

Auctionpay - Bridge Documentation

Synchronizing With eTapestry

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Overview

The synchronization described in this document is designed to allow you to exchange event information between Auctionpay Event Software (AES) and eTapestry Fundraising Software, thereby enabling you to get a full 360 degree view of your donors and their participation in benefit events. This bridge will help you simplify your event preparation by allowing you to import attendees from eTapestry to Auctionpay Event Software. It will also give you the ability to fully store and maintain event results in your primary database of record (eTapestry), making your donor database current from one event to the next.

Compatibility

Please ensure that you have version 4.1 or later of Auctionpay Event Software installed prior to moving forward with the eTapestry Bridge synchronizations. For questions about updating your software version, see your user manual, visit the online support pages at www.auctionpay.com, or contact our client services for assistance at softwaresupport@auctionpay.com or call 1-866-269-8151.

Preparing for the Synchronization

To successfully utilize the Auctionpay eTapestry Bridge, it is important that you have a working knowledge of eTapestry and its import and export features.

Please review the advanced import/export documentation as defined in eTapestry's help system.

Sync Explanation

The synchronization between Auctionpay Event Software and eTapestry consists of 3 parts:

Before the Event:

Supporter Import (eTapestry to Auctionpay Event Software): The Supporter Import allows you to transfer your supporter information from the eTapestry database into the Auctionpay Event Software. This transfer populates the bidder, donor, and staff information in the Auctionpay Event Software and it brings over their eTapestry Account Number. This transfer can be executed multiple times if needed. Besides avoiding the duplicate data entry into AES, the Supporter Import is key by establishing the Alternate ID in AES. That ID is used to de-dupe further Supporter Imports from eTapestry and to identify information sent back to eTapestry after the event.

After the Event:

Supporter Export (Auctionpay Event Software to eTapestry): Supporter Export allows you to transfer supporters from AES that do not have an associated eTapestry Account Number. This process will ensure that all supporter records created in Auctionpay Event Software have corresponding records in eTapestry. The sync accounts for walk-ins and last minute entries into the Event Software. During this sync, any supporters not recognized in eTapestry will be treated as new and assigned a new Account Number.

Note: Supporter Export is not necessary in all cases, only if you have bidders or donors in the Event Software without eTapestry Account Numbers.

Repeat Supporter Import (eTapestry to Auctionpay Event Software): The Repeat Supporter Import is designed to pull down any additional Account Numbers from eTapestry that were not imported during previous syncs. During Supporter Import, the Event Software will use the Alternate ID first to distinguish new records from existing records. If the ID is not found for an imported record, then AES matches last name/business name and first name (if not business) plus either email, zip code, or city if they are present in both. If neither are present in one of them, then it uses just name for matching. The Repeat Supporter Import uses the same file format as in the first time Supporter Import. This sync is necessary only if you do not have Alternate IDs associated with every record in AES.

Gift Export (Auctionpay Event Software to eTapestry): Gift Export allows you to transfer sales and donation information back to ETapestry. The Gift Export relies on Alternate IDs maintained in the previous syncs to mark each purchase, ticket sale, and in-kind donation with the ID of the supporter in eTapestry. If you don't have Alternate IDs for some of the bidders or donors, the Gift Export will still work but it can now create duplicates in eTapestry because every entry will create a separate supporter record in eTapestry.

Before the Event - Sync 1: Transferring General Attendee Information from ETapestry to Auctionpay Event Software

It is recommended that you run a query in eTapestry that includes those supporter records you want to include as bidders and donors in your event. However, if you choose to export **All Records**, you can still delete records from AES later that you know will not be needed. At the same time, you can also repeat the Supporter Import at a later time in case you missed some bidders or donors in the first transfer. If you bring over a large dataset, your sync will take longer and paging through records in AES will require more time. So it is advisable to start with a well defined subset of all your donor records.

Exporting from eTapestry

Please refer to your eTapestry documentation to learn more about exporting records.

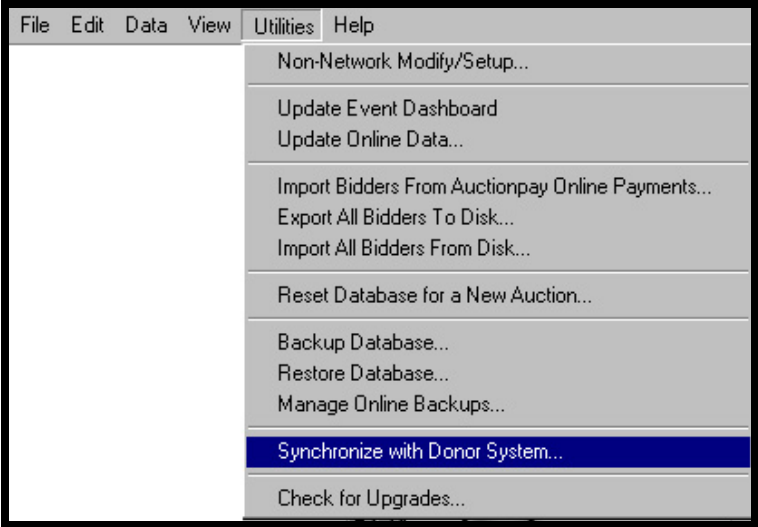
For the Supporter Import, the following fields should be exported out of eTapestry to a .csv file for importing into Auctionpay Event Software:

Column Name	Comments
Account Number	Becomes Alternate ID in AES
Name	Full name of business, individual, or first person of couple
Sort Name	Becomes AlphaSort in AES
Account Type	Needs to be either Individual or Business
Persona Type	Needs to be either Individual or Business
Envelope Salutation	Contact of a business (recommended use in eTapestry); ignored otherwise
Spouse Name	Full name of second person of couple
Phone – Voice	Primary phone number
Phone – Voice 2	Secondary phone number
Email	
Address Line 1	
Address Line 2	
City	
State	
Postal Code	Becomes ZIP in AES
Short Salutation	Becomes Salutation in AES
Long Salutation	Ignored at this time

Importing Records into Auctionpay Event Software

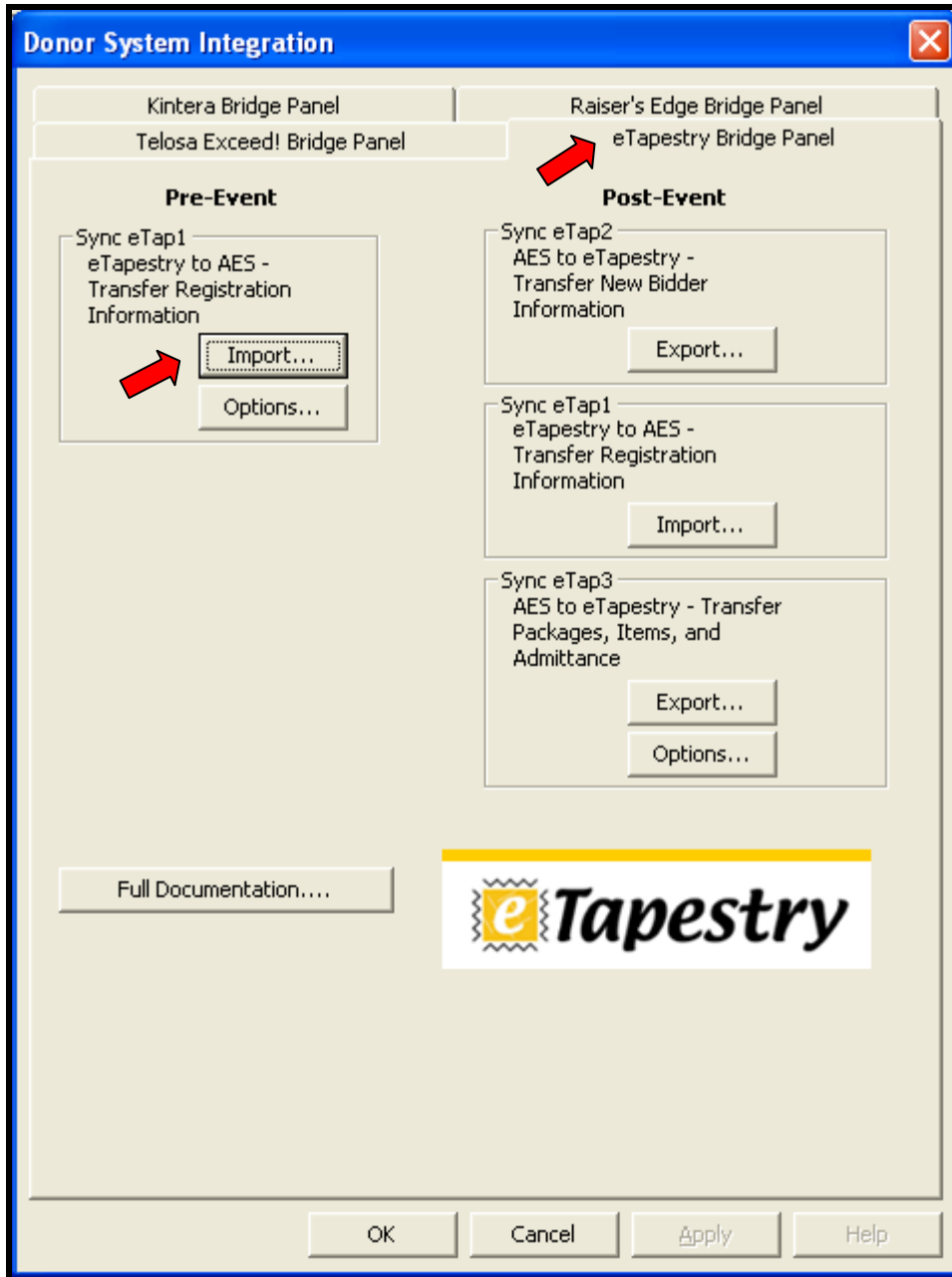
Open the Auctionpay Event Software application. If you have not previously entered any information into the software, choose to open a new blank database. If you have previously entered item and package information, make sure you open the database that you have been working with.

Highlight **Utilities** in the navigation bar, and click on **Synchronize with Donor System**.



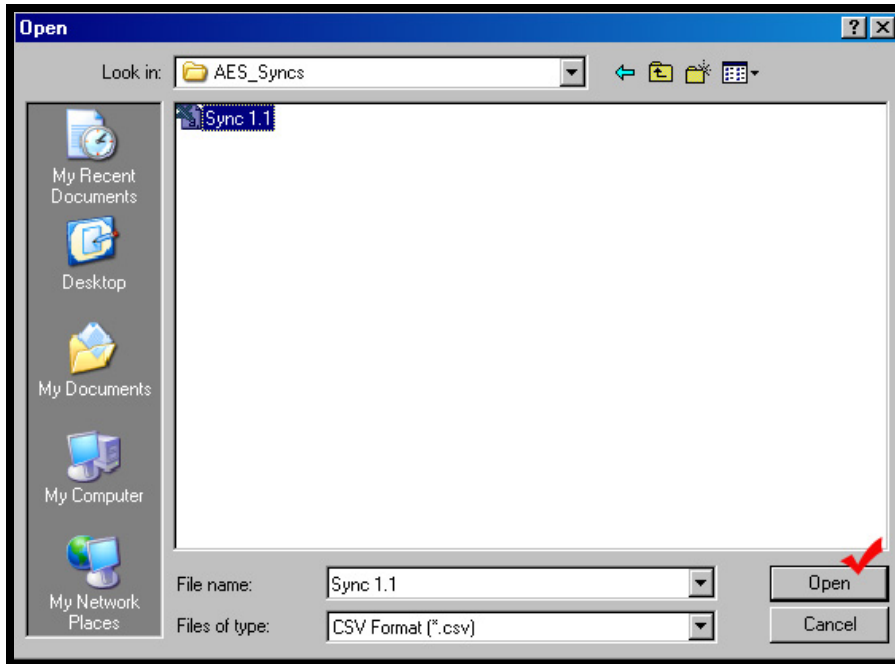
You will be prompted to enter your login/password. If you do not have your admin password, please refer to the documentation sent to you regarding administrator access or contact our client service department for assistance.

From the synchronization panel, make sure to select the **eTapestry Bridge Panel**, then click on the **Import** button in the **Pre-Event** section.

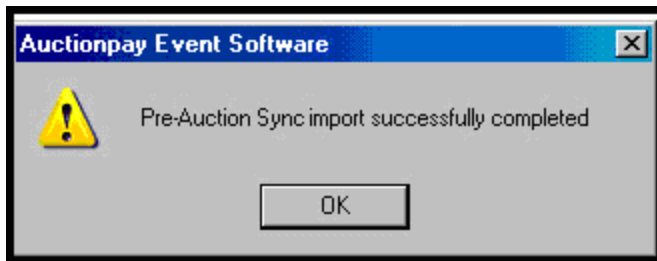


Note that you can set **Options** for the import by pushing the **Options** button first. In particular, you might want to choose to import this file only into the Bidders or Donors but not into Staff. Especially for large import files, that is highly recommended because the import might take considerable time to complete.

Locate the .csv file that you created that contains your exported supporter list from eTapestry. Click **Open**.



If the import worked correctly, you will see the following message:



Note that you can run Supporter Import multiple times. Auctionpay Event Software recognizes the records that were previously imported as long as they have the same Account Number (Alternate ID) and will not create duplicates.

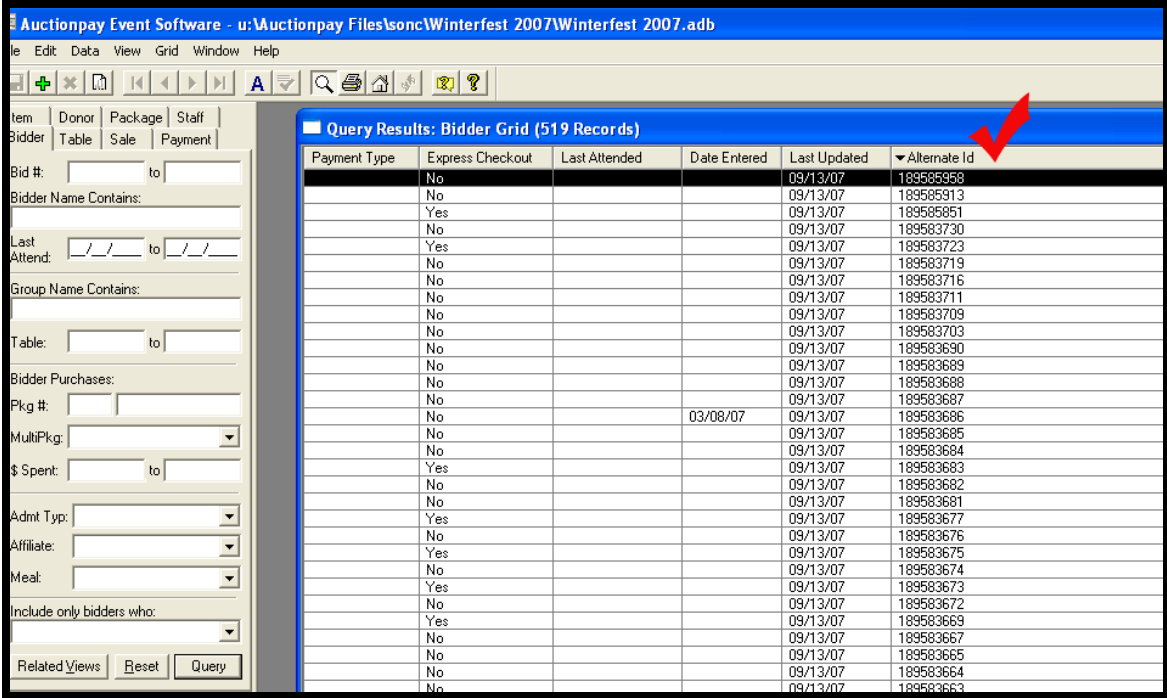
After the Event - Sync 2: Transferring Supporter Information from Auctionpay Event Software to eTapestry

Exporting from AES

Supporter Export and a repeat of Supporter Import are designed to ensure the IDs between both applications are matched. When new contacts get added to your Event Software database, they will not necessarily be found in the eTapestry database. To properly synchronize the two databases, you'll need to run these two syncs to locate any additional supporter IDs not found in AES or create new constituent records in eTapestry and send the IDs back to the Event Software. If you are sure that you did not add any new constituents to the Event Software since the initial sync 1, then you do not need to run syncs 2 and 1 at this time. You can skip right to Gift Export from here.

Important: Auction information associated with records in AES that do not have eTapestry account numbers (Alternate IDs) will create duplicate supporter entries in eTapestry if there is more than one gift record in the Gift Export for that supporter. Please double check that all records in the Auctionpay Event software have an Alternate ID attached to them.

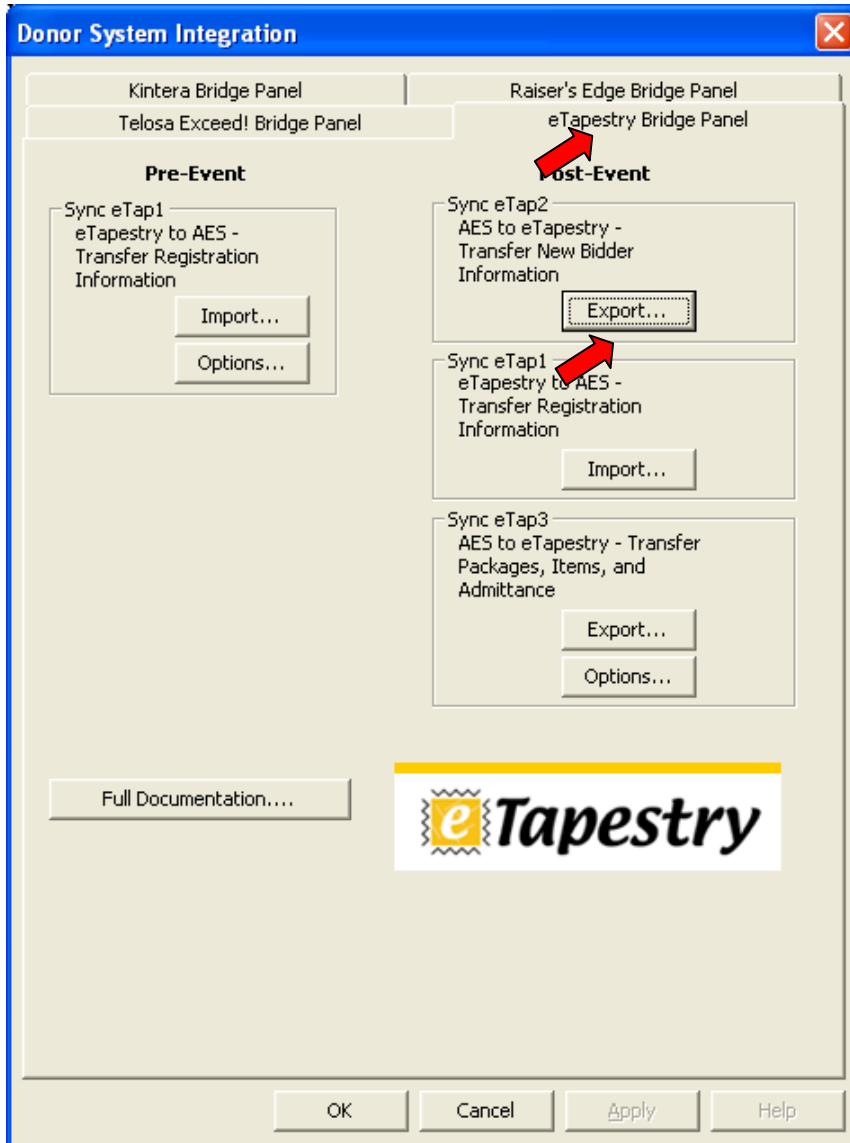
To verify this is the case, open a bidder grid view and scroll to the right until you get to the Alternate ID column. All of your bidders should have associated values in the Alternate ID field.



Also remember to check on the donor grids as well.

To perform Supporter Export, access the donor synchronization panel using the **Utilities** menu and clicking on **Synchronize with Donor System**.

From the synchronization panel, make sure to select the **eTapestry Bridge Panel**, then click on the **Export** button in the **Post-Event Sync eTap2** section. Save the export file to your computer so that you can easily refer to it later.



Transferring New Supporters Back to ETapestry

Supporter Export will export a .csv file of only those records that do not have an Alternate ID.

The file should be imported and mapped according to the import guidelines for eTapestry. Please refer to eTapestry's documentation to learn more about importing your supporter records to that system.

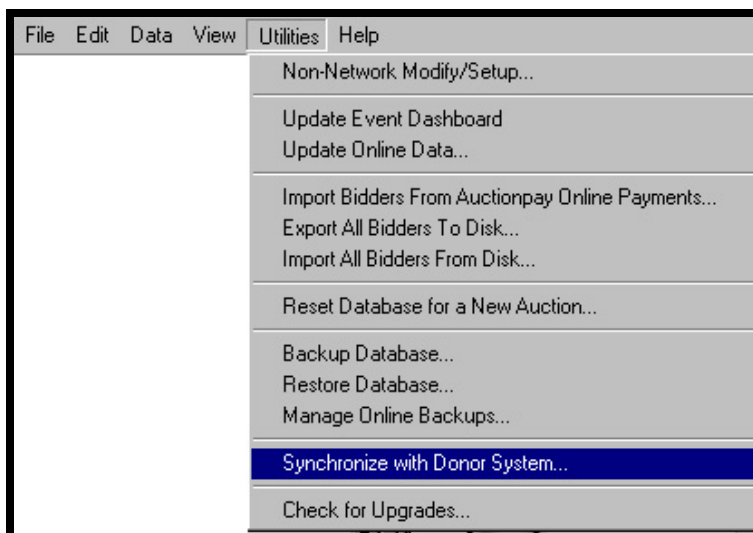
After the Event – Repeat Supporter Import: Transferring All Supporter IDs From eTapestry to AES

Just follow the steps for Supporter Import described above but restrict the supporters that you transfer from eTapestry to those that don't have an Alternate ID in AES yet. That should be the same supporters that you transferred from AES to eTapestry in the previous step.

After the Event – Gift Export: Transferring Purchase and Donation Information From AES to eTapestry

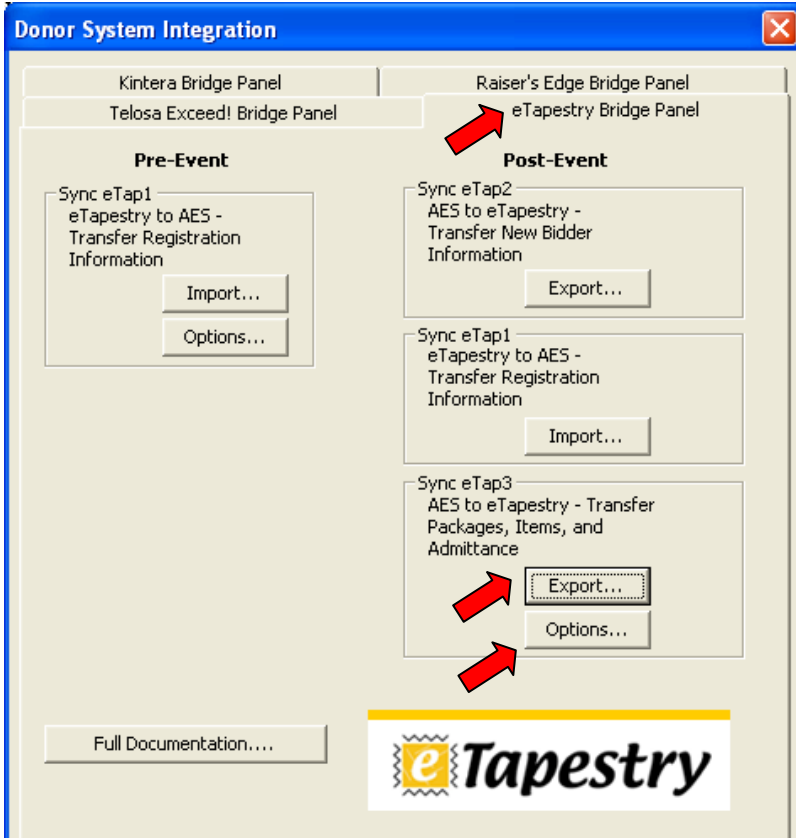
Exporting from AES

To create the Gift Export .csv file, access the donor synchronization panel by highlighting **Utilities** and clicking on **Synchronize with Donor System**.



From the synchronization panel, make sure to select the **eTapestry Bridge Panel**. Next, you need to tell AES what fund name should be used in eTapestry for these gift records. Use the **Options** button and fill in the fund name. Make sure that fund is defined in eTapestry.

Now, click the **Export** button in the **Post-Event Sync eTap3** section. Save the export file to your computer so that you can easily refer to it later.



Importing into ETapestry

The following fields will be exported from Auctionpay Event Software for import into eTapestry.

Column Name	Comments
Account Number	Alternate ID in AES
Name	Full name of supporter; either Account Number or Name are required
--- see table above ---	Allows for same columns used in Supporter Import/Export
Fund	Name of fund in eTapestry these gifts should be associated with
Gift Type	One of these: In Kind, Cash, Check, Credit Card; Cash is used for other
Date	Date when payment or donation received
Package Name	Name of either auction package sold, ticket sold, or item donated
Received	Total dollar amount paid if this is a sale
Paid	Either y (yes) or n (no)
Value	Value of donated item if Gift Type is In Kind
Check Number	Additional info when Gift Type is Check

Please refer to your eTapestry import documentation to learn more about importing into the eTapestry system.

Congratulations!

You have completed all of the steps necessary.