

TEST YOUR PAGE

IT IS VERY IMPORTANT TO TEST YOUR eCOMMERCE PAGE IMMEDIATELY AFTER RECEIVING THE FINAL PAGE LINK, AND BEFORE POSTING THE LINK TO YOUR WEBSITE AND/OR GIVING THIS LINK TO YOUR DONORS.

Test your page by making an actual donation/entry. This will provide you with the most accurate test and the most information about your page, how it works with eTapestry, and how it works with your processing account.

Testing your page by submitting an actual donation/entry, and additional entries for each option/designation on your page, will allow you to verify the following:

1. **Your processing account is setup correctly to process online donations**
2. **Your processor information is entered correctly in your eTapestry database**
3. **Your defined fields, Funds, Approaches, and any other options are setup per your request**
4. **Your notification email address is setup correctly**

Additionally, testing your page will allow you to see exactly how entries will transfer to your eTapestry database, and where each defined field and designation is going (that is why it is important to test your page selecting each option, even if you will have to submit multiple entries and/or donations). Information should be verified and used from the data in eTapestry.

Your processing account will provide you with a **Virtual Terminal** so you can refund any test donations made while testing your eCommerce form. Refunding and/or deleting from eTapestry will not refund the actual money from the credit card. You can delete the entries from eTapestry after refunding the money from your **Virtual Terminal**. Please contact your processing provider for instructions to access and/or use your **Virtual Terminal**. You will be using one of the following companies:

Customer Support
1-888-955-5455 (option #1)
iatscs@ticketmaster.ca
Monday through Friday:
7:30am to 5:00pm PST



Virtual Terminal & Gateway Support
877-470-4001
virtualsupport@sagepayments.com
8:00am - 8:00pm
EST

SAGE PAYMENT SOLUTIONS

USING eTAPESTRY

When someone submits a successful online entry the information is then sent to your eTapestry database. The database will create a new account with this entry or merge it with an existing account. It will check on 3 field values and 2 of these values must match with the values of an existing account for it to automatically merge. The fields and values checked are:

1. **Account Name**
2. **Account Street Address**
3. **Account E-mail**

If the person types in a middle initial, abbreviates an address field, or changes any fields in any way to differ what eTapestry has on record it will read it as a different value. eTapestry will create a new account if it reads this difference on more than one of the fields above.

Check your online journal entries report for possible duplicates and merge accounts when needed. A note will also be created when an automatic merge with an existing account occurs.

When you receive online notifications please remember that this is only the beginning, in regards to tracking and reporting on your eCommerce information. Within your database you have an account and journal entry to correspond with each successful entry.

Login to eTapestry: <https://app.etapestry.com/prod/Login.jsp>

PLEASE CONTACT SUPPORT@ETAPESTRY.COM IF YOU HAVE ANY QUESTIONS!

You will have a standard report to use to see only eCommerce entries and can see by following these steps:

Click on **Report/Export**
Click on **eTapestry Standard Reports**
Click on **Online Journal Entries Report**

Online Giving Reports
[Online Journal Entries Report](#)

Important Notes: You can limit the report to specific online entries by selecting a specific query for this report. The standard query Base: All Constituents will pull all entries, whereas a standard query like Constituent Journal Entry Dates: Last Week, will pull a more limited list of entries.

If you run this report on screen you will have additional options only offered with this report. You will have the option to run the eTapestry duplicate check on each entry/account, or click on **'Run Duplication Check on All'** at the bottom of the report to use this feature with the entire selection of entries displayed.

Transaction: If you look at an eCommerce transaction you will see a section on the right-hand side with the text-**User Defined Fields**. In this section you will see a **System Defined Fields** category with the data source of the transaction. You will also see any defined fields you have setup on your eCommerce page and requested. If you did not specify a category name it will be under the category 'eCommerce'.

Journal Note: If an eCommerce entry does not have a monetary value attached it will enter the system as a Journal Note. On this note you will see the same defined field options as you do on a transaction, at the bottom of the note.

E-MAIL CONFIRMATIONS; A FRIENDLY REMINDER

Organization Name, Email, and Phone number will be included on the e-mail confirmation sent to the person making the entry. This information is pulling directly from your eTapestry database and you can be updated within eTapestry. Please make sure this information is correct, after receiving the email from your initial tests. If it needs to be updated,

Click on **Manage**
Click on **My Organization**
Update **Personas page** with correct Organization Name, Email, and Phone Number
Save

You can update your Notification Email Addresses in eTapestry.

IMPORTANT: If your organization has multiple eCommerce pages setup, and each is setup to notify a different person at your organization please do not change the Receiving and/or Sending Email in your database. Anything entered in the database in the sections below will **override anything originally setup on your eCommerce pages**, and change the information for **ALL** ecommerce forms. If you know that you have multiple pages setup to notify different people submit an edit request to have these pages updated.

To change the Receiving and/or Sending email back to the original setup clear out any data in eTapestry in these text boxes and click Save on the page. To update all your eCommerce forms:

Click on **Manage**
Click on **My Organization**
Click on **eCommerce** (make changes to receiving and/or sending email information)
Save

Sending Email: You can only enter 1 email address in this section. The email address in this section will be the "From" address for the confirmation sent to the email address filled in by the person submitting the online entry.

Receiving Email: This section can be filled in with multiple email addresses, separated by a comma-space (john@smith.com, abby@normal.com). These email addresses will receive an email copy of entry information submitted to the eCommerce forms setup for this database.