

## How to Run an Export for Fundraising Report Card from eTapestry

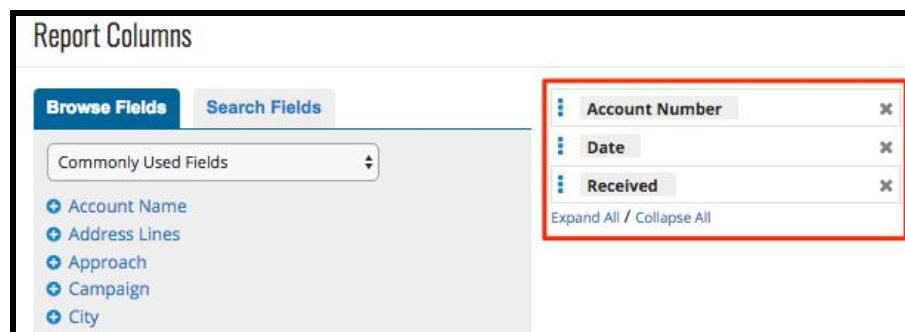
### ❑ Step 1 - Create a custom query for “All transactions received”

*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**



- Select Save

### ❑ Step 3 - Run the report

- Select Run Report beneath your newly created report



- 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