How to Run an Export for Fundraising Report Card from eTapestry

Step 1 - Create a custom query for "All transactions received"

You may skip this step if you created this custom query during the integration setup process.

- Log in to eTapestry
- Select Queries, and then Manage Queries
- Select New Category
- Enter **Fundraising Report Card DO NOT MODIFY** as the category name (with exact spelling and formatting), and then select Save Category
- Select New Query
- Enter **All transactions received** as the query name (with exact spelling and formatting)
- Leave the Starting Query information as is
- Select Journal Entries as the Data Return Type
- Leave the Criteria Matching as is
- Add criteria of Individual Transaction Received Greater than or equal to \$0.01
- Select Save And
- **Step 2** Create a custom report
 - Select Reports, and then Manage Reports
 - Select a Category
 - Select New Report
 - Name your report
 - Add three fields and in this exact order: Account Number, Date, Received

Report Columns		
Browse Fields Search Fields	Account Number	×
Commonly Lised Fields	Date	×
	Received	×
Address Lines	Expand All / Collapse All	
O Approach		
O Campaign		
O City		

• Select Save

Step 3 - Run the report

• Select Run Report beneath your newly created report

Sort by Hame created Last osed			proproving i or i repor
Fundraising Report Card Export	Created: 3/30/2017 5:18 PM	Last Used: Unknown	
Run Report Copy Move Delete			

- Select Fundraising Report Card DO NOT MODIFY as the Category
- Select All received transactions JE as the Query
- Select **CSV File Download** as the Report Format
- Select Submit
- **Step 4** Upload the CSV file to Fundraising Report Card
 - Log in to Fundraising Report Card
 - Drag and drop the CSV file into your Fundraising Report Card