1.1 Standard Field Set Consulting

Service Description

While eTapestry allows your organization to create custom fields, we know there are common field sets that nearly all non-profit organizations need to track. For this service we help you take some of our more common field sets and tailor them to your specific needs. This service covers any one of the following standard field sets: Grant Tracking, Volunteer Tracking, Major Gift Tracking, Moves Management, Benevon, Planned Giving Tracking.

Remote Preparation

Your organization's prep work includes:

- Sign up to request consulting: https://app.etapestry.com/hosted/ConsultingRequestForm/index.php
- Finish training listed in Pre-Consulting Worksheet: https://app.etapestry.com/hosted/ConsultingRequestForm/Pre-Consulting Worksheet Mission Specific UDFs.doc
- Return completed Pre-Consulting Worksheet back to consulting@etapestry.com
- You will receive a scheduling link to sign up for time with a consultant

Delivery Process

You will work with a consultant through the following steps. Once these steps are complete we will consider the service delivered and close your project. If you determine you need additional assistance in this or any other area, you can request additional consulting services using the request form below:

https://app.etapestry.com/hosted/ConsultingRequestForm/index.php

1.2 Project Approach

The following describes the implementation approach for **Custom User Defined Fields**

Project Approach		
Phase	**Purpose**	**Overview of Tasks**
Prepare	To coordinate with the consultant to schedule dates and times for each session. To provide consultant with necessary information regarding the queries and reports you want created.	• Complete preconsulting survey and identify the standard field set you need help with. • Schedule initial consultant call, consultant configuration work and secondary consulting session.
First Session	To review queries and reports needed.	• Discuss details of customizing standard fieldset and queries and reports needed to work with those fields. Download standard field set if necessary.

<table>
<tr><th colspan="3">Project Approach</th></tr>
<tr><td></td><td></td><td>Review database structure and discuss revisions to database if necessary.</td></tr>
<tr><td>Configure</td><td>To configure queries and reports based on preconsulting survey and initial consulting session.</td><td>Configure the following Functional Areas:
Consultant will configure required standard fields and add fields as needed; as well as customize built-in queries and reports. Add framework for any additional queries and reports.
Consultant will test fields, queries and reports created.</td></tr>
<tr><td>Second Session</td><td>To walk through queries and reports created</td><td>Walkthrough setup of standard defined fields, queries and reports created by consultant, standard queries and reports.
Customer will conduct a data entry walk through using their data
Customer and consultant will run queries and reports created and adjust if necessary</td></tr>
<tr><td>Wrap Up</td><td>To complete the activities required to formally end the implementation project.</td><td>Create an engagement summary document that outlines the following:
List of fields,queries and reports created
Any special instructions regarding customization</td></tr>
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