

Release Notes for October 30th, 2010

6.9.0

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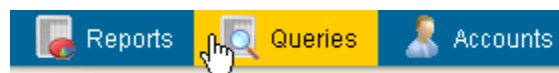
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Overview

This document serves as official internal notification of enhancements deployed during eTapestry's 6.9.0 release. **These release notes are effective as of October 30th, 2010.**

Quick Bar

In order to make key reports, queries and recently viewed accounts more easily accessible, hovering in the bottom left hand corner of the eTapestry window will bring up a new navigation bar.



Clicking on the name of custom reports and queries will take you to their setup or definition pages while clicking on the icon to the left of their name will launch and preview the reports and queries, respectively.

Access Favorite Reports and Queries

Reports and Queries marked as Favorites will display in their respective categories in the Quick Bar. Just like the Favorite Query/Report Welcome tile, the Quick Bar will display up to 10 favorites of each type which are unique to each user.

Access Recently Viewed Reports, Queries, and Accounts

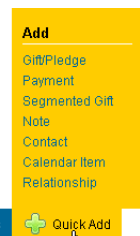
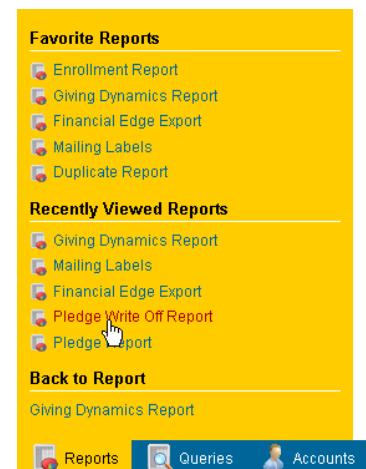
Each user's five most recent queries and reports and the previous 10 visited accounts will be stored in the Quick Bar.

Back to Report

The most unique feature to the Quick Bar is the ability to navigate back to the results page of the user's most recently run report. Now you can run a report, drill into an account, and quickly navigate back to the results of that report. The Back to Report link is available for up to one hour since you last accessed the results.

Quick Add

Only while on an account, a fourth option is displayed in the Quick Bar: Quick Add. This allows users to add frequently used Journal Types as well as new Relationships.



Cart Updates

A number of added Cart features are present in this release, including:

Discounts

Now you can set up and apply discounts to specific items within your cart. There are two different types of discounts that can be created: Flat Amount and Percentage. Discounts can require a code or be available to anyone purchasing the qualifying items. Date restrictions can also be placed on when the discounts can be used.



Create Discount

Internal Information

Name

Description

Criteria

Who Should Receive This Discount?

☐ Everyone gets this discount

☒ Those that enter the specific code

When Is This Discount Applicable?

☐ Any time

☒ Only valid from to

Discount Type

☐ Flat Amount

☒ Percentage

Applicable Items

[Add/Remove Items](#) % [Update All](#)

Sort By [Name](#) [Category](#) [Regular Price](#) [Discount Price](#) Displaying 3 of 3 items


<input type="text" value="4"/> %	Moneyball Books	Regular Price: \$12.00 Discount Price: \$11.52	Remove
<input type="text" value="4"/> %	Freakonomics Books	Regular Price: \$15.99 Discount Price: \$15.36	Remove
<input type="text" value="4"/> %	Initech Mugs	Regular Price: \$8.75 Discount Price: \$8.40	Remove

[Add/Remove Items](#)

Items are added and removed to each individual discount and discount amounts applied. You can apply a blanket discount to all items by using the “Update All” button at the top of the Applicable Items area.

When on the cart, discounts are entered while on the “My Cart” page.

Your Cart

Item	Qty	Unit Pri
 Dharma Mug \$0.87 off each Promo Code: member10	<input type="text" value="1"/> Remove	\$8- \$7.

St

Using a Promotion Code?

Promotion Code(s) Provided
[\[Remove\]](#) **member10** \$0.87 off select items listed above.

[Continue Browsing](#)

Internal Recording of Discounts

Discounts are recorded on the transaction level as a new set of fields under the transaction's Order Information tab. Query and report fields have also been added for Discount Name, Promo Code, and Discount Amount.

Any items with applied discounts will also display the discounts while on the item page.

Order Information *	
Item Information	
Name:	Freakonomics
Quantity:	1
Discount Information	
Name:	Membership
Total Discount:	\$1.59
Promo Code:	member10
Shipping Information	

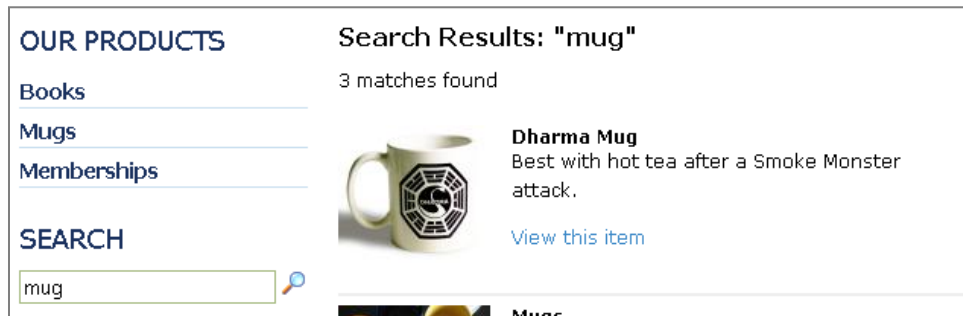
Rich Text Descriptions

Now Category and Item Descriptions can display formatted text and hyperlinks on the cart.

Item Identification	
Name	<input type="text" value="Season Pass"/>
Short Description	<div> B I U Font Font Size </div> <p>Tickets for the entire season (12 shows).</p> <ul style="list-style-type: none"> • 1/4/2011 • 3/15/2011 • 5/8/2011 • 7/7/2011

Online Item Search

An online item search has been added that will find partial word matches within the Item and Category names and descriptions. This way searching on "book" will bring up items with both "book" and items with "notebook" in the title or description.



This capability can be disabled in the Cart Preferences under online options.

Address Validation

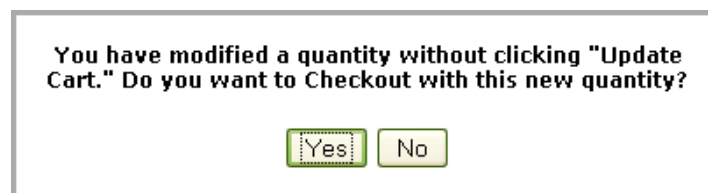
Keeping in line with how addresses are handled on Personal Fundraising, a customer's country is now asked prior to all other address fields to conditionally format the state/province list as well as do proper Postal Code validation depending on the particular country.

SSL Security Certificate Logo Added

In order to make all customers fully aware of the level of data security used for their credit card information, the appropriate security logo has been placed on the checkout pages.

Quantity Update Notification upon Checkout

If a customer modifies the quantity of items and attempts to checkout without selecting "Update Cart," we will now present a notification asking if they would like to checkout with their updated quantity or remain on the page to correct any mistake.



Other Enhancements

Here are some items that were added but were not part of a larger project.

Date, Currency, Number and Text Formatting Options in Reports

Now the same options that were available to these field types in Correspondence have been carried over to Reports. The options are:

Dates: Original (mm/dd/yyyy); Long format (e.g. October 22nd, 2010); Month/Day; Month/Year

Currency: Full; No Decimal; Full, No Currency; No Decimal, No Currency

Number: Original; Full; No Decimal

Text: Original; Lower Case; Upper Case

Addition of Attachments at the time of Journal Creation

Now you can upload attachments to journal items without having to save them first. The attachments capability is available on new Journal Entries. Uploading multiple attachments is now easier since the page no longer reloads with each uploaded file.

QuickBooks Export Update

Changes have been made to the QuickBooks Export to correct discrepancies with the “ADDR4” column, location of the Fund, and “MEMO” columns. As a result, the import process into QuickBooks should now be much more streamlined.