Customizing Your Database

Blackbaud eTapestry

In eTapestry, you can customize the data displayed on several screens, tailoring your database to fit your needs. Make the most of your database by taking advantage of eTapestry’s customizable features - use this document as a guideline to customize any of the following screens:

* [**Dashboard Customization**](http://app.etapestry.com/help/index.php/Page_Customization#Dashboard_Customization)
* [**Home Page Customization**](http://app.etapestry.com/help/index.php/Page_Customization#Home_Page_Customization)
* [**Journal Page Customization**](http://app.etapestry.com/help/index.php/Page_Customization#Journal_Page_Customization)
* [**Account Header Customization**](http://app.etapestry.com/help/index.php/Page_Customization#Account_Header_Customization)
* [**Search Results Customization**](http://app.etapestry.com/help/index.php/Page_Customization#Search_Results_Customization)
* [**Editing Save And Options**](http://app.etapestry.com/help/index.php/Page_Customization#Editing_Save_And_Options)

Each of these areas can be customized differently for every user on your database, allowing each user to set up the database in the manner that best suits their needs.

You can also customize some options in the database through **user preferences** and **organization preferences**.

First we’ll discuss the User and Organization preferences:

**User Preferences**

The User Preferences can be modified by clicking on Main > My User Preferences. Some of the changes that you can make here include the following:

* Specify how many items to view in search results and on the journal
* Set your Locale/Time Zone (used for data entry, reports, and scheduling emails)
* Duplicate check on Save
* Default Export Extension (xls or mrg)
* “Use External Program for Email”

**Now onto Dashboard preferences:**

To customize, click on the Select Tiles and Layout link at the bottom of the Dashboard page.

Place a check next to each of the tiles that you would like to include on your dashboard. Then, click the circle next to the layout that you would like your Dashboard to have. Click Save to save your selections and return to the Dashboard.

Administrative users can create security preferences that block users from including these tiles on their Dashboard pages. If you do not see some of these tiles listed, it may be due to your security rights within the database.)

**Home page customization:**

The **Home page** is the account page where you can see an general overview of whole account. You can customize it to include only the tiles you wish to see. To customize the Home page, click the Select Tiles and Layout link at the bottom of the Home page.

This takes you to the Home page customization area, where you can select the content that you would like to display on the page and the layout of the page.

On the Home page, you can drag and drop your tiles into the locations that you'd like them to appear within your selected page layout. If you'd like to remove a tile, you can click the icon in the upper right of the tile.

**Journal Page Customization:**

Click on the Add/Remove columns at the bottom of the journal screen

This opens the Add/Remove Columns page for the Journal screen.

To select a new column, click on the appropriate category under "Select Columns to Display," and check the box next to the column.

The column will then appear in the list of selected columns on the right. To move the column up or down in the column order, place your cursor over the column. When the cursor turns into the , click and hold the mouse button. Drag the column where you want it to appear in the list, and release the mouse button to drop it into place.

To remove a selected column, you can either uncheck the box next to that column in the "Select Columns to Display" list, or you can click the next to the column. When you've finished selecting your columns, click Save to save the changes.

Please note that the data in any columns that are not default columns will not link back to the journal entry.

**Account Header customization:**

The Account Header is the data that appears at the top of the account when you have the account open. By default, the header will display the Address, default Phone, Email, and Web Page data from the account's primary persona. You can customize the data shown by clicking **Edit Header** in the Account Header

To select a new field, click on the appropriate category under "Select Columns to Display," and check the box next to the field. You can choose to include other Persona fields, the account number (located in Account Fields), Phone Types, or any Persona, Constituent, Tribute, or User user defined fields that have been set up on your database.

The column will then appear in the list of selected columns on the right. To move the column up or down in the column order, place your cursor over the column. When the cursor turns into the , click and hold the mouse button. Drag the column where you want it to appear in the list, and release the mouse button to drop it into place.

You can also add a new Row to the header by clicking Add Row. You can move fields into the new row so that they will appear on a different line in the header.

To remove a field that you don't want to see in the header, you can either uncheck the box next to that field in the "Select Columns to Display" list, or you can click the next to the field.

When you've finished selecting your fields, click Save to save the changes. Any new fields that you have selected will now be displayed on the header of all accounts. (If the field is empty on the account, it will also be blank in the header.)

**Search results customization:**

You can customize the fields that appear in the search results on the Find Account screen, allowing you to display the fields that are most useful for you when you are searching for accounts.

To add fields to the search results on the Find Account screen, click the Add/Remove Columns link in the upper right hand side of the Find Account screen

By default, the Last Entry and Quick Add columns will be selected. To add other columns, click on the appropriate category under "Select Columns to Display," and check the box next to the field. You can choose to include other Persona fields, the account number (located in Account Fields), Phone Types, or any Persona, Constituent, Tribute, or User user defined fields that have been set up on your database.

The column will then appear in the list of selected columns on the right. To move the column up or down in the column order, place your cursor over the column. When the cursor turns into the , click and hold the mouse button. Drag the column where you want it to appear in the list, and release the mouse button to drop it into place.

To remove a column that you don't want to see in the search results, you can either uncheck the box next to that field in the "Select Columns to Display" list, or you can click the next to the field. Please note that you cannot remove the Role, HH, or Personas columns from the search results.

When you've finished selecting the columns, click Save to save the changes. Any new columns that you have selected will now be displayed in the search results on the Find Account page. (If the field is empty on the account, it will also be blank in the search results.)

**Save and Customization:**Most screens in the database include a "Save And" option which allows you to save the changes on the current screen and automatically navigate to another area in the database after the save has been completed. You can customize which navigation options appear in the Save And menus on the following pages: Add Account, Defined Fields, Edit Header, All Journal Entry pages, My Organization, My User, Other, Persona, Preferences, Relationship, and Rights. You can also choose which option will appear first in the Save And list on each screen, allowing you to set the option that you use most frequently as the first, default choice.

To edit the Save And options on a particular screen, begin by navigating to that screen and clicking the Edit Options icon next to the Save And menu.

A warning message will pop up to let you know that this action will leave the current page without saving. Click OK to proceed to the Add/Remove Options screen, or click Cancel to remain on the current screen.

In the Select Options column, check the box next to any options you'd like to add to the Save And menu on this screen

Selected options will appear in the column on the right side of the page. To move an option up or down in the list, place your cursor over the option. When the cursor turns into the , click and hold the mouse button. Drag the option where you want it to appear in the list, and release the mouse button to drop it into place. It is recommended that you place the option that you use most frequently at the very top of the list. This will make that option the default Save And option for the page.

To remove an option that you don't want to see listed in the Save And menu, you can either uncheck the box next to that option in the "Select Options" list, or you can click the next to the option. Please note that you must have at least one Save And option selected.

Click the Save button once you have made your selections and placed them in the order you would like to see them. Your Save And preferences will be saved for that screen.