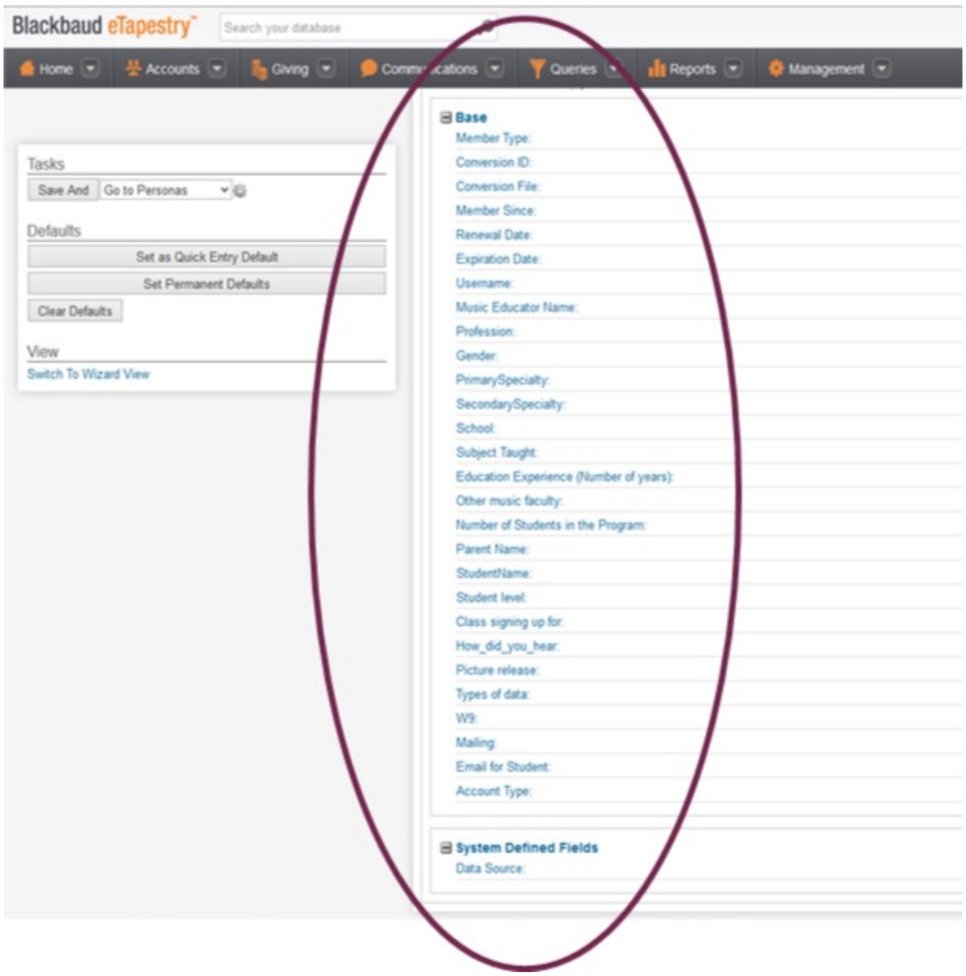
The last two lines in the *Persona* section are "Short Salutation" and "Long Salutation."

- The “Short Salutation” is Mr./Ms./Dr./etc. and their last name
- The “Long Salutation” is Mr./Ms./Dr./etc. and their full name

Base

This section is found at the bottom of the “*Persona”* section. It is for any specific that would need to be included on an envelope. *Include the title in this section - Mr./Ms./Mrs./Dr.- etc.*

User Defined Fields: Accounts



Under the *“Persona”* section is a small section called *“User Defined Fields”* with an arrow pointing down.

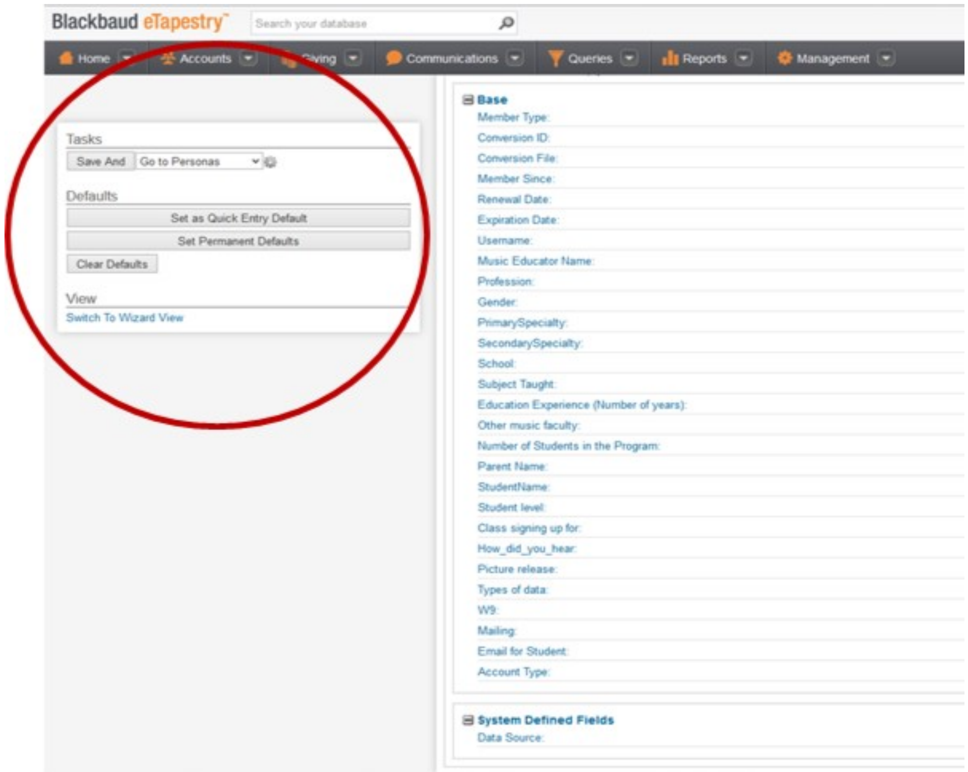
- Click the option under it labeled *“User Defined Fields: Account”* with an arrow pointing to the right.
- A long list appears. Click on the options (ex. “Membership Type”).

Notes:

- Depending on the line of the User Defined Fields, there are either boxes to check, a drop down menu, or a box to type the information in.

- Information only needs to be entered that is applicable to the type of account. Hover over each defined field to find out if it is required for that account type.
- If a field does not include an option that needs to be added, see the Management section for how to add a value to a defined field.
- Double checking is CRITICAL! Make sure to include all pertinent information from the website order provided from the LMA data coordinator.

Saving Account Info

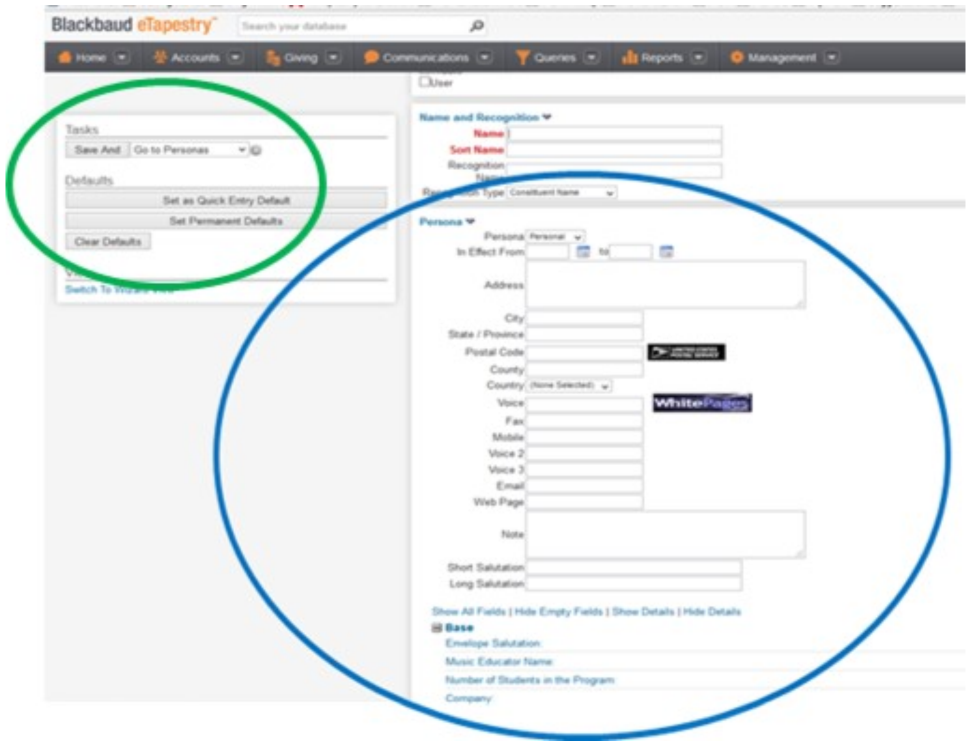


After all information has been entered, look at the “Tasks” box in the top left corner (under the “Accounts” drop down menu) and find the “Save And” button. Next to the “Save And” button is a drop down menu of options of different screens after saving the account.

Note: Again, this step is all about preference. After clicking the preferred screen option, press the “Save And” button.

3. **Updating Records**

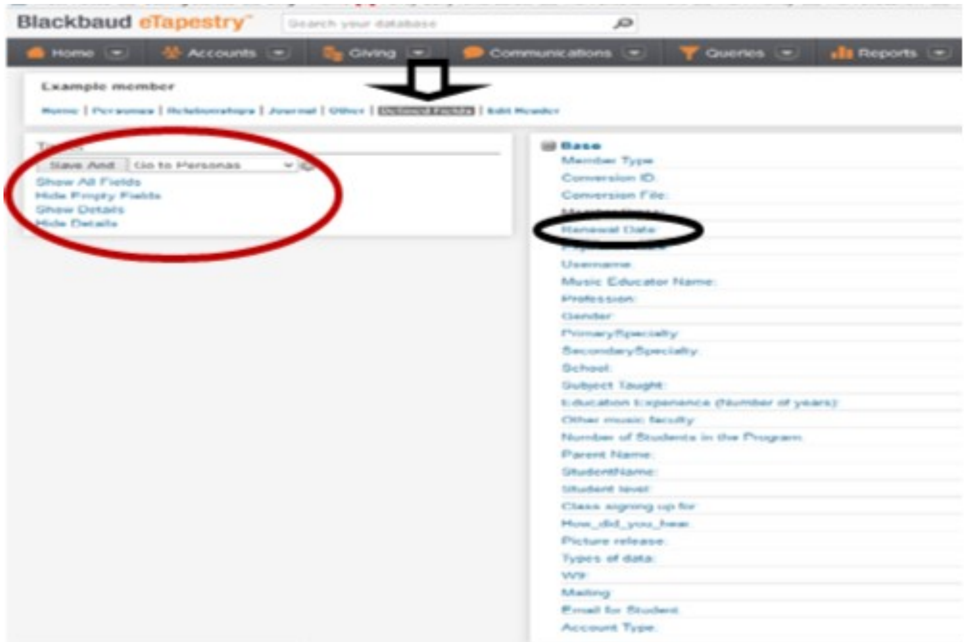
To update records, first search the database for the account. There are two ways to do this:



1. Type the account name in the search bar with gray text that says “Search your database”
   a. Click on the account name to open it
2. Click on the “Accounts” drop-down menu from the navigation bar
   a. Click on the “Find an Account” blue button
   b. Type the account name in the “Search For” field

3.1. **Personas**

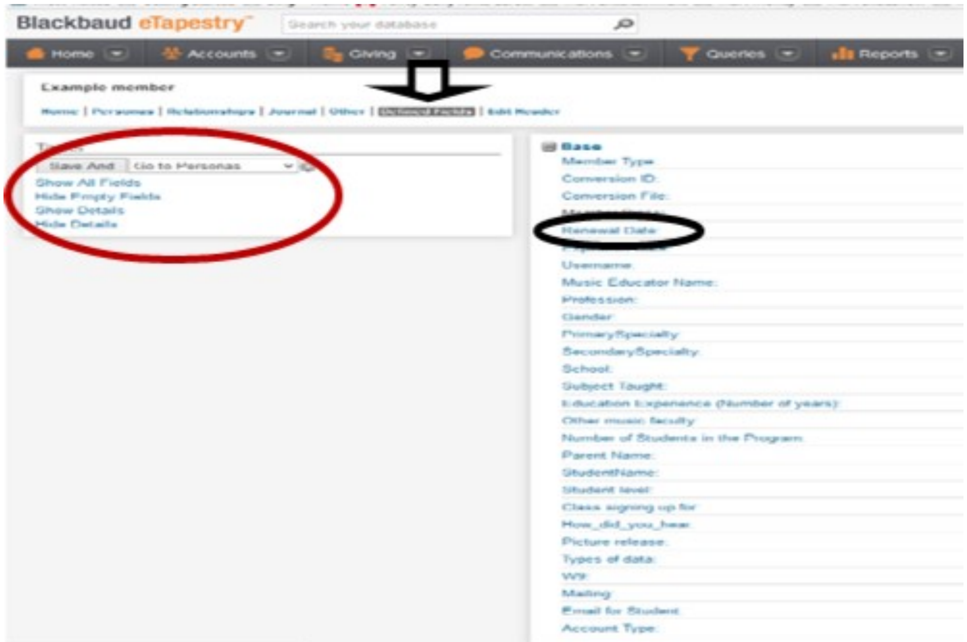
Access the account to update a member, donor, clinician, or volunteer “Persona” (mailing address, birthday, phone number, etc.):



- Click on the account name to open it
- Click on the “Personas” link in the submenu located beneath the account quick information in the top left corner
- Select the field that needs to be updated
- Enter the updated information
- Click on the “Save And” gray button in the Tasks box located on the left

3.2. **Renewals**

If members renew their account, update the account expiration date:



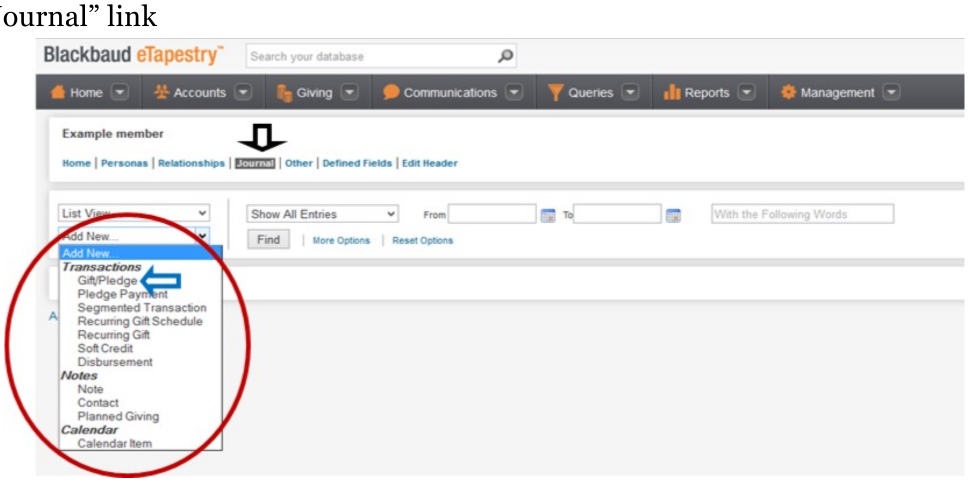
- Click on the account name to open it
- Click on the "Defined Fields" link from the submenu located beneath the account quick information in the top left corner
- Click on the "Expiration Date" link
- Enter the new membership expiration date (the date can be changed to one year from the date of the renewal).

  Note: Make sure to add a Journal Entry "Note" to the account recording the update has been made based on membership renewal and the date of the renewal.

3.3. **Donations**

Donations are entered using the "New Gift/Pledge" form. There are two ways to access this:

1. "Journal" link



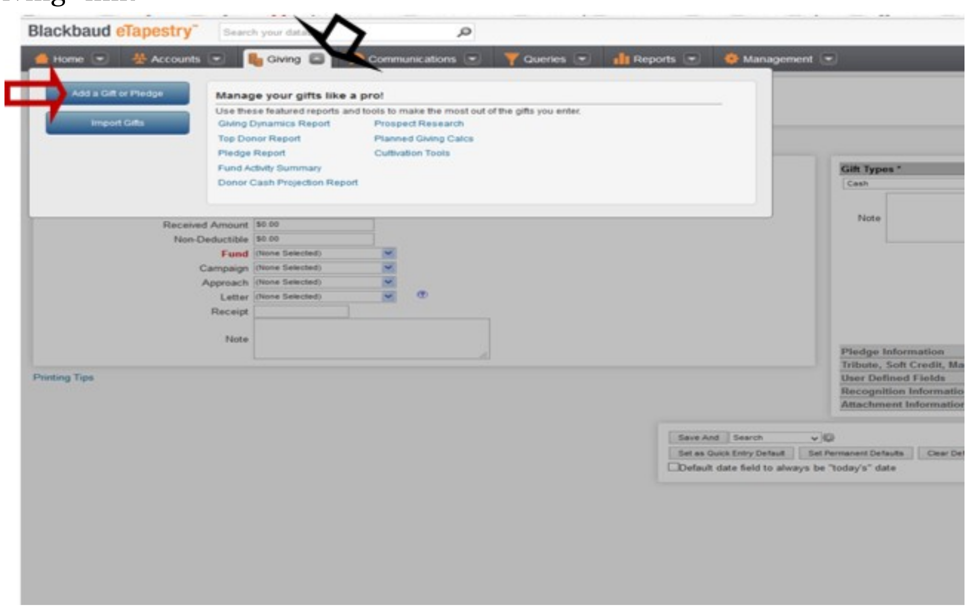
- Search for the account
- Click on the account name to open it
- Click on the “Journal” link from the submenu located beneath the account quick information in the top left corner
- Select the “Gift/Pledge” form from the “Add New” drop-down menu on the left, beneath the account quick information and submenu
- Fill in the “Basic Information” fields with gift information from the donation form

    i. If the donation is part of a sponsorship fund or campaign, select the corresponding organization from the “Fund” and/or “Campaign” drop-down menu(s).
    ii. If the donation is an Adopt-a-School sponsorship, a soft credit needs to be applied to the account.

        1. Search for the account
        2. If an account is not found in the database, enter a gift note on the left hand side of the screen notating the school music program that is being sponsored

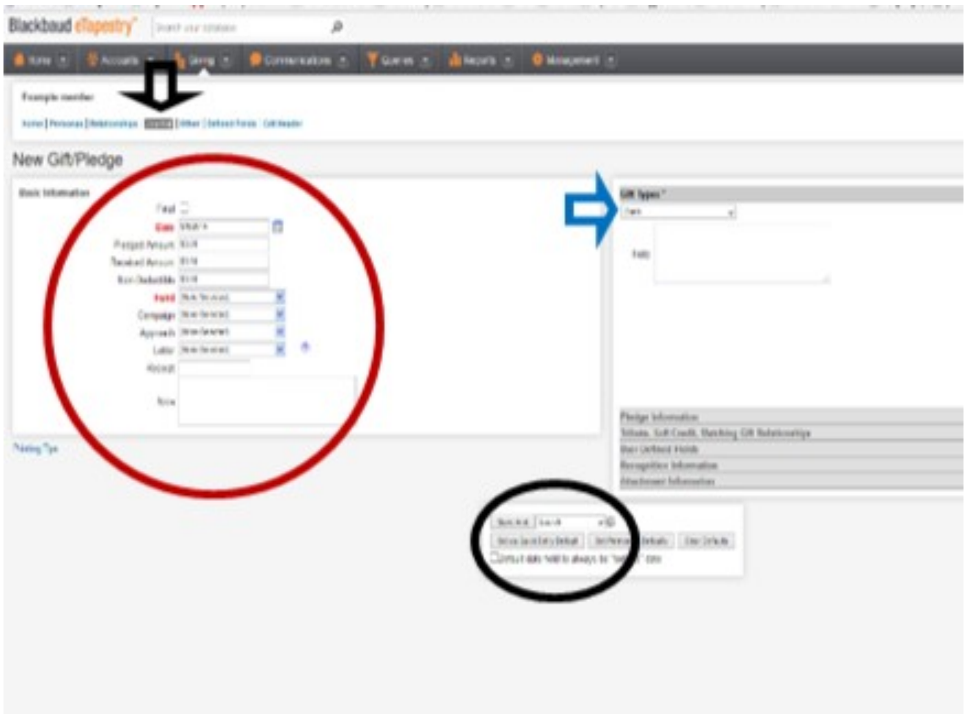
- Select the “Gift Type” (cash, credit/debit card, etc.) from the “Check” drop-down menu on the right
- Fill in the “Gift Type” fields with transaction notes pertaining to gift
- Attach the supporting documentation(s) (copy of check, donation form, etc.) by clicking on the “Attachment Information” gray bar

2. “Giving” link



- Click on the “Giving” link in the navigation bar (not the drop-down menu)
- Click on the “Search for an Account” gray button next to the “Account Number” field
- Type the account name in the “Search For” field
- Click on the “Find” button
- Click on the account name to open it
- Fill in the “Basic Information” fields with gift information from the donation form

i. If the donation is part of a sponsorship fund or campaign, select the corresponding organization from the “Fund” and/or “Campaign” drop-down menu(s).
ii. If the donation is an Adopt-a-School sponsorship, a soft credit needs to be applied to the account.



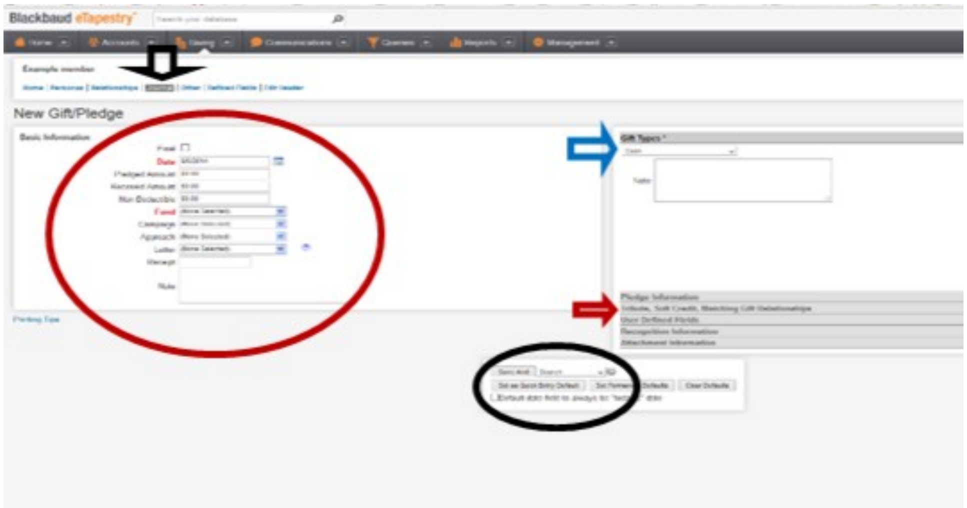
1. Search for the account
2. If an account is not found in the database, enter a gift note on the left hand side of the screen notating the school music program that is being sponsored

- Select the “Gift Type” (cash, credit/debit card, etc.) from the “Check” drop-down menu on the right
- Fill in the “Gift Type” fields with transaction notes pertaining to the gift
- Attach the supporting documentation(s) (copy of check, donation form, etc.) by clicking on the “Attachment Information” gray bar
- Click on the “Save And” gray button at the bottom before changing screens, or the data just entered will be lost

3.4. **In-kind donations**

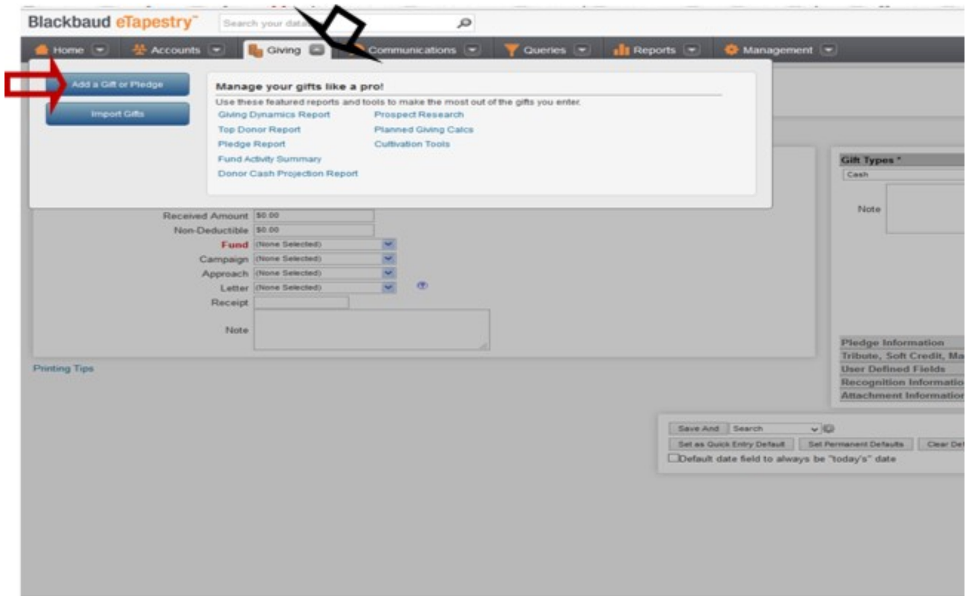
In-kind donations are entered using the “New Gift/Pledge” form. There are two ways to access this:

1. “Journal” link



- Search for the account
- Click on the account name to open it
- Click on the “Journal” link from the submenu located beneath the account quick information in the top left corner
- Select the “Gift/Pledge” form from the “Add New” drop-down menu on the left, beneath the account quick information and submenu
- Fill in the “Basic Information” fields with gift information from the donation form
- Select “Gift In Kind” from the “Check” drop-down menu on the right
- Fill in the “Gift Type” fields with transaction notes pertaining to the gift
- Attach the supporting documentation(s) (copy of check, donation form, etc.) by clicking on the “Attachment Information” gray bar
- Click on the “Save And” gray button at the bottom before changing screens, or the data just entered will be lost

2. “Giving” link



- Click on the “Giving” link in the navigation bar (not the drop-down menu)
- Click on the “Search for an Account” gray button next to the “Account Number” field
- Type the account name in the “Search For” field
- Click on the “Find” button
- Click on the account name to open it
- Fill in the “Basic Information” fields with gift information from the donation form
- Select “Gift In Kind” from the “Check” drop-down menu on the right
- Fill in the “Gift Type” fields with transaction notes pertaining to the gift
- Attach the supporting documentation(s) (copy of check, donation form, etc.) by clicking on the “Attachment Information” gray bar
- Click on the “Save And” gray button at the bottom before changing screens, or the data just entered will be lost

3.5. **Name changes**

Often a name needs to be changed on an account because of misspelled or changed names, or for editing purposes:

- Click on the “Other” link from the submenu located beneath the account quick information in the top left corner
- Change the spelling in the “Name” field of the account
- Click on the “Save And” gray button in the Tasks box located on the left

4. **Managing Journal Entries**

4.1. **Journal entries**

The journal entries are essentially the best way for us to track account activity and keep everyone updated at any point in time. So any time we do any of the below, we should be creating a journal entry:

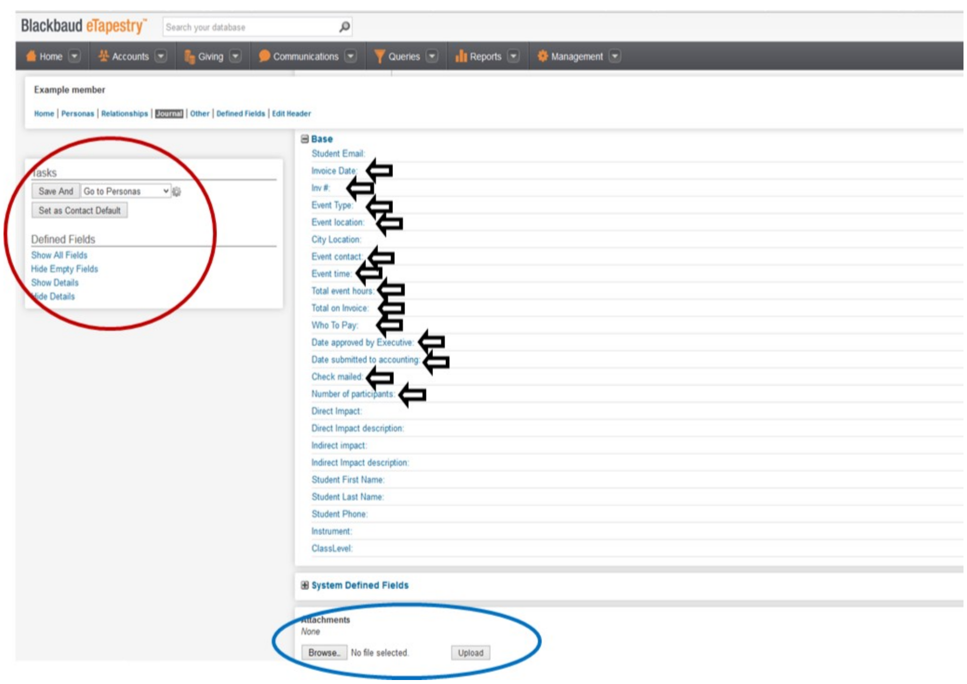
- Email
- Call
- Receive a donation
- Collect an invoice
- Use of benefits by a member
- Meet face-to-face

This allows any member of the LMA team access to information about the accounts without contacting another member of the team.

4.2. **Invoices**

This is how member benefits are tracked. So it is essential that these journal entries are kept up to date and accurately filled out.

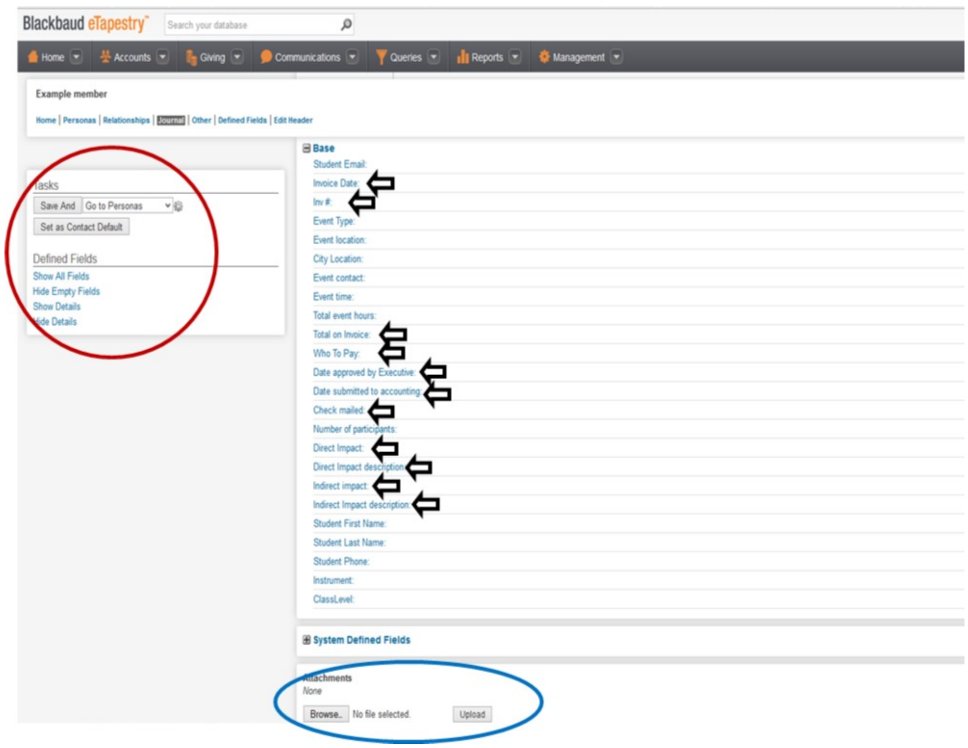
Educator essentials invoices



- Click on the “Journal” link from the submenu located beneath the account quick information in the top left corner
- Select the “Contact” form from the “Add New” drop-down menu on the left, beneath the account quick information and submenu

- Fill in the “Date” field with the date the clinic happened
- Fill in the “Subject” field with *EE Clinic*
- Click on the “Method” drop-down menu
- Select “Clinic”
- Fill in the “Base” fields
- Attach the W9 (if applicable)
    - Fill in the “Note” field recording that a W9 is attached.
- Click on the “Save And” button in the Tasks box located on the left

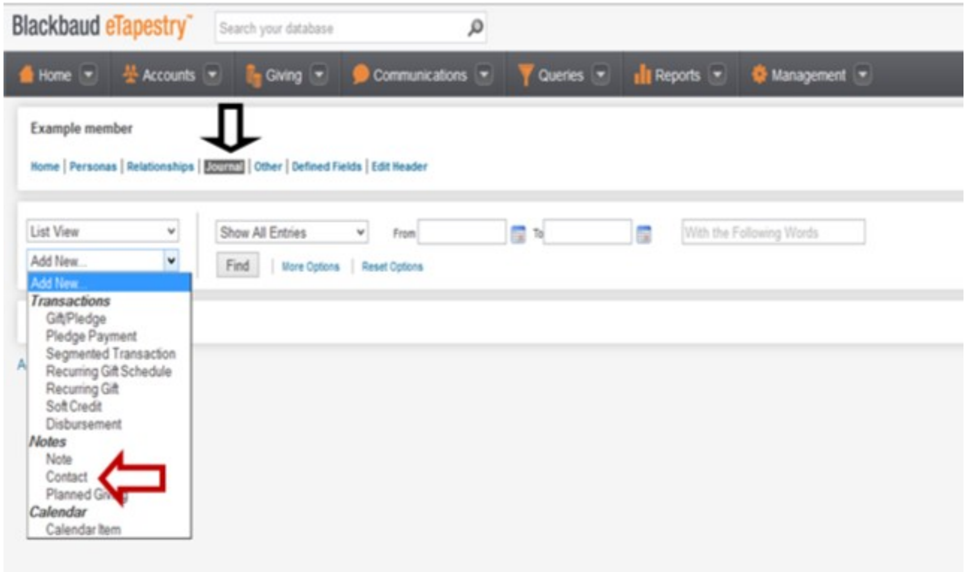
ITS invoices



- Click on the “Journal” link from the submenu located beneath the account quick information in the top left corner
- Select the “Contact” form from the “Add New” drop-down menu on the left, beneath the account quick information and submenu
- Fill in the “Date” field with the invoice date
- Fill in the “Subject” field with *ITS*
- Click on the “Method” drop-down menu
- Select “Repair or Purchase”
- Fill in the “Base” fields
- Click on the “Save And” button in the Tasks box

4.3. **Contacts**

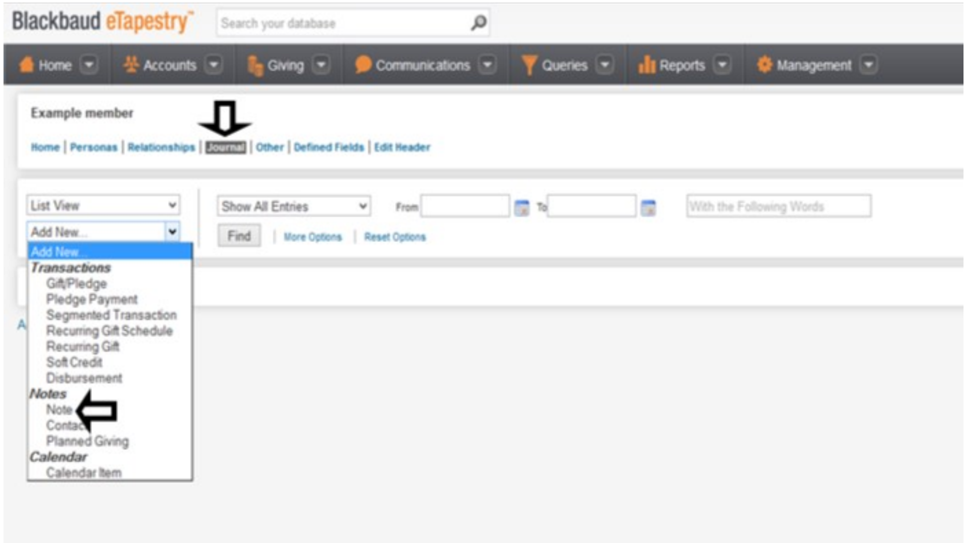
For any contact (mailing, email, meeting, phone calls) with a member, donor, or prospect the journal entry type will be a "Contact."



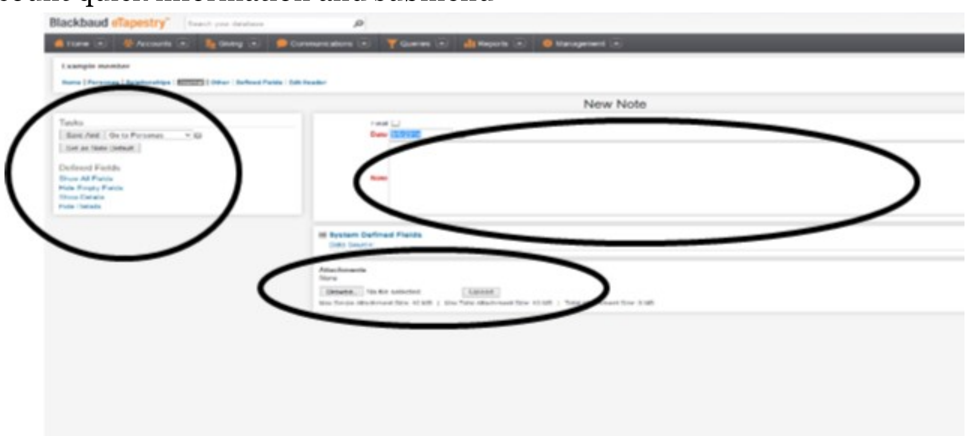
- Click on the "Journal" link from the submenu located beneath the account quick information in the top left corner
- Select the "Contact" form from the "Add New" drop-down menu on the left, beneath the account quick information and submenu
- Fill in the "Date" field with the date contact is made
- Fill in the "Subject" field using your best discretion
- Click on the "Method" drop-down menu
    - Email
    - Phone
    - Mailing (anything not generated in eTapestry)
    - Face-to-face meeting
    - Prospective meeting (potential donors, volunteers, board members)
- Fill in the "Note" field with any pertinent information about the contact.
- Click on the "Save And" button in the Tasks box located on the left

4.4. **Notes**

This type of Journal entry is appropriate for anything that is pertinent and important to the account that is not related to invoices, fundraising, or direct contact.



- Click on the "Journal" link from the submenu located beneath the account quick information in the top left corner
- Select the "Note" form from the "Add New" drop-down menu on the left, beneath the account quick information and submenu

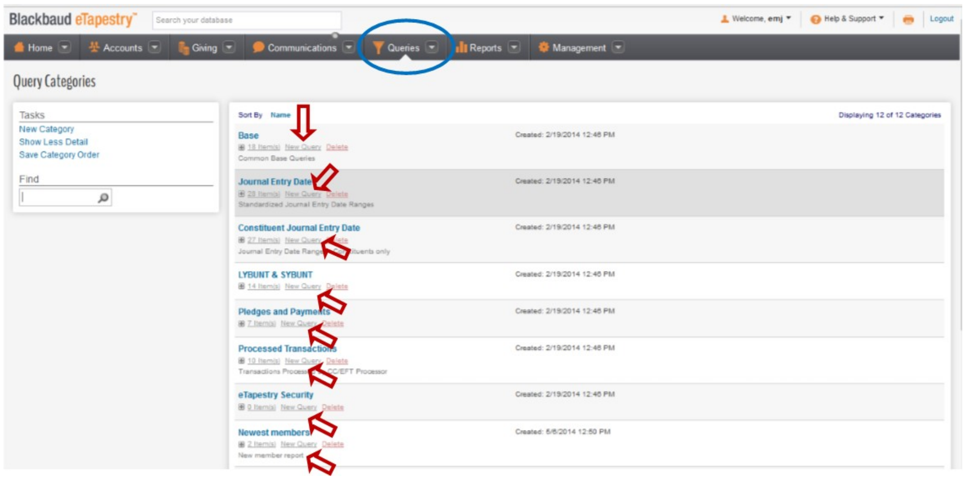


- Fill in the "Note" field" with information regarding the contact
- Click on the "Save And" button in the Tasks box located on the left

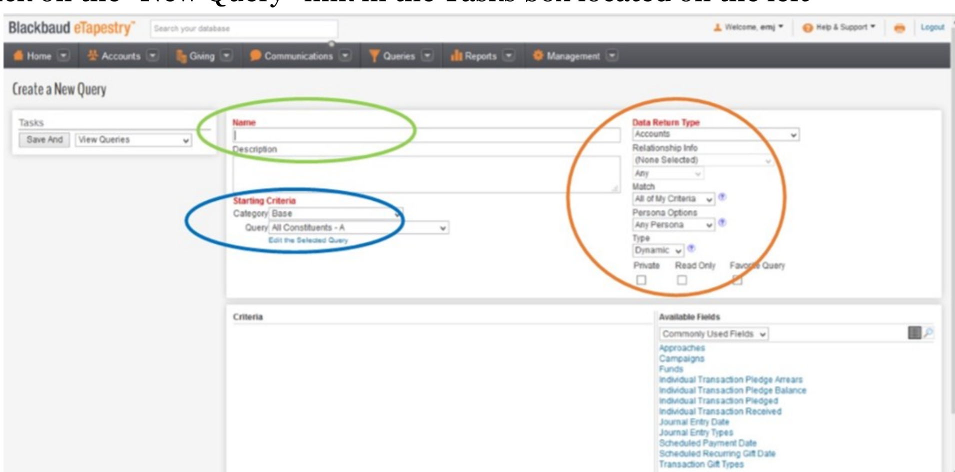
5. Creating Queries and Reports

Building a query is the first step in creating a pool of data to draw from when pulling a report. A query will allow you to narrow the criteria to draw upon when running a report. Many queries already exist in the database. Make sure to search through the existing queries before building a new query.

5.1. Queries



- Select the “Queries” drop-down menu from the navigation bar
- Select the category the primary data will pull from
- Click on the “New Query” link in the Tasks box located on the left

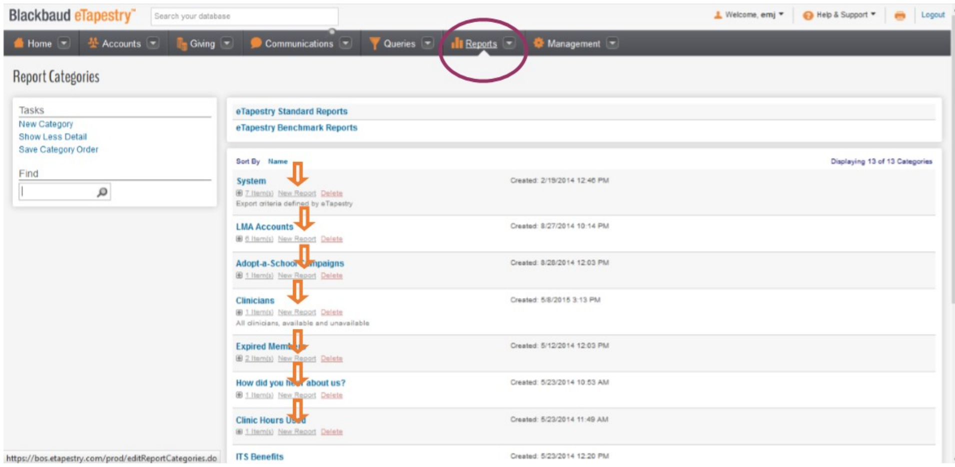


- Fill in the “Name” field with a query name
- Click on the “Starting Criteria” drop-down menu and adjust the fields (if applicable)
  - A new query will auto-populate the starting criteria based on the selected category to create the new query
- Click on the “Data Return Type” drop-down menu
- Select the “Data Return Type”
- Create the query criteria using the available fields in the “Data Return Type” fields
- The query will automatically pull to match “All of My Criteria”; a query may yield data that may match only part of the criteria.
  - Click on the “Match” drop-down menu to change the query criteria to “Any of My Criteria”

- Check the “Favorite Query” box to create a shortcut on the home page (if applicable)
- Click on the “Save And” button in the Tasks box

5.2. **Reports**

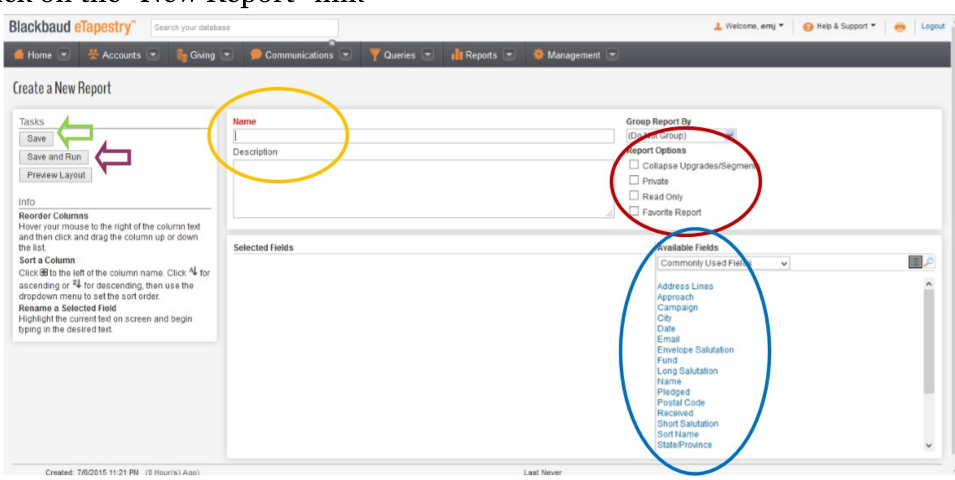
A report is built using a specific selection of data from the database.



- Click on the “Reports” link in the navigation bar (not the drop-down menu)
- Select the category the primary data will pull from

  Note: Creating a new **general** category may be more beneficial for finding the report in the future.

- Click on the “New Report” link

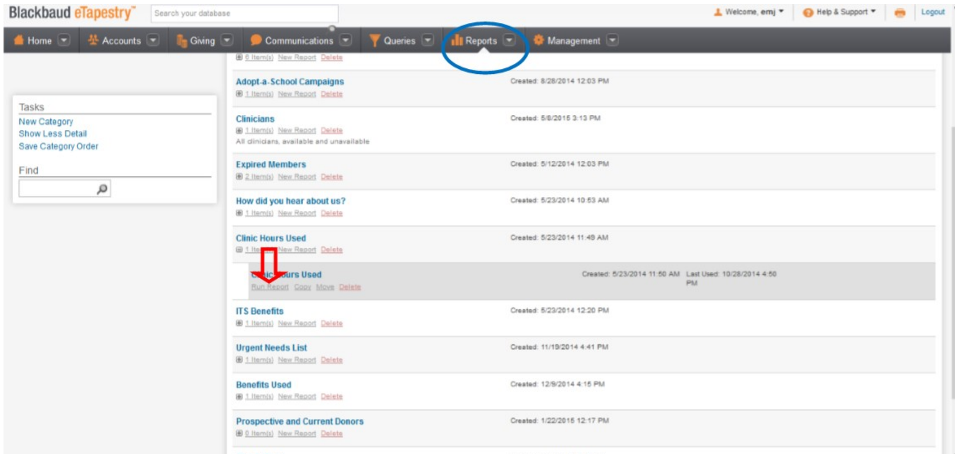


- Fill in the “Name” field with a query name
- Check the “Favorite Report” box from the “Report Options” section on the right to create a shortcut on the home page (if applicable)
- Click on the fields desired to display in the report from the “Available Fields” section on the right
- Save the report. There are two ways to do this:
  - Click on the “Save” button on the left hand side of the screen to save the query
  - Click on the “Save and Run” button in the Tasks box to immediately view the report

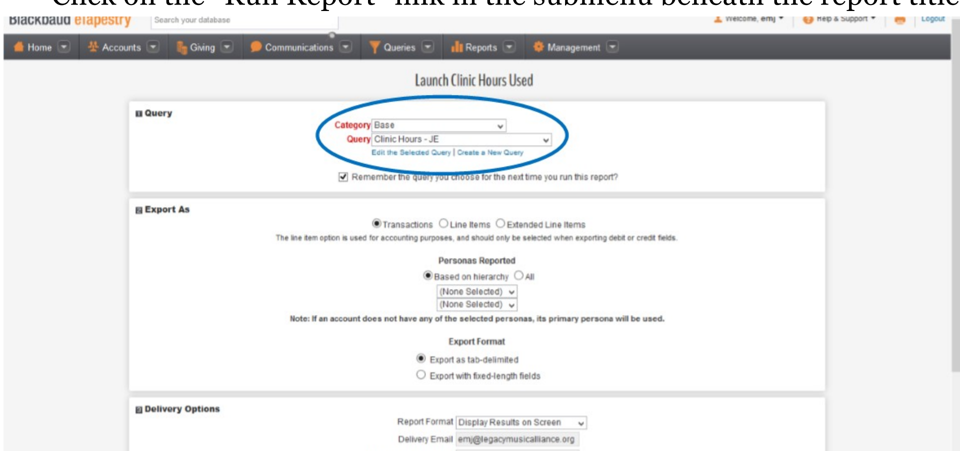
5.3. **Export reports**

A report can be exported as a PDF or Excel document, and it can also be scheduled to run regularly.

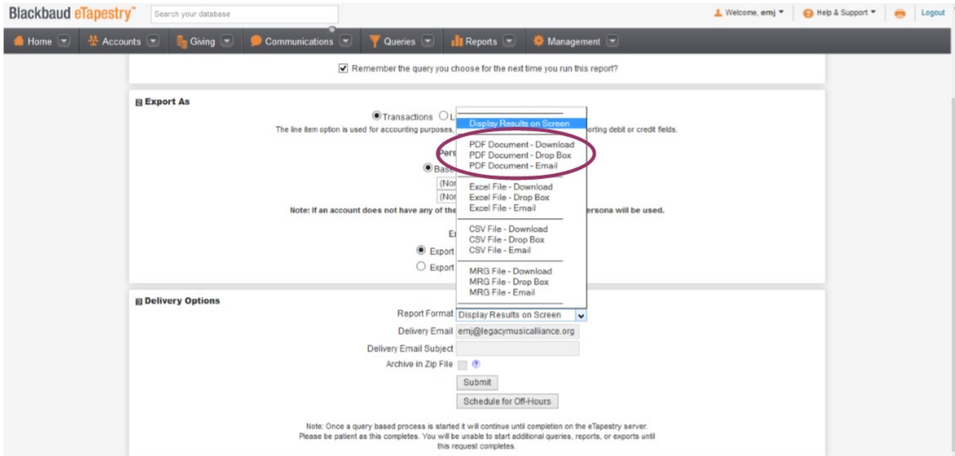
Exporting to a PDF document



- Click on the “Report” link in the navigation bar (not the drop-down menu)
- Select the category the primary data will pull from
- Hover over a report title to highlight
- Click on the “Run Report” link in the submenu beneath the report title

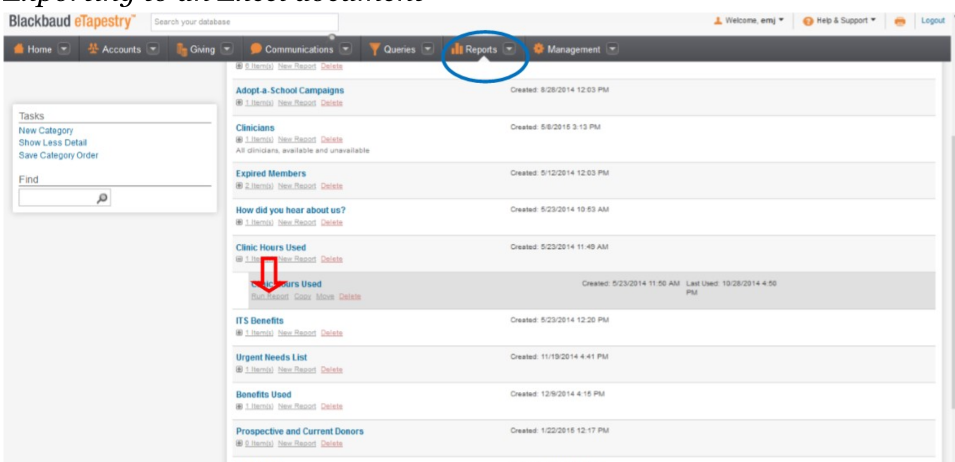


- Click on the “Base” drop-down menu in the “Category” field
- Select the “Category”
- Click on the “Clinic Hours – JE” drop-down menu in the “Query” field
- Select the “Query”

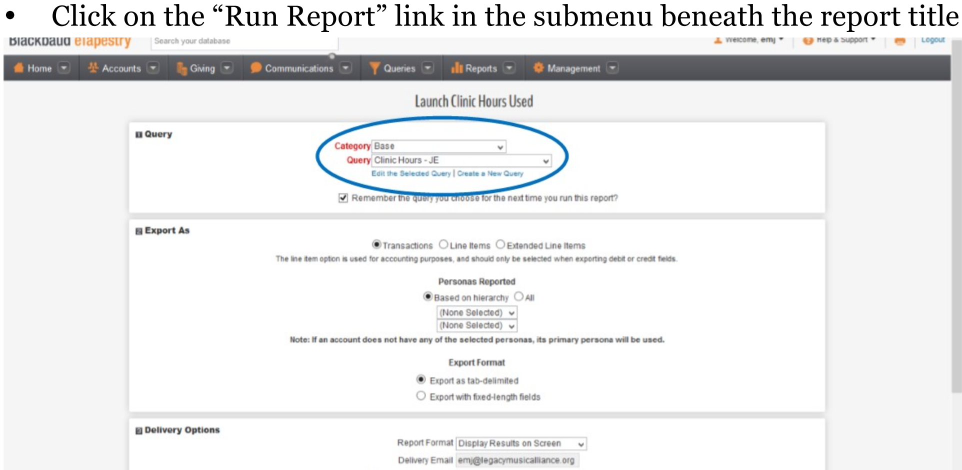


- Click on the “Report Format” drop-down menu
- Select a “PDF Document - Download,” “PDF Document - Dropbox,” or “PDF Document - Email”
- Click on the “Submit” button at the bottom

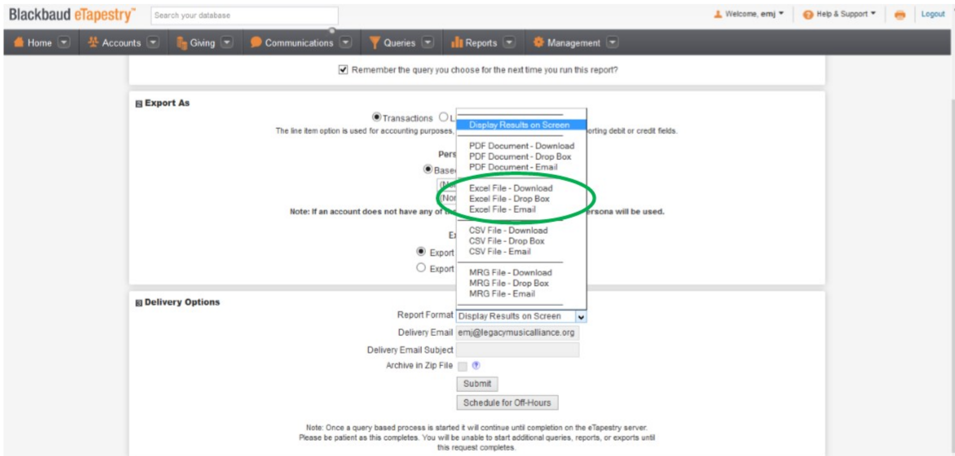
Exporting to an Excel document



- Click on the “Report” link in the navigation bar (not the drop-down menu)
- Select the category the primary data will pull from
- Hover over a report title to highlight
- Click on the “Run Report” link in the submenu beneath the report title



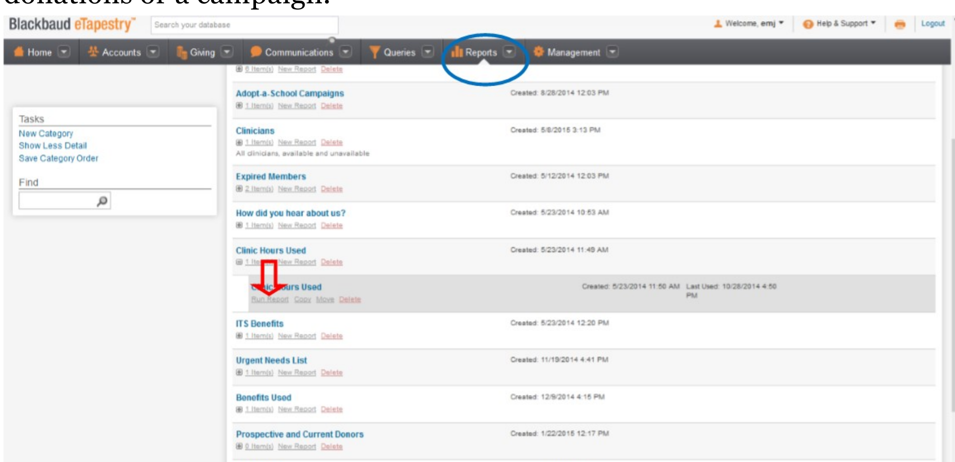
- Click on the “Base” drop-down menu in the “Category” field
- Select the “Category”
- Click on the “Clinic Hours - JE” drop-down menu in the “Query” field
- Select the “Query”



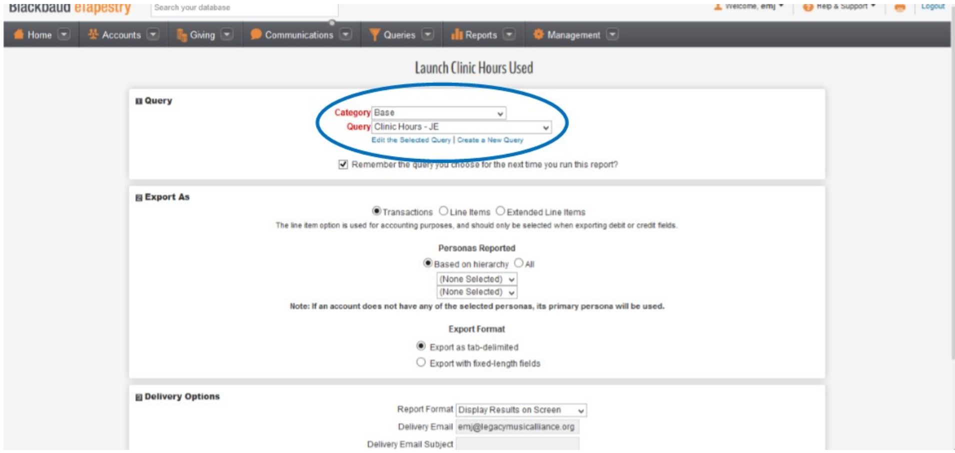
- Click on the “Report Format” drop-down menu
- Select an “Excel File - Download,” “Excel File - Dropbox,” or “Excel File - Email”
- Click on the “Submit” button at the bottom

Schedule for Off-Hours

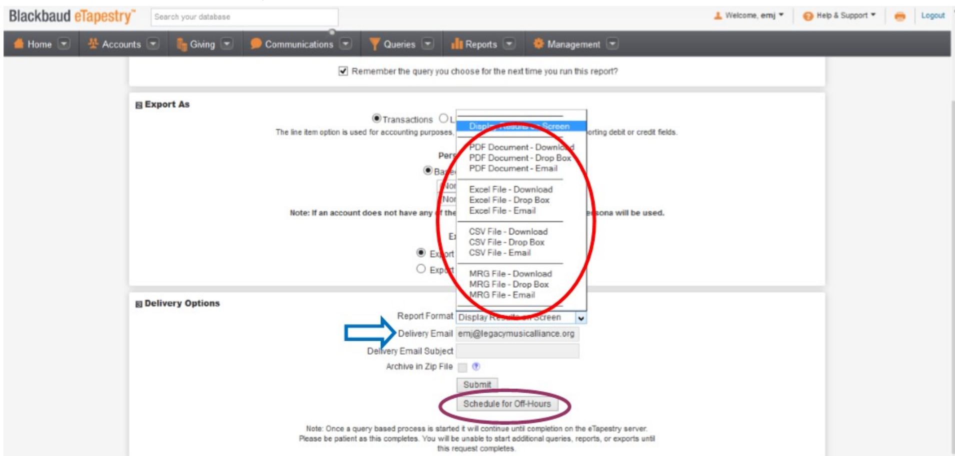
This is most effective for a regularly scheduled report, tracking members as well as donations or a campaign.



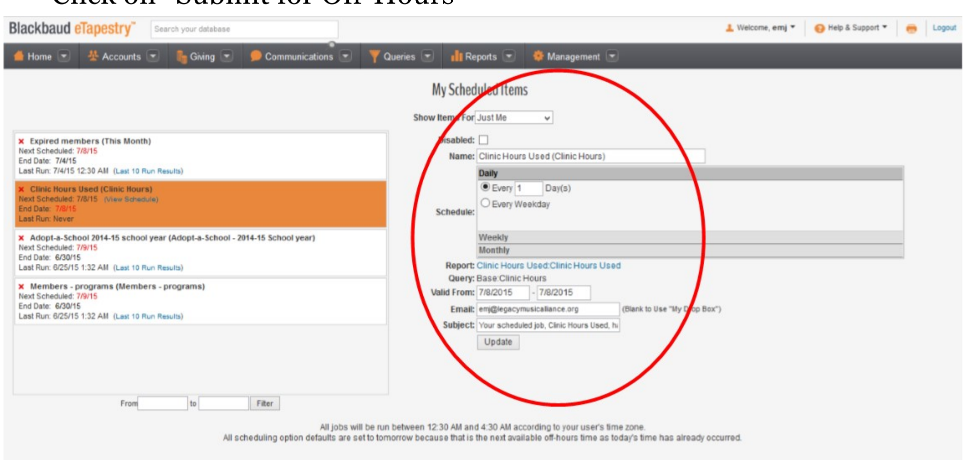
- Click on the “Report” link in the navigation bar (not the drop-down menu)
- Select the category the primary data will pull from
- Hover over a report title to highlight
- Click on the “Run Report” link in the submenu beneath the report title



- Click on the “Base” drop-down menu in the “Category” field
- Select the “Category”
- Click on the “Clinic Hours - JE” drop-down menu in the “Query” field
- Select the “Query”



- Click on the “Report Format” drop-down menu
- Select a “PDF Document - Email,” an “Excel File - Email,” a “CSV File - Email,” or a MRG File - Email"
- Fill in the “Delivery Email” field with the email address
- Fill in the “Delivery Email Subject” field with the email subject
- Click on “Submit for Off-Hours”



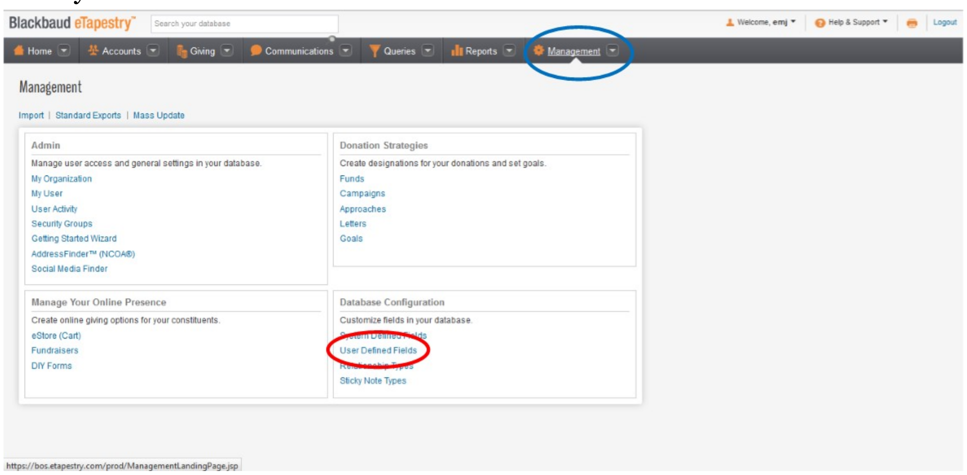
- Select how often to receive the report in the “Schedule” field (daily, weekly, monthly)
- Fill in the “Valid From” field with dates to run the report
- Click on the “Update” button at the bottom

6. Managing Accounts

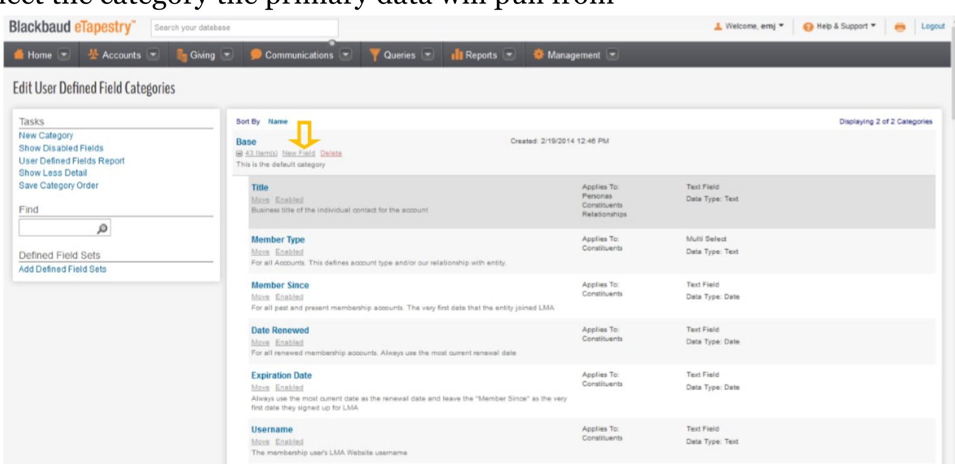
The management section allows eTapestry account administrators to make broad changes that affect all of the accounts in eTapestry.

6.1. User Defined fields

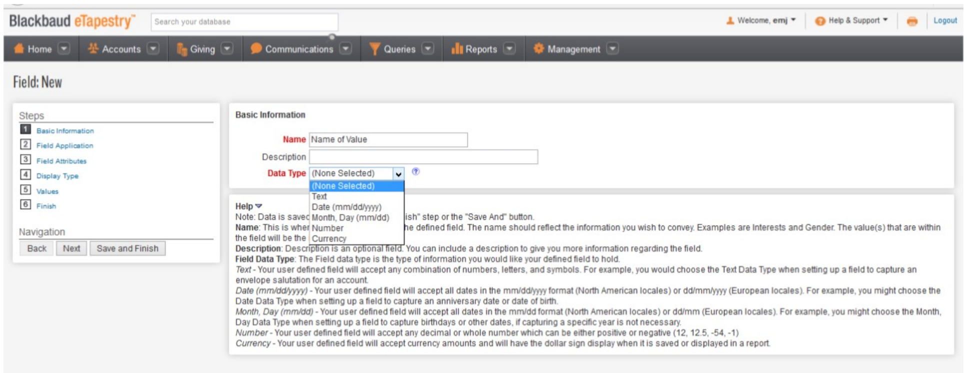
Many of the User Defined Fields have a limited amount of responses or “values” that you can choose. Often you may need to add some values in order to complete the information in a journal entry or the defined fields section of an account.



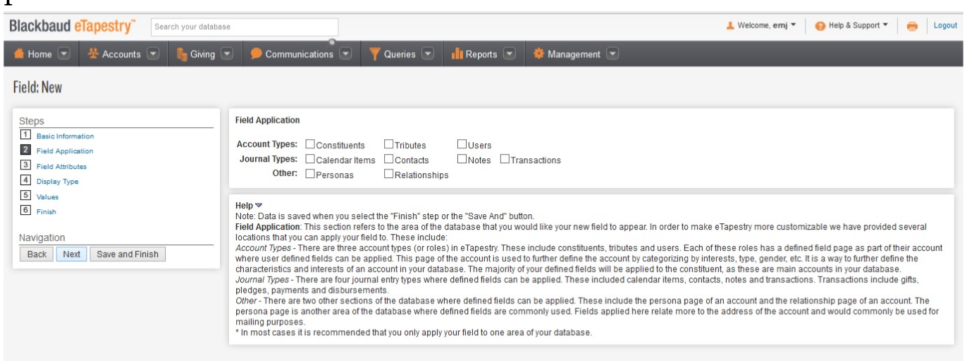
- Click on the “Management” link in the navigation bar (not the drop-down menu)
- Click on the “User Defined Fields” link below the “Database Configuration” section
- Select the category the primary data will pull from



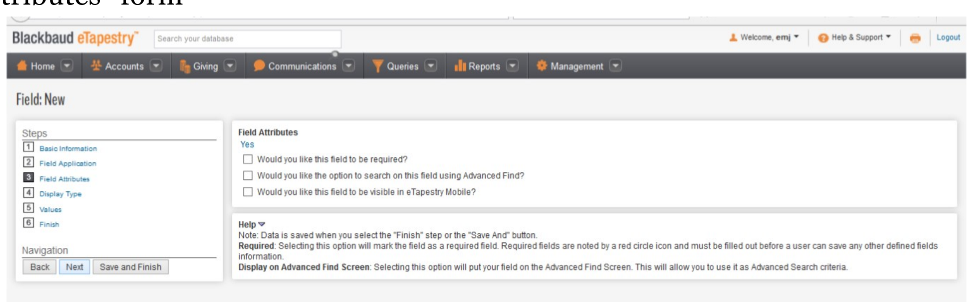
- Click on a field, and drag and drop to reorder
- Click on “New Field” to add a defined value



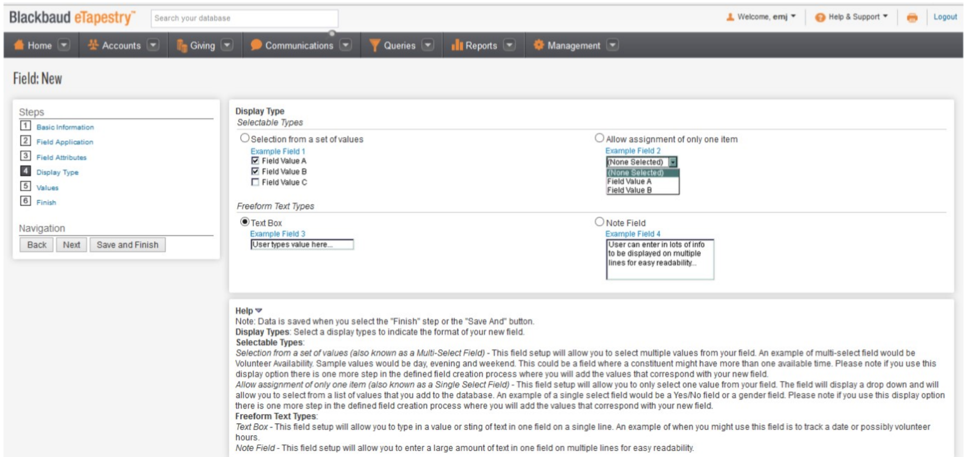
- Fill in the “Name” field
- Fill in the “Description” field, if applicable
- Click on the “None Selected” drop-down menu next to the “Data Type” field
- Select the “Data Type”
- Click on the “Next” button in the Navigation box located on the left to go to the “Field Application” form



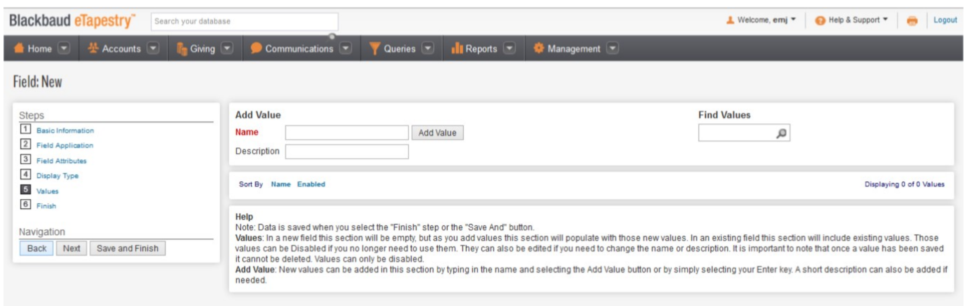
- Click on the checkbox(es) next to “Account Types,” “Journal Types,” and “Other” fields in the “Field Application” section
- Click on the “Next” button in the Navigation box located on the left to go to the “Field Attributes” form



- Click on the checkbox(es) below the “Field Attributes” section if the answer is “Yes” to the question
- Click on the “Next” button in the Navigation box located on the left to go to the “Display Types” form



- Click on the checkbox(es) below the “Display Type”
  - The help section beneath the selection area outlines detailed information about each of the display types
- Click on the “Next” button in the Navigation box located on the left to go to the “Values” form

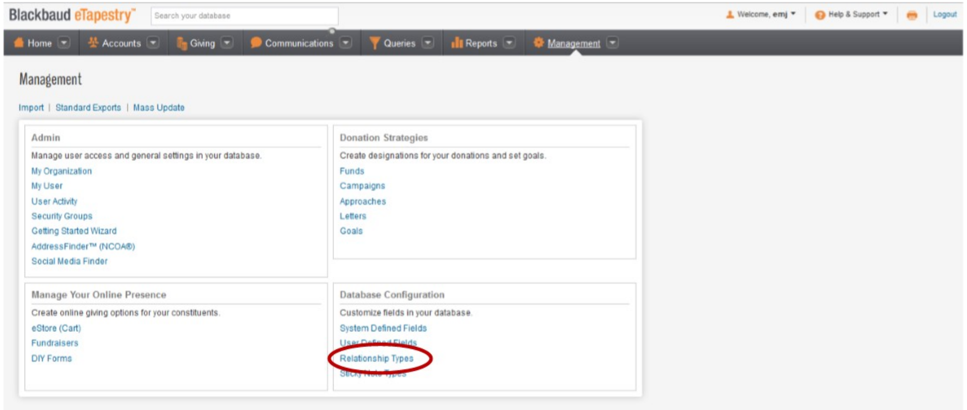


- Fill in the “Name” field (if application)
- Click on the “Next” button in the Navigation box located on the left to go to the “Finish” form
- Click on the “Save and Finish” button in the Tasks box located on the left

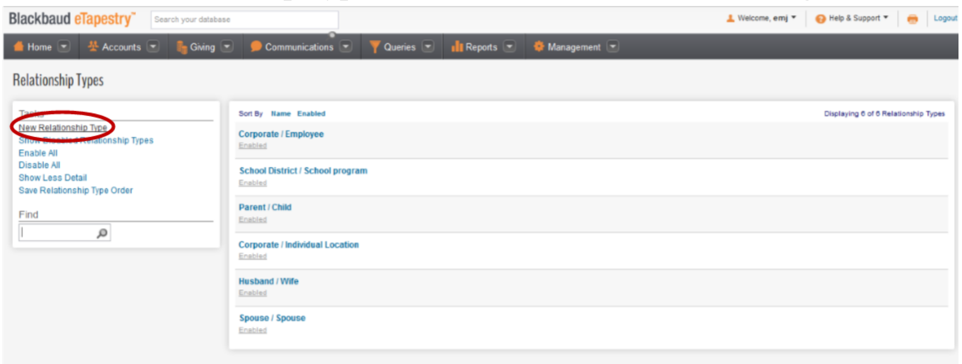
Note: To add a Defined Field in the Edit User Defined Field Category: Select Base screen under Tasks, and select “New Defined Field.” Follow the steps to add a New Defined Field

6.2. **Relationship types**

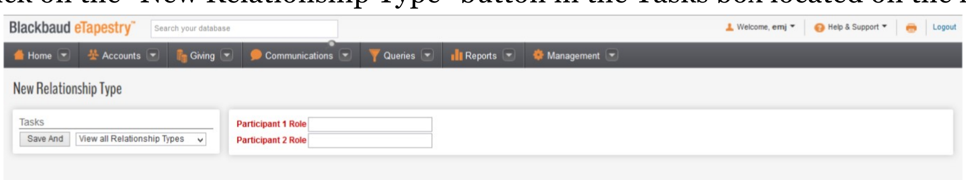
Relationship Types can be added to accommodate new relationships that arise.



- Click on the “Management” link in the navigation bar (not the drop-down menu)
- Click on the “Relationship Types” link below the “Database Configuration” section



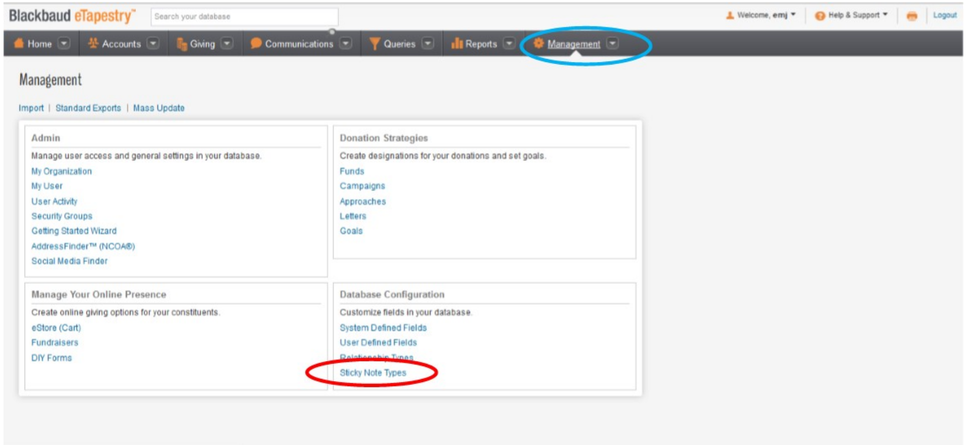
- Click on the “New Relationship Type” button in the Tasks box located on the left



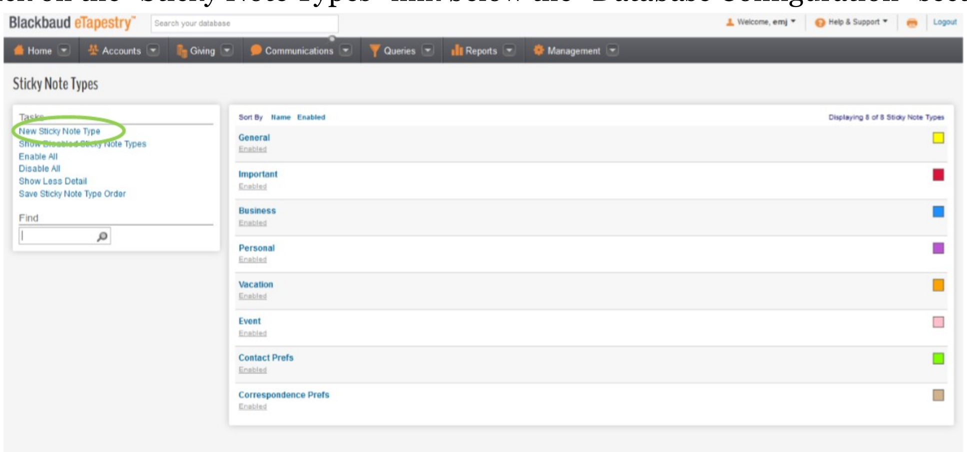
- Fill in the “Participant 1 Role” and/or “Participant 2 Role” fields
- Click on the “Save And” button in the Tasks box

6.3. **Sticky Note types**

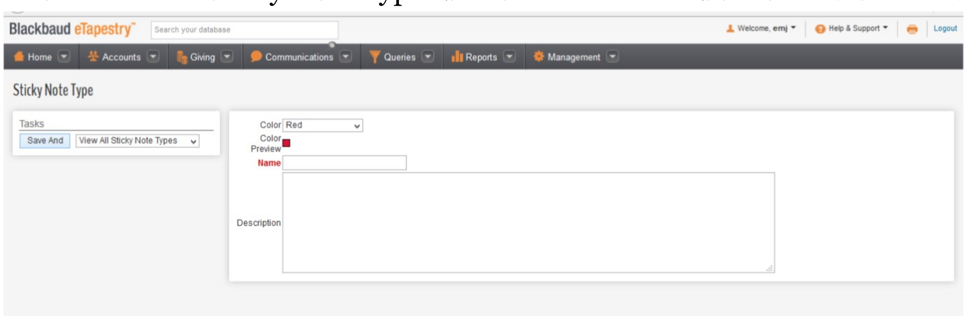
Sticky Note types can be added to accommodate new note types that arise.



- Click on the "Management" link in the navigation bar (not the drop-down menu)
- Click on the "Sticky Note Types" link below the "Database Configuration" section



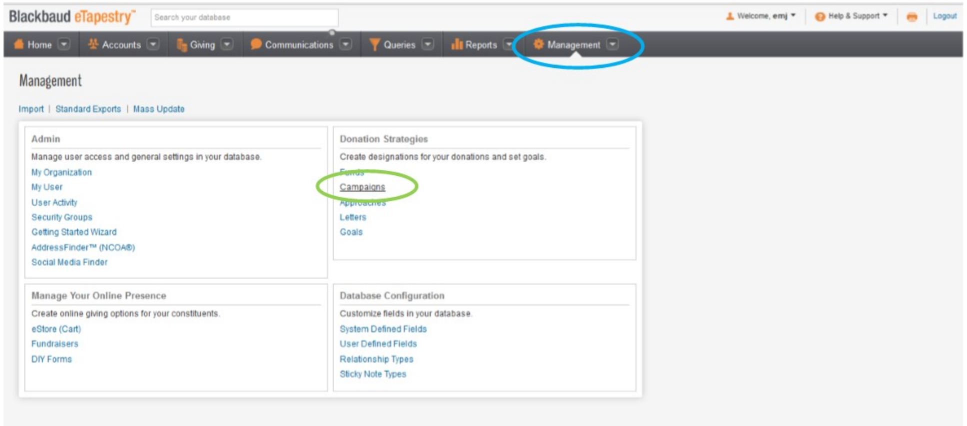
- Click on the "New Sticky Note Type" button in the Tasks box located on the left



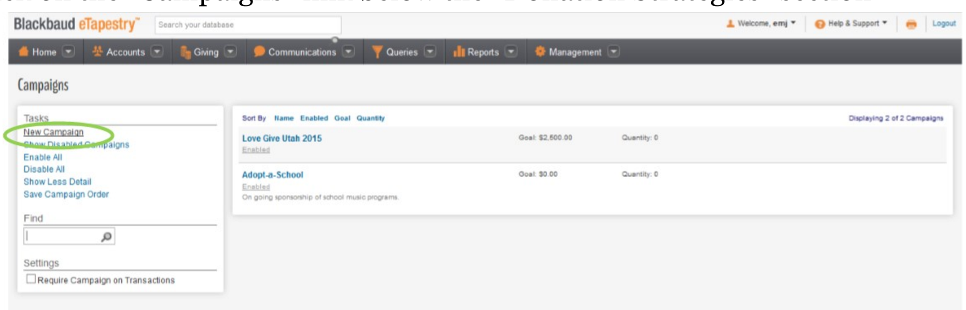
- Click on the "Red" drop-down menu next to the "Color" field
- Fill in the "Name" field
- Fill in the "Description" field
- Click on the "Save And" button in the Tasks box

6.4. **Campaigns**

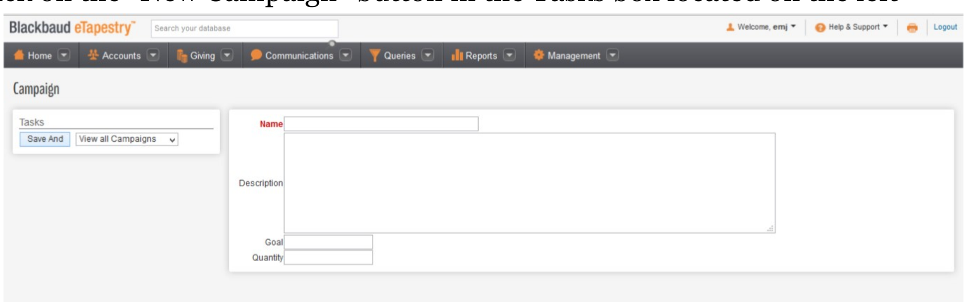
New Campaigns can be added according to the needs of LMA.



- Click on the “Management” link in the navigation bar (not the drop-down menu)
- Click on the “Campaigns” link below the “Donation Strategies” section

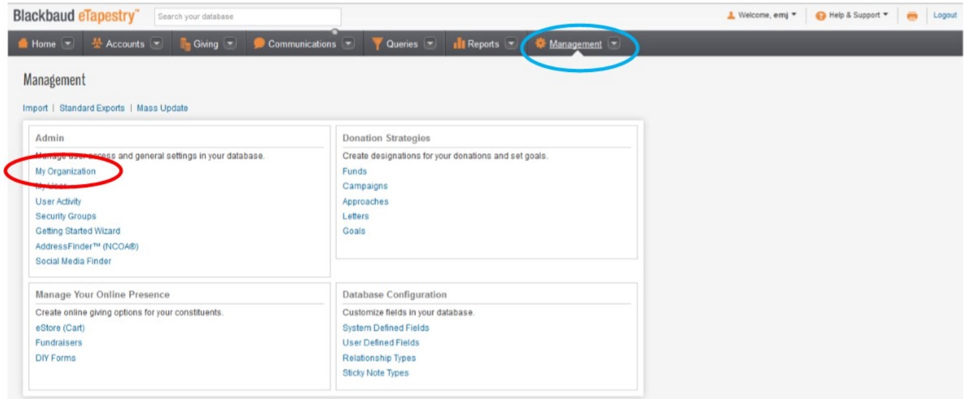


- Click on the “New Campaign” button in the Tasks box located on the left



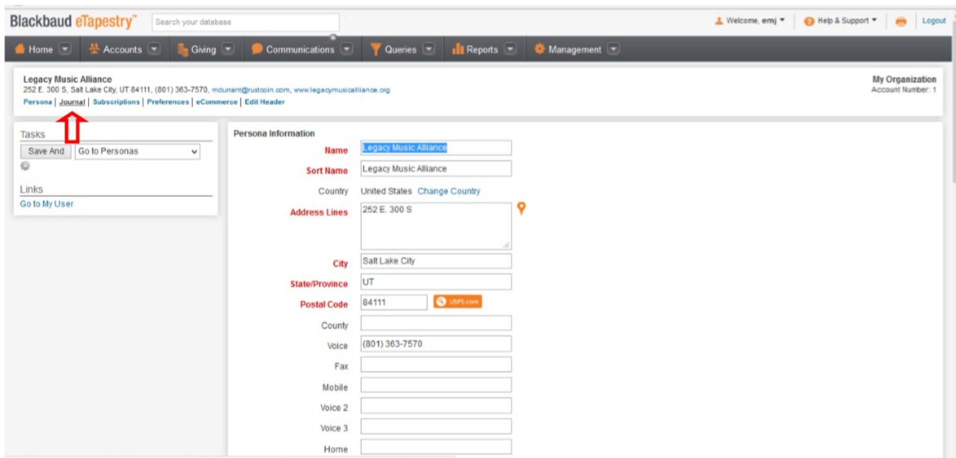
- Fill in the “Name” field
- Fill in the “Description” field
- Fill in the “Goal” field
- Fill in the “Quantity” field
- Click on the “Save And” button in the Tasks box

6.5. **"My Organization" account**



- Click on the drop-down menu next to the username on the top right
- Click on the "My Organization" link

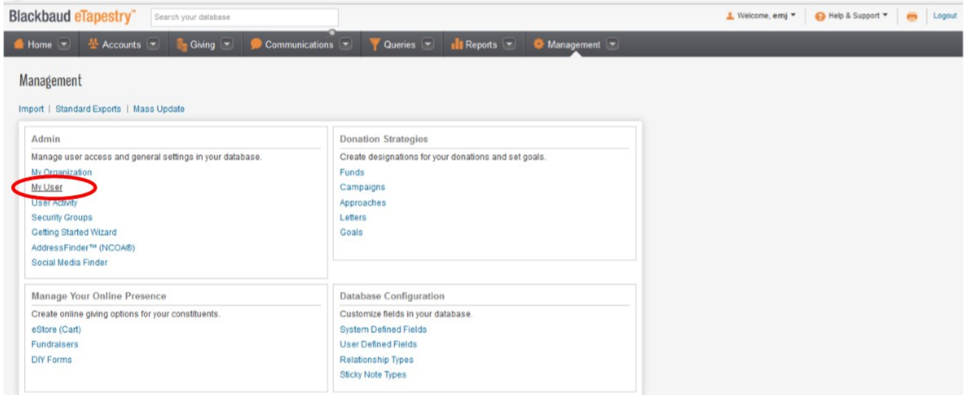
  Note: This will take you to the account for LMA. Here we have all the information about the organization.



- Click on the "Journal" link from the submenu located beneath the account quick information in the top left corner

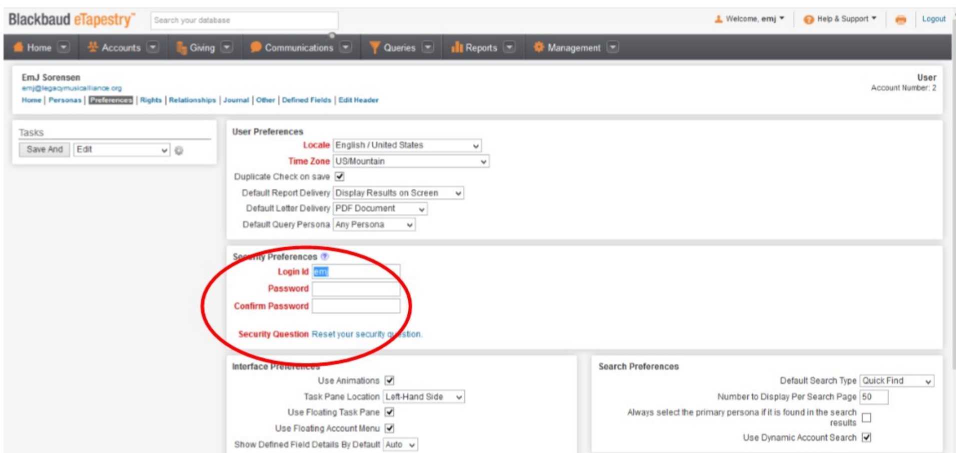
  Note: The Journal is important to manage and add to on a consistent basis. It houses the history of LMA as well as important documents that pertain to the organization history. All LMA employees are encouraged to add details to the Journal. The eTapestry database manager will oversee all of the history entry for this account.

6.6. **Individual user accounts**



- Click on the drop-down menu next to "Welcome, [your username]" on the top right
- Click on the "My User" link

Note: This will take you to your individual user account. Here we have all the information about the user.

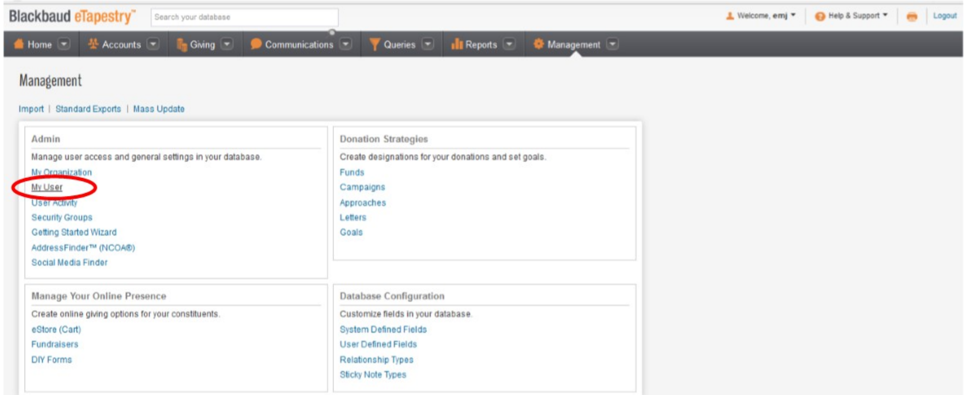


Password change

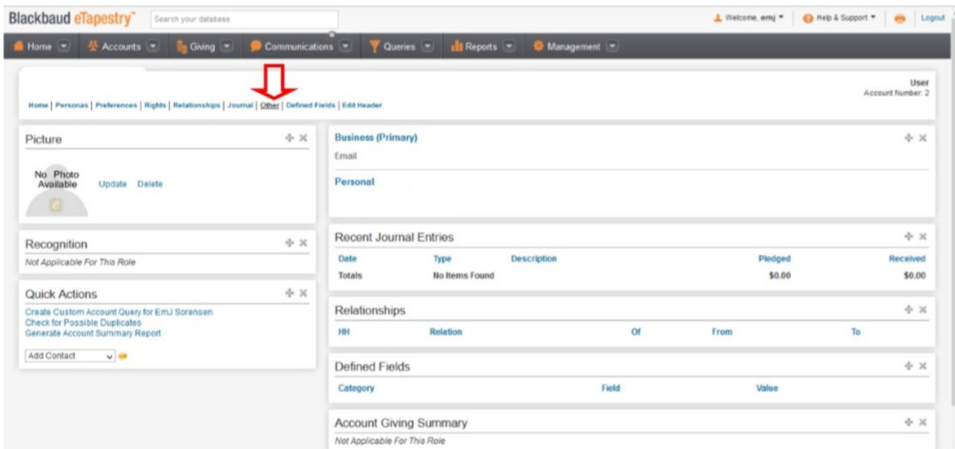
- Click on the "Preferences" link from the submenu located beneath the account quick information in the top left corner
- Fill in the "Password" field with a new password
- Fill in the "Confirm Password" field with the new password

Note: The Journal tab can be used to add any history of calendar events that are needed.

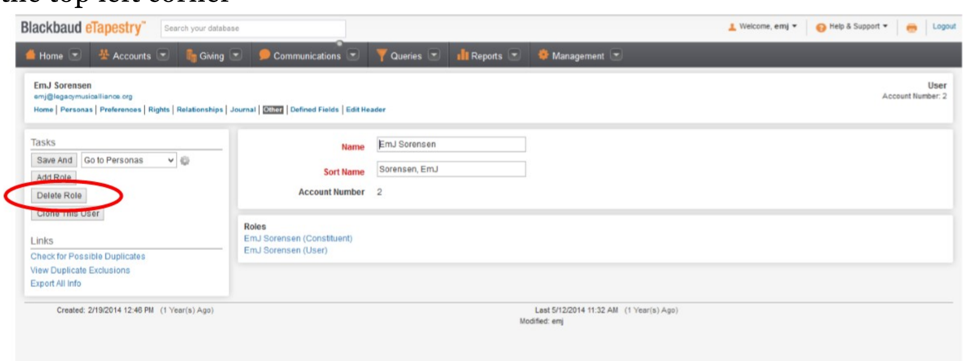
6.7. **Account removals**



- Click on the drop-down menu next to "Welcome, [your username]" on the top right
- Click on the "My User" link



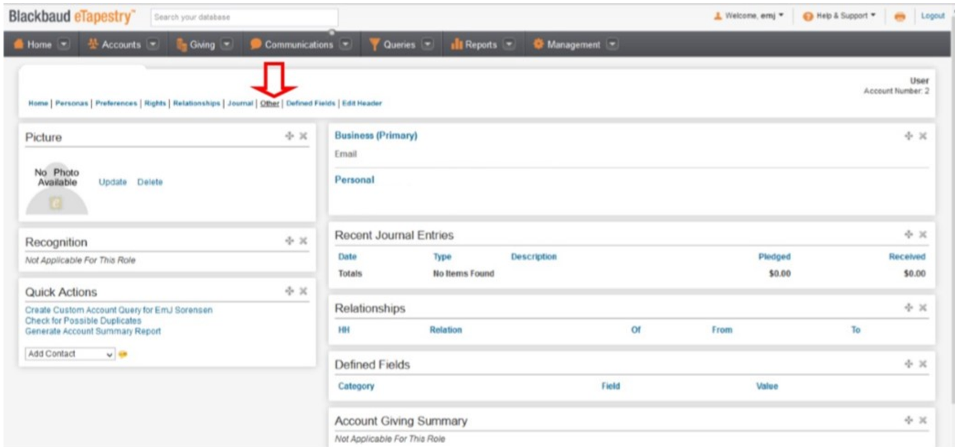
- Click on the "Other" link from the submenu located beneath the account quick information in the top left corner



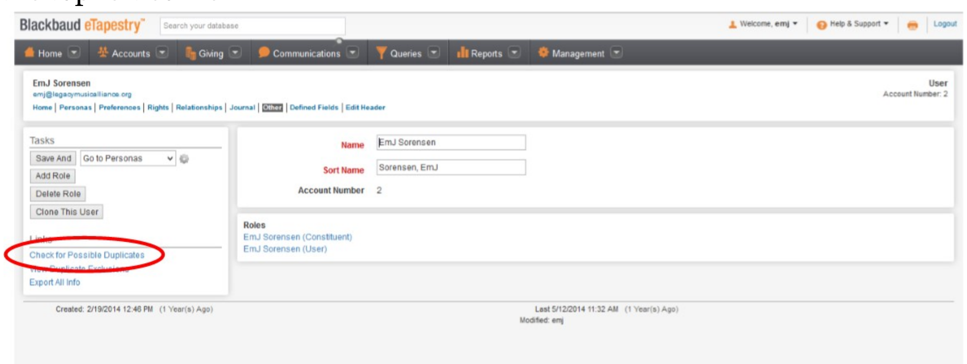
- Click on the "Delete Role" gray button in the Tasks box located on the left
- Click on the "Yes" button when the pop-up asks for confirmation

6.8. **Account mergers**

Sometimes a duplicate account can be added. eTapestry automatically checks for duplicate accounts once all account data has been entered. If a duplicate account exists, accounts can be merged to help avoid losing account information. Accounts can be merged by



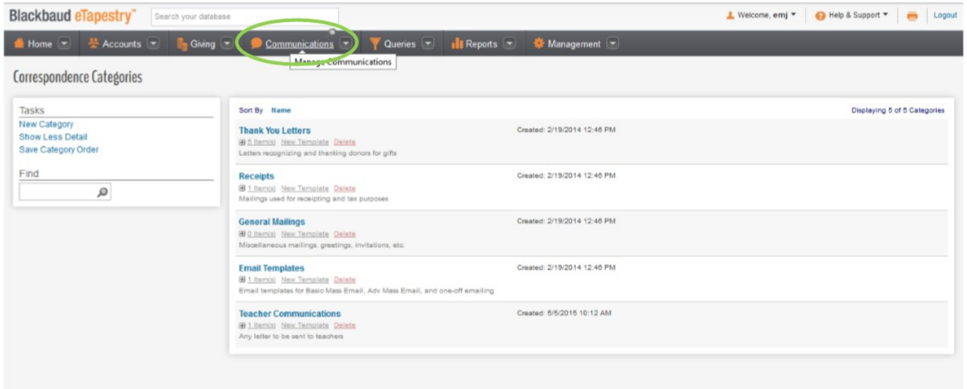
- Click on the account name to open it
- Click on the “Other” link from the submenu located beneath the account quick information in the top left corner



- Click on the “Check for Possible Duplicates” link in the Links box
- Click on the “Merge These Accounts” link
- Click on the “Save” button in the Tasks box

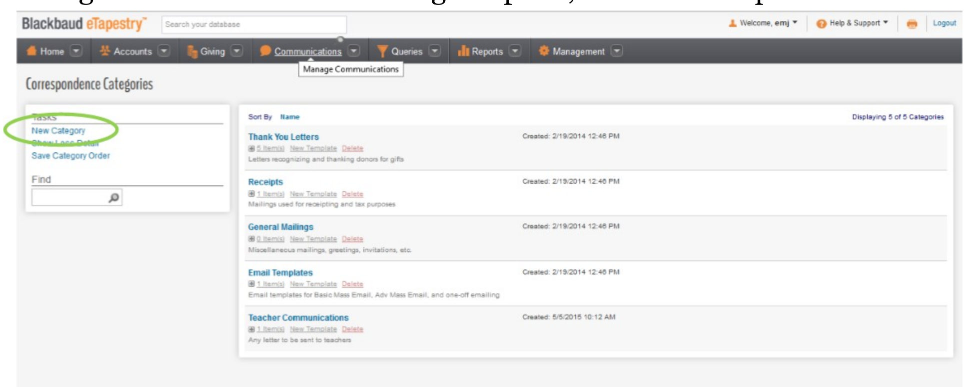
7. Create Mailings

7.1. Template letters

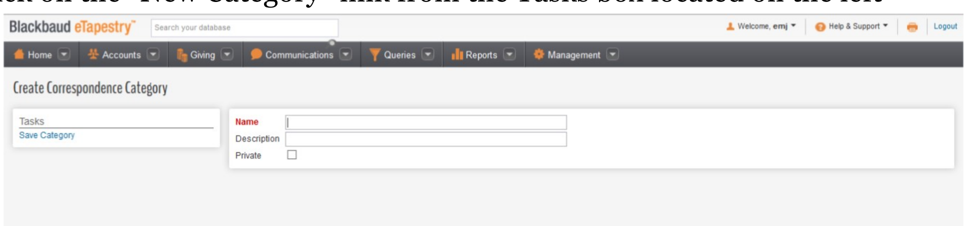


- Click on the "Communications" link in the navigation bar
- Select the category the template data will pull from

If the mailing does not match an existing template, follow the steps below:

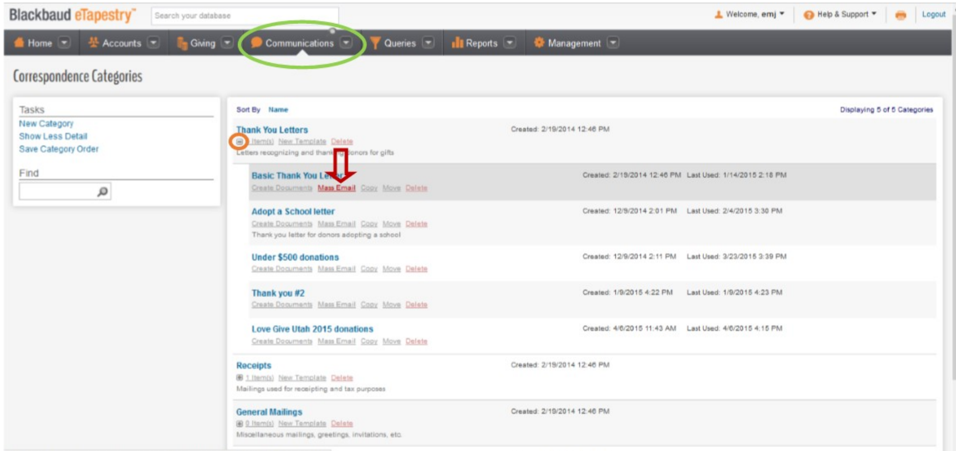


- Click on the "New Category" link from the Tasks box located on the left

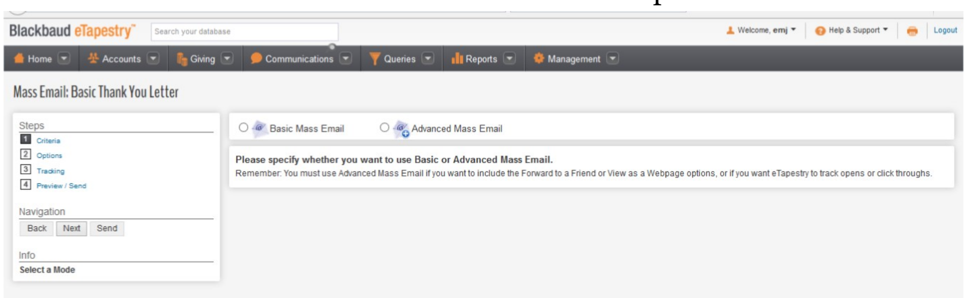


- Fill in the "Name" field
- Fill in the "Description" field
- Click on the "Save Category" link in the Tasks box located on the left

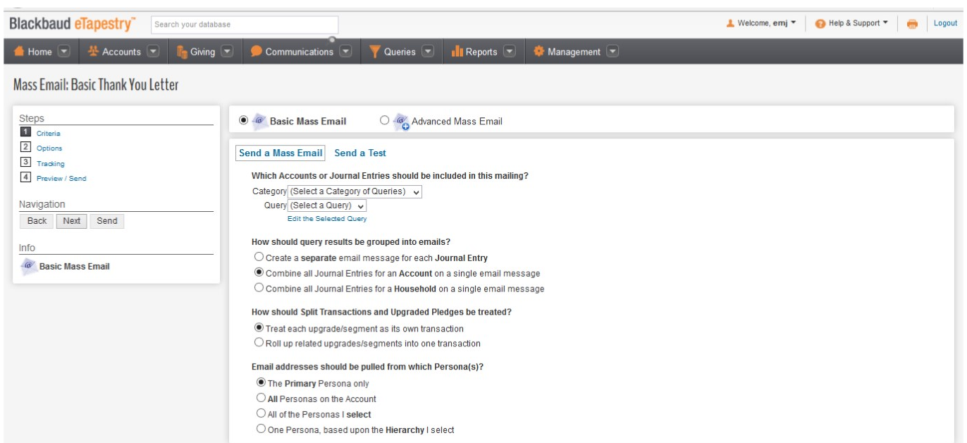
7.2. **Mass mailings**



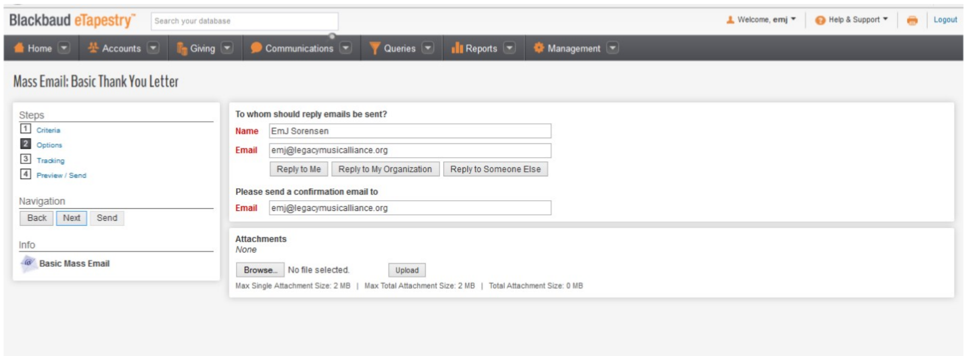
- Click on the "Communications" link in the navigation bar
- Click on the "+" button below the category
- Click on the "Mass Email" link under the desired template



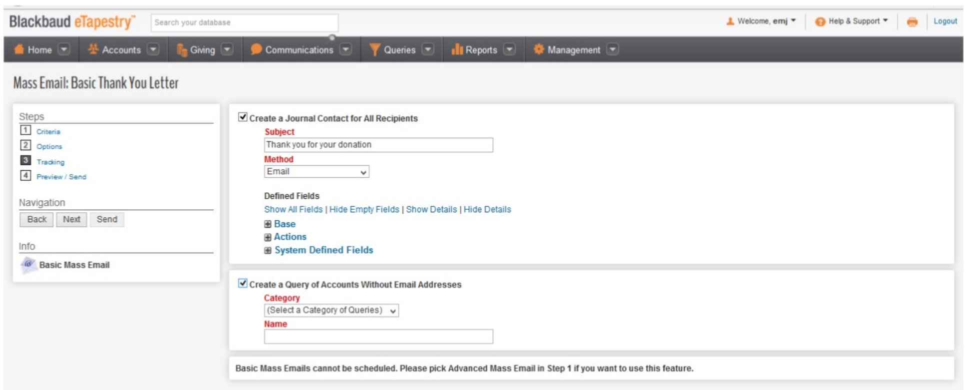
- Select "Basic Mass Email" or "Advanced Mass Email"



- Click on the "Select a Category of Queries" drop-down menu next to the "Category" field
- Select the "Category of Queries"
- Click on the "Select a Query" drop-down menu next to "Query" field
- Select the "Query"
- Answer the questions by clicking on the radio button
- Click on the "Next" button in the Navigation box located on the left to go to the "Options" form



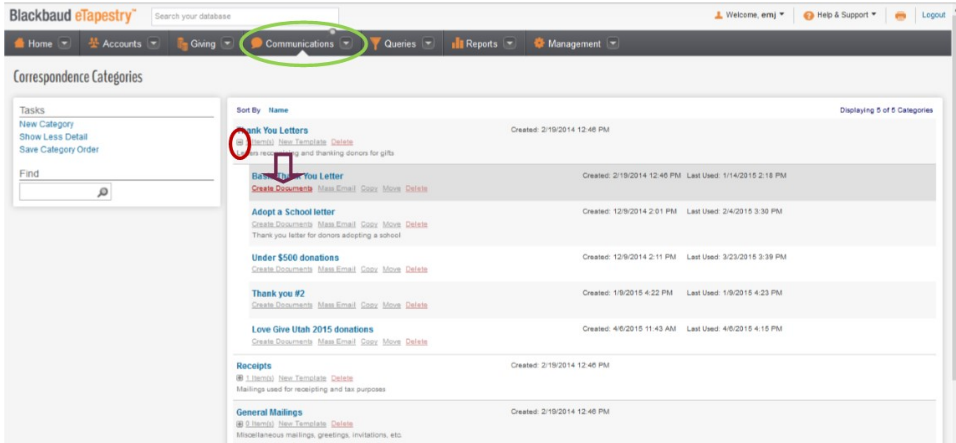
- Fill in the "Name" field with the sender's information
- Fill in the "Email" field with the reply address
- Attach any supporting documentation(s) by clicking on the "Choose File" button under the Attachments box
- Click on the "Next" button in the Navigation box to go to the "Tracking" form



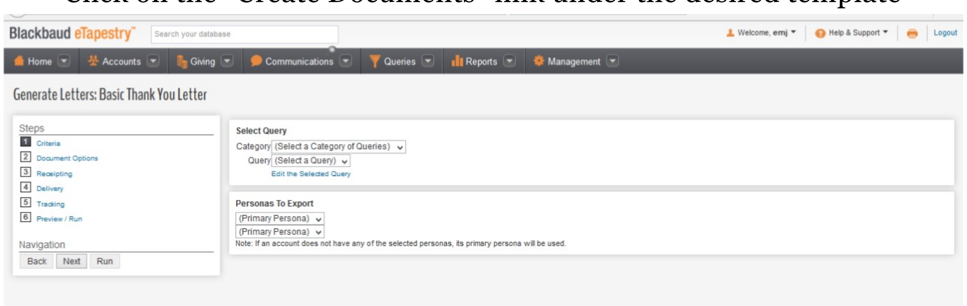
- Click on the checkbox next to "Create a Journal Contact for All Recipients"
- Fill in the "Subject" field using your best discretion
- Click on the checkbox next to "Create a Query for Accounts Without Email Addresses"
- Click on the "Select a Category of Queries" drop-down menu below Category
- Select "Base"
- Fill in the "Name" field with *Accounts - No Email*
- If desired to send at a later date, check the box to schedule to be sent at a later date and time—this feature is for Advanced Mass Mailings only
    - Click on the checkbox next to "Would you like to schedule this email to be sent at a later date and time?" to send the email at a later date
    - Click on the "Select a Category of Queries" drop-down menu below Category
    - Fill in the "Name" field
    - Select the "Category of Queries"
- Click on the "Next" button in the Navigation box to go to the "Preview/Send" form
- Click on the "Send" button in the Tasks box if the letter is final

7.3. **Emails**

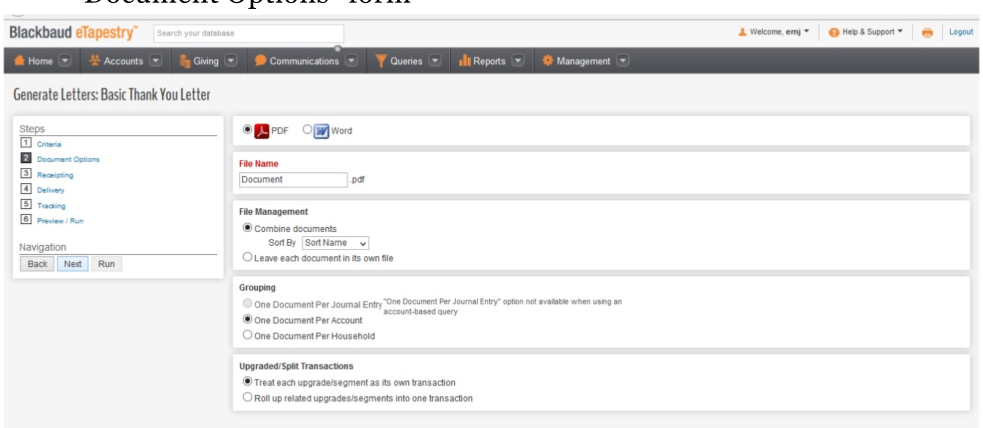
Individual mailing



- Click on the "Communications" link in the navigation bar
- Click on the "+" button below the category
- Click on the "Create Documents" link under the desired template



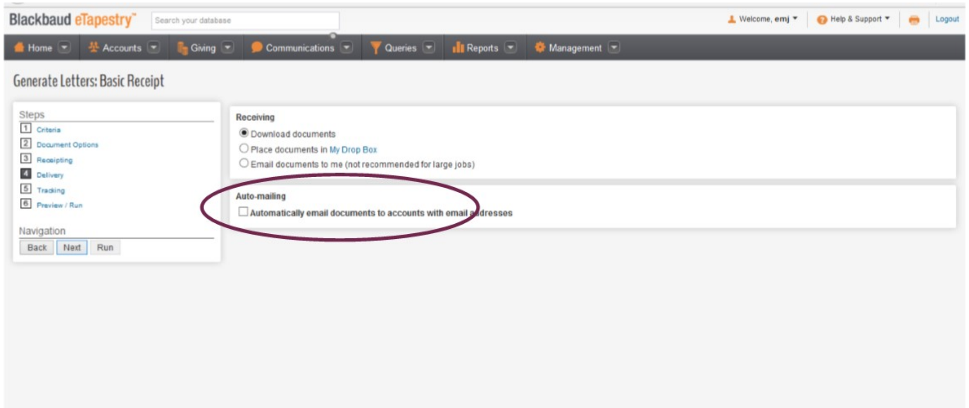
- Click on the "Select a Category of Queries" drop-down menu next to Category
- Select the "Category of Queries"
- Click on the "Select a Query" drop-down menu next to Query
- Select the "Query"
- Click on the "Next" button in the Navigation box located on the left to go to the "Document Options" form



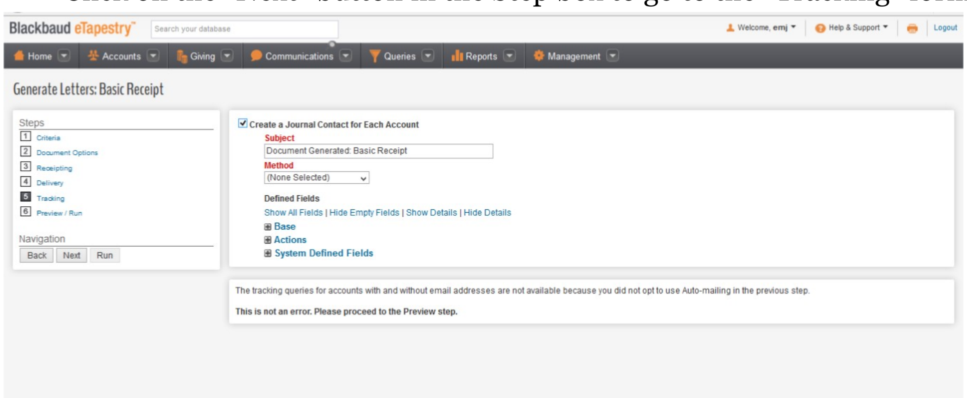
- Fill in the "File Name" field
- Click on the radio buttons below "File Management," "Grouping," and "Upgraded/Split Transaction" with the desired template

Note: The thank you letter template cannot be used to create receipts with automatically generated numbers.

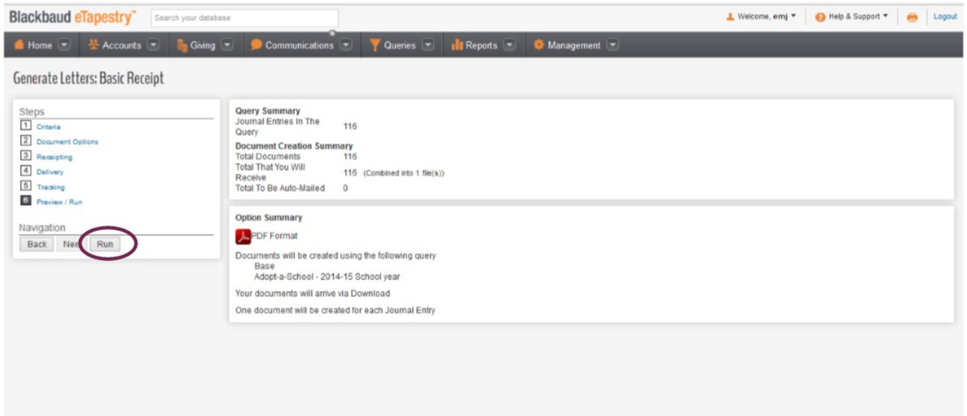
- Click on the “Next” button in the Navigation box to go to the “Receipting” form—Legacy Music Alliance does not use automatically generated receipts.
- Click on the “Next” button in the Navigation box to go to the “Delivery” form



- Click on the radio buttons below “Receiving” with the desired receiving method
- If an auto-generated email of the thank you letter is desired, check the box
    - Fill in the desired method of delivery (body of the email or as an attachment)
    - Enter a subject line
- Click on the “Next” button in the Step box to go to the “Tracking” form



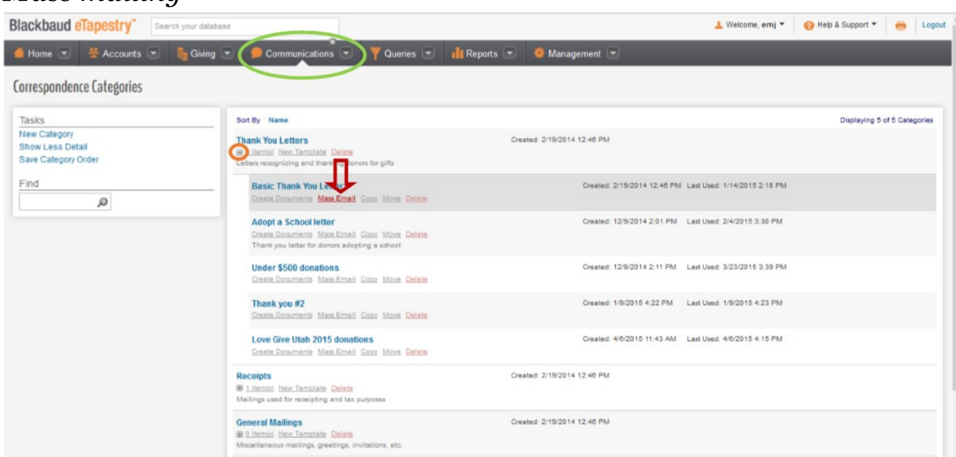
- Click on the checkbox next to “Create a Journal Contact for All Recipients”
- Fill in the “Subject” field using your best discretion
- Click on the drop-down menu below “Method”
    - If the documents are being emailed, select “Email”
    - If the documents are being mailed, select “Mailing”



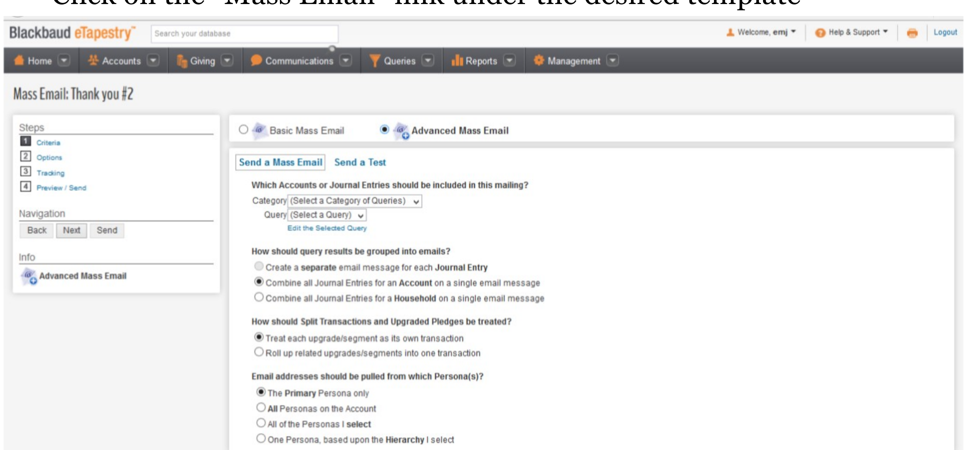
- Click on the "Next" button in the Navigation box to go to the "Preview/Send" form
- Click on the "Run" button in the Navigation box

7.4. **Scheduling a mailing**

Mass mailing

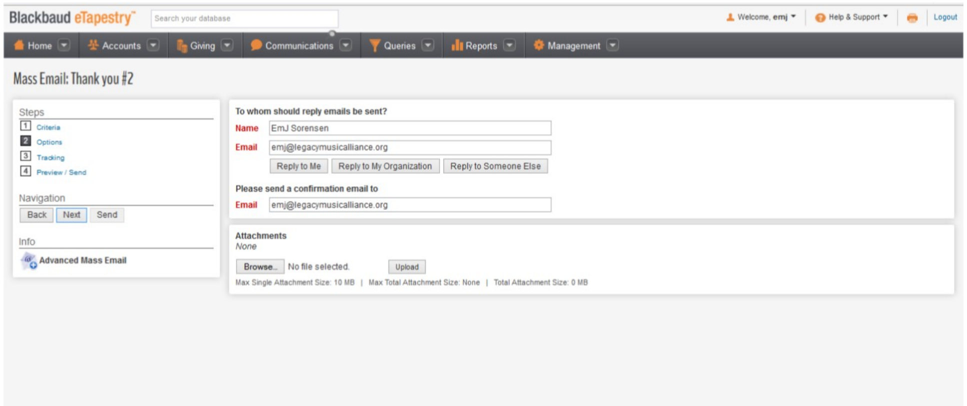


- Click on the "Communications" link in the navigation bar
  Click on the "+" button below the category
- Click on the "Mass Email" link under the desired template

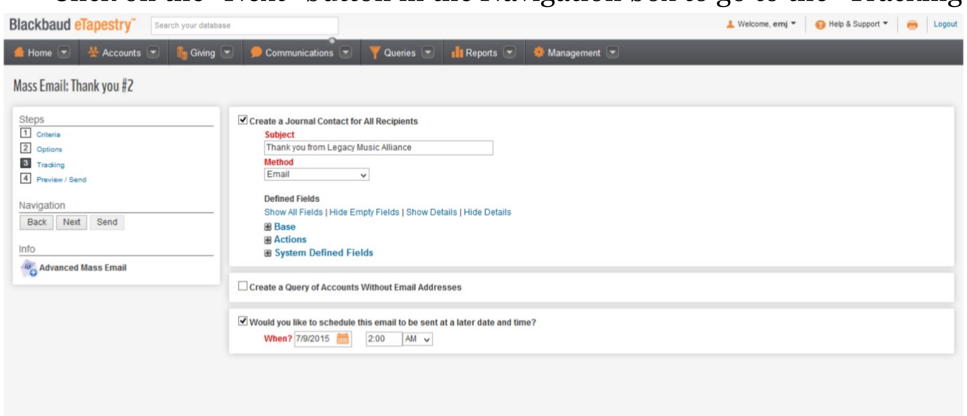


- Select "Advanced Mass Email"
- Click on the "Select a Category of Queries" drop-down menu next to Category

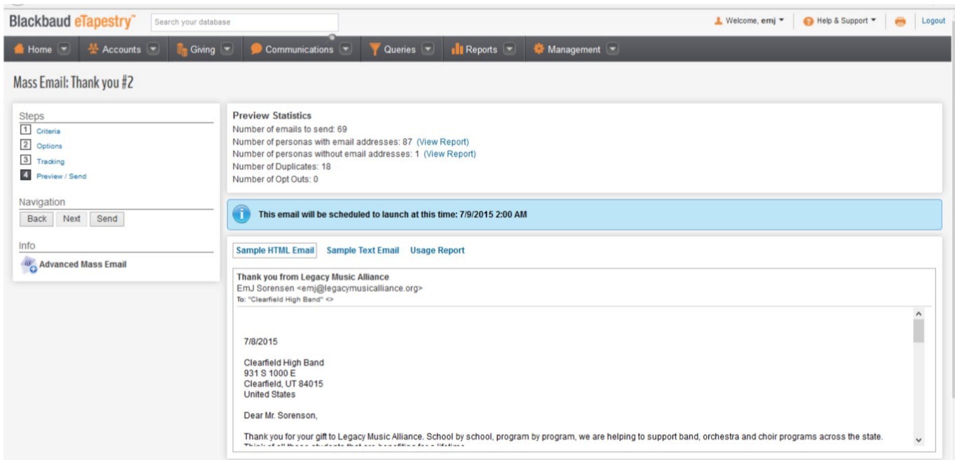
- Select the “Category of Queries”
- Click on the “Select a Query” drop-down menu next to Query
- Select the “Query”
- Answer the questions by clicking on the radio buttons
- Click on the “Next” button in the Navigation box located on the left to go to the “Options” form



- Fill in the “Name” field with the sender’s information
- Fill in the “Email” field with the reply address
- Attach any supporting documentation(s) by clicking on the “Choose File” button under the Attachments box
- Click on the “Next” button in the Navigation box to go to the “Tracking” form



- Click on the checkbox next to “Create a Journal Contact for All Recipients”
- Fill in the “Subject” field using your best discretion
- Click on the checkbox next to “Create a Query for Accounts Without Email Addresses”
- Select “Base”
- Fill in the “Name field with *Accounts – No Email*
- Click on the checkbox next to “Would you like schedule this email to be sent at a later date and time?”
- Fill in the “When” fields with the desired send date and time by typing in the date or using the calendar button to the right of the field



- Click on the “Next” button in the Navigation box to go to the “Preview/Send” form
- Click on the “Send” button in the Navigation box if the letter is final