MICRO EDGE®

GIFTS® 6 VERSION 6.6

Employee GIFTS®

User's Guide

NOTICE

The software described in this document is furnished under a license agreement. The software may be used or copied only in accordance with the terms of the agreement. No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording, for any purpose without the express written permission of MicroEdge, LLC. Information in this document may be revised from time to time without notice.

U.S. Government Users: *Use, duplication, or disclosure is subject to the restrictions as set forth in the Rights in Technical Data and Computer Software clause at DFARS 252.227-7013 subparagraph (c)(1)(ii), or the Commercial Computer Software -- Restricted Rights at CFR 52.227-19, subparagraphs (c)(1) and (2), as applicable. Manufacturer is MicroEdge, LLC. 619 W. 54th Street, New York, NY 10019.*

Copyright © 2014 by MicroEdge, LLC. All rights reserved.

Part number: EMG66-UG

Publication date: December 2014

GIFTS, Employee GIFTS, Matching GIFTS, Volunteer GIFTS, Essential GIFTS, GIFTS Connections, MyGIFTS, Award, Riverside Grants, and the Grants Manager are trademarks of MicroEdge, LLC. Other brands, or products, are the trademarks or registered trademarks of their respective holders, and should be treated as such.

Printed on Recycled Paper.

Contents

Welcome to Employee GIFTS 1
Components of the Employee GIFTS Module 2
Using This Manual 3
Chapter Summaries 4
Conventions Used in This Manual 5
Using Online Help 8
Maintenance and Support Program 9
Using the Documentation on Your GIFTS CD 10

1 Employee GIFTS Basics 1
What is Employee GIFTS? 2
About GIFTS and Employee GIFTS 3
Matching GIFTS and Volunteer GIFTS Workflow 8
Starting GIFTS 10
The GIFTS User Interface 13
Data Entry 18
Working with Coding Sheets 23

2 Setting Up Employee GIFTS 1
Getting Started 2
Step 1: Setting Security Permissions 3
Step 2: Creating Employee GIFTS Classifications 11

Step 3: Setting the Employee GIFTS Preferences 16
Step 4: Setting Up Matching and Volunteer Programs 20
Step 5: Setting Up Your Correspondence Templates 33
Step 6: Setting up the Donor Coding Sheet 37
Maintaining Your Program Setup 44

3 Working with Gifts 1

Finding Gifts 2
The Matching Gifts and Volunteer Gifts Folders 9
Processing Gifts 11
How GIFTS Calculates the Award Amount 22
Tips for Efficient Data Entry 31
Holding Gifts 34
Removing a Gift Hold 35
Approving a Declined Gift 36
Viewing the Audit Trail for a Gift 37
Creating a Grant for a Single Gift 38
Undoing an "Out-of-Period" Grant 41
Transferring Gifts to Another Branch 42
Deleting a Gift 44

4 Period-End Processing 1

Period-End Processing at a Glance 2
Step 1: Creating and Managing Batches 4
Step 2: Activating Period-End Processing 9
Step 3: Running the "Schedule of Gifts to be Paid" Report 10
Step 4: Creating Grants for Approved Gifts 12

Step 5: Processing Payments 16
Step 6: Generating Recipient Correspondence 27
Step 7: Generating Donor Correspondence 29

5 More About Donors 1
Finding Donors 2
The Donors Folder 6
About Donors and Contacts 8
Creating or Modifying a Donor 11
Holding Gifts for a Donor 20
Transferring Donors to Another Branch 22
Deleting a Donor 24

6 More About Organizations 1
Finding Organizations 2
The Organizations Folder 7
Creating or Modifying an Organization 9
Holding Gifts for an Organization 22
Deleting an Organization 24

7 Reporting 1
Printing or Exporting from the Organizer 2
Producing GIFTS Reports 4

8 Importing Donors 1
About the Donor Import 2

About the GIFTS Import Module 3
How Donors are Created and/or Updated 5
Running an Import 9
Canceling and Re-doing Imports 13
Donor Import File Layouts 14

Welcome to Employee GIFTS

Thank you for choosing Employee GIFTS, the premier software for tracking gifts made on behalf of your company's employees. This chapter describes how to use this manual to guide yourself through the process of setting up and using Employee GIFTS.

In This Chapter

Components of the Employee GIFTS Module **2**

Using This Manual.....**3**

Chapter Summaries **4**

Conventions Used in This Manual **5**

Using Online Help **8**

Maintenance and Support Program.....**9**

Using the Documentation on Your GIFTS CD..... **10**

Components of the Employee GIFTS Module

Two Employee GIFTS components are available:

- Matching GIFTS can track your matching gift forms and calculate the award amount due the recipient organizations as a result of your donors' gifts. At the end of each period, the gifts awarded are summarized into grants that reflect the amount awarded to each organization in that period.
- Volunteer GIFTS can track the time that your employees have donated and the subsequent grants made on behalf of donors to the organizations with which they volunteer. As in Matching GIFTS, the gifts awarded are summarized into grants at the end of each period; these grants reflect the amount awarded to each organization in that period.

Using This Manual

If you have been using GIFTS, you are already familiar with the basic elements and concepts of the GIFTS system, including the Organizer, the Calendar, and the Report Library. Most aspects of Employee GIFTS work just as you would expect them to based on your knowledge of GIFTS.

This manual documents only those areas of the system that have to do specifically with Matching GIFTS and Volunteer GIFTS. Some aspects of the system are documented both in this manual and in the *GIFTS User's Guide* for convenience; in other cases, you are referred to the *GIFTS User's Guide* for more information.

Chapter Summaries

This manual includes the following chapters:

Chapter	Description
"Employee GIFTS Basics" on page 1	This chapter introduces Employee GIFTS, explains how it fits into the GIFTS grants management system, outlines the Employee GIFTS workflow, and describes how to work with the GIFTS user interface.
"Setting Up Employee GIFTS" on page 1	This chapter outlines all of the steps necessary to set up the system to calculate your giving. You should not process any gifts until your GIFTS administrator has gone through the steps in this chapter.
"Working with Gifts" on page 1	Typically, the processing of employee giving programs is divided into periods. During each period, forms are received and processed. This chapter describes how to enter gifts into the system.
"Period-End Processing" on page 1	This chapter describes the what happens at the end of a giving program period—the processes for generating payments and correspondence.
"More About Donors" on page 1	This chapter includes detailed information about tracking donor information.
"More About Organizations" on page 1	This includes detailed information about tracking recipient organization information.
"Reporting" on page 1	This chapter describes the Employee GIFTS reporting options.
"Importing Donors" on page 1	This chapter describes how to import donor information from an external system into GIFTS.

Conventions Used in This Manual

Before you read this manual, it is helpful to familiarize yourself with the conventions used throughout this manual. Doing so will enhance the usefulness of the documentation.

Essential GIFTS Functionality

For users of Essential GIFTS, the level of functionality that you have is determined by which options, such as the Contacts Manager, that you have purchased. The following icons are used in this manual to indicate which features are available on your system.

Icon	Description
	This feature is available for users of the Contacts Manager option.
	This feature is available for users of the Correspondence option.
	This feature is available for users of the Calendar / Activity Tracking option.
	This feature is only available in GIFTS.

Please note that the name "GIFTS" is used generically to refer to any configuration of the system, including the Essential GIFTS configurations.

Since GIFTS is a modular system available in a variety of configurations, the screens shown in this document may not always reflect the configuration of your system.

Example: The number of folders displayed in the GIFTS Organizer is dependent upon your configuration. Here are the Organizer folders for a basic GIFTS configuration:

These are the folders for a system with optional modules; in this case, both Employee GIFTS and the Budget Module:

Procedural and Typographic Conventions

Procedural conventions help identify procedures and tasks you'll perform.

- Important procedures are always given as a numbered set of tasks.
- Check marks indicate a checklist of general items or tasks.
- Characters given in this font are examples of data that you should enter, such as the directory path to a file.
- Data elements within the GIFTS system are presented with an Initial Capital Letter. For example, the word "donor" is capitalized when it is used to refer to a Donor record within GIFTS.

Different Types of Notes

When appropriate, notes provide additional information or warnings that may apply to you. This manual uses four types of notes. Each type of note serves a unique purpose as defined below.

Note: A note with this format and the heading "Note" provides information that applies to some users. Notes apply to special situations. For example, a Note might explain minor differences in setup procedures among network and standalone systems.

Important: A note with this format and the heading "Important" provides information that applies to all users. This type of note provides information that is essential to the completion of a task.

Caution: A note with this format and the heading "Caution" provides important information that applies to all users. Pay special attention to these notes.

Tip: A note with this format and the heading "Tip" provides useful information that applies to most users. Although Tips are not essential to the completion of a task, they provide alternative methods, shortcuts, or special applications relating to the procedures in the text.

Using Online Help

While you work with GIFTS, you can find answers to your questions by reading the printed documentation or by using GIFTS online help. Use online help when you need immediate assistance. Most of the material that is in the printed documentation is also in online help.

From the Help menu of any GIFTS module, you can:

Choose	**To**
Contents	Display the contents of the GIFTS online help.
Index	Display the index of the GIFTS online help.
MicroEdge on the Web	Go to the MicroEdge Home Page. (*http://www.microedge.com*)
	Go to the latest GIFTS Compatibility Fact Sheet. (*http://www.microedge.com/support/compatibility/*
Technical Support	Display information about contacting MicroEdge Technical Support.
About GIFTS	Display copyright and release information for GIFTS.

Maintenance and Support Program

Members of MicroEdge's Maintenance and Support Program receive unlimited telephone consultation on the use of the software, assistance in error isolation and correction, prompt furnishing of any available problem solutions relating to the currently supported versions of GIFTS, and software updates.

Our toll free Technical Support hotline is available Monday through Friday, 9:00 A.M. to 8:00 P.M. Eastern time. You may contact MicroEdge's Technical Support Specialists as follows:

Phone	1-877-704-3343
Fax	(212) 757-1784
E-mail	*helpdesk@microedge.com*
Web	From the GIFTS menu, choose Help ➤ Technical Support

Note: To access the Web, you must have an Internet connection (either a LAN connection or a dial-up connection) and a frames-enabled browser (Microsoft Internet Explorer 4.0 or later, or Netscape Navigator 3.0 or later).

For details about our support policies, please refer to the MicroEdge *Client Resource Guide*. If you have any questions regarding the Maintenance and Support Program, please contact our Client Administration Representative at 1-800-899-0890, option 6, then 2, who will be happy to assist you.

Using the Documentation on Your GIFTS CD

MicroEdge provides you with the GIFTS documentation on your GIFTS CD in Portable Document Format (PDF). To view these files, you will need to install Adobe®'s Acrobat® Reader, which is available for free from Adobe Systems, Inc. at *http://www.adobe.com*.

The documentation on the CD is in the exact same format as your printed manuals. You can print out selected pages, sections, chapters, or the entire book. You can also install the files on your computer or network so you can access them online, and take advantage of features such as a "hot" table of contents, index, and cross-references within books.

Acrobat Reader's other features are described in the Reader's online Help. Note that MicroEdge does not provide technical support for the Acrobat Reader. We cannot assist you with the installation, configuration, or use of this product.

1 Employee GIFTS Basics

This chapter introduces Employee GIFTS, explains how it fits into the GIFTS grants management system, outlines the Employee GIFTS workflow, and describes how to work with the GIFTS user interface.

In This Chapter

What is Employee GIFTS? **2**

Matching GIFTS and Volunteer GIFTS Workflow **8**

Starting GIFTS **10**

The GIFTS User Interface **13**

Data Entry **18**

Working with Coding Sheets **23**

What is Employee GIFTS?

Employee GIFTS is an optional module for the GIFTS grants management system. With the Employee GIFTS module installed, expanded areas of the system are available for entering and tracking grants made on behalf of your company's employees. Two Employee GIFTS components are available:

- The Matching GIFTS functionality is used to track your matching gift forms and to calculate the award amount due the recipient organizations as a result of your donors' gifts. At the end of each period, the gifts awarded are summarized into grant records (approved Requests) that reflect the amount awarded to each organization in that period.
- The Volunteer GIFTS functionality is used to track the time that your employees have donated, and the subsequent grants made on behalf of donors to the organizations with which they volunteer. As in Matching GIFTS, the gifts awarded are summarized into grant records at the end of each period; these grants reflect the amount awarded to each organization in that period.

Matching GIFTS and Volunteer GIFTS are parts of the Employee GIFTS suite; they are purchased separately, but most of the options for setting up your Employee GIFTS programs are common to both. The term "Employee GIFTS" simply refers to options and functionality that are common to the tracking of both matching gifts and volunteer gifts programs.

In most respects, the tracking of Matching Gifts and Volunteer Gifts is very similar, and is documented only once in this manual for both options. Cases where functionality is different for matching gifts and volunteer gifts are clearly indicated.

About GIFTS and Employee GIFTS

Employee GIFTS tracks matching and volunteer gifts, and uses the information to create grants in the form of approved GIFTS Requests. Organizations, Contacts, and other GIFTS records are also shared with and used in Employee GIFTS.

While you may be mainly concerned with tracking your matching and/or volunteer giving programs, you may wish to take the time to understand how the Employee GIFTS options fit into the overall GIFTS system.

What Does GIFTS Do?

The GIFTS grant-tracking system tracks requests for funding that are received. For each proposal, the system maintains a Request record; GIFTS tracks whether or not these requests are subsequently approved for funding or declined.

A Request record contains the vital information about the request, such as a description of the project, how much was requested, and how much was subsequently awarded.

Each Request is associated with an Organization record (which tracks information about the organization that requested funding) and a Primary Contact, who is generally an employee of the requesting organization.

In the GIFTS Organizer, there are folder tabs for these Request, Organization, and Contact records.

What Does Employee GIFTS Do?

When you have the Matching GIFTS and/or Volunteer GIFTS modules included in your GIFTS system, there are additional folders in the GIFTS Organizer that are used to display information from individual Gift records (either Matching Gifts or Volunteer Gifts) and from your employee donors. Information about these employees is maintained in Donor records.

In the Matching Gifts folder, you track the Matching Gift records that are received. The system calculates how much money should be awarded to each organization based on the guidelines and limits that have been set up for your giving program.

In the Volunteer Gifts folder, you track the Volunteer Gifts records of your employees and the subsequent awards to the organizations with which they volunteer. The system calculates the award amount by evaluating the number of hours volunteered and checking the program guidelines and limits that apply to the Donor and recipient Organization.

Each Gift record—whether for a Matching Gift or a Volunteer Gift—is associated with both a recipient Organization and a Donor.

How Do Employee GIFTS and GIFTS Fit Together?

In order to prevent you from creating duplicate Organization records in your database, GIFTS maintains a single Organization record for each organization. This same Organization record is used both by Employee GIFTS (when donations are made to the organization) and GIFTS (when the organization requests funding from the giving programs tracked by the main GIFTS system).

The following diagram illustrates how matching gifts, volunteer gifts, and Requests share the Organizations file.

The GIFTS Organizer includes a folder for both Contact records and Donor records. However, since the same individual may be both a contact and a donor, the GIFTS database shares information between Contact and Donor records.

Note: If you are using Essential GIFTS without the Contact Management option, you do not have access to detailed Contact information.

Contacts and Donors have separate folders and data entry screens because the information you want to capture for each type of individual is usually specific to the context in which you are working:

- In Donor records, you can note the branch to which he or she belongs in your organization and his or her status as an employee (full time, part time, and so forth).
- In Contact records, you can note his or her academic background or place him or her on your mailing lists.

When you are ready to process Gifts for a particular period, you create grant records (Requests with a disposition of "approved") indicating the amount awarded each organization for that period. Each grant is associated with a Payment record noting the cumulative amount.

When the grants are created, you have full use of the GIFTS Payment-tracking features to make sure that all of your awards are paid. If you are using the optional Budget Module, you can also reflect your gift awards in your budget for the year.

The graphic below shows how the Matching Gifts and Volunteer Gifts records fit in with GIFTS:

If you use GIFTS to track Requirements and Activities, you can use these features to manage your Employee GIFTS grants; you can also maintain Contact information for your Donors.

Matching GIFTS and Volunteer GIFTS Workflow

Every matching or volunteer giving program is defined by its rates and limits. In this respect, your organization is unique from other organizations that have employee giving programs. In order for Employee GIFTS to work effectively for you, it is essential that you set up the system to correctly calculate your giving.

"Setting Up Employee GIFTS" on page 1 outlines all of the steps necessary. You should not enter or process any Gift records until you have gone through the steps in that chapter.

Typically, the processing of employee giving programs is divided into periods. During each period, forms are received and processed as follows:

1. Forms are received from the donors or recipient organizations.
2. Your staff enters completed forms into the GIFTS system."Working with Gifts" on page 1 describes how to add and modify Gift records.
3. Based on the guidelines and limits for your program, GIFTS evaluates each Gift and generates the appropriate Award Amount. If the Gift is not eligible for matching—for instance, if the Donor record indicates the giver is not eligible or the limits set up for the Organization have been exceeded—GIFTS declines the match.

"Period-End Processing" on page 1 describes the period-end processes for generating payments and correspondence at the end of a giving period. Gifts are processed in batches. A batch is simply a group of Gifts that you've chosen; you choose the Gifts that are to be processed in a given period, and assign a name to the batch for future reference.

At the end of a period, you can:

1. Create a batch that includes approved Matching or Volunteer Gifts from the giving period.
2. Produce reports that detail the payments that are to be made for that period.

3 Create grant records that consolidate all of the matches for each recipient.

4 Process the Payment records created for the grant using the standard GIFTS Payment-processing functionality.

5 Produce correspondence for donors and recipient organizations for that period.

While "Working with Gifts" includes basic information about entering and tracking Donors, "More About Donors" on page 1 includes detailed information about Donor records. Likewise, "More About Organizations" on page 1 provides more information about tracking Organization records.

Finally, you can use the options described in "Reporting" on page 1 to generate reports for your giving programs.

Starting GIFTS

Access to GIFTS is restricted to users who are registered in the system; your GIFTS administrator sets up the security features. This section describes how to:

- Log in to GIFTS
- Set the GIFTS password that controls access to your user account
- Change your GIFTS password
- Log in as a different user while you are in GIFTS
- Exit GIFTS

Logging in to GIFTS

To start GIFTS, you must have a login ID assigned by your GIFTS administrator. If you do not know your login ID or you have trouble logging in to GIFTS, please contact your GIFTS administrator.

Note: If your GIFTS administrator has integrated your Windows NT login with GIFTS, you are not prompted to log in.

Use the following procedure to start and log in to GIFTS:

1. Open the Windows Start menu and select Programs ➤ MicroEdge GIFTS ➤ GIFTS/Essential GIFTS. You are prompted to log in:

2. Enter your login ID and password and click OK. GIFTS starts.

Setting Your Password

To prevent unauthorized use of the user account, you can set a password for your user account. To set a password for your user account:

1 Log in to GIFTS.

2 From the main menu, select Options ➤ Change Password. You are prompted to enter a password:

3 If no password currently exists for your user account, leave the Old Password field blank.

4 Enter a password in the New Password field.

5 Enter the password again in the Verify field. This ensures that you typed the password correctly.

6 Click OK. Your password is saved.

Changing Your Password

To change the password for your GIFTS user account:

1 Log in to GIFTS.

2 From the main menu, choose Options ➤ Change Password. You are prompted to enter a password:

3 Enter your current password in the Old Password field.

4 Enter your new password in the New Password field.

5 Enter the new password again in the Verify field. This ensures that you typed the password correctly.

6 Click OK. Your new password is saved.

Logging In as a Different User

In some cases, it is convenient to log in to GIFTS on another user's workstation. You can do so without having to exit GIFTS. To log in as a different user:

1 From the main menu, choose Options ➤ Change User. You are prompted to log in to GIFTS.

2 Log in using your login ID and password (if necessary).

Exiting GIFTS

When you are finished with a GIFTS session, choose File ➤ Exit from the main menu to exit the GIFTS application.

If you are using additional modules, such as the Administrator Module, Budget Module, or A/P Module, exiting GIFTS does not close these modules. Choose File ➤ Exit from the main menu of each module in order to exit them.

Caution: Never shut off your computer without first exiting out of all applications, including Windows. Turning off the power to your computer or restarting without first closing GIFTS and all your other software applications can cause damage to your system.

The GIFTS User Interface

The elements of the GIFTS user interface comply with the standards used by most Windows applications. This section describes how you select items that are displayed on your screen by highlighting them, and details the tools and menu options available. The use of data entry fields is described in "Data Entry" on page 18.

Selecting Items

Often, you work in GIFTS by selecting an item, such as a Request, and then initiating an action. For example, you might select a proposal from a list of Requests and then approve it.

In general, you select items displayed on your screen by moving the point over them and clicking the left mouse button once. To indicate that you have selected an item, GIFTS highlights it. For example, here a user has highlighted an approved Request:

Throughout this manual, selected items upon which an action is to be performed are referred to as being highlighted or selected.

Selecting Multiple Records

You can select more than one record in order to perform the same operation on all of the selected records at once. To select more than one record, hold CTRL as you click on records. Each record you click on is highlighted; you can de-select records by clicking on them again.

You can also select a record, hold SHIFT, and click another record to select all of the records in between (including the two you clicked on directly).

Selecting All Records

To select all of the records in the Organizer grid, click the right mouse button and choose Select All, choose Edit ➤ Select All from the main menu, or press CTRL+A. All of the records in the Organizer grid are highlighted.

Main Toolbar

A toolbar is a group of buttons. Each button on the toolbar represents a certain function. If you click on the button, the function that it represents is performed.

The Main tool bar in GIFTS is located at the top of the screen. The tool bar and the buttons on it remain constant regardless of the data view or entry screen you are currently displaying. However, buttons are disabled and enabled to fit the options available to you at that moment.

Enabled buttons appear in full color; you can click them to initiate an action. Disabled buttons appear dimmed; nothing happens if you click a disabled button.

To view the tool tip that describes a tool, move the mouse pointer to the button and allow it to remain there. After a brief pause, the tool tip is displayed.

Menus

The main menu is displayed at the top of the GIFTS screen, and consists of the File, Edit, View, Action, Quick, Options, and Help menus. Each of these menus leads to a menu from which you can choose further options.

A menu and toolbar are also displayed at the top of data entry screens like Request records and Payment records. These menus include tools and

options that are appropriate for that type of record. For example, you can choose Action ➤ Approve from a Request record to Approve the Request.

Selecting Menu Items

To select a menu item, move the pointer to one of the items in the main menu and click the left mouse button once. The menu is "pulled down" and the choices on it are displayed. You can select an item within the menu item by moving the pointer to the desired item and clicking the left mouse button. As described below, you can also use the keyboard to select options from the main menu.

Grid Displays

GIFTS often displays information in the form of a grid made up of rows and columns. The most frequently-used grid is the Organizer grid.

Grids are used to display a variety of information. For example, Process Logs display information in a grid.

Note that you can identify a grid by the following characteristics:

- ✔ The color of the rows in the grid alternates between white and light yellow to help you distinguish between the items in the grid.
- ✔ If the grid has more than one column, each column has a title that appears in the top border of the grid.
- ✔ Along the top and left borders of the grid, thin lines divide each item.
- ✔ On the left side of the grid, an arrow indicates which item is currently selected.

With the following options, you can change the size of the grid items to meet your needs.

Re-sizing a Grid

You can change the width and height of the items in a grid. To adjust the width and height of the items in a grid, move the pointer to one of the vertical or horizontal lines that divides the columns or rows. The pointer will change to the re-size tool.

You can now click and drag the line to increase or decrease the width or height of the column or row. When the column or row is the appropriate size, release the mouse button.

Hiding Grid Columns

To hide a column, move the pointer to the column title and click the right mouse button. The column is hidden.

A small area of the hidden column is displayed so that you can expand the column later by clicking the right mouse button in this area. If you are printing an ad hoc report from the Organizer, this area does not appear on the report. Hidden columns are restored when you exit GIFTS.

You can also hide and restore columns by re-sizing them. Note that you cannot right-click on a column to restore it if you hid it with the re-size tool.

Data Entry

This section describes how to enter data into the text, date, numeric, and coded fields that you will encounter while entering data into your GIFTS system.

Working with More Than One Record

You can work with more than one record at a time in GIFTS. Open two or more Requests, Organizations, Contacts, or other type of GIFTS record and compare data side by side. You can even copy and paste information from one form to another.

These GIFTS records will appear as separate tasks in the Microsoft Windows task bar. You can click on the task bar to switch between the GIFTS records that you have open.

Entering Text Fields

You can enter characters (letters, numbers, and so forth) into a text without restriction. The Project Title field for Requests is an example of a text field.

To enter data into a text field, first move the cursor into it using either the following methods:

- Move the pointer to the field and click the left mouse button.
- Press TAB to move the insertion point from field to field (until it is in the text field).

You can use the standard Windows editing commands within the GIFTS text fields:

Command	Description
Cut (CTRL+X)	Cut the highlighted text to the Windows clipboard. The item is removed from the field or document. You can then paste it within GIFTS or into another application, such as a word processor or spreadsheet. The item remains in the clipboard until the next copy or cut command, or when you exit Windows.
Copy (CTRL+C)	Copy the highlighted text to the Windows clipboard. You can then paste it within GIFTS or into another application, such as a word processor or spreadsheet. The item remains in the clipboard until the next copy or cut command, or when you exit Windows.
Paste (CTRL+V)	Copy the text from the Windows clipboard into the current insertion point. The material remains in the clipboard and can be pasted multiple times.

Spell Checking Text Fields

You can check the spelling of the text in any field that is marked with "F3=Spell." For example, you can spell check the background information for an Organization.

To run a spell check:

1. Make sure that the cursor is inside the field you want to check.
2. Press F3. The spell checker verifies that each word is spelled correctly.
   - If no words are misspelled, a message indicates that the check is complete.

❖ If there are spelling errors, the spelling checker options are displayed.

The Not in Dictionary field contains the word that was not found in the spelling checker's dictionary. The following options are available:

Option	Description
Ignore	Ignore the current word and proceed to the next misspelled word.
Ignore All	Ignore all occurrences of this word within the field you are checking.
Change	Select a word in the Suggestions list to enable this button. The selected word then appears in the Not in Dictionary field—which is now labeled the Change To field. If the word in the Change To field is not the correct word, you can choose another from the Suggestions list or type the correct word into the Change To field. Then click this button to change the word.
Change All	Change all occurrences of this word to the word displayed in the Change To field.
Add	Add the current word to your custom dictionary; it is permanently saved to the custom dictionary on your workstation. The filename of your custom dictionary is specified in the Add Words To field. The spelling checker uses both its main dictionary and your custom dictionary. Regardless of the custom dictionary you are using, the spelling checker always has access to its main dictionary.
Cancel	Cancel the spelling check.

Entering Date Fields

Date fields are displayed and entered in the format defined in your Windows Regional Settings. For more information about the Regional Settings, please refer to the "regional settings" or "regional options" entry in the Windows online help index.

GIFTS verifies that the dates you enter exist. For example, you cannot enter February 29, 2003 because 2003 is not a leap year. If you enter an invalid date, you will not be able to save the record.

You may not always receive a message like this when you enter invalid date. For example, if you enter an invalid date in the Request Date field of a Request, the Save and Close button will simply be unavailable.

To enter a date, you can:

- Type the date into the field.
- Press F3 to enter the current date into the field.
- Press F4 or click the down arrow to the right of the field to choose the date from a calendar. The date currently entered in the field (or the current date, if the field is blank) is highlighted. To choose a specific date, click on it.

Entering Numeric Fields

Enter numbers or digits into numeric fields using your keyboard. If NUM LOCK pressed, you can enter numbers using the keypad. Any decimal points or commas needed are automatically supplied.

Entering Currency Fields

Enter numbers or digits into currency fields using your keyboard. If NUM LOCK is pressed, you can enter numbers using the keypad. Any decimal points, currency symbols, or commas needed are automatically supplied.

By pressing INSERT, you can toggle between "insert" mode, in which you can enter additional digits into the field, and "overwrite" mode, where you can overwrite existing digits.

The currency used by GIFTS is determined by the Windows Regional Settings. For more information, please refer to the "currency" entry in the Windows online help index.

Entering Coded Fields

A coded field has a list, maintained by your GIFTS administrator, from which you can select a value to enter in the field. Coded fields are used throughout the system.

To enter a value in a coded field, click the list to display the values that you can answer. Click on the value you wish to select.

You can also type an entry into a coded field. The auto-complete feature will fill in the rest of the entry. For example, if you wanted to change the entry in the Status field above to "Active Grant," you could type only the first two or three letters, and the rest of the coded entry would appear.

Working with Coding Sheets

When entering data, you need to use consistent terms to classify your information. To address this issue, GIFTS has a *Coding Sheet* for each of your Requests, Organizations, Contacts, and Donors that allows you to choose classifications from a set categories defined by your GIFTS administrator.

Note: Essential GIFTS does not have Coding Sheets for Organizations, Contacts, or Donors.

Example: This is the Coding Sheet for a Request.

Note: The number of codes that you can specify for any given record is limited to approximately 60.

Coding Sheets are also displayed when you search by Coding Sheet data in Quick Find.

Adding Codes

To add classifications to a Coding Sheet, click on a category or highlight the category and click Add. The available codes are displayed.

Note the following features that enable you to find the code you want quickly and easily:

- In the Find field, you can enter the first several letters of a code and press ENTER or TAB to search for it. GIFTS highlights the first code with a Description value or Code value that contains those letters. To locate the next code that contains those letters, choose Action ➤ Repeat Find from the menu or press F3.

- You can use the arrows on the toolbar or click on the folder icons to collapse and expand the levels, or "tiers," of codes.

- GIFTS remembers whether you chose to "expand all" or "collapse all" levels each time you work with a category, and automatically expands or collapses all of the levels the next time you work with that category.

- You can also highlight a folder and click Expand Branch to expand the levels beneath it.

- The Select Codes window is a Smart Form™. To change its position, click and drag on the daisy at the top left of the form. To re-size it, click and

drag on the bottom right corner. GIFTS remembers the size and position between your GIFTS sessions.

Tip: When coding Organizations and Requests, you can add codes for multiple categories without closing this window by clicking on the categories on the Coding Sheet as you work with the codes.

When coding Organizations and Requests, you don't have to close the Select Codes window to work with a different category. Just click on a category to view its codes.

In each category, you can select one or more codes. The number of codes allowed per each category is defined by the GIFTS administrator. If you attempt to add a code after the limit has been reached, GIFTS gives you the option to replace the existing code or, if more than one code is allowed, one of the existing codes.

Choose a code to replace, if necessary, and click OK to replace the existing code.

Primary and Secondary Codes

If more than one code is specified for a category, the *primary code* is displayed in blue on the Coding Sheet, and the *secondary codes* are displayed in green. This section describes how primary and secondary codes are used in the GIFTS Report Library and in the merge templates for your letters, write-ups, and checks.

Report Library Most GIFTS standard reports use primary codes to group records. For example, in the "Grant Summary by Program Area 1" report, a grant with multiple Program Area codes is listed only once in the report, and is grouped by its primary Program Area code.

The use of primary codes also ensures that records are not repeated within the report, which would inflate the total information for the report.

Some standard reports, however, group records by both primary and secondary coding information. (These reports include the phrase "including secondary codes" in their titles.) In these reports, the same record may be listed multiple times—once for each code that you assigned. In these reports, the totals are inflated because records are listed more than once.

Merge Templates If you create letters, write-ups, and checks from GIFTS, merge templates merge data from GIFTS to your letter, write-up, or check. Your GIFTS administrator can set up your templates to include secondary codes for fields that merge data from your Coding Sheets.

For information about setting up letter and write-up templates, please refer to the *GIFTS Administrator's Guide*. For information about check templates, please refer to the *A/P Module User's Guide*.

Lowest-Level Coding

If your GIFTS administrator has required coding at the lowest level for a category, you must select the lowest (most detailed) coding level available. For example, the Program Area category has been set up with four levels,

and coding is required at the lowest level. If you select a higher level, the following message is displayed:

You need to select a sub-code from within Basic Skills to meet the requirement.

Inactive Codes

Occasionally, your organization may determine that a code is no longer relevant to your grant tracking. Your GIFTS administrator can mark codes that are no longer used as *inactive.* Inactive codes are not available for data entry.

Wherever an inactive code was used (before being marked as inactive), it is followed by "(Inactive)" to indicate that the code is no longer used.

2 Setting Up Employee GIFTS

This chapter describes how to set up Employee GIFTS. These steps should be performed by the GIFTS administrator before users begin entering matching gift or volunteer gift data.

In This Chapter

Getting Started **2**

Step 1: Setting Security Permissions..... **3**

Step 2: Creating Employee GIFTS Classifications **11**

Step 3: Setting the Employee GIFTS Preferences **16**

Step 4: Setting Up Matching and Volunteer Programs **20**

Step 5: Setting Up Your Correspondence Templates **33**

Step 6: Setting up the Donor Coding Sheet **37**

Maintaining Your Program Setup **44**

Getting Started

Before you can process employee gift information, you must first enter your program guidelines and limits into GIFTS. Gather this information for all your giving programs before you begin setting GIFTS up. With the guidelines and limits in front of you, you can complete the setup process in one or two sittings. If you don't have to stop to look up information, you're less likely to forget where you left off and to skip important steps.

Before You Begin: Make sure you have the following information for each employee giving program:

- The limit that is placed on total amount of gifts that a particular donor or class of donors can give in the course of a year.
- The limit that is placed on total amount of gifts that a particular organization or class of organizations can receive in the course of a year.
- For matching gifts programs, the rates at which gifts are matched (such as 1:1, 2:1, and so forth), and the different rates that may apply for gifts above or below a certain amount.
- If the rates at which gifts are matched is dependent upon either the giver's Donor Class (such as "Full Time") or by the recipient's Organization Class (such as "Educational"), make sure that you know exactly what these classifications are and how the rates are adjusted for each.
- For volunteer gifts programs, the minimum number of hours required for a gift to be awarded.
- Rules that govern the eligibility of your employees to participate in the programs (must have been employed for at least 30 days, and so forth).
- Samples of the form letters that you generate to donors and recipient organizations as part of your processing.

Once you have collected this information, begin with the following section, "Step 1: Setting Security Permissions," and then proceed through the other setup steps as directed. Not all of the steps have to be addressed in the order in which they are presented, but you will probably find it most logical to address the steps in this order.

Step 1: Setting Security Permissions

Note: If you are using Essential GIFTS, detailed system security is not available. Please proceed to "Step 2: Creating Employee GIFTS Classifications" on page 11.

When you first start up Employee GIFTS, users do not have access to the Matching GIFTS or Volunteer GIFTS areas of the system. To provide access to these functions, you must set up user permissions.

The security rights for each staff member are determined by the *user group* to which he or she belongs. A *group* is simply a group of staff members with identical security access rights.

The group's security access rights are determined by the *permission set* assigned to the group. If you intend to use security, you must first decide which sets of access rights are necessary to your organization.

For instance, if you have several users at the management level who want to view information in the system, but who don't want to accidentally modify any of the data, you can assign them view-only permissions. Likewise, you may wish to prevent grants management users from viewing information about your employee giving.

The security functionality is shared by GIFTS. If you are going to set up new groups, make sure that you take the security for your grant-tracking programs into account as well. For more information about GIFTS security, please consult the *GIFTS Administrator's Guide*.

To set up your system security:

1. Create permission sets that define users' system access rights.
2. Create your user groups and assign a permission set to each user group.
3. Create a user account for each member of your staff and assign each to his or her appropriate user group.

Managing Permission Sets

Permission sets allow you to create a set of permissions for specific job types and tasks and apply them to one or more user groups. You can also copy and edit an existing permission set, and print a report of permissions in a set.

To work with your permission sets:

1 Choose Access ➤ Permissions from the Administrator menu. A list of your existing permission sets is displayed:

2 To work with a permission set, you can:

- Click New to create a new set.
- Highlight an existing set and click Edit to make changes to it.
- Highlight an existing set and click Save As to create a new set with the same permissions. Open the newly saved set by clicking Edit.

The permissions for the set are displayed.

3 Enter or edit the name and description of the set in their respective fields.

The permissions grid displays permissions in the same manner that Windows® Explorer® displays the directories and files on your computer. To view or edit the permissions for Matching GIFTS or Volunteer GIFTS, click the box to the left of the module's name.

For each function listed, you can set the permissions that are not shaded.

Permission	Description
Execute	Permission to perform the function selected.
View	Permission to display and report the data. This permission cannot be disabled.
Update	Permission to edit existing entries of the type selected.
Add	Permission to create new entries of the type selected. A user needs both add and update privileges to create and edit entries.
Delete	Permission to delete existing entries of the type selected.

4 Use the check boxes to set the permissions for each Employee GIFTS function.

Function	Allows Users to...
Login	View data related to your matching gifts or volunteer gifts programs. Without this permission, access to all information related to matching gifts or volunteer gifts is restricted—including the Donors folder, the Matching Gifts and/or Volunteer Gifts folders, the Emp Gifts tab of Organization records, and all Activities and Documents that are related to these programs.
Matching Gifts / Volunteer Gifts	Add, update, view, or delete individual Gift records.
View Audit Trail	View the Audit Trail history of each Gift, including all significant changes made, the user who made these changes, and the date on which changes were made.
Create Grants	Create grant records for approved Gifts.
Undo Grants	Reverse the creation of approved Requests from Gifts.
Period End Processing	Execute all aspects of period-end processing outside of the creation of grants, including the creation of batches and running the "Gifts to be Paid" report.
Matching / Volunteer Gifts Parameters	Provides access to the setup options for your matching gifts and volunteer gifts programs. This is typically reserved for the GIFTS administrator.

5 Click Save and Close when you are finished.

Creating and Managing Groups

The access rights for a user group are determined by the permission set to which it is assigned. If all of your staff members will have equal unlimited access to GIFTS, they can use the permission set for the Admin group that comes with the system. For details on creating a new permission set, please refer to "Managing Permission Sets" on page 4.

Caution: Do not modify the Admin group or its permission set. You should always have a user group with unlimited administrative privileges; each

Admin group user should use a password to prevent unauthorized use of his or her account.

To work with the GIFTS user groups:

1 Choose Access ➤ Groups from the Administrator menu. The Groups window opens:

❖ ***To create a new group***, click New. You are prompted to enter the name of the group and its permission set:

Users with Branch Security must also specify the Branch Security permissions described in "Setting Up Branch Security" on page 8.

Click Save and Close. You are returned to the list of groups, which now displays the group you created.

❖ ***To create a new group with the same permissions as an existing group***, highlight the group and click Save As. You are prompted to enter the name of the new group, and its permission set. If you have Branch Security, you also specify the Branch Security permissions for the group. When you are finished, click Save and Close.

- ***To edit the name of a group***, highlight it and click Edit. When you are finished, click Save and Close.
- ***To change the permission set of a group***, highlight it and click Edit. Select a new permission set and click Save and Close.
- ***To delete a group***, highlight it and choose File ➤ Delete from the Groups menu. You are prompted to confirm that you want to delete the group or, if there are users assigned to the group, you are notified that you cannot delete the group unless no users are associated with it.

  If you want to delete a group that has users associated with it, you must either assign those users to another group or remove them from the system.
- For information about ***setting the Approval Restrictions*** for the group, please refer to the *GIFTS Administrator's Guide*.

2 When you are finished working with your groups, choose File ➤ Close from the Groups menu.

Setting Up Branch Security

If you have a GIFTS system with Branch Security, there are additional steps that you can take to manage access to your employee gifts program data. Each user group has a *primary branch* for which its users have full access (according to that group's permissions) to data assigned to that branch. All data created by a user is assigned to his or her primary branch.

In addition, you can give a user group full access or view-only rights to other branches. For information on setting up Branch Security, and assigning groups the appropriate branch permissions, please see the "Setting Up Branch Security" chapter of the *GIFTS Administrator's Guide*.

Making Donors Branch-Specific

If your organization processes gifts at branch locations, you can use the "Donors are branch specific" option in the GIFTS Security Preferences to "stamp" each Donor with the branch of the user that entered the Donor

record. This enables you to prevent users from viewing information about Donors entered at other branches.

Note: If your organization processes gifts at single location, you can also restrict users at other branches from viewing Employee GIFTS information by not granting them the Login permission for the Matching GIFTS and/or Volunteer GIFTS Modules.

Creating and Managing Users

When you first install GIFTS, only one user, Admin, is included with the system. If you have imported data into GIFTS from an external system, the import process may have created users.

To add additional users to your system, or to modify existing users:

1. Log into the GIFTS Administrator Module. (If you have not yet set up security, log in as Admin.)

2. From the menu, choose Access ➤ Users. The Users window opens:

3 Click New to create a new user. To edit an existing user, highlight that user and click Edit. The window containing the user's data opens:

Enter or edit the following user attributes:

Field	Options
Login ID	The name the user enters when he or she logs in to GIFTS—usually the initials of the user or an abbreviation of his or her name.
Name	The full name of the user.
Title	The user's title.
E-Mail	The user's e-mail address, which can be included in reports and data exports.
Group	The group to which this user is assigned.

To prevent unauthorized account access, you should create a password for each user. Otherwise, anyone can use his or her account without entering a password. For more information about password security, please refer to the *GIFTS Administrator's Guide*.

4 Click OK when you are finished.

Step 2: Creating Employee GIFTS Classifications

Classifications (also known as codes) are used to restrict data entry in certain fields to a pre-defined list of options. By forcing consistent data entry in these fields, you can then produce reliable reports and queries.

For instance, if all users use the "Arts & Culture" Program Area code to classify Gifts made to cultural organizations, you could then produce a report listing all your grants to these organizations. Without pre-defined classifications, users would enter this information inconsistently, and you could not produce an informative report; without the codes, different users would use different names to describe grants to the same Program Area.

GIFTS offers many Code Tables for tracking information, and allows you to create new Code Tables for classifying Organizations, Requests, Donors, and Contacts. Essential GIFTS provides classifications for Requests only.

As part of your setup, it is important for you to establish the appropriate classifications so that you can set up Employee GIFTS to accurately reflect the parameters of your programs. In order to do so, please follow steps 2A, 2B, and 2C in the order in which they are presented.

Important: The GIFTS Code Replace feature cannot modify classifications—such as Donor Class and Organization Class—that potentially affect the calculation of awards. Be sure to set up the appropriate classifications now, as it may be difficult to change your coding structure once you begin processing Gifts. For more information about the GIFTS Code Replace feature, please see the *GIFTS Administrator's Guide*.

Step 2A: Review Employee GIFTS Code Tables

The following Code Tables are used specifically in the tracking of Matching Gifts and Volunteer Gifts data. Review these tables and the descriptions of

how they are used, and think about how this information relates to your programs.

Code Table	Description
Branch/Division	If your company has several branches or divisions, it may be important for you to track the Gifts based on the division from which they initiated. If you have Branch Security, you must set up Branch/Divisions in the process of setting up Branch Security; for more information on Branch Security, please refer to the *GIFTS Administrator's Guide*.
Donor Class	Many matching gifts and volunteer gifts programs place limits on their donors based on donor class—usually denoting the donor's employment status, such as full time, part time, or retiree. In addition, many programs apply different match rates based on the donor class. If such is the case with your organization, it is critical for you to establish the appropriate codes for this table. **Note:** If your rates or limits do not vary by donor class, you still need to have at least one Donor Class code (such as "All") to establish limits for Donor records.
Organization Class	Many matching gifts and volunteer gifts programs vary the match rate for gifts based on the class of the recipient organization. For instance, your program can match gifts to educational institutions at the rate of 2:1, while all other classes of organizations are matched at the rate of 1:1. If this is the case with your company, it is critical for you to establish the appropriate codes for this table. **Note:** If your rates or limits do not vary by organization class, you still need to have at least one Organization Class code (such as "All") to establish limits for Organization records.
Donor Gift Type	Some matching gifts programs allow donors to make gifts in several forms such as cash, product, or stock. If you wish to track this information, be sure to establish the appropriate codes. (This table is not relevant to volunteer gifts programs.)
Match Hold Reason	Matches can be placed on hold for any reason. Matches placed on hold are not approved by the system, and are therefore not be paid or processed during period-end processing. If you have specific reasons why matches are put on hold, you can establish codes explaining them in the Match Hold Reason Code Table.

Code Table	Description
Request Type and Status	Codes in the Request Type and Status Code Table apply not to Gifts records, but to the approved Requests that are created for Gifts during period-end processing. You may wish to set up Request Type and Status codes to be used for your employee gifts programs so that they can be easily distinguished from other types of giving. If you are using the GIFTS Budget Module, you must decide whether you wish to include given amounts from Matching Gifts and Volunteer Gifts in your budget. If not, you should ensure that you have a Request Type that does not "hit" the budget (options in the Budget Years Setup window determine which Request Types hit the budget). For more information, please refer to the *Budget Module User's Guide*.

Step 2B: Plan Your Codes in Writing

Based on the descriptions of the Code Tables in Step 2A, plan your codes in writing. You can use the worksheets in the Implementation Workbook provided to all clients who attend the *GIFTS Setup* training course.

Step 2C: Creating/Editing Codes

Use the following instructions to enter new codes into the system or to edit existing codes. Refer to the worksheets you completed in Step 2B as you work.

1 Log in to the GIFTS Administrator Module.

2 From the main menu, choose Setup ➤ Code Tables.

3 Click the System tab to access the Code Tables for Donor Class, Organization Class, Branch/Division, Donor Gift Type, and Match Hold Reason.

4 Highlight the Code Table you wish to edit and click Edit Codes. The existing codes for that table are displayed:

5 To add a new code, choose File ➤ New from the menu. If you wish to edit an existing code, highlight it and choose File ➤ Edit. The Code window opens:

- In the Code field, you may enter an abbreviation for the classification. For instance, you can enter EDU as the Code for the Organization Class "Education." This information is optional in GIFTS, but it may help users who are entering information from paper forms that use abbreviations to save space.
- Your entry in the Description field is displayed in data entry fields, GIFTS reports, search queries, and the GIFTS Organizer. This is required.

6 Click the OK to save the code and return to the code list.

7 Repeat Steps 5–6 as needed to edit the Code Table. When you are finished, click Save and Close. You are returned to the list of available system codes.

Repeat this procedure to edit each of the Code Tables required for your setup.

Step 3: Setting the Employee GIFTS Preferences

Some companies identify their employees by their Social Security number, while others have their own employee ID format. Employee GIFTS allows you to specify which method you use to track your employees, and tailors its Donor search options accordingly.

In addition, you can supply a default "employer organization" (presumably your organization) to which new Donors are automatically assigned; users will not have to enter the name and address of your company each time they create new Donors.

To set the Employee GIFTS preferences:

1 Log in to the GIFTS Administrator Module.

2 From the menu, choose Setup ➤ Employee GIFTS ➤ Preferences. The Employee GIFTS Preferences window opens:

3 Set the options as described in the following sections, and click OK to save the preferences when you are finished.

Setting the Employer Organization

The Organization entered in the Employer Organization area is used as the default Primary Organization for all new Donors. The default address for these Donors—which is used as their mailing address for correspondence—will be the Office Address of this Organization. To enter a default employer:

❖ Click the Find button to search for the Organization record representing your company. If it is found, highlight it and click OK to return to the Employee GIFTS preferences.

- If the search is not successful, click New in the search window to create a new Organization and then enter your company's name and address. When you have completed entering the Organization information, click OK to save the Organization record and return to the Employee GIFTS preferences.

Changing the Employer Organization

If you change the Employer Organization, you are given the opportunity to update all of the existing Donors attached to the previous Employer Organization to the new Employer Organization.

To change the Employer Organization:

1. Click the Find button to search for the appropriate Employer Organization.
2. Select an Organization and click OK. You are returned to the Employee GIFTS Preferences window.
3. Click OK. You are prompted to specify whether you wish to update existing Donors with the new employer.
4. Click Yes to update the existing Donors, or No to leave them as they are.

Clearing the Employer Organization

If you clear the Employer Organization, new Donors will not have a default Primary Organization or a default address upon creation. However, existing Donors are not affected and retain their existing Primary Organization and address.

To clear the Employer Organization:

1. Double-click on the panel displaying the Organization information. You are prompted to confirm that you wish to clear the employer.
2. Click Yes. You are returned to the Employee GIFTS Preferences window.
3. Click OK to save the preferences.

Setting Gift Entry Refresh Options

Depending on how you typically process your Employee GIFTS data, this option may help streamline your data entry. After entering a new Gift and clicking Save and New, the Gift entry form resets according to your selection:

- The entry form will "Keep the last Recipient, clear the Donor."

  In this case, after clicking Save and New, the next Gift form will open with the recipient Organization already entered—the same Organization as the previous Gift.

- The entry form will "Keep the last Donor, clear the Recipient."

  In this case, after clicking Save and New, the next Gift form will open with the Donor already entered—the same Donor as the previous Gift.

- The entry form will "Clear the Recipient and the Donor." In this case, click Save and New and the new Gift record opens with neither Donor nor Organization entered.

Managing Employee ID Numbers

In the Donor Search section of the Employee GIFTS Preferences window, indicate whether you prefer to search for Donors based on Employee ID or on Social Security Number.

If you track employee ID numbers, you have the additional option to establish an Employee ID Input Mask that forces users to fill the Employee ID field in the format you specify.

The mask is established by creating a pattern for the data to be entered. This pattern is established with the following variables:

Variable	Description
#	Allows numbers only
&	Allows any character
?	Allows letters only

Variable	Description
A	Allows numbers and letters
U	Allows only letters and makes them uppercase
L	Allows only letters and makes them lowercase

These symbols can be combined with constant characters like dashes (-) or slashes (/) to form the appropriate ID format. For instance, ##-UUU allows the entry of 12-ABC but not XYZ-ABC. If the Employee ID Mask is left blank, users can enter any alphanumeric string in the Employee ID fields.

Step 4: Setting Up Matching and Volunteer Programs

Setting up your matching gifts and volunteer gifts programs properly is essential, since the setup of your program is used to calculate the awards that are made to the recipient Organizations. Each time you enter a Gift, GIFTS evaluates how much should be awarded to the organization based on the following:

- The donor's eligibility is verified by checking that the appropriate number of days has elapsed since their start date.
- The award amount is calculated based on the established rates.
- The Donor Limits are checked to ensure that the award does not exceed the limits for the donor.
- The Organization Limits are checked to ensure that the award does not exceed the limits for the recipient organization.

In sections 4A, 4B, and 4C you will set up your giving program in order to make these calculations. Note that if you are tracking more than one matching gifts or volunteer gifts program, you must repeat the setup process for each program.

Step 4A: Setting Program Parameters

In this section you will define the general parameters of your program. These include the name of the program, the number of days that must elapse before a new employee is eligible to participate in the program, and the Request Type to be used for the grants that are created to reflect your matching gifts or volunteer gifts awards.

1. Log in to the GIFTS Administrator Module.
2. From the main menu, choose Setup ➤ Employee GIFTS. A submenu displays the available matching gifts and/or volunteer gifts programs, such

as "Matching GIFTS 1." Select the program you wish to set up (you can rename it using this procedure). The program Parameters window opens:

3 Use the Program Information fields to set up your program parameters:

Field	Description
Name	The name of the program. If you have more than one program, choose names that your users can use to distinguish between them.
Request Type	During period-end processing, the system creates Request (grant) records for approved matches. When these Requests are created, they are assigned to the Request Type that you choose here. (You cannot change this setting when you create the Requests). If you are using the optional GIFTS Budget Module, you must decide if you wish to include these grants as part of your budget. If not, make sure that the Request Type you specify here does not hit the budget. For more information, please refer to the *Budget Module User's Guide*.
Start Date Period	This is the amount of days that must elapse between the employee's start date at your company and when they are eligible to participate in the program. If they are eligible to participate immediately, enter 0 (zero) in this field.

In order to complete the setup of your program, you must establish the appropriate guidelines and limits for your gifts, as described in sections 4B and 4C.

Step 4B: Setting Matching Periods and Rates

The term "guidelines" refers to the method used to determine how your company matches gifts by your Donors. Some companies always award the recipient Organization the same amount as was given by the Donor (a 1:1 ratio). However, most companies vary their contributions based on the amount given and/or the Class of the Donor or recipient Organization.

The ratio of your company's contribution to the Donor's gift is known as the rate. Rates can vary depending on either the recipient Organization's Class or the Donor's Class. For instance:

- Educational institutions may be matched at a higher rate then Arts institutions—at a rate of 2:1 instead of 1:1, for example. Therefore, you would set the rates according to the recipient Organization Class.
- Gifts given by full-time employees may be matched at a higher rate than those given by part-time employees. Therefore, you would set the rates according to the Donor Class.

In addition, your rates can be subject to additional considerations:

- For matching gifts programs, rates may be different depending upon how much the Donor has already given for the year (this is known as stepped matching). Beyond a pre-defined break point, their gifts are matched at a different rate.

  For instance, a program may match a Donor's gifts 2:1 until he or she has contributed a total of $5,000 for the year. Subsequent contributions are then matched 1:1. If the Donor has given $4,600 and submits a $1,000 gift, the first $400 is matched at 2:1 and $600—the amount that exceeds the break point—is matched at 1:1, bringing the total award amount to $1,400.
- For volunteer gifts programs, your company may contribute a fixed amount to the Organization once the volunteer has contributed a requisite number of hours (this is known as fixed matching) or you may contribute a specific amount for each hour volunteered (variable matching).

Before you set up the rates in your system, you should determine the following:

1. If your rates vary, do they vary by Organization Class or Donor Class? (Note that they cannot vary by both.)
2. If your matching gifts program includes stepped matching (as defined above), what are the different rates and what is the break point for each Class? (Whether you are determining break points for Organization or Donor Classes depends upon your answer to Question #1.)
3. Does your volunteer gifts program, if any, grant a fixed amount for each volunteer, or does it match a specific amount for each hour volunteered? If so, what are the appropriate match rates for each Organization or Donor class?

When you have this information available, you are ready to set up your program rates.

Tip: To view a report of your rates, choose Setup ➤ Employee GIFTS and then choose Tools ➤ Rates Report.

To set up your program rates:

1. From the Administrator menu, choose Setup ➤ Employee GIFTS and choose the program you are working with from the submenu.

2 Make sure the Matching Guidelines tab is presented, and click New to create a new Rate Period.

3 Enter the Start Date of the period. If the period does not yet have an End Date, you can leave the End Date field blank. This rates for this period will be applied to all gifts entered between the Start Date and the End Date.

Tip: Rate Periods are useful for companies whose rates are subject to change, and for companies who wish to enter historical data that uses different rates. If you are entering current data only, and you do not anticipate that your rates will change, you can create a single open-ended period.

4 Specify whether Rates Vary By the Organization Class or the Donor Class. Note that rates can vary by one or the other, but not both.

5 If you are setting up a volunteer gifts program, choose whether the match rate for volunteer activity is variable (dollars matched per hour volunteered) or fixed (a set amount donated when the requisite number of hours have been volunteered).

Tip: If your rates do not vary, you still need to set up rates for each class. To simplify this, specify that the Rates Vary By the Class with the fewest number of codes.

6 Click New to establish the rates for an Organization Class or Donor Class. Depending on whether you are setting up a matching gifts or volunteer gifts program, please consult either "Setting Matching GIFTS Program Rates" on page 25 or "Setting Volunteer GIFTS Program Rates" on page 26.

Important: Employee GIFTS does not Approve gifts for any class (Organization or Donor, depending upon your settings) for which rates have not been defined. Be sure to set up rates for every Class, even if the settings are the same for each.

7 When you have entering rates for each Class, click Save and Close and proceed to Step 4C to establish the limits for your program.

Setting Matching GIFTS Program Rates

You can use the following fields to set up the rates for each Organization Class or Donor Class.

Field	Description
Class	The Class to which these rates apply.
Match Rate 1	The rate at which gifts to this Class should be matched. If your rates change after the cumulative giving for the year reaches a break point, this field should contain the rate for gifts made before the break point is reached. The rate is the ratio between the number you enter here and one (1). For instance, to match gifts at a ratio of 2:1, enter a two (2) in this field.
Break Point	To *step* your rates so that they change after the cumulative giving for the year reaches a break point, enter the break point amount in this field. Gifts up to (but not including) this amount are matched at Match Rate 1. Gifts at or above this amount are matched at Match Rate 2.

Field	Description
Match Rate 2	The rate at which gifts that should be matched after the break point has been exceeded. If no break point is specified, this field is not available. The rate is the ratio between the number you enter here and one (1). For instance, to match gifts at a ratio of 1:1, enter a one (1) in this field.

When you have entered the rate information, click OK to save it. You are returned to the Rate Period window, where you can click New to create the rates for another Class. Be sure to set the rates for each Organization or Donor Class in your system.

Setting Volunteer GIFTS Program Rates

You can use the following rate fields to set up the rates for each Organization Class or Donor Class. If you are specifying variable rates, the following fields are available.

Field	Description
Class	The Class to which the rate applies.
Award per Hour	The amount awarded for *each hour* volunteered.

If you are specifying fixed rates, the following fields are available.

Field	Description
Class	The Class to which the rate applies.
Threshold	The minimum number of hours that must be volunteered in order for the match to be awarded.
Award Amount	The amount of the match that is awarded if the requisite number of hours have been volunteered.

When you have entered the rate information, click OK to save it. Repeat this procedure for each Class in your system; note that the rates for each class default to those you set for the last class with which you were working.

Step 4C: Setting Gift Limits

Limits control how much a Donor can give in a year and how much an Organization can receive in a year. Nearly every company has limits of some kind for their program. However, you may not need to use all of the limits that Employee GIFTS has available.

Since your limits may change over time, you can create Limit Periods; the limits for a period apply to all gifts entered during that period. If you plan to enter historical data, you may need to establish historical Limit Periods. If you are entering current data and you do not anticipate that your limits will change, you can create a single, open-ended period for your limits.

Depending upon your program, you may have Donor Limits, Organization Limits, or both. Since most companies restrict awards based on limits applied to Donors, Donor limits are mandatory—gifts cannot be Approved for Donors unless you have set up Donor Limits for his or her Donor Class. Organization Limits, on the other hand, are optional.

Tip: To view a report of your limits, choose Setup ➤ Employee GIFTS and then choose Tools ➤ Limits Report.

To set up the limits for a period:

1. From the Administrator menu, choose Setup ➤ Employee GIFTS and choose the program you are working with from the submenu.
2. Make sure the Matching Limits tab is presented, and click New to create a new Limit Period.

3. Enter the Start Year of the period. If the period does not yet have an End Year, you can leave the End Year field blank. These limits will be applied to all gifts entered between the Start Year and the End Year, if any.
4. Follow the instructions in the following sections for setting up Donor Limits and Organization Limits. As noted above, Donor Limits are mandatory and Organization Limits are optional. If no Limits have been set up for the Class of the recipient Organization, GIFTS assumes that no limits apply.

Setting Donor Limits

You must set up Donor Limits for each Donor Class in order for the system to allow matches for Donors of that class. If the limits for your Donors are

the same regardless of their Class, you still need to set up limits for each Class. To set up your limits:

1 In the Limit Period window, click the Donor Limits tab.

2 Click New to work with the limits for a particular Donor Class.

3 Use the fields to set the limits, as follows:

Important: Any limit field that you leave blank indicates to the system that no limit should be applied. If you wish to specify that awards of a certain type should be blocked completely, enter a zero (0).

Field	Description
Class	The Class to which the limits apply.
Gift Amount Limits	
Min. Per Gift	For each gift, the minimum amount that the Donor is required to give in order for that gift to be matched. (For volunteer gifts programs, this is the minimum number of hours.)
Award Amount Limits	

Field	Description
Max Per Gift	The maximum amount that can be awarded on behalf of a Donor *per gift*.
Max Per Org	The maximum amount that can be awarded *to a single Organization* on behalf of the Donor within a given year.
Max Per Year	The maximum amount that can be awarded on behalf of the Donor within a given year.
# Gifts Limits	
Max Per Org	The maximum number of gifts that the Donor can give to a particular Organization within a given year.
Max Per Year	The maximum number of gifts that the Donor can give over the course of a given year.

4 When you have entered the appropriate limits, click OK to save them and return to the Limit Period window.

5 To add the limits for the next class, repeat steps 1–4. Remember, you must establish limits for each Donor Class.

When you have established the Limits for each Donor Class, you can exit the program setup windows and either:

- Return to "Step 4: Setting Up Matching and Volunteer Programs" on page 20 to set up your remaining giving programs (if necessary).
- Proceed to "Step 5: Setting Up Your Correspondence Templates" on page 33.

Setting Organization Limits

Organization limits are optional; no limits are placed on giving to any Organization Class for which no limits have been specified. To set up Organization limits:

1 In the Limit Period window, click the Organization Limits tab.

2 Click New to work with the limits for a particular Organization Class.

3 Use the fields to set the limits, as follows:

Important: Any limit field that you leave blank indicates to the system that no limit should be applied. If you wish to specify that awards of a certain type should be blocked completely, enter a zero (0).

Field	Description
Class	The Class to which you wish the limits to apply.
Gift Amount Limits	
Min. Per Gift	For each gift, the minimum amount that the Donor is required to give in order for the gift to be matched. (For volunteer programs, this is the minimum number of hours volunteered.)
Award Amount Limits	
Max Per Gift	The maximum amount that can be awarded to the Organization *in a single gift*.
Max Per Donor	The maximum amount that can be awarded to the Organization *on behalf of a single Donor* within a given year.
Max Per Year	The maximum amount that can be awarded to the Organization *in a given year.*
# Gifts Limits	
Max Per Donor	The maximum number of gifts that the Organization can receive on behalf of a particular Donor within a given year.
Max Per Year	The maximum number of gifts that the Organization can receive within a given year.

4 When you have entered the appropriate limits, click OK to save them and return to the Limit Period window.

5 To add the limits for the next class, you can repeat steps 1–4.

When you have established the Organization Limits for your company's giving program, you may exit the program setup windows and either:

- Return to "Step 4: Setting Up Matching and Volunteer Programs" on page 20 to set up your remaining giving programs (if necessary).
- Proceed to "Step 5: Setting Up Your Correspondence Templates" on page 33.

Step 5: Setting Up Your Correspondence Templates

During the processing of your gifts, you can use Employee GIFTS to generate correspondence to the Donors and the recipient Organizations involved. In most cases, companies generate letters at the end of each giving period that detail the relevant awards for each Donor and recipient Organization.

To produce this correspondence from GIFTS, you can set up merge templates that can produce letters for your word processor and/or e-mail messages; these templates include both fixed text and fields that merge information directly from GIFTS into the correspondence.

Note: If you are using Essential GIFTS without the Correspondence feature, correspondence templates are not available.

Step 5A: Determine Your Needs

As you prepared to set up your program, you should have gathered the form correspondence that you plan to send to your Donors and recipient Organizations.

At this point, please review these letters and identify the information that should be merged from GIFTS. In particular, you need to create templates for the correspondence you will generate during period-end processing.

Templates are organized in GIFTS by event. The event of the template determines when it is available from GIFTS, as detailed in the following table.

Event	Description
Matching GIFTS Batch for Recipients	Run during period-end processing. Typically, these are letters to recipients that detail the award they are to receive as a result of the gifts made during the period, and may serve as a cover letter for a check.

Event	Description
Matching GIFTS Batch for Donors	Run during period-end processing. Typically, these letters list all of the matching gifts that have been made on behalf of a Donor during the period.
Matching GIFTS	Letters related to matching gifts that are sent outside of period-end processing. For instance, you may have a standard letter that details matching gifts that are on hold.
Volunteer GIFTS Batch for Recipients	Run during period-end processing. Typically, these are letters to recipients that detail the award they are to receive as a result of the hours volunteered there during the period, and may serve as a cover letter for a check.
Volunteer GIFTS Batch for Donors	Run during period-end processing. Typically, these letters list all of the gifts that have been made on behalf of a Donor during the period.
Volunteer GIFTS	Letters related to volunteer gifts that are sent outside of period-end processing. For instance, you may have a standard letter that details volunteer gifts that are on hold.
Donors	Letters addressed to Donors that are sent outside of period-end processing.
Organizations	Letters addressed to recipient Organizations that are sent outside of period-end processing.

Step 5B: Setting Up the Correspondence Feature

Before you can set up your templates, you should ensure that GIFTS is configured to use your word processor. If you have already used the correspondence features of GIFTS, you may skip this section and proceed to "Step 5C: Creating Correspondence Templates" on page 35.

Note: If you have a multi-user version of GIFTS, you can set the External Preferences for all workstations ("system-wide") or separately for each workstation. For more information, please refer to the *GIFTS Administrator's Guide*.

To set up the correspondence feature:

1 Log in to the GIFTS Administrator Module.

2 From the Administrator menu, choose Setup ➤ Preferences. Click the External tab:

3 Use the Word Processor fields to set up the correspondence feature of GIFTS:

Field	Description
Word Processor	The word processor to which GIFTS is linked; the word processor you choose must be installed on the workstation and working properly.
Program File Name	The path to your word processor's executable (.EXE) file. Enter the path or click the Browse button located at the bottom of the window to locate the executable. If you are using Microsoft Word®, this field is not available; Windows automatically detects the path to Word.
Document path	The location where merged documents will be stored. Enter the path or click the Browse button located at the bottom of the window.
Template path	The location where your correspondence templates will be stored. Enter the path or click the Browse button located at the bottom of the window.

Once you have verified and/or modified the preferences, click OK to save your changes and proceed to the following section.

Step 5C: Creating Correspondence Templates

To work with the correspondence templates:

1 Log in to the GIFTS Administrator Module.

2 From the Administrator menu, choose Setup ➤ Correspondence Templates.

For information about creating, editing, managing, and deleting correspondence templates, please refer to the *GIFTS Administrator's Guide*.

Step 6: Setting up the Donor Coding Sheet

In order to produce meaningful reports and queries, it is necessary to classify the records in your system. GIFTS allows you to classify Donors with a Coding Sheet. During data entry, users enter the appropriate classifications so that those records can be included in reports and queries.

There are separate Coding Sheets for Donors and Contacts. If a person is both a Contact and a Donor, then they will have both a Contact Coding Sheet and a Donor Coding Sheet. This enables you to use the Coding Sheets for information that relates specifically to each person's activities as a Contact and/or Donor.

If a person is both a Donor and a Contact, users access the Donor Coding Sheet through the Donor record and the Contact Coding Sheet through the Contact record.

Tip: Donor Coding Sheets are optional. In the Donor records, GIFTS tracks Donor Class, VIP status, and the Division/Branch to which the Donor belongs. If these classifications are sufficient for your needs, it is not necessary to set up a Donor Coding Sheet.

The following is an example of a Donor Coding Sheet:

The steps to setting up the Open Classification System for Donors are as follows:

1. Determine which categories you want on the Donor Coding Sheet. This might include some of the standard GIFTS Code Tables, and/or new ones that you can create, like "Field of Interest."
2. Determine which classifications you wish each category on the Coding Sheet to contain.

The following sections contain basic instructions for setting up these options. For more complete information about Code Tables, Coding Sheets, and other elements of the GIFTS Open Classification System (OCS), please refer to the *GIFTS Administrator's Guide*.

Step 6A: Defining Donor Code Tables

GIFTS includes the following pre-defined Code Tables for use as categories on your Coding Sheets. (Please note that the Table Name and Number of Levels cannot be modified for pre-defined Code Tables.) The pre-defined tables that are most appropriate for Donors are Gender, Age Group, and Ethnicity.

You can use the following procedure to add new Code Tables for use on your Donor Coding Sheets.

1. From the Administrator menu, choose Setup ➤ Code Tables. The Table Maintenance window lists the Coding Sheet Code Tables in your system.
2. Click New Table to add a Code Table to the system.

Field	Description
Name	Code Table names can contain more than one word, and are limited to 50 characters (including spaces).

Field	Description
Levels	Code Tables can have as many as five levels. By using levels to classify increasingly specific information, you increase the flexibility of your reporting. You can query or report on broad categories of information at the top level (such as 'Southwest,' in the case of a geographic Code Table) or specific codes at lower levels (such as 'Arizona').
Max # of Selections	In most cases, users should be restricted to entering only one classification in each category. However, you can allow users to enter several classification codes in a given category.
Require Coding at Lowest Level	Use this option to require that users enter codes at the lowest (most detailed) level of this table.

3 Click OK to save the Code Table.

4 Continue adding Code Tables or click Cancel to finish.

Once you have added the necessary Code Tables, please continue to the following section to define the classification codes that are available within each table.

Step 6B: Creating Codes for the Donor Tables

The tables that you intend to include on the Donor Coding Sheet need to contain the appropriate classification codes that users can enter to describe your Donors. You can add codes to a Code Table at any time.

To add codes to a table:

1 From the Administrator menu, choose Setup ➤ Code Tables. The Table Maintenance window displays a list of the Coding Sheet Code Tables in your system.

2 Highlight the Code Table and click Edit Codes.

3 To add a code:

- In a single-level table, click New to add a new code.

- In a multiple-level table, click New to add a new code at the current level (the same level as the highlighted code) or, to create a subordinate code, highlight a code and click New Sub to create a code at the level beneath it.

4 Enter a Description and, if desired, a Code for the classification. The optional Code is an abbreviated value that can be used as an alternative to the full description. During data entry, the Code is displayed in parentheses next to the code Description. The Code does not appear in most standard reports.

5 Click OK to save the code. You are returned to the list of codes in that table.

6 Repeat steps 3–5 to add more codes to the table.

7 Click Save and Close to save your changes to the table.

Once you have added the classifications you wish to use, please proceed to the following section to set up your Donor Coding Sheet.

Step 6C: Setting Up the Donor Coding Sheet

To specify the categories you wish to include on Donor Coding Sheets, you edit the system's Coding Sheet Preferences. You can also provide default codes so that when new Donors are created, they are automatically coded with the default information.

To add Code Tables to your Donor Coding Sheet:

1 From the Administrator menu, choose Setup ➤ Preferences.

2 Click the Coding Sheet tab, and then the Donor radio button.

3 Click Add. A list of the categories defined for use on the Donor Coding Sheets is displayed.

4 Highlight the Code Tables you wish to add to the Coding Sheet and click Save and Close. The "Select from available tables" window closes, and tables you selected are displayed on the Coding Sheet.

5 To re-arrange the order in which the categories are displayed to Employee GIFTS users, you can highlight a category and click the Up or Down button to move it to the appropriate position.

6 Refer to the following sections, "Required Categories" and "Default Classifications," for information about additional Coding Sheet options.

When you are finished setting up your Donor Coding Sheet, click OK to save your changes.

Required Categories

If you specify a Donor Coding Sheet category as required, users cannot save new Donors until they enter a classification into the category. You can make categories required or remove requirements at any time by highlighting the category and clicking Required or Not Required. Required categories are displayed in bold type.

Default Classifications

Default classifications can save data entry time and provide consistency in the classification of your Donors. Each time a user creates a Donor record, the default classifications you specify in the Coding Sheet Preferences are automatically entered into the Donor record.

It is not necessary to specify default classifications; they should only be used if they will save data entry time. If the default classification will be changed more often then not, then it should not be defined. In addition, your users should be aware that defaults are being applied to the records they create.

To define a default classification:

1. Click on the category for which you wish to supply a default classification.
2. Click Default. The classifications defined for that category are displayed.
3. Highlight the classification code you wish to use as the default and click Insert. (Even if the category allows more than one classification, you may only supply one value as the default.)
4. Choose File ➤ Close to exit.

If you wish to change a default, you must first remove the current default; to do so, highlight it and click Remove.

Maintaining Your Program Setup

Once you have your program settings established, you may need to modify them from time to time to reflect changes in your programs. Please refer to the following sections for information about modifying or deleting rate periods, rates, limit periods, and limits.

Important: Changes to your settings do not affect gifts that have already been entered into the system. The award amount for gifts is calculated at the time the gift is entered, and is therefore not altered by subsequent changes made to your program settings.

If existing gifts must be changed, you can delete and re-enter them or use the Manual Award Amount option to modify their Award Amount.

Modifying or Deleting Rate Periods & Rates

You may need to modify a rate period if you have set it up incorrectly or if you want to enter additional information such as a Period End Date.

If the matching guidelines for your company are changing, you should create a new rate period starting with the effective date of the new guidelines. You should not change the rate information on your existing period, since this would apply the wrong rates to any historical gifts entered after you make the changes. Before you create a new rate period, you will need to enter an End Date for your current rate period if you have not already done so.

To modify or delete rate periods and rates, please use the following procedure:

1. From the Administrator menu, choose Setup ➤ Employee GIFTS and choose the program with which you want to work from the submenu.
2. Click the Matching Guidelines tab.
   - ❖ To delete a rate period: highlight it and choose File ➤ Delete from the menu. You are prompted to confirm that you want to delete the rate period. Click Yes and then click Save and Close.
   - ❖ To edit a rate period: highlight it, click Edit, and continue to Step 3.

3 In the Rate Period window, modify the rate as necessary:

- To modify a rate, highlight it and click Edit.
- To delete a rate, highlight it and choose File ➤ Delete from the menu.

Modifying or Deleting Limit Periods & Limits

You may need to modify limit periods if you have set them up incorrectly or if you want to enter additional information such as the Period End Year.

To modify or delete limit periods and limits, please use the following procedure:

1 From the Administrator menu, choose Setup ➤ Employee GIFTS and choose the program with which you want to work from the submenu.

2 Click the Matching Limits tab.

- To delete a limit period: highlight it, click Delete, and click OK to exit.
- To edit a limit period: highlight it, click Edit, and continue to Step 3.

3 In the Limit Period window, modify the information as necessary. To modify or delete a limit, highlight it and click the Edit or Delete button, as appropriate.

3 Working with Gifts

This chapter describes how to enter employee gifts and view the giving histories for your Donors and recipient Organizations.

In This Chapter

Finding Gifts **2**
The Matching Gifts and Volunteer Gifts Folders **9**
Processing Gifts **11**
How GIFTS Calculates the Award Amount **22**
Tips for Efficient Data Entry **31**
Holding Gifts **34**
Removing a Gift Hold **35**
Approving a Declined Gift **36**
Viewing the Audit Trail for a Gift **37**
Creating a Grant for a Single Gift **38**
Undoing an "Out-of-Period" Grant **41**
Transferring Gifts to Another Branch **42**
Deleting a Gift **44**

Finding Gifts

When you need to find a gift that has already been entered into the system, you have several options

Searching In the Matching Gifts folder or Volunteer Gifts folder of the Organizer, you can search for, view, and open individual Gift records. For information about searching for gifts, please refer to "Finding Gifts by Searching" on page 5.

Zooming When you *zoom* in on a particular record or records, the Organizer automatically updates all of the information in its folders with information related to that record or records.

For instance, you can zoom in on a Donor and then view all of the gifts or recipient Organizations associated with that person. For more information about zooming, please refer to "Finding Gifts by Zooming" on page 7.

Histories Each gift has a Donor and a recipient Organization. From any gift, you can view:

- A summary of the Donor's giving history for the current Limit Year and a list of all gifts that have been logged for that Donor.
- A summary of the Organization's history for the current Limit Year and a list of all gifts that have been logged for that Organization.

You can "jump" directly from these lists to previously-entered gifts without having to close the gift you are working with or end your data entry session.

For more information about the histories, please refer to "Viewing a Donor's History" on page 26 or "Viewing an Organization's History" on page 28.

Previous/Next While you are entering gifts, you can click the Previous and Next buttons to browse through the gifts you entered. For more information, please refer to "Tips for Efficient Data Entry" on page 31.

Viewing and Printing a Donor's History

At any time, you can use the search and zoom features of the GIFTS Organizer to view the complete matching gifts or volunteer gifts history for a Donor. Please refer to the following instructions as an example of how you can view a Donor's history—as you become familiar with the system, you'll find that there are many ways to retrieve the information you need.

Tip: You can also view a Donor's history from within a gift record, as described in "Viewing a Donor's History" on page 26.

To access a Donor's history:

1. In the Organizer, click on the Donors tab.

2. From the main menu, choose Edit ➤ Find. The Donor Quick Find options are displayed. Note that there are numerous properties—such as Last Name and Start Date—for which you can search.
3. Click the Last Name property. You are prompted to complete the search expression.
4. Choose "begins with" as your search operator, and enter a letter into the available field.
5. Click Find Now. The Donors whose last names begin with the text you entered are displayed in the Organizer.

6. Highlight the Donor whose history you wish to review and choose Edit ➤ Zoom from the main menu. The Donor's name and phone number are italicized.
7. Click on the Matching Gifts or Volunteer Gifts folder tab. The gifts for that Donor are displayed. You can print or export this information by choosing File ➤ Print or File ➤ Export from the main menu.

For a complete description of the Organizer search functions, please refer to the *GIFTS User's Guide*.

Viewing and Printing an Organization's History

At any time, you can use the search and zoom features of the GIFTS Organizer to view the complete matching gifts or volunteer gifts history for an Organization. Please refer to the following instructions as an example of how you can view a Organization's history—as you become familiar with the system, you'll find that there are many ways to retrieve the information you need.

Tip: You can also view an Organization's history from within a gift record, as described in "Viewing an Organization's History" on page 28.

To access an Organization's history:

1. In the Organizer, click on the Organizations tab.
2. From the main menu, choose Edit ➤ Find. The Organization Quick Find options are displayed. Note that there are numerous properties—such as Name and Vendor Number—for which you can search.
3. Click the Name property. You are prompted to complete the search expression.
4. Choose "starts with" as your search operator, and enter a letter into the available field.
5. Click Find Now. The Organizations whose names begin with the text you entered are displayed in the Organizer grid.
6. In the list of Organizations, highlight the Organization whose history you wish to review and choose Edit ➤ Zoom from the main menu. The Organization's name and address are italicized.
7. Click on the Matching Gifts or Volunteer Gifts folder tab. The gifts for that Organization are displayed. You can print or export this information by choosing File ➤ Print or File ➤ Export from the main menu.

For a complete description of the Organizer search functions, please refer to the *GIFTS User's Guide*.

Finding Gifts by Searching

You can search for gifts using any of the search techniques described in the *GIFTS User's Guide*. This section details the Quick Find search properties for matching gifts and volunteer gifts. If you are not familiar with the Quick Find search, you may wish to read the search information in the *GIFTS User's Guide*.

To access the Quick Find for matching gifts or volunteer gifts:

1 From the Organizer, click the Matching Gifts or Volunteer Gifts tab. Then choose Edit ➤ Find from the GIFTS menu.

You can search on any combination of the following properties:

Property	Description
Approval Date	The date on which the gift was approved.
Award Amount	The amount being awarded to the Organization receiving the gift.
Declination Date	If the gift has been Declined, this is the date of the Declination.
Disposition	Gifts can have a Disposition of Pending (which includes gifts on hold), Approved, or Declined.
Disposition Reason	A reason entered for the current Disposition.
Division	The division to which the gift belongs.
Donor Class	The employee gifts Class to which the Donor belongs (usually indicates their employee status, such as full-time or part-time).

Property	Description
Donor's Employee ID	The Donor's Employee ID. If your company tracks employees by their Social Security Number, you may not be using this field.
Donor's Last Name	The last name of the Donor.
Donor's Social Security No	The Social Security Number of the Donor. If your company tracks employees by an internal employee ID system, you may not be using this field.
End of Period Batch	If the gift has been placed in a batch for period-end processing, this is the name of the batch.
Entry Date	The date on which the gift was entered into the system.
Gift Amount	*For matching gifts only*—the amount given by the Donor to the recipient Organization.
Gift Date	The date on which the gift was made.
Gift Hours	*For volunteer gifts only*—the number of hours volunteered by the Donor on behalf of the recipient Organization.
Gift Type	*For matching gifts only*—the type of the gift (such as cash, product, or stock).
Gift Year	The year in which the Donor gave the gift (based on the Fiscal Year).
Manual Award	If the system-calculated award amount (based on your program's guidelines) was overwritten during data entry and a different award amount assigned, this is considered a 'manual' award. If you choose this option, only manual awards are selected.
Manual Match	*For matching gifts only*—indicates that the Match Amount (the portion of the Donor's gifts that is applicable for matching) is not the actual amount of the gift. If you choose this option, only gifts with manual match amounts are selected.
Gift ID	The system-defined ID number of the gift.
Matching Gifts Program	For matching gifts installations that include more than one matching gifts program—the program to which the gifts are assigned.
Matches with Alerts	If you choose this option, only gifts with an Alert posted are selected.
Organization Class	The Class of the gift's recipient Organization.
Organization's Name	The name of the recipient Organization.

Property	Description
Received Date	The date on which the gift form was received.
Staff	This is the staff person who entered the gift into the system (shown in the "Entered" block on the matching gift and volunteer gift data entry windows).
Volunteer Gifts Program	For volunteer gifts installations that include more than one volunteer gifts program—the program to which the gifts are assigned.

Finding Gifts by Zooming

When you zoom in on a record (or group of records), the Organizer automatically "populates" the other Organizer folders with information related to that record. You can use this functionality to find gifts by their relationship to another record—for instance, you can find all of the Donors or gifts that are associated with a particular recipient Organization.

The following table provides an example of how you can retrieve matching gifts or volunteer gifts information by zooming in on database records.

Zoom In On a Group of…	…and Switch to the Matching Gifts or Volunteer Gifts Folder to View…
Organizations	Gifts for those Organizations
Requests (created during period-end processing)	The gifts that were used to create the Requests
Donors	Gifts for those Donors
Contacts	Gifts for those Contacts, if they are also Donors (The Contacts folder is not available if you are using Essential GIFTS without the Contacts Management option.)
Payments	The gifts that are being paid by the Payments

Similarly, if you zoom on gifts in the Matching Gifts or Volunteer Gifts folder and then switch to one of the other folders, the following is what you will see.

Zoom In On Gifts and Switch to…	**…to View…**
Organizations	Organizations associated with those gifts
Requests	Requests created from those gifts
Donors	Donors associated with those gifts
Payments	Payments associated with grants which have been created from those gifts
Documents	Documents created for those gifts
Activities	Activities created for those gifts

To zoom in on records:

1. Search for the records you need. Don't worry if records you don't want are also displayed in the grid, you can exclude the records you don't want to zoom in on.
2. Highlight the records that you wish to process. To highlight more than one record, hold down CTRL as you click on the records or choose File ➤ Select All from the main menu.

3. Choose Edit ➤ Zoom from the GIFTS menu to zoom in on the record or records you've selected. The first column of information in the record or records is italicized to indicate that the record is currently zoomed.

The Matching Gifts and Volunteer Gifts Folders

The Matching Gifts and Volunteer Gifts folders of the Organizer can provide a list of gifts that either met your search for gifts or are related to another record currently zoomed on in the Organizer.

You can customize the Organizer by displaying different columns and changing the sort order in which records are displayed. For more information on these features, please refer to the *GIFTS User's Guide*. By default, the following columns are displayed.

Column	Description
Alert Status	A red exclamation mark is displayed if an alert has been posted for the gift. Double click on the mark to view the alert.

Column	Description
Disposition	Gift Year, Disposition, Disposition Date, and Hold Reason or Disposition Reason. If you have multiple matching gifts programs installed, the Program Name is displayed. If the gift has been included in a batch, the Batch Name is displayed.
Donor	Donor Last Name, First Name, Middle Initial, Phone, Fax, e-mail, Social Security Number or Employee ID, Class, and Donor hold information.
Organization	Organization Name, Class, and Organization hold information.
Gift	Gift Date. In the matching gifts folder, the Gift Amount and Gift Type are displayed. In the volunteer gifts folder, the Gift Hours are displayed.
Match	Award Amount, and 'manual' information. For matching gifts, the Matched Amount is also displayed.
Remarks	Hold remarks, and for matching gifts, the Gift Type remarks.
ID	A system-generated ID number.
Audit	The dates on which the record was created and last modified, and the login IDs of the users that created and last modified the record.

More columns are available than may fit on the screen. You may use the scroll bar at the bottom of the folder to scroll to the right and view this information, or re-size the columns in the grid to see more information at once.

The Matching Gifts and Volunteer Gifts folders use colors to communicate additional information. The color is applied to the text in the Disposition column.

Color	Indicates
Blue	Pending: the gift has not been Approved or Declined.
Green	Approved: the gift has been awarded.
Black	Declined: no award will be made.

Processing Gifts

Matching gifts and volunteer gifts programs are typically high-volume—a large number of forms must be processed in each giving period. The data entry features for processing gifts have been designed to allow you to process these forms as efficiently as possible.

The instructions here detail the process of entering a new matching gift or volunteer gift record. For tips on working with large volumes of forms, please refer to "Tips for Efficient Data Entry" on page 31.

Caution: Before entering gifts data, it is essential that you set up GIFTS as described in "Setting Up Employee GIFTS" on page 1. If GIFTS has not been set up to properly reflect your program's rates and limits, significant errors may result in the calculation of the award amounts due to recipient Organizations.

To enter a gift:

1. Begin a data entry session.
2. Specify the recipient Organization.
3. Specify the Donor.
4. Enter the gift information used to calculate the award.
5. If you need to alert yourself or your colleagues to something important about the gift, you can create an alert for it.

Beginning a Data Entry Session

To begin a data entry session:

1 From the GIFTS menu, choose File ➤ New ➤ Matching Gift or File ➤ New ➤ Volunteer Gift (depending upon the type of record you wish to enter). A blank gift entry form is displayed.

Note: If you are using Branch Security for the *centralized* data entry model, and you are adding a new gift, you will see an additional field called 'Branch' above the Organization area. The field defaults to the branch associated with the user creating the gift, but can be changed. For information on the centralized data entry model, please see "About Branch Security" on page 290 in the *GIFTS Administrator's Guide*.

Until you close the gift entry form, GIFTS considers this to be a single data entry session.

Specifying the Recipient Organization

If you had an Organization zoomed in the Organization folder when you chose the option to create a new gift, the Organization information is automatically entered into the gift entry form. Similarly, if you are in the middle of entering a batch of gifts, GIFTS can be set up to enter information from the last Organization used. This option is set up in your Employee

GIFTS preferences—for details, please see "Setting Gift Entry Refresh Options" on page 18.

If no Organization is specified, or if the recipient is different from the Organization whose information is currently displayed, you can search GIFTS for the Organization or create a new Organization record if the recipient is not already on file.

Note that you must first search for an existing Organization before creating a new one—this helps ensure that you don't create a "duplicate" record for an Organization that is already in your system.

The recipient Organization is added in this area of the Matching Gift record.

You can search for the recipient Organization by any of the following means:

- Enter part or all of its Name and press TAB.
- Enter part or all of its Postal Code and press TAB.
- Click the Find button.

GIFTS displays the results, if any, of your search.

If the recipient is not listed, you can refine your search or create a new record. To refine the search, you can:

- ❖ Choose another search operator, such as "starts with" or "is exactly."
- ❖ Edit the text for which you are searching.

When you have refined the search, click Search. If you are sure the recipient is not already on file, click New to create a new record. For detailed information about creating Organization records, please refer to "More About Organizations" on page 1.

Note: Your GIFTS administrator can set options in the General Preferences that determine how the system performs Organization name searches. By default, the system may search for Organizations that "begin with" or "contain" the name you enter. Organization name searches may include the A.K.A. name, legal name, and/or sort name for the Organization.

When you click OK to choose a recipient from the search list or add a new record, the Organization information is displayed in the Organization panel of the entry form.

Tip: To "jump" to an Organization record, click on the Organization Name, which is underlined. You can then view or modify the Organization and click Save and Close or choose File ➤ Close from the Organization menu to return to the gift entry form.

Once you have specified the correct recipient Organization, you can proceed to the next section to identify the Donor information.

Specifying the Donor

The Donor is the employee of your company who gave the gift to the recipient Organization. You can either locate a Donor in your system or create a new Donor record.

You can also set up GIFTS to "remember" the last Donor you entered, entering that information automatically when you add a new gift. This is especially helpful if you are entering a batch of gifts for a single Donor. To set up this option, please see "Setting Gift Entry Refresh Options" on page 18.

Note that you must first search for an existing Donor before creating a new one—this helps ensure that you don't create a "duplicate" record for a Donor that is already in your system.

You can search for the Donor by any of the following means:

- Enter his or her Social Security Number or Employee ID and press TAB.
- Enter part or all his or her Last Name and press TAB.
- Click the Find button.

GIFTS displays the results, if any, of your search.

If the Donor is not listed, you can refine your search or create a new record. To refine the search, you can:

- Choose another search operator, such as "starts with" or "is exactly."
- Edit the text for which you are searching.

Note that you can search for Contacts, Donors, or both. When you have refined the search, click Search. If you are sure that the Donor is not already on file, click New to create a new record. For detailed information about creating Donor records, please refer to "More About Donors" on page 1.

When you click OK to choose a recipient from the search list or add a new record, the Donor information is displayed in the Donor panel of the Gift record.

Tip: To "jump" to a Donor record, click on the Donor Name, which is underlined. You can then view or modify the Donor and click Save and Close or choose File ➤ Close from the Donor menu to return to the gift entry form.

Once you have specified the correct Donor, you can proceed to the next section to enter the gift information.

Note: If the Donor is your employee's spouse—whose name should be entered into the Spouse Name field of the employee's Donor record—be sure to click the Spouse Match box to reflect this fact in your reports.

Entering the Gift Information

The gift information includes the date on which the form was received, the date of the gift, the Gift Year, and the Gift Amount. Using this information—and the guidelines and limits set for the Organization and Donor you specified—the system either Approves the gift and calculates the Award Amount, or Declines the gift.

Note that you can manually override both the amount that the system matches, and the amount of the award. By overriding the Award Amount, you can Approve gifts that were Declined, and vice versa.

If the gift, Donor, or recipient Organization is on Hold, the gift is given a Disposition of Pending until the Hold is released, at which time it will be Approved or Declined.

The gift-related fields are located in the right side of the entry form.

Field	Description
Disposition	The Disposition is displayed above the gift-related fields.
Program	The matching gifts or volunteer gifts program to which this gift belongs. If your system has only one program, it is displayed and cannot be modified. Otherwise, choose the appropriate program.
Received	The date on which the gift form was received. This field defaults to the current date.
Verified	The staff member who verified the gift form. This defaults to the user who is logged into GIFTS.
Gift Date	The date on which the Donor made the gift to the recipient Organization. This date is used to identify the Guideline Period used to calculate the match rate.
Gift Year	The Fiscal Year in which the gift falls. This year is used to identify the Limit Period used to check the Donor and Recipient limits.

Field	Description
Gift Amount or Hours	The amount that the Donor gave to the recipient Organization. For volunteer gifts, this is the number of hours volunteered.
Entered	The user currently logged into the system. This information is used for the system Audit Trail and cannot be modified.
Matched Amount	*For matching gifts only:* The portion of the Donor's gift to be matched. It defaults to the Gift Amount, but you can manually change it if necessary. The Award Amount is always calculated based on the Matched Amount rather than the actual Gift Amount. The Matched Amount is also used when determining the Donor or the Organization's cumulative gifts for the year for the purpose of applying rates and limits. **Example:** A Donor donates $10,000 to her alma mater but does not want the entire gift to be matched since it would use up her limit for the year (and prevent her from having gifts matched to other recipients). So, she indicates that only $2,500 of this gift should be matched. In this case, you should enter $10,000 as the Gift Amount, click the Manual option, and specify the Matched Amount as $2,500.
Manual Matched Amount	The Manual option allows you to modify the Matched Amount, and provides a small text window for remarks. You can click the Remarks button at any time to view the remarks.
Award Amount	The amount to be paid to the recipient Organization, as calculated by the system. For more information about how this calculation is made, including all the reasons why a gift may be declined, please refer to "How GIFTS Calculates the Award Amount" on page 22.

Field	Description
Manual Award Amount	You can click Manual to override this calculation and enter a manual Award Amount; a text window is displayed, where you can enter notes regarding the manual award. You can click the Remarks button at any time to view the remarks. If the Disposition of the gift was previously Declined and the Award Amount you enter is greater than zero, the Disposition is changed to Approved. Likewise, if the Disposition of the gift was Approved and you change the Award Amount to zero, the Disposition becomes Declined.
Approve	*For volunteer gifts only:* This check box is available for volunteer gifts with an Award Amount of zero. When you select this check box, the default "declined" status for the gift is overridden, and the gift may be included on standard reports.
Description	A short description of the gift's purpose.
Gift Type	*For matching gifts only:* If your company allows gifts to be made in forms other than cash (such as product or stock), choose the appropriate value from this list. The default Gift Type is cash. You can enter remarks about the Gift Type by clicking the Remarks button next to the Gift Type field.
Hold Reason	Places the gift on Hold. For more information about this feature, please refer to "Holding Gifts" on page 34.

Once this information has been entered to your satisfaction, you can click Save and New to save the gift and continue working. The current gift is saved, and the Gift record is cleared—with the exception of the Organization information, which remains because users usually process a number of gifts for a single Organization during a data entry session.

If you are finished entering gifts for the time being, choose File ➤ Close from the Gift menu.

Using Gift Alerts

An alert is a way of marking and annotating a gift so that you can remind yourself or your colleagues of something important regarding the gift. Exactly how gift alerts are used is up to you.

You can choose whether you want the Alert Message to display when users open the Gift record. For example:

To post or edit an alert:

1 Open the Gift record.

2 From the Gift menu, choose Action ➤ Alert.

Field	Description
Alert	The Alert text. If this field is left blank, no Alert is posted.
Display Alert Message?	Enable this option to display the alert message each time a user opens the Gift record. Otherwise, users can click the Alert button to view the message.

3 Click OK to save the alert and return to the Gift record.

Removing an Alert Message

1 To remove an alert, open the Alert window, delete the message text, and click OK. Then, save the Gift. GIFTS cancels the Alert.

How GIFTS Calculates the Award Amount

The calculation of a gift's Award Amount can be complicated, involving the match rate of the Donor Class or Organization Class as well as any limits that may apply to the Donor and/or Organization. As you enter gift information, Employee GIFTS makes these calculations for you based on your program guidelines and limits.

Employee GIFTS verifies the applicable gift eligibility, matching rates, and award limits in order to make and approve Award Amount calculations, as described in the following sections.

Verification of Gift Eligibility

Employee GIFTS goes through the following checks as you enter the gift information. If any of these checks fail, the gift is declined. When a gift is declined, the Award Amount is always zero and the Disposition is Declined.

- When the Gift Date is entered, Employee GIFTS verifies that the appropriate number of days have elapsed between the employee's Start Date and the Gift Date. If not enough time has elapsed, the gift is declined.

  If you suspect that the Start Date has not been entered or has been entered incorrectly, you can jump to the Donor record (by clicking on the Donor's name), enter his or her Start Date, and click OK to return to the gift entry form. The gift's eligibility is recalculated.

- Based on the Gift Year, Employee GIFTS ensures that the current year's Donor Limits have been defined for the Donor's Class. If no Donor Limits have been set up, or the Donor has not been assigned to a Class, the gift is declined.

  If the gift has been Declined because the Donor has not been assigned to a Donor Class, jump to the Donor record (by clicking on the Donor's name), enter his or her Class, and click OK to save the Donor and return to the gift entry form. The Award Amount is automatically recalculated.

  Note: The gift is not recalculated if you have saved it; you must either delete and re-enter it, or specify a manual award, as described in "Approving a Declined Gift" on page 36.

- If the gift has been declined because Donor Limits have not been set up for the Donor's Class, please contact your GIFTS administrator or refer to "Step 4C: Setting Gift Limits" on page 27 for more information. Then, you must delete and re-enter the gift, or specify a manual award, as described in "Approving a Declined Gift" on page 36.

- Based on the Gift Date, Employee GIFTS determines which Guideline Period the gift falls in. If no Guideline Period is found which encompasses the Gift Date, the gift is declined; please refer to "Step 4B: Setting Matching Periods and Rates" on page 22 for information about setting up Guideline Periods.

  To correct the Declined gift, you must either delete and re-enter it, or specify a manual award as described in "Approving a Declined Gift" on page 36.

- Match rates may be based on either the Donor's Class or the recipient Organization's Class, depending upon the setup of your program. Employee GIFTS ensures that Match Rates are defined for either the Donor Class or Organization Class, as appropriate. If not, the gift is declined.

  Please contact your GIFTS administrator or refer to "Step 4B: Setting Matching Periods and Rates" on page 22 for information about setting up your program rates. To correct the Declined gift, you must either delete and re-enter it, or specify a manual award, as described in "Approving a Declined Gift" on page 36.

  If the gift was declined because the recipient is not assigned to an Organization Class, you can jump to the Organization record (by clicking on its name), enter its Class, and click OK to return to the gift entry form. The gift's eligibility is recalculated.

  Note: The gift is not recalculated if you have saved it; you must either delete and re-enter it, or specify a manual award as described in "Approving a Declined Gift" on page 36.

Once Employee GIFTS verifies that the gift is eligible, it calculates the proposed Award Amount as described in the following section.

Verification of Matching Rates

GIFTS calculates the Award Amount for eligible gifts when you enter the Gift Amount. Note that the Award Amount is not finalized until it has been evaluated against your program limits.

Note: For matching gifts, the award is calculated based on the Matched Amount—not the Gift Amount. The "manual Matched Amount" option is used to indicate that a different amount of money should be matched than the actual gift amount. For information about entering a manual Matched Amount, please refer to "Entering the Gift Information" on page 17.

The system finds the rates that have been set up for the applicable Organization Class or Donor Class within the current Guideline Period.

Matching Gifts Calculations

The calculation of matching gifts depends upon whether your program uses a single rate or stepped matching that uses a "Tier 1" rate up to a break point, and a "Tier 2" rate after the break point has been reached:

- If you specified a single rate, the Award Amount is calculated based on this rate and the Match Amount. GIFTS then verifies the limits, as described in the next section.

  Example: If the rate is 2:1, the Award Amount for a Match Amount of $100 is $200.

- If you specified a break point, GIFTS first calculates the cumulative Matched Amount for the Donor within the Fiscal Year of the gift:

  - If the cumulative Matched Amount plus the Matched Amount for the current gift is less than the break point, the Award Amount is calculated based on the Tier 1 rate.

  - If the cumulative Matched Amount plus the Matched Amount for the current gift is greater than the break point, GIFTS identifies the portion of the Matched Amount below the break point and matches that portion at the Tier 1 amount. Then, GIFTS matches the remaining portion at the Tier 2 amount.

Example: The rate setup for the recipient Organization's Class in this Guideline Period is as follows:

Tier 1 Rate	2:1
Break Point	$5,000
Tier 2 Rate	1:1

The Donor has given a cumulative amount of $4,500 this year and has given another $1,000 in this gift. The first $500 of the gift is matched 2:1, and the second $500 is matched 1:1. The Award Amount, therefore, is $1,500.

Volunteer Gifts Calculations

The calculation of volunteer gifts depends upon whether your program uses variable rates or fixed rates:

- If you defined variable rates, GIFTS calculates the Award Amount by multiplying the number of hours volunteered by the rate specified for the applicable Donor Class or Organization Class.
- If you defined fixed rates, GIFTS verifies that the minimum number of hours have been volunteered and awards the amount specified for the program. If the minimum number of hours have not been volunteered, the gift is declined.

Once the proposed Award Amount has been calculated based on the rates, the system proceeds to verify it against the limits established for the Donor and for the Organization.

Verification of Award Limits

Once the Award Amount is calculated, Employee GIFTS ensures that the Award Amount does not exceed the limits established for the Donor and/or recipient Organization.

1. GIFTS checks the Award Amount against the limits established for the Donor Class:

- If the limits have already been reached: the gift is Declined and the Award Amount is set to zero.
- If the limits have not been reached but the full Award Amount would exceed the limits: GIFTS deducts the portion of the Award Amount that would exceed the limit, and then proceeds to check the new award against the Organization Limits.
- If no portion of the Award Amount exceeds the limits: the Award Amount is checked against the Organization Limits.

2 GIFTS checks the Award Amount (minus any portion that would exceed the Donor Limits) against the limits established for the Organization Class:

- If no Limits are found: the final Award Amount (less any portion that would exceed the Donor Limits) is placed in the Award Amount field and the gift is Approved.
- If the limits for the Organization's Class have already been reached: the gift is Declined and the Award Amount is set to zero.
- If the limits have not been reached but the full Award Amount would exceed the limits: GIFTS deducts the portion of the Award Amount that would exceed the limit, places the remaining amount in the Award Amount field, and Approves the gift.

Note: If you need to override the Award Amount generated by the system, please refer to "Entering the Gift Information" on page 17.

Viewing a Donor's History

The Donor History tab available from any gift displays:

- A summary of the Donor's history to date for the current Limit Year

❖ A list of all gifts that have been logged for that Donor.

You can double-click on any gift listed in the grid to open it; GIFTS closes the current gift when you open a gift from the list. If you've made changes to the current gift, GIFTS prompts you to save them.

The right side of the Donor History displays a summary of the Donor's giving for the current year. You can use this information to check how close the Donor is to exceeding the limits on his or her giving

Field	Description
Gift	*For matching gifts only*—the total amount of gifts given by the Donor within the current year.
Hours	*For volunteer gifts only*—the number of hours volunteered within the current year.
Matched	*For matching gifts only*—the total Matched Amount of the gifts given by the Donor within the current year.
Award	The total amount awarded to recipient Organizations on behalf of the Donor within the current year.
Limit/Yr	The Award Amount limit applied to the Donor for this year, based on his or her Donor Class.
Available	The amount of matching funds available for the remainder of the year (the limit minus the cumulative Award Amount).

Field	Description
# Entered	The number of gifts entered for this Donor within the current year.
# Approved	The number of Approved gifts entered for this Donor within the current year.
# Declined	The number of Declined gifts entered for this Donor within the current year.
# Pending	The number of Pending gifts entered for this Donor within the current year.

A list of the gifts for the Donor is displayed in the grid, which includes the following information:

Column	Description
Alert Status	A red exclamation mark is displayed if an alert has been posted for the gift. Double click on the mark to view the alert.
Donor	The name, telephone number, Social Security Number or Employee ID, and Class of the Donor.
Organization	The Organization Name and Organization Class.
Gift	The Gift Date, Gift Amount or Hours, and Gift Type.
Match	The Match Amount and Award Amount.
Remarks	The Hold Remarks.
ID	The system-generated ID number for the gift.
Audit	The dates on which the gift was created and last modified, and the login IDs of the users that created and last modified the gift.

Viewing an Organization's History

The Organization History tab available from any gift displays:

❖ A summary of the Organization's history to date for the current Limit Year

❖ A list of all gifts that have been logged for that Organization.

You can double-click on any gift listed in the grid to open it; GIFTS closes the current gift when you open a gift from the list. If you've made changes to the current gift, GIFTS prompts you to save them.

The right side of the Organization History displays a summary of the Organization's award for the current year. You can use this information to check how close the Organization is to exceeding the limits on its awards.

Field	Description
Gift	*For matching gifts only*—the total amount of gifts given to the Organization within the current year.
Hours	*For volunteer gifts only*—the number of hours volunteered within the current year.
Matched	*For matching gifts only*—the total Matched Amount of the gifts given to the Organization within the current year.
Award	The total amount awarded to the Organization within the current year.
Limit/Yr	The Award Amount limit applied to the Organization for this year, based on the Organization Class.
Available	The amount of matching funds available for the remainder of the year (the limit minus the cumulative Award Amount).
# Entered	The number of gifts entered for this Organization this year.

Field	Description
# Approved	The number of Approved gifts to the Organization during the current year.
# Declined	The number of Declined gifts to the Organization during the current year.
# Pending	The number of Pending gifts to the Organization during the current year.

A list of the gifts to the Organization is displayed in the grid, which includes the following information:

Column	Description
Alert Status	A red exclamation mark is displayed if an alert has been posted for the gift. Double click on the mark to view the alert.
Disposition	The Gift Year, Gift Disposition, Disposition Date, and Disposition Notes.
Organization	The Organization Name and Class.
Gift	The Gift Date, Gift Amount or Hours, and Gift Type.
Match	The Match Amount and Award Amount.
Remarks	The Hold Remarks.
ID	The system-generated ID number for the gift.
Audit	The dates on which the gift was created and last modified, and the login IDs of the users that created and last modified the gift.

Tips for Efficient Data Entry

Employee GIFTS has been designed to make the high-volume entry of gift records as efficient as possible. For this reason, there are several features available only on the data entry form for matching gifts and volunteer gifts.

Now that you have an understanding of the data entry process, please use this section to review and note several options that can streamline your data entry.

- An option is available in the Administrator Module for retaining either the Donor or the Recipient information in the form between entries. If you typically process new gifts in batches sorted by Recipient or Donor, contact your GIFTS administrator to find out about setting this option.
- You can "jump" to the recipient Organization's record by clicking on the underlined Organization Name in the gift entry form. After you view or modify the Organization, click Save and Close or choose File ➤ Close from the Organization menu.
- You can "jump" to the Donor's record by clicking on the underlined Donor Name in the gift entry form. After you view or modify the Donor, click Save and Close or choose File ➤ Close from the Donor menu.

The options described in the following table are located at the top of the gift entry form. The table describes the use of each option, how it is designed to help you work with maximum efficiency, and the circumstances under which each option is available.

Button	Description
Save and New	Saves the current record without exiting the gift entry form. Use this button when you finished working with a gift and you wish to enter another gift. The data entry form is cleared—with the exception that the Organization information from the previous gift is entered by default. If this is not the Organization you want, you can change it by searching for the correct Organization. Since gifts for recipients are usually processed in batches, Save allows you to enter multiple gifts without having to re-open the gift entry form or re-enter the recipient Organization.

Button	Description
File ➤ Close	Choose File ➤ Close to close the gift entry form and exit to the Organizer. If the gift is new, Employee GIFTS discards it. If the gift is an existing record to which you've made changes, you are given an opportunity to save these changes.
New	Clears the data entry form but does not exit the gift entry form, allowing you to enter a new gift. Use this button when you wish to "start over" or if you don't want to save the changes you've made to the current gift. You can start a new gift without closing and re-opening the gift entry form. If the current record is new and you've entered enough information for the gift to be saved—or if the current record is an existing record to which you've made changes—you are given an opportunity to save the gift before continuing. If you haven't entered enough information to permit a save, the current record is discarded.
Previous	Returns to the last record viewed, modified, or entered in the gift entry form. Use this option when you need to check something that you entered previously, or when you realize that you've made a mistake that you wish to correct. This is much more efficient than having to exit the data entry form and search for the gift from the Organizer. Note that you can only go back to gifts entered during the current data entry session. If the current record is new and you've entered enough information for the gift to be saved—or if the current record is an existing record to which you've made changes—you are given an opportunity to save the gift before continuing. If you haven't entered enough information to permit a save, the current record is discarded.
Next	Moves to the record entered after the current record. This button is only available if you have used the Previous button to return to a previous record. If you've made changes to the current record, you are given an opportunity to save these changes before continuing.

Button	Description
File ➤ Delete	Deletes the current record. You are required to confirm that you wish to delete the record; there is no way to recover a deleted record. This option is only available if you are viewing a record that has been saved. To discard a new gift, click New or choose File ➤ Close from the Gift menu.

Holding Gifts

When a gift is placed on Hold, the gift is given a Disposition of Pending, meaning that it has been neither Approved nor Declined. Pending gifts cannot be included in a batch for period-end processing, and therefore are not paid or included in the correspondence generated to Donors and Organizations.

Note: Gifts cannot be put on Hold if the gift is already included in a batch. If you need to put a batched gift on Hold, you must first remove it from the batch as described in "Modifying a Batch (Adding or Removing Gifts)" on page 6.

To put a gift on Hold, please use the following procedure:

1. Open the gift. You can access gifts from the Matching Gifts or Volunteer Gifts folders of the Organizer and from the history tabs of other gifts.
2. Choose a Hold Reason from the Hold Reason list. The Hold Remarks window is displayed.
3. Enter any remarks you wish to make regarding the reason for the hold, and click OK. Users can view these remarks in the Gift record and in the Organizer.

Removing a Gift Hold

You can remove the Hold from a gift at any time. When the Hold Reason is removed, the Hold Remarks are cleared and the appropriate Matched Amount (for matching gifts only) and Award Amount are calculated.

To remove the Hold from a gift:

1. Open the gift in the Match or Volunteer window.
2. From the Hold Reason list, choose "None." The Matched Amount, if applicable, and Award Amount are updated, and the gift is either Approved or Declined (as determined by your program guidelines and limits).

Note that a gift may also be held because there is a hold on either the Donor or the recipient Organization. For more information, please refer to "Holding Gifts for a Donor" on page 20 or "Holding Gifts for an Organization" on page 22.

Approving a Declined Gift

Occasionally, you may find that a gift was Declined not because it was outside of your program guidelines but because some aspect of your program's setup, or the Donor or Organization information, was incomplete.

While you can correct the setup or data entry mistake, the gifts that have already been saved with a Disposition of Declined remain Declined. Since the system does not make retroactive changes to gift data, the Award Amount and Disposition of saved gifts are not recalculated.

To correct gifts that have been incorrectly Declined, you have the following options:

1. Click the Manual option and enter a manual Award Amount. For more information, please refer to "Entering the Gift Information" on page 17.

2. Delete the gift and re-enter it after you have resolved issues regarding your setup or data. Since Declined gifts cannot be included in batches or have grants created for them, you should not encounter any restrictions when attempting to delete the gift. For more information on deleting the gift, please refer to "Deleting a Gift" on page 44.

   Note: Deleting the gift and then re-entering it after you have corrected your setup issues has the following advantages:

   - The system calculates the appropriate Award Amount for you, just as it does for any new gift.
   - The fact that a Manual Award was entered is displayed in the Organizer folder, the gift entry form, and in the Audit Trail. Since the gift is not truly a Manual Award, entering it as such may prove misleading to other users or to management.

Viewing the Audit Trail for a Gift

A gift's Audit Trail provides a history of the important actions in the life of the gift. Since the Audit Trail is maintained automatically and cannot be edited by GIFTS users, it should always represent an accurate history of events.

To access a gift's Audit Trail, open the gift and choose Tools ➤ View Audit Trail from the Gift menu. The Audit Trail is displayed. To print the Audit Trail, click Print.

The Audit Trail tracks the following events:

- ✔ The creation of the gift, including the original Gift Amount or Gift Hours
- ✔ The Approval of the gift, including the Matched Amount (if applicable), the Award Amount, and Disposition Reason
- ✔ The Declination of a gift, including the Disposition Reason
- ✔ Changes made to the Gift Amount or Hours
- ✔ Changes made to the recipient Organization or Donor specified
- ✔ Changes made to the Matched Amount or Award Amount (if a Disposition change does not also result)
- ✔ The creation of a grant for the gift or the undoing of the grant creation

Creating a Grant for a Single Gift

In general, you create grants during period-end processing that consolidate your giving to each recipient Organization. Then, you use the GIFTS grant-tracking functionality to process your Payments and, if desired, reflect your employee giving in the optional Budget Module.

If the occasion demands it, you can also process a gift "out of period." For instance, you may need to process a gift for a VIP Donor or you may find an overdue gift that was mistakenly left out of a previous batch.

Important: Once a grant has been created for a gift, you cannot include the gift in a normal batch for period-end processing. Unlike the period-end process that creates summary grants for each recipient, this process creates one grant for each gift selected—gifts are not grouped together by the recipient Organization as they are during period-end processing.

Use the following procedure to create a grant for an individual gift; note that this "out-of-period" processing is the exception, not the rule.

1 Open the gift, or highlight the gift (or gifts) in the Organizer and choose Action ➤ Create Grants. The grant creation options are displayed.

2 Use the available fields to determine how the grants should be processed.

Field	Description
Grant Information	
Request Type	Defaults to the Request Type for giving program to which the gift belongs. There is no access to this field.
Grant Date	The Grant Date to be assigned to the Request. The field defaults to the Gift's Received Date, but can be changed. When the Request is created at the end of this process, the date here also serves as the Request Date.

Field	Description
Payment Information	
Fiscal Year	The Fiscal Year in which the grant payment or payments fall. If you use the optional Budget Module and your payments fall in an Open Budget Year, you are required to specify a Reserve Fund from which the grant payments will be drawn.
Mark Payment as Paid	A single payment is automatically created for the full amount of the grant. If you check this box, this payment is automatically marked as "Paid." Otherwise, the Payment Status is "Scheduled." (The default setting of this option is determined by the Request Preferences described in the *GIFTS Administrator's Guide*.)
Reserve Fund	
Browse	This option is displayed if you need to resolve a Payment or Payments against the Budget. Click Browse to choose the Reserve Fund from which the Payments will be drawn; only the Budget for the year specified is available. The Budget Categories are displayed on the left-panel. When you click on a category, the Reserve Funds located beneath it are displayed in the right panel. To choose a Reserve Fund, double-click on it or highlight it and click OK. For more information about working with the Budget, please refer to the *Budget Module User's Guide*.

3 Click OK. If your GIFTS system has been set up to require data entry in certain categories for each Approved Request, a message indicates this fact. Otherwise, you may skip to the next step.

- Click OK. The Requests Coding Sheet is displayed. The categories that are displayed in bold type are required, meaning that you must enter a classification into them.
- To enter classifications, double-click on a required category. A list of the available classifications is displayed. Double-click on the appropriate code (or highlight it and click Insert). Enter a classification for each required category.
- When you have finished entering classifications, click the OK button on the Coding Sheet window to continue.

4 If you're creating grants for more than one gift, a process log is displayed; the log lists the grants being created, as well as any relevant informational or error messages.

5 When the grant creation is complete, click Print or Save As to keep the log for your records.

Undoing an "Out-of-Period" Grant

You can 'undo' the creation of "out-of-period" grants that were created outside of the normal period-end processing procedures. You can undo a single grant, or a batch of grants at once.

Note: This procedure cannot be used to undo gifts that were consolidated during normal period-end processing. If you need to undo grants created during period-end processing, please refer to "Undoing the Creation of Grants" on page 14.

To undo the creation of an out-of-period grant:

1. Open the gift, or highlight the gift in the Organizer and choose Action ➤ Undo Grants from the menu. You are prompted to confirm your intentions.

2. Click Yes to delete the grant (Approved Request). In addition, all Payments related to the Request are deleted. If you are using the Budget Module, any funds allocated to make these Payments are returned to the Reserve Fund from which they were drawn.

   A message is displayed if there are any outstanding issues that must be addressed. If you are undoing more than one grant, the relevant messages are displayed in a process log. When the process is complete, click Print or Save As to keep the log for your records.

Transferring Gifts to Another Branch

If your organization uses Branch Security, you can transfer gifts to other divisions for future handling. Note that you cannot transfer a gift if it has been included in a period-end batch.

Who may transfer gifts to another branch depends on the Branch Security model you are using. These two models, based on decentralized data entry versus centralized data entry, are described in "About Branch Security" on page 290 of the *GIFTS Administrator's Guide*.

- If you are using Branch Security for the decentralized data entry model, you must log in to GIFTS as a user in the Admin group.
- If you are using Branch Security for the centralized data entry model, you must log in to GIFTS as a user with permission to modify records from the branch associated with the gift or gifts. (This would include the Admin group.)

Transferring a Single Gift to Another Branch

To transfer a gift:

1. Log in to GIFTS as a member of the Admin user group, the open the gift.
2. Choose Action ➤ Transfer from the gift menu. You are prompted to enter the gift's new branch.
3. Select a branch and click OK. The gift is transferred, and the new branch's name is displayed at the top of the gift record.

Transferring a Batch of Gifts to Another Branch

To transfer a batch of gifts:

1. In the Matching or Volunteer Gifts folder of the Organizer, display and highlight the gifts you wish to transfer.
2. From the main menu, select Action ➤ Transfer Branch.
3. Select the branch to which you wish to transfer the gifts.

4 Click OK to perform the transfer. A process log opens, detailing the results of your batch transfer.

Deleting a Gift

You can delete matching gifts and volunteer gifts from the system at any time, provided that:

- The gift has not been included in a batch
- No grants have been created for the gift

Caution: Once you delete a gift, there is no way to recover it except by restoring a backup of the database prior to when the gift was deleted.

To delete a gift:

1. Open the gift.
2. From the Gift menu, choose File ➤ Delete. You are prompted to confirm that you wish to delete the gift.
3. Click Yes. The gift is permanently removed.

4 Period-End Processing

Typically, the processing of matching gifts and volunteer gifts programs is divided into periods. At the end of each period, you process the payments and send correspondence for that period. This chapter describes how to perform your *period-end processing*.

In This Chapter

Period-End Processing at a Glance **2**

Step 1: Creating and Managing Batches **4**

Step 2: Activating Period-End Processing **9**

Step 3: Running the "Schedule of Gifts to be Paid" Report **10**

Step 4: Creating Grants for Approved Gifts **12**

Step 5: Processing Payments **16**

Step 6: Generating Recipient Correspondence **27**

Step 7: Generating Donor Correspondence **29**

Period-End Processing at a Glance

The term *period-end processing* refers to the steps taken to complete gift processing for any given period. Here's an overview of the steps you need to complete on a daily or as-needed basis. Each step is described in more detail in the following pages:

1 **Create a period-end batch.**

Identify and group all of the gifts you wish to process into a period-end batch.

2 **Activate period-end processing.**

Choose a batch to initiate period-end processing.

3 **Run the "Schedule of Gifts to be Paid" report.**

This report groups the gifts for the period by their recipient Organizations, and provides you with a visual confirmation of the gifts that are to be processed.

Since the report groups matches together by Organization, it should accurately reflect the grants that are to be created for these gifts: one for each Organization that reflects the total amount that it has been awarded during that period.

GIFTS ensures that this report accurately reflects your batch by requiring that you re-generate the report whenever you add or remove matches to or from the batch.

4 **Create grants for your Approved Gifts.**

Create grants (Approved Requests) to the recipient Organizations for this period. The grants are included in your overall grant-management data.

5 Process the grant Payments.

Search for and process the Payments that have been created as a result of your period-end processing. GIFTS offers several options for sharing Payment data with your accounting department.

6 Generate recipient Organization correspondence.

Most companies produce correspondence to the recipient Organizations detailing not only the amount they are to be awarded during the period, but also the Donors on whose behalf the awards are being made. This may serve as a cover letter to a check, or notification that a check is being sent separately.

7 Generate Donor correspondence.

Most companies also produce correspondence to their Donors notifying them of the gifts that have been made on their behalf.

Important: Steps 1 through 3 must be processed in order and are mandatory. Step 4 is mandatory if you are going to address Step 5. Steps 6 and 7 are optional and can be processed in either order.

Step 1: Creating and Managing Batches

Before you can run the period-end processes, you must first identify the gifts that you wish to process for the current period and identify them as a *batch*. A batch is simply a group of gifts that you've chosen to process at the end of a giving period

All period-end processing functions revolve around a batch. In order to activate the different period-end processing options, you must first identify the batch you wish to process.

Planning a Batch

Before your create your batch, you should spend a moment thinking about the gifts that need to be included in the batch and how they are related. For instance:

- ✔ Were all of the gifts received within a certain date range?
- ✔ Were all of the Donors' gifts made within a certain date range?
- ✔ Do you want to process gifts for a particular Organization Class or Donor Class only?

The more clearly you can define your criteria for your batch, the easier it will be to select them. Not all gifts are eligible for inclusion in a batch; please refer to "Which Gifts Can Be Included in a Batch?" on page 5 for more information.

Note: If you use the GIFTS Budget Module, all Payments for a batch are resolved against a single Reserve Fund during period-end processing. If you have structured your Budget so that more than one Reserve Fund exists for matching gifts or volunteer gifts data, you may need to divide each period's gifts into batches that reflect the Reserve Fund from which the Payments should be resolved.

Which Gifts Can Be Included in a Batch?

When it comes time to process your gifts at the end of the period, you will identify to the system all of the gifts that you wish to include in the batch. However, not all gifts are eligible to be included in a batch. A gift can only be included in the batch if the following are true:

- ✔ The Disposition of the gift is Approved.
- ✔ The gift is not already included in a batch.
- ✔ A grant has not already been created for the gift.
- ✔ All of the gifts belong to the same matching gifts or volunteer gifts program. (If you have multiple giving programs, you cannot mix gifts from different programs in the same batch.)

If you attempt to add an invalid gift to a batch, you are notified by the system. You can either modify the problematic records or remove them from your selection in order to create the batch. If you are adding gifts to an existing batch, the system will skip any gifts that do not meet the above criteria.

Creating a Batch

Batches are created from the Matching Gifts and Volunteer Gifts folders of the GIFTS Organizer. In order to create a batch, you should be familiar with the Organizer's searching and selecting techniques. For complete information on using the GIFTS Organizer, please consult the *GIFTS User's Guide*.

Follow the instructions below to create a new batch.

1. In the Organizer, go to the Matching Gifts or Volunteer Gifts folder.

2. From the GIFTS menu, choose Edit ➤ Find. The Quick Find search options are displayed.

3 Use Quick Find or the Advanced search to retrieve the gifts you want to include in the batch. The gifts are displayed in the Organizer grid.

Tip: It's all right if a few gifts you'd like to include in the batch are not displayed in the grid. You can add and remove individual gifts from/to a batch after it has been created. When selecting the gifts to be included in the batch, simply try to come as close as possible to the final result.

4 Highlight the gifts to be included in your batch.

5 From the GIFTS menu, choose Action ➤ Period-End Processing ➤ Create Batch. The system scans the gifts you chose to make sure that they are eligible to be included in the batch. If any gifts cannot be included, GIFTS displays a log explaining the error.

6 You are prompted to name the batch. Be sure to use a name that will allow GIFTS users to distinguish between batch and other batches that you have created or will create, and click OK. A message indicates that the gifts have been batched.

Modifying a Batch (Adding or Removing Gifts)

You can add eligible gifts to or remove gifts from an existing batch at any time. However, not all gifts are eligible to be added; please refer to "Which Gifts Can Be Included in a Batch?" on page 5 for more information.

Note: You cannot add or remove gifts if grants have already been created for the batch because all period-end processing for that batch is complete at that point.

Since the "Schedule of Gifts to be Paid" report must accurately reflect the gifts that are to be paid in this batch, GIFTS requires that you re-run this report after making changes to a batch.

To modify an existing batch:

1 In the Organizer, go to the Matching Gifts or Volunteer Gifts folder.

2 From the GIFTS menu, choose Edit ➤ Find. The Quick Find search options are displayed.

3 Use Quick Find or the Advanced search to retrieve the gifts you want to include in the batch. The gifts are displayed in the Organizer grid.

4 Highlight the gifts to be added to or removed from the batch.

5 Choose the add or remove option:

- If you are adding gifts, choose Action ➤ Period-End Processing ➤ Add Gifts to Batch. GIFTS scans the gifts you chose to ensure that they are eligible to be included in the batch and displays a log explaining the error if any are not.
- If you are removing gifts, choose Action ➤ Period-End Processing ➤ Remove Gifts from Batch. Note that the gifts you are removing must be from the same batch.

If you are adding gifts, you are prompted to identify the batch you wish to modify.

6 Choose a batch from the list and click OK. If any gifts cannot be added, GIFTS displays a log that explains why. If the process is successful, a message indicates that the gifts have been added.

Checking the Status of a Batch

From time to time, you may want to check the status of a batch to see which aspects of period-end processing have been completed. This information is available in the grid from which you select batches for period-end processing.

To check the status of a batch:

1 In the Organizer, go to the Matching Gifts or Volunteer Gifts folder.

2 From the menu, choose Action ➤ Period-End Processing ➤ Select Batch. A grid displays the existing batches.

Column	Description
Batch	The name of the batch.
Created	The date on which the batch was created, and the user who created it.

Column	Description
Reported	The date on which the "Schedule of Gifts to be Paid" report was run, and the user who ran it.
Requests Created	The date on which grants were created for the batch, and the user who created them.
Donor Letters	The date on which Donor Correspondence was generated, and the user who performed this function.
Org Letters	The date on which Recipient Correspondence was generated, and the user who performed this function.

To exit without selecting a batch, click Cancel. To select a batch for further processing, highlight it and click OK.

Deleting a Batch

You can delete any batch for which grants have not yet been created. Note that this process deletes only the batch designation—it does not delete any of the batched gifts or the data contained within them.

To delete a batch:

1. In the Organizer, go to the Matching Gifts or Volunteer Gifts folder.
2. From the menu, choose Action ➤ Period-End Processing ➤ Select Batch. A grid displays the existing batches.
3. Double-click on a batch, or highlight it and click OK. The gifts in the batch are displayed in the Organizer grid. In addition, the period-end processing functions should now be enabled in the Action/Period-End Processing menu.
4. From the menu, choose Action ➤ Period-End Processing ➤ Delete Batch. A message notifies you that the batch has been deleted.

Step 2: Activating Period-End Processing

This section describes how to activate period-end processing after you have created a batch. To select a batch for period-end processing:

1. In the Organizer, go to the Matching Gifts or Volunteer Gifts folder.
2. From the menu, choose Action ➤ Period-End Processing ➤ Select Batch. A grid displays the existing batches.
3. Select a batch from the list and click OK. The gifts in the batch are displayed in the Organizer. In addition, the period-end processing functions should now be enabled in the Action ➤ Period-End Processing menu.

   Although you can search for a batch using the Matching Gifts or Volunteer Gifts Quick Find, the period-end processing functions are not enabled when you use Quick Find.

   Note: If you change the contents of the Organizer by performing a search or zooming in on a record in another folder, the batch is no longer considered active and the period-end processing functions are disabled.

Step 3: Running the "Schedule of Gifts to be Paid" Report

This report groups the gifts in a batch by their recipient Organizations and provides you with a detailed list of the gifts that are to be processed. In effect, the report is a preview of the grants creation step—you should review the report to ensure that the results of your period-end processing will be accurate.

GIFTS makes sure that this report accurately reflects the batch that you defined by requiring that you re-run the report whenever you add gifts to or remove gifts from the batch. Therefore, the grants and Payments that you will create are always accurately reflected in this report.

You must complete this step before you can create grants and process Payments for the batch.

To run the report:

1. In the Organizer, go to the Matching Gifts or Volunteer Gifts folder.
2. From the menu, choose Action ➤ Period-End Processing ➤ Select Batch. A grid displays the existing batches.
3. From the list, choose the batch for which you wish to run the report and click OK. The gifts included in the selected batch are displayed in the Organizer grid.
4. From the GIFTS menu, choose Action ➤ Period-End Processing ➤ Print "Gifts to be Paid" Report. The report is generated in the Crystal Reports

viewer. (If the report had been run before for the same batch, you are prompted to confirm that you wish to run the report again.)

5 When the report has finished processing, you can print a copy for your records or export it to another application, such as a spreadsheet or Internet browser. For more information about the Crystal Reports viewer, please refer to "Step 5: Running the Report" on page 6.

When you are finished viewing the report, close the viewer and return to GIFTS; closing the viewer conserves your computer's available memory.

Step 4: Creating Grants for Approved Gifts

This step consolidates your giving for each Organization—as detailed in the "Gifts to be Paid" report—into grant records (Approved Requests) that can be processed by GIFTS. Payment information is associated with these grants, and you can use the GIFTS grant-tracking features to manage them.

The outcome of this process is as follows:

- A single grant is created for each recipient Organization
- The amount of each recipient's grant is the sum total of all the awards granted to that Organization within the giving period

Creating Grants

To create grants for your employee giving:

1. In the Organizer, go to the Matching Gifts or Volunteer Gifts folder.
2. From the menu, choose Action ➤ Period-End Processing ➤ Select Batch. A grid displays the existing batches.
3. From the list, choose the batch for which you wish to create grants and click OK. The gifts included in the selected batch are displayed in the Organizer grid.
4. From the GIFTS menu, choose Action ➤ Period-End Processing ➤ Create Grants for Batch. You are prompted to confirm your intentions.

   If the Create Grants for Batch option is disabled, it is likely because you have not run the "Gifts to be Paid" report for this batch or because you have modified the batch since you last ran the report. Also, be sure that your GIFTS administrator has granted you the security permissions needed to create grants.

5 Click Yes to continue. The grant options are displayed.

Field	Description
Grant Information	
Request Type	The Request Type designated for the matching gifts or volunteer gifts program to which the gifts belong. For information about specifying the Request Type for a giving program, please refer to "Step 4: Setting Up Matching and Volunteer Programs" on page 20.
Grant Date	The Grant Date to be assigned to the grants. This also serves as the Request Date.
Payment Information	
Fiscal Year	Choose the Fiscal Year of the gift payments. GIFTS uses the Fiscal Year information in the standard financial reports and, if you use the GIFTS Budget Module, to determine the Budget Year from which funds for the Payments are drawn.
Mark Payment as Paid	For each grant, a single Payment is automatically created for the full Grant Amount. You can use this option to automatically mark these Payments as 'Paid.' Otherwise, their Status will be 'Scheduled.'
Type	The type of Payments created by the approval process. If your GIFTS administrator defined a default Payment Type, it is displayed here. If the default does not apply to the Payments you are creating, select another Payment Type from the list.
G/L Account	If you use a general ledger accounting system for your grant payments, you can select a G/L account for the Payment. If your GIFTS administrator defined a default G/L account, it is displayed here. If the default does not apply to the Payments you are creating, select another G/L account from the list.
Reserve Fund	

Field	Description
Browse	This option is displayed if you have to resolve Payments against your Budget. Click Browse to choose the Reserve Fund from which the Payments will be drawn. Only the Reserve Funds for the Fiscal Year specified are available. The Budget Categories are displayed on the left panel. Highlight a Category to display the Reserve Funds located beneath it in the right panel. To choose a Reserve Fund, highlight it and click OK. For more information about resolving Payments against the Budget, please refer to the *Budget Module User's Guide*.

6 Enter the grant information, and click OK.

Note: If GIFTS has been set up to require the entry of classification data for Approved Requests, the Request Coding Sheet is displayed. To enter a classification, double-click on the category to display a list of available classification codes. Then, highlight the classification you wish to use and click Insert. When you have entered all of the required classifications, click OK.

As the grants are created, a process log details the operation. If your Request Coding Sheets use any categories (such as "Geographical Area Served") that are also used in your Organization Coding Sheets, the classifications from your Organizations are automatically inserted into their grants. Note that classifications from the Organization override any classifications that you may have entered in this step.

7 When the process is complete, click Print or Save As to keep the log for your records.

Undoing the Creation of Grants

You may need to undo the creation of grants. If you processed a batch prematurely, you can undo all the grants for that batch. Or, if there are gifts that should not have been included in a batch, you can undo the grants made for those specific items.

Important: This process deletes grant record and payments associated with the grants you choose to undo. Any changes that you have made to either the grants or the payments are permanently deleted.

To undo the creation of grants for matching gifts or volunteer gifts:

1. In the Organizer, go to the Matching Gifts or Volunteer Gifts folder.
2. From the menu, choose Action ➤ Period-End Processing ➤ Select Batch. A grid displays the existing batches.
3. From the list, choose the batch that includes the grants you wish to undo and click OK. The gifts included in the selected batch are displayed in the Organizer.
4. From the GIFTS menu, choose Action ➤ Period-End Processing ➤ Undo Grants Creation. You are given to option to undo all of the grants for the batch, or only some of the grants.

5. Choose the appropriate option, and click OK.

   Note: If you chose Select Grants from this Batch to Undo, a grid lists the grants that were created for the batch. Highlight the grants you wish to undo and click OK.

   A process log lists the grants that were deleted. When the process is complete, click Print or Save As to keep the log for your records.

Step 5: Processing Payments

After creating grant records for your awards, you have the full payment-tracking functionality of GIFTS at your disposal to process your Payments. This section describes the basic aspects of working with Payments; for more detailed information about Payment processing, please refer to the *GIFTS User's Guide*

Most likely, you will need to request checks or wire transfers from your accounting department. GIFTS offers several methods for sending your payment requests to your accounting department. The method you choose depends upon the content and format of the data that needs to be exchanged.

Tip: If the "Schedule of Gifts to be Paid" report is sufficient for your needs, you can skip the rest of this section.

Consider the following options:

Option	Description
Print a report from the Organizer	You can search for the appropriate Payments in the Organizer and then print or export the contents of the Organizer as a report. (Using the Organizer as a report writer is known as *ad hoc reporting*.) Your report can include the date on which the Payment is scheduled, the recipient Organization, the amount, and other information available in the Payments tab of the Organizer. For more information, please refer to "Printing or Exporting from the Organizer" on page 17.
Print a report from the GIFTS Report Library	The GIFTS Report Library includes more than 40 financial reports. You can produce a report that details the Payments that are to be made. For more information, please refer to "Generating a Financial Report" on page 19.

Option	Description
Export information electronically to your A/P system	The GIFTS Accounts Payable (A/P) Module can export payment information to Blackbaud Accounts Payable, Quicken, QuickBooks, and other popular accounting packages. For more information, please refer to "Exporting Payments" on page 22.
Print checks from GIFTS	Users of the GIFTS Check Writer can print checks directly from GIFTS. For more information, please refer to the *A/P Module User's Guide*.
Print check requisition forms	The GIFTS A/P Module can print Check Requisition Forms for payments, and use an Audit Trail to track these forms. For more information, please refer to the *A/P Module User's Guide*.

These options are followed by an explanation of how to mark the Payments in GIFTS as having been 'Paid.'

Printing or Exporting from the Organizer

From the Organizer, you can create *ad hoc reports* that include the information displayed in the Organizer grid. To create an ad hoc report, you use the Organizer's searching and display options to retrieve the information you want—and then simply print or export this information.

You can use this functionality as a convenient way to print or export a list of the payments associated with a batch. This section describes the basics of ad hoc reporting; for more information, please refer to the *GIFTS User's Guide*.

You can modify ad hoc reports to meet your needs with the following options:

Include and Remove Columns By default, the Payments folder displays the status, amount, date, payee, reference information, Fund code, notes, ID, and Audit Trail information for your Payments. You can choose to display a wide variety of other columns or to remove columns that you don't need.

Sort Order By default, Payments displayed in the Organizer are sorted according to their scheduled date. You can sort records based on a number of properties—such as Vendor Number, Tax ID, and Bank Code—and choose whether the sort order is ascending or descending. In case two or

more Payments have the same value in the sorting property, you can set secondary properties by which to sort them.

Printed Format For printed reports, you can adjust the size of the columns, or hide columns entirely.

Export If you choose to export the report to your spreadsheet program, you can modify it as you would any other spreadsheet document.

Tip: You can save column, sort order, and print setup options as Organizer *Views*. For more information, please refer to the *GIFTS User's Guide*.

To create an ad hoc report for the Payments associated with a batch of gifts:

1. Go to the Payments folder of the GIFTS Organizer.
2. From the GIFTS menu, choose Edit ➤ Find. The Quick Find search options are displayed.
3. Click on the Matching/Volunteer Batch search property. A list of batches is displayed.
4. Choose a batch and click Find Now. The Payments for the batch are displayed in the Organizer.
5. Choose the columns and sort order that you wish to use for the report.
   - ❖ To add, remove, or rename columns, choose View ➤ Show Columns from the GIFTS menu.
   - ❖ To modify the sort order, choose View ➤ Show Sorts from the GIFTS menu.
6. If you are printing the report, you can adjust the size of a report column by clicking on the vertical line that divides it from the adjacent column and then dragging the line to the desired width. You can also click the right mouse button on the header of a column to exclude it from the printed report.
7. Print or export the report.

- To print the report, choose File ➤ Export from the main menu. The Print Setup options are displayed. You can enter headers, choose whether you wish the report to list the Payment totals, and set standard printing options. When you have entered this information, click Print.
- To export the contents of the Organizer grid to your spreadsheet program, click the Export button on the Main tool bar or choose File ➤ Export from the main menu. GIFTS launches your spreadsheet program (if it is not already open) and exports the column headings and contents of the grid into a new spreadsheet document. You can also export the data to an HTML file.

Generating a Financial Report

There are a variety of financial reports in the GIFTS Report Library. Many of these reports, particularly the "Check Request" and "Payments Due" series of reports, include detailed information about your scheduled payments.

This section describes how to run reports; for a complete overview and explanation of reporting, please refer to *Using GIFTS Reports*.

To create a financial report that includes the payments related to a matching gifts or volunteer gifts batch:

1. Choose View ➤ Reports from the main menu to go to the Report Library.
2. Click the Financial tab to go to the Financial report folder.
3. From the Select Report to Run list, choose a report.

4. Since you only wish to include Payments for a particular batch, choose Edit ➤ Search ➤ New Search to limit the report to include only the payments from a particular batch.

   The Quick Find search properties are displayed. Click the Matching / Volunteer Batch search property to choose a batch.

   Tip: To create your search criteria, you use the same search features that you use in the Organizer. The principles are the same—the only difference is that instead of choosing the records to be displayed in the Organizer grid, you're choosing the records to be included in a report.

The search criteria do not modify the format or structure of report; they determine which payments are included in the report.

5 If you are running a financial report, see "Setting the 'As of' Date for Financial Reports" on page 20 for information about setting the report's 'as of' date.

6 Choose Edit ➤ Report Title to edit the title of the report. The title should accurately describe the report contents, and should indicate the name of the batch to which the Payments belong.

7 Choose File ➤ Run Report. The report is generated and displayed in the report viewer. When the report has finished processing, you can print or export it:

- To print the report, click the Print button on the report viewer toolbar.

- To export the report, click the Export button on the report viewer toolbar. You are prompted to choose an export format and a filename for the exported data. You can export the report to a variety of file formats that are appropriate for word processors, spreadsheets, and Internet browsers.

Setting the 'As of' Date for Financial Reports

Many financial reports produce information specific to the date in which they are run. For instance, the "Schedule of Appropriations and Payments" reports present a picture of your financial history for the current year.

In many cases, you may want to produce financial reports of this kind after you have closed out a particular year. For instance, in the first few months of any new year, you may wish to produce reports on last year's giving for the IRS.

For this reason, an 'As of' date setting is available for all of the financial reports in the Standard Reports Library.

When you select a financial report, the "as of" date defaults to the current date

When you set 'As of' date to a date other than the current date, your reports are affected in the following ways:

- If the report automatically selects information relevant in the "Current Year," the current year is based on the 'as of' date, not the current date.
- If the report includes columns for future or past years, or future or past months, these columns are automatically adjusted based on the 'as of' date.
- Reports that include 'Scheduled' Payments include payments that have a Status of Paid, but for which the Payment Date is after the 'as of' date.
- Reports that include 'Paid' and 'Refund' Payments exclude these Payments if their Payment Date is after the 'as of' date.
- Payments for Requests that were approved after the 'as of' date are excluded from the report, regardless of their actual Schedule or Paid dates.
- Payments that were voided after the 'as of' date are reported as being 'Paid.'

The financial reports have been designed to recreate your data based on the 'as of' date, but some data—once it is altered in GIFTS—cannot be restored to its past condition; therefore, the results of reports run with the 'as of' date

may not completely represent a version of the financial data as of that date. The following data cannot be accurately recovered based on 'as of' date.

- Payments that have been deleted are not reflected.
- Payments for which the amount changed between the 'as of' date and the current date report the current amount, not the previous amount.

Important: Custom reports created by MicroEdge, the Report Designer, or any third-party report writer may not have been designed to take advantage of the 'As of' date functionality.

Exporting Payments

You can use the GIFTS A/P Module to export Payment information from GIFTS to your accounting system by means of an electronic file. Once your accounting department has processed this information, you can import the relevant check data (check number and check date) into GIFTS from another electronic file.

The following graphic illustrates the *general* flow of information from one system to another, starting with GIFTS. Note that this flow is different for some A/P links, such as the link to Blackbaud's Accounts Payable.

The GIFTS A/P Module supports links for popular accounting packages like Blackbaud Accounts Payable, Quicken, QuickBooks, Solomon, AccPAC Plus, MIP Accounting, Oracle Financials, and Great Plains Dynamics.

For the latest list of available links, choose Help ➤ MicroEdge on the Web ➤ GIFTS Compatibility Fact Sheet from the GIFTS menu or visit our Web site at *http://www.microedge.com/support/compatibility.htm*. The A/P Module also supports generic ASCII import and export formats for transferring payment data.

For more information, please refer to the *A/P Module User's Guide* or contact MicroEdge Technical Support.

Printing Checks

If you purchased the GIFTS Check Writer, you can print checks directly from GIFTS. For more information, please refer to the *A/P Module User's Guide*.

Marking Payments as 'Paid'

If you chose not mark each Payment as Paid when you created grants for a batch of gifts, you should change their Status from 'Scheduled' to 'Paid' when you are informed that the checks have either been cut or sent. You can mark each Payment as Paid individually, or you can mark an entire batch as 'Paid' at once.

Note: If you export your Payments to an external A/P system, you can mark them as Paid when you either export them or when you import your Payment information from your A/P system into GIFTS. Likewise, the GIFTS Check Writer marks Payments as Paid when checks are printed.

Please note that if you mark a group of Payments as Paid, you cannot supply the check number or check date for each Payment. If you wish to record the check number for each Payment, mark them as Paid individually or considering using an A/P link, which can automatically transfer your check data.

To mark Payments as Paid:

1. Go to the Payments folder of the GIFTS Organizer.

2. From the GIFTS menu, choose Edit ➤ Find. The Quick Find search options are displayed.

3 Use Quick Find to search for the Payments with which you wish to work. (You can use the Matching/Volunteer Batch search property to search for the Payments associated with a period-end batch.)

4 Click Find Now after you enter your search criteria. The Payments you requested are displayed in the Organizer grid.

5 Highlight the Payments you wish to mark as 'Paid.'

6 From the GIFTS menu, choose Action ➤ Mark as Paid. You are prompted to add the Paid Date and notes for these Payments.

- Enter the date you wish to be reflected as the Payment Date for each Payment.
- Enter any notes you wish to make in regard to these Payments. This text is appended to the Notes of each Payment.
- If you are marking a single Payment as 'Paid,' you can enter the Check Number.

7 Click OK to continue. If you selected more than one Payment, a process log displays the Status of each Payment. The log also lists the reason for any errors that may occur.

8 When the process is finished, click Print or Save As to keep the log for your records.

Marking a Payment as 'Paid'

You can also mark an individual payment as paid by opening its Payment record. If the Payment was made by means of a wire transfer and you would like to enter the wire transfer information, you must open the Payment to enter this data.

To mark a Payment as Paid:

1 Go to the Payments folder of the GIFTS Organizer.

2 From the GIFTS menu, choose Edit ➤ Find. The Quick Find search options are displayed.

3 Use Quick Find to search for the Payment with which you wish to work. (You can use the Matching/Volunteer Batch search property to search for the Payments associated with a period-end batch.)

4 Click Find Now after you enter your search criteria. The Payments you requested are displayed in the Organizer grid.

5 Open the Payment you wish to mark as Paid. The Payment record is displayed.

6 Click the Pay button. The Payment information fields are enabled.

7 Enter the Payment information:

Field	Description
Wire Transfer	Check this box if the Payment is to be made by wire transfer. The Wire Transfer tab of the Payment record is enabled. For information about wire transfers, please refer to the *GIFTS User's Guide*.
Date Paid	The date on which the Payment was paid. This date is required in order for the Payment to be considered paid.
Check No.	The check number of the Payment. This is optional.

Field	Description
Date Cleared	The date the check or wire transfer cleared. There is no access to this field if the Payment has not been marked as Paid.
AP Invoice	The invoice number used by your external A/P system for this Payment. Note that this is not entered automatically by the optional GIFTS A/P links—it is a data entry field.

8 When you have entered the date and check or wire transfer information, click Save and Close to save the payment.

Step 6: Generating Recipient Correspondence

The option to generate end-of-period recipient correspondence groups the awards due to each recipient and prints a letter for or sends an e-mail message to each recipient Organization. The letter or e-mail details the awards they are to receive. The format of the correspondence is set up by your GIFTS administrator.

The first step in generating the recipient correspondence is to select the batch of gifts for which you wish to produce the correspondence. Then, you choose a letter template and GIFTS merges information from your database with the template to produce the appropriate letters.

Letters are generated as a batch, so the following conditions apply:

- Depending on your system setup, multiple letters (in this case, there is one for each recipient) are saved to a single document with page breaks separating the individual letters, or as separate word processor documents.
- The address specified as the Employee GIFTS Contact's Primary Address is used for each letter. If no Primary Address has been specified, GIFTS uses his or her Office Address. If no Office Address has been specified, GIFTS uses his or her Home Address.

To send the period-end recipient correspondence for a batch:

1. In the Organizer, go to the Matching Gifts or Volunteer Gifts folder.
2. From the menu, choose Action ➤ Period-End Processing ➤ Select Batch. A grid displays the existing batches.
3. From the list, select a batch and click OK. The gifts in the batch are displayed in the Organizer.
4. From the GIFTS menu, choose Action ➤ Period-End Processing ➤ Send Recipient Correspondence. The Correspondence Generation Wizard is displayed.

5 Use the Wizard to generate the correspondence. For step-by-step instructions for generating correspondence, please refer to the *GIFTS User's Guide*.

Step 7: Generating Donor Correspondence

The option to generate end-of-period correspondence for your recipients groups the gifts that each Donor gave and prints a letter for or sends an e-mail message to each Donor. The letter or message details the awards made on their behalf. The format of the correspondence is set up by your GIFTS administrator.

The first step in generating the Donor correspondence is to select the batch of gifts for which you wish to produce the correspondence. Then, you choose a letter template and GIFTS merges information from your database with the template to produce the appropriate letters.

Letters are generated as a batch, so the following conditions apply:

- Depending on your system setup, multiple letters (in this case, there is one for each donor) are saved to a single document with page breaks separating the individual letters, or as separate word processor documents.
- The address specified as the Donor's Primary Address is used automatically. If no Primary Address has been specified, the system uses the Donor's Office Address. If no Office Address has been specified, the system uses the Donor's Home Address.

To send the period-end donor correspondence for a batch:

1. In the Organizer, go to the Matching Gifts or Volunteer Gifts folder.
2. From the menu, choose Action ➤ Period-End Processing ➤ Select Batch. A grid displays the existing batches.
3. From the list, select a batch and click OK. The gifts in the batch are displayed in the Organizer.
4. From the GIFTS menu, choose Action ➤ Period-End Processing ➤ Send Donor Correspondence. The Correspondence Generation Wizard is displayed.

5 Use the Wizard to generate the correspondence. For step-by-step instructions for generating correspondence, please refer to the *GIFTS User's Guide*.

5 More About Donors

Donors are employees of your organization who donate to or volunteer for recipient Organizations. This chapter describes how to enter and work with Donor information.

In This Chapter

Finding Donors **2**

The Donors Folder **6**

About Donors and Contacts **8**

Creating or Modifying a Donor **11**

Holding Gifts for a Donor **20**

Transferring Donors to Another Branch **22**

Deleting a Donor **24**

Finding Donors

When you need to find a Donor, you can choose between a couple of methods. You can use the method you find most convenient, based on your work style and the area of the system in which you are working.

Method	Description
Searching	In the Donors folder of the Organizer, you can search for Donors. The Donors that meet your *search criteria* are displayed in the Organizer grid, where you can view the information displayed in the grid or open individual Donor records.
Zooming	You can *zoom in* on records—such as Organizations or gifts—and then view the Donors related to them by moving to the Donors folder. For instance, you can zoom in on a recipient Organization and switch to the Donors folder to view the Donors who have given gifts to that Organization.

Finding Donors by Searching

You can search for Donors using any of the search techniques described in the *GIFTS User's Guide*. This section details the Quick Find search properties for Donors. If you are not familiar with the Quick Find search, you may wish to read the search information in the *GIFTS User's Guide*.

To search for Donors:

1 Go to the Donors folder of the Organizer and choose Edit ➤ Find from the GIFTS menu. The Quick Find search properties are displayed.

Property	Description
Class	The Employee GIFTS Class to which the Donor belong. This usually corresponds with the Donor's employment status (like 'Full Time' or 'Part Time').
Coding Sheet	Search the Donor Coding Sheet classifications. This option is not available in Essential GIFTS.
Department	The department to which the Donor belongs.
Division	The division to which the Donor belongs.
Donor ID	GIFTS assigns a unique ID number to each Donor; these are sometimes included in reports and queries for easy reference.
Donor is a Contact	Searches for Donors who are also listed as a Contact in your database, and who may be a Contact for one or more Requests.
Donor is a VIP	Searches for Donors flagged as VIPs.
Donors with Alerts	Searches for Donors that have an alert posted.
Donors with Matching Gifts	*For matching gifts programs only*—Donors that are associated with matching gifts.
Donors with Volunteer Gifts	*For volunteer gifts programs only*—Donors that are associated with volunteer gifts.
Employee ID	The Donor's Employee ID number.
First Name	The first name of the Donor.

Property	Description
Last Name	The last name of the Donor.
On Hold for Employee Gifts	Limits the search to Donors who have been specified as on 'Hold' for matching gifts and volunteer gifts.
Position/Title	The position or title of the Donor.
Retire Date	The date on which the Donor retired.
Social Security No.	The Social Security Number of the Donor.
Start Date	The date on which the Donor's employment began with the company.
Termination Date	The date on which the Donor's eligibility for participation in the employee gifts programs expired.
Include Contacts	Include Contacts associated with your grant making activities. For more information on the relationship between Contacts and Donors, see "About Donors and Contacts" on page 8.

2 Click on a search property. You are prompted to complete the search expression. For instance, if you are searching a text field you can choose "begins with" as your search operator, and then enter the beginning of the text in the available field.

3 Click Find Now to run the search or click OK to return to Quick Find, where you can click another property to create another expression.

4 When you have created all of expressions you need, click Find Now. The Donors that meet the search criteria are displayed in the Organizer grid.

Finding Donors by Zooming

When you zoom on a particular record or a group of records, the Organizer automatically "populates" the other Organizer folders with information related to that record or records. You can use this functionality to find matches by their relationship to another record—for instance, you can find all of the Donors or matches that are associated with a particular recipient Organization.

The following table provides an example of how you can retrieve Donor information by zooming in on database records.

Zoom in on a Record in this Folder…	**…and Go to the Donors Folder to View…**
Organizations	Donors who gave gifts to that Organization.
Requests	Donors who gave the gifts that were paid by the grants.
Matching Gifts	Donors who gave the gifts.
Volunteer Gifts	Donors who volunteered the time that led to the gift award.

Similarly, if you zoom on records in the Donors folder and then switch to other folders, you can retrieve information as it relates to the Donors.

Zoom on Donors and Go to…	**…to View…**
Organizations	Organizations that received gifts from the Donor.
Requests	Grants that have been created for gifts given by the Donor.
Matching Gifts	Matching gifts associated with the Donor.
Volunteer Gifts	Volunteer gifts associated with the Donor.
Documents	Documents, including GIFTS correspondence and external documents, associated with the Donor.
Activities	All activities associated with the Donor.

To zoom in on records:

1. Search for the records you need. Don't worry if records you don't want are also displayed in the grid, you can exclude the records you don't want to zoom in on.
2. Highlight the records that you wish to zoom in on.
3. Choose Edit ➤ Zoom from the GIFTS menu to zoom in on the record or records you've selected. The first column of information in the record or records is italicized to indicate that the record is currently zoomed.

The Donors Folder

The Donors folder of the Organizer displays the Donors that have been entered into GIFTS.

You can customize the content, sort order, and content of the Donors folder as described in the *GIFTS User's Guide*. By default, the following columns are displayed:

Column	Description
Alert Status	A red exclamation mark is displayed if an alert has been posted for the Donor. Double click on the mark to view the alert.
Name/Phone/SSN	Last Name, First Name, Middle Name, Social Security # or Employee ID, Office Phone, Extension and Fax
Office Address	Complete Office Address
E-Mail/Division/ Department	E-mail Address, Division, Department
Donor Class/Hold Status	The Donor Class. This also contains notification that the Donor is a VIP, if applicable. If the Donor is on hold, this column reflects this fact, along with the Hold Notes.
ID	The system-generated ID of the Donor record.

Column	Description
Audit	The dates on which the record was created and last modified, and the login IDs of the users that created and last modified the record.

More columns are available than may fit on the screen. You may use the scroll bar at the bottom of the folder to scroll to the right and view this information, or re-size the columns in the grid to see more information at once.

Since you can display Contacts as well as Donors in the Donors Folder, the Organizer uses colors to distinguish between Contacts and Donors:

Color	Indicates
Black	The person is a Contact only (not a Donor).
Blue	The person is a Donor only (not a Contact).
Green	The person is both a Donor and a Contact.

About Donors and Contacts

The GIFTS Organizer displays separate folders for Contacts and Donors. Within the database, however, Contact information and Donor information is stored in one place. Since the same individual may be both a Contact and a Donor, the majority of information about a person is shared between their "Contact" record and their "Donor" record.

Example: Rose Anderson is a Vice President in your company as well as a board member of a local charity.

There are separate Contact and Donor folders and data entry forms because the some Donor information is not relevant to Contacts, and vice versa. For instance, you need to know the employment status of your Donors but not of Contacts, who are usually not employees of your organization. Likewise, you do not need to know the academic background of your Donors but it can be useful for Contacts who are advisors on a project.

The following diagram illustrates how some Donor and Contact information is shared.

Donors Donors are employees (or spouses of employees) at your company. You may have all of the employees at your company entered as potential Donors, or you may create new Donors when a gift form is submitted. A Donor may be involved with the Organization he or she supports. In these cases, the Donor is also considered to be a Contact.

Contacts A Contact is a person who is involved with a recipient Organization, such as an advisor, board member, or Primary Contact. In some cases, you may assign employees to certain projects as consultants or in other capacities (usually to grants outside of your employee giving program). If that employee also participates in your matching gifts or volunteer gifts programs, he or she is also considered to be a Donor.

Contact and Donor Indicators

GIFTS automatically keeps track of whether a person is a Donor, a Contact, or both. This section describes how GIFTS determines this, and how you can change these settings manually.

If you enter a new person from the Donors data entry form, that person is automatically flagged as a Donor: searches based on "Donors only" will include this person, but searches based on "Contacts only" will not. However, if you perform any of the following actions for that Donor, GIFTS automatically determines that this Donor is also a Contact:

- Select the Donor as the Primary Contact for an Organization or Request.
- Create an Affiliation between the Donor and an Organization or Request.
- Edit the Donor's record from the Contacts tab of the Organizer (you can list Donors in the Contacts folder by using the "Contact is a Donor" Quick Find search property).

If you enter a new person from the Contacts data entry form, that person is automatically flagged as a Contact: searches based on "Contacts only" will include this person, but searches based on "Donors only" will not. However, if you perform any of the following actions for that Contact, GIFTS automatically determines that this Contact is also a Donor:

- Select the Contact as the Donor for a gift.
- Edit the Contact's record from the Donors tab of the Organizer (you can list Contacts in the Donors folder by using the "Donor is a Contact" Quick Find search property).

You can also manually update these designations at any time:

- On Page 1 of a Contact record, you can check or clear the 'Contact is also a Donor' option. Note that if you clear this option, it does not delete any of the Donor information for this person. You can restore the Donor information at any time by checking this option.
- On Page 1 of a Donor record, you can check or clear the 'Donor is also a Contact' option. Note that if you clear this option, it does not delete any of the Contact information for this person. You can restore the Contact information at any time by checking this option.

Creating or Modifying a Donor

You can enter a new Donor into the system at any time, including while you are entering matching gift or volunteer gift information:

- When you are entering a gift and your search for the Donor fails, you can click the New button in the "Search for Donor" to display a blank data entry form for Donors.

- From the Organizer, you can go to the Donors folder and click the New button on the Folder toolbar.

To modify an existing Donor, you can:

- Click on the underlined name of the Donor in a gift entry form to jump to that Donor's record.

- Use the search or zoom features to display the Donor in the Organizer grid. Then, choose File ➤ Open from the main menu.

The following sections describe the available fields in the Donor data entry forms.

Page 1 of a Donor Record

Page 1 of a Donor record includes basic information, including the Donor's name and address. It also includes information vital to Employee Gifts programs, including their Donor Class (no gifts will be approved for the

Donor unless a valid Class has been entered) and their employment status information.

Note: If you are using Branch Security for the *centralized* data entry model, and you are adding a new Donor, you will see an additional field called 'Branch' below the Donor Class field. The field defaults to the branch associated with the user creating the Donor, but can be changed. For information on the centralized data entry model, please see "About Branch Security" on page 290 in the *GIFTS Administrator's Guide*.

Field	Description
Last Name	The last name of the Donor.
First Name	The first name of the Donor.
Middle Name	The middle name of the Donor.
Prefix	The Donor's prefix, such as Mr., Ms., or Dr.
Suffix	The Donor's suffix, if applicable, such as Ph.D.
Employee ID	If you use internal employee ID numbers to reference your employees, enter the ID here. Note that your GIFTS administrator may have set up this field to accept only IDs of a specific format. For more information, please contact your GIFTS administrator. If you use identify Donors by their Social Security Numbers, there is a separate field for Social Security Number on Page 2 of the Donor record.

Field	Description
E-mail	The Donor's e-mail address. If the address is displayed in blue type, you can click on it to send an e-mail message to the Donor. To edit the address, click to the right of it and use the left arrow to move the cursor to the area that you want to edit.
Donor Class	You must specify the Donor's Class in order for the system to calculate the awards for his or her gifts. Your GIFTS administrator sets up the available classes. Note that if you change the Donor Class, the Donor Class of Approved gifts for this Donor is not changed because the original Donor Class was used to calculate the Award Amount.
Donor is a VIP	If the Donor is a VIP, check this box. Each time a user opens the Donor or a gift associated with the Donor, the system generates a message to remind the user that this Donor is a VIP.
Donor is also a Contact	For more information about this option, please refer to "Contact and Donor Indicators" on page 9.
Start Date	The date on which the employee started at the company. If you have set up your gifts program so that employees are only eligible to participate after a certain amount of time has elapsed, this information is important for the system to evaluate the eligibility of the Donor.
Termination Date	The date on which the employee (or the employee's spouse) is no longer eligible to participate in your employee gifts program—often the date on which the employee left the company, retired, or passed away. Gifts entered with a Gift Date after the Termination Date are automatically Declined.
Retire Date	The date on which the employee retired, if applicable.
Death Date	The date on which the employee died, if applicable. When a death date is entered, it is automatically entered as the Termination Date. If your company allows spouses of deceased employees to participate in your employee gifts program after this date, you can manually adjust the Termination Date after you enter the Donor's Death Date.

When you are finished with this information, you can work on another tab or click Save and Close to save the Donor information.

Page 2 of a Donor Record

Page 2 of a Donor record contains additional biographical information, notes about the Donor, Salutation information, and the Donor Hold flag.

Field	Description
Biographical	
Division	The branch or division to which the Donor belongs. This information is important if you need to run reports or queries by division, or if you batch records for period-end processing based on division.
Department	The department to which the Donor belongs. Unlike Division, Department is a text field that does not contain pre-defined values.
Position / Title	The position or title of the Donor at your company.
Social Security No.	The Donor's Social Security Number.
Spouse Name	The name of the Donor's spouse.
Notes	Any notes relating to the Donor.
Hold Flag	
Hold Employee Gifts	Check this option to automatically place all new gifts for this Donor on Hold. For more information, please refer to "Holding Gifts for a Donor" on page 20.

Field	Description
Notes	Notes relating to the fact that the Donor is on hold. Any notes you enter are automatically cleared when the Donor is taken off hold.
Salutation	
Formal	The Donor's formal salutation, such as "Mr. Casper." This automatically defaults to the Donor's prefix and last name.
Informal	The Donor's informal salutation, such as "Allen." This automatically defaults to the Donor's first name.
Addressee	The Donor's addressee salutation, such as "Mr. Allen Casper." This automatically defaults to the Donor's complete name.

When you are finished with this information, you can work on another tab or click Save and Close to save the Donor information.

Donor Address Information

You can store up to three different addresses for each Donor, and decide which of the addresses should be used as the Primary Mailing Address (the default address for correspondence). Each address also includes telephone numbers.

Note: If your GIFTS administrator has set up a default employer in the Employee GIFTS preferences, the Office Address of each Donor defaults to the employer Organization's address.

The address selected as the primary mailing address will be used for GIFTS correspondence.

To enter address information:

1 Use the tabs on the left side to choose the address you wish to enter: Office, Home, or Alternate.

2 If you wish this address to be the Primary Mailing Address, click the Use as Primary Mailing Address option at the lower left corner of the form. (Only one of the three addresses can be specified as the Primary Mailing Address.) An aqua dot is displayed on the tab for the Primary Mailing Address.

3 Enter the address information into the available fields:

Field	Description
Addresses	
Address	The street address.
City	The city.
State	The state, province, or county. For addresses outside of the U.S. and Canada, you can skip this field unless you wish to be able to report or search on the State / Province / County field.
Postal Code	The postal (or Zip) code. For addresses outside of the U.S. and Canada, you can skip this field unless you wish to be able to report or search on the Postal Code field. If your GIFTS administrator enabled the postal code data entry shortcut, you can skip the City, State, and Country when you create or edit an address. Enter the Postal Code and click any field. GIFTS fills in the City and State for you. If these fields are not filled automatically, the shortcut is not enabled or the Postal Code you entered is not on file.
Country	Enter the country or choose from the list.
Description	*For the Alternate Address only*—a description of the Alternate Address, such as “Summer Home.”
Phone(s)	

Field	Description
Main	The main telephone number and extension. Enter the number as you want it to appear in reports or queries. For instance, "(919) 834-1212" or "919/834-1212." If your GIFTS administrator specified a default telephone number format, you can type the number with no parentheses, spaces, or dashes. GIFTS formats the number for you. If your GIFTS administrator defined a default area code and you type a telephone number with no area code, GIFTS adds the default area code. If the default is not appropriate for the telephone number you typed, you can edit it.
Alternate	For this telephone number, you can also enter the description.
Fax	The Donor's fax number at this address.
Last Updated	Displays the date of the last update to this address and the login ID of the user who updated it.
Mobile	The Donor's mobile phone number, if available.
Pager	The Donor's pager number, if available.

Note: The Office Address has an option to 'Omit Organization Name from Label' option to omit the Donor's Organization Name from the 'Mailing Label' merge field used in correspondence.

4 When you are finished with this information, you can work on another tab or click Save and Close to save the Donor information.

Donor Coding Sheet

When entering data, you need to use consistent terms to classify your information. To address this issue, GIFTS has a *Coding Sheet* for each of your Donors that allows you to choose classifications from a set categories defined by your GIFTS administrator. These classifications are displayed on the Coding tab of your Donor records.

Example: You can choose the "Teaching" classification in the "Volunteer Type" category.

If your GIFTS administrator specified any categories on the Donor Coding Sheet as *required*, you cannot save a new Donor record until you have provided a code in that category.

This section includes basic information about entering Coding Sheet data. For more comprehensive information, please refer to "Working with Coding Sheets" on page 23.

Adding Codes To classify the Donor, highlight the category in which you wish to supply a code and click Add. The codes defined for that category are displayed.

To add a code, highlight it and click Insert. The code is displayed on the Coding Sheet. When you are finished adding codes, choose File ➤ Close from the Code Selection menu.

Primary and Secondary Codes Some categories allow you to select more than one code. If more than one code is specified for a category, the *primary code* is displayed in blue, and the *secondary codes* are displayed in green.

For an explanation of how primary and secondary codes are used in GIFTS reports and correspondence, please refer to "Primary and Secondary Codes" on page 27. To make a secondary code the primary code within a category, highlight it and click the Primary button at the bottom of the Coding Sheet.

Removing Codes To remove a code, highlight it and click Remove.

When the Coding Sheet information is complete, you can click on the other Donor tabs to work with or view other information—the Coding Sheet is saved automatically. If you are finished working with this Donor, click Save and Close to save the Donor and return to the GIFTS Organizer.

Holding Gifts for a Donor

When a Donor is placed on 'Hold,' new gifts entered for that Donor are assigned a Disposition of Pending (regardless of whether the gift would otherwise be Approved or Declined). Pending gifts cannot be batched for period-end processing, and therefore are not processed or Declined until the Hold is removed.

Note: Placing a Donor on Hold does not affect gifts that have already been entered. The Hold will only affect gifts entered after the Donor is placed on Hold.

When the Donor's Hold is removed, GIFTS searches for all of the Donor's Pending gifts and—if the gift itself is not on hold and there is no hold on the recipient Organization—GIFTS evaluates the gift and changes its Disposition to either Approved or Declined (according to the guidelines and limits for your giving program).

The following sections describe how to add and remove Donor Holds.

Placing a Donor on Hold

When a Donor is placed on 'Hold,' new gifts entered for that Donor are assigned a Disposition of Pending (regardless of whether the gift would otherwise be Approved or Declined). To place a Donor on Hold:

1. Open the Donor record and go to Page 2.
2. Check the Hold Employee Gifts box.
3. Enter any notes you wish to make regarding the hold in the Hold Notes field.
4. Click Save and Close to save the Donor record with your changes. The Donor is now on Hold.

Removing a Donor Hold

When a Donor's Hold is removed, GIFTS searches for all of the Donor's Pending gifts and—if the gift is itself is not on hold and there is no hold on

the recipient Organization—GIFTS evaluates the gift and changes its Disposition to either Approved or Declined.

To remove a Donor Hold:

1. Open the Donor record and go to Page 2.
2. Clear the Hold Employee Gifts box. The Hold Notes are removed.
3. Click Save and Close. GIFTS evaluates the Pending gifts for the Donor.

Transferring Donors to Another Branch

If your Donors are branch-specific, you can transfer a Donor to another branch so that users at that branch can enter new gifts for the Donor.

The Donor's *existing* gifts are not transferred; users at the new branch cannot view the Donor's giving history at his or her previous branch (unless they have rights to view the data from that branch).

Who may transfer Donors to another branch depends on the Branch Security model you are using. These two models, based on decentralized data entry versus centralized data entry, are described in "About Branch Security" on page 290 of the *GIFTS Administrator's Guide*.

- If you are using Branch Security for the decentralized data entry model, you must log in to GIFTS as a user in the Admin group.
- If you are using Branch Security for the centralized data entry model, you must log in to GIFTS as a user with permission to modify records from the branch associated with the Donor or Donors. (This would include the Admin group.)

Transferring a Single Donor to Another Branch

To transfer a single Donor to another branch:

1. Open the Donor record.
2. From the menu, choose Action ➤ Transfer Branch. You are notified that the Donor's giving history will not be transferred.
3. Click Yes. You are prompted to enter the Donor's new branch.
4. Enter a new branch and click OK. You are prompted to confirm your choice.
5. Click Yes. The Donor is transferred.

Transferring a Batch of Donors to Another Branch

To transfer a batch of Donors:

1. In the Donors folder of the Organizer, display and highlight the Donors you wish to transfer.
2. From the main menu, select Action ➤ Transfer Branch. You are notified that the Donors' giving histories will not be transferred.
3. If you want to continue, click Yes. The Transfer Donors window opens.
4. Select the branch to which you wish to transfer the Donors and click OK. A window opens, asking you to confirm this transfer.
5. Click Yes to perform the transfer. A process log opens, detailing the results of your batch transfer.

Deleting a Donor

You can delete a Donor only if there are no matching gifts or volunteer gifts associated with the Donor. If there are gifts for the Donor, you must either delete the gifts or change the Donor for the gifts before you can delete the Donor.

To delete a Donor:

1. From the Donors folder of the GIFTS Organizer, open the Donor record.
2. From the Donor menu, choose File ➤ Delete. You are prompted to confirm your intentions.
3. Click Yes. The Donor is deleted.

6 More About Organizations

Recipient Organizations are the institutions that receive funding as the result of your matching gifts and/or volunteer gifts programs. This chapter describes how to enter and work with Organization information.

In This Chapter

Finding Organizations **2**

The Organizations Folder **7**

Creating or Modifying an Organization **9**

Holding Gifts for an Organization **22**

Deleting an Organization **24**

Finding Organizations

When you need to find a Donor, you can choose between a couple of methods. You can use the method you find most convenient, based on your work style and the area of the system in which you are working.

Method	Description
Searching	You can search for Organizations in the Organizations folder of the Organizer. The Donors that meet your *search criteria* are displayed in the Organizer grid, where you can view the information displayed or open individual Organization records.
Zooming	You can *zoom in* on records—such as Donors or gifts—and then view the Organizations related to them by moving to the Organizations folder. For instance, you can zoom in on a Donor and switch to the Organizations folder to view the Organizations to which the Donor has given gifts.

Finding Organizations by Searching

You can search for Organizations using any of the search techniques described in the *GIFTS User's Guide*. This section details the Quick Find search properties for Donors. If you are not familiar with the Quick Find search, you may wish to read the search information in the *GIFTS User's Guide*.

To search for Organizations:

1 Go to the Organizations folder of the Organizer and choose Edit ➤ Find from the GIFTS menu. The Quick Find search properties are displayed.

You can search on any combination of the following properties:

Property	Description
Charitable Missing Tax Status	Charitable Organizations whose Tax Status is not specified on the Tax Status page of the Organization record.
City	The city in the Organization's mailing address.
Coding Sheet	Searches on any combination of codes in any Code Tables on the Organization Coding Sheet. When you click this property, the Coding Sheet template for Organizations is displayed, and you can choose any combination of codes on the template.
Matching/Volunteer Class	The Organization Class to which the Organization belongs. Often, companies vary their guidelines and rates for different Organization Classes.
Matching/Volunteer Hold	Use the property to search for Organizations that have or have not been placed on Hold.
Name	The name of the Organization. Depending upon options chosen by your GIFTS administrator in the General Preferences, the system searches for the Organization's name, A.K.A. name, sort name, legal name, or any combination of these four names.
Organization ID	The ID of the Organization. (GIFTS assigns an ID number to each Organization as it is created. These numbers are sometimes included in reports for quick reference.)

Property	Description
Organization with Alerts	Search for Organizations that have alert messages.
Postal Code	The postal code in the Organization's mailing address.
Primary Contact's Last Name	The last name of the person assigned as the Primary Contact on first page of the Organization record.
State	The state, province, or county in the Organization's mailing address.
Tax Status Requires Verification	Charitable Organizations whose Tax Status verification is overdue, as specified on the Tax Status page of the Organization record.
Vendor Number	The Vendor Number in the Organization record. (Vendor numbers are useful if your external accounting system requires them.)

2. Click on a search property. You are prompted to complete the search expression. For instance, if you are searching a text field you can choose "begins with" as your search operator, and then enter the beginning of the text in the available field.

3. Click Find Now to run the search or click OK to return to Quick Find, where you can click another property to create another expression.

4. When you have created all of expressions you need, click Find Now. The Donors that meet the search criteria are displayed in the Organizer grid.

Finding Organizations by Zooming

When you zoom on a particular record or a group of records, the Organizer automatically updates all of the information in the other Organizer folders with the information related to that record or records. You can use this functionality to find matches by their relationship to another record—for instance, you can find all of the recipient Organizations or matches that are associated with a particular Donor.

The following table provides an example of how you can retrieve Organization information by zooming in on database records.

Zoom in on a Record in this Folder…	**…and Go to the Organizations Folder to View…**
Matching Gifts	The recipient Organization for the selected gifts.
Volunteer Gifts	The recipient Organization for the selected gifts.
Requests	The recipient Organization for the selected Requests.
Donors	The Primary Organization (usually the employer) of the selected Donors.
Contacts	The Primary Organization (usually the employer) of the selected Contacts.
Payments	The Organization identified as the Payee Organization ("fiscal sponsor") for the Payment.
Activities	The Organization associated with the selected Activities.
Documents	The Organization associated with the selected Document Activities, including system-generated correspondence and external documents.

Similarly, if you zoom on records in the Organizations folder and then switch to other folders, you can retrieve information as it relates to the Organizations.

Zoom in on Organizations and Go to…	**…to View…**
Matching Gifts	The matches entered for the selected Organizations.
Volunteer Gifts	The gifts entered for the selected Organizations.
Requests	The Requests associated with the selected Organizations.
Donors	The Donors who submitted matching or volunteer gifts to the Organization.

Zoom in on Organizations and Go to…	…to View…
Contacts	Contacts associated as the Primary Contact for the selected Organizations, or associated with any Request for which the Organization is the recipient.
Payments	Payments for which the Organization is identified as the Payee Organization ("fiscal sponsor").
Documents	Any Document Activities, including system-generated correspondence and external documents, associated with the Organizations.
Activities	Activities associated with the selected Organizations.

To zoom in on records:

1. Search for the records you need. Don't worry if records you don't want are also displayed in the grid, you can exclude the records you don't want to zoom in on.
2. Highlight the records that you wish to zoom in on.
3. Choose Edit ➤ Zoom from the GIFTS menu to zoom in on the record or records you've selected. The first column of information in the record or records is italicized to indicate that the record is currently zoomed.

The Organizations Folder

The Organizations folder of the Organizer lists the Organizations that have been entered into the system.

You can customize the content, sort order, and content of the Organizations folder as described in the *GIFTS User's Guide*. By default, the following columns are displayed:

Default Column	Description
Alert Status	A red exclamation mark is displayed if an alert has been posted for the Organization. Double click on the mark to view the alert.
Organization	The Organization's name and complete address.
Primary Contact	The name and office telephone number of the Organization's Primary Contact.
Also Known As	The Organization's also known as (A.K.A.) name, if any.
Legal Name	The Organization's legal name. This is usually the name on the Organization's 501(c)(3) or similar document.
ID	The unique, system-defined identification number assigned to the Organization.

Default Column	Description
Audit	The dates on which the record was created and last modified, and the login IDs of the users that created and last modified the record.

More columns are available than may fit on the screen. You may use the scroll bar at the bottom of the folder to scroll to the right and view this information, or re-size the columns in the grid to see more information at once.

The following color-coding is used in the Organizations folder:

Color	Meaning
Black	No outstanding circumstances.
Red	The Organization is flagged as a Charitable Organization, but its Tax Status has not been specified.
Green	The Organization is flagged as a Charitable Organization and the Next Verify Date for its Tax Status has expired.
Blue	This Organization is flagged as Non-Charitable; therefore, no Tax Status information is necessary.

Creating or Modifying an Organization

You can enter new Organizations into the system at any time, including while you are entering matching gift or volunteer gift information:

- When you are entering a gift and your search for the Organization fails, you can click the New button in the "Search for Organization" form to display a blank data entry form for Organizations.

- From the Organizer, you can go to the Organizations folder and click the New button on the Folder toolbar.

To modify an existing Organization, you can:

- Click on the underlined name of the Organization in a gift entry form to jump to that Organization's record.

- Use the search or zoom features to display the Organization in the Organizer grid. Then, choose File ➤ Open from the main menu.

The following sections describe the available fields in the Organization data entry forms.

Entering Basic Organization Information

The Organization tab is where you enter the Organization name, address, telephone and facsimile numbers, the Primary Contact, and notes about the Primary Contact's relationship with the Organization. This is the minimum

information that should be entered for any organization, though only the Organization Name is a required field.

Entering the Primary Contact for Grants Management

The Primary Contact identified on the Organization tab is the Primary Contact for grant proposals submitted by that Organization. Note that the Organization Primary Contact is not the same as the Matching GIFTS and/or Volunteer GIFTS Contact:

- The Organization Primary Contact is the default recipient for grants management and Organization correspondence.
- The Matching GIFTS and/or Volunteer GIFTS Contact (displayed on the Emp Gifts tab of the Organization record) is the Primary Contact for grants created during period-end processing and the default recipient for period-end batch letters and other Employee GIFTS correspondence.

When you choose a Primary Contact, the system creates an Organization Primary Contact Affiliation—a special type of Affiliation used to identify the person as the Organization's Primary Contact. (For more information about Affiliations, please refer to the *GIFTS User's Guide*.)

To select a Primary Contact for the Organization, type the person's name in the Last Name field (on the top right of the Organization tab) and press TAB. GIFTS searches the Contacts folder for people with that last name.

- If a match or matches are found a list of the matches is displayed. To choose a Contact from the list, highlight their record and click OK. If none of the people are correct, you can modify the search. If you cannot find the Contact, click Cancel to return to the Organization record.
- If the system did not find a matching last name, or if you rejected the people it did find by clicking Cancel, the necessary Contact fields are displayed on the Organization record. Enter this basic information about the Primary Contact, and the system will create a Contact record for them when you save the Organization information.

After you have chosen or created a Contact, you can use the Title and Relationship Notes fields for information about the Contact's title within and/or relationship to the Organization.

When you have completed entering or modifying information on the Organization tab, click one of the other tabs to enter more information, or click Save and Close to save the Organization information and exit.

Entering the Primary Contact for Employee Gifts

The left panel of the Employee GIFTS ("Emp Gifts") tab of an Organization record identifies the Primary Contact for this Organization's matching gifts and/or volunteer gifts program.

Note that the Matching GIFTS and/or Volunteer GIFTS Contact is not the same as the Organization Primary Contact:

- The Matching GIFTS and/or Volunteer GIFTS Contact displayed on the Emp Gifts tab of the Organization record is the Primary Contact for grants created during period-end processing and the default recipient for period-end batch letters and other Employee GIFTS correspondence.
- The Organization Primary Contact (displayed on Page 1 of the Organization record) is the default recipient for grants management and Organization correspondence.

To enter a Matching GIFTS or Volunteer GIFTS Primary Contact:

1. Click the Matching or Volunteer tab (if available) to determine whether you are entering the matching gifts or volunteer gifts contact information.
2. In the Last Name field, type the last name of the contact and press TAB. GIFTS searches the Contacts file for people with that last name and displays a list of matches. You can choose a Contact from the list, modify the search parameters, or enter a new Contact.

3 Enter the Title of the Contact as it relates to your matching gifts or volunteer gifts tracking.

4 Enter any Relationship Notes regarding this contact's relationship as the Matching GIFTS Contact for the organization.

Entering Employee Gifts Information

The right panel of the Employee GIFTS ("Emp Gifts") tab of an Organization record includes information specific to the tracking of matching gift and volunteer gift information.

Field	Description
Employee Gifts Class	The Class to which the Organization belongs. It is essential to specify the Organization Class because your program's rates or limits are based on the Organization Class. Note that if you change the Organization Class, the Organization Class of Approved gifts for the Organization is not changed because the original Organization Class was used to calculate the Award Amount.
FICE #	The FICE # of the Organization.
Accrediting Agent	If the Organization has been accredited, enter this information here.
Hold Employee Gifts	Check this option to automatically place all new gifts for this Organization on Hold. For more information, please refer to "Holding Gifts for an Organization" on page 22.
Hold Notes	Notes relating to the fact that the Organization is on hold. Any notes you enter are automatically cleared when the Organization is taken off hold.

Entering Tax Status Information

In most cases a donation is only deductible when it is made to an Organization that qualifies under Section 170 (c) of the Internal Revenue Service (IRS) code. Many giving programs further restrict their contributions to government agencies and Organizations that qualify under Section 501(c)(3) of the tax code.

If you designate an Organization as a Charitable Organization, GIFTS checks its tax status and displays the Organization in red or green type if its tax status information is missing or due to be verified.

The cumulative index section of the Tax Status tab documents who verified the information, when they verified it, and when it should be verified again. This information is not required, but makes it possible to quickly identify Organizations that are scheduled for re-verification.

Tip: To research the tax status of an Organization, enter its tax ID and choose Action ➤ Research from the main menu.

Field	Description
Legal Name	The Legal Name of the Organization.
Tax ID	Tax ID (Employer Identification Number or EIN) of the Organization.
Registration Date	Tax registration date.
Financial Report Date	The date of the most recent copy of the Organization's financial report that you have on file. This field can be searched to compile a list of Organizations that have not provided recent financial data. Then, you could generate mailing labels or a reminder letter to request more recent data.

Field	Description
Notes	The notes field can indicate that the Organization's 501(c)(3) letter is in the tax file. It could also provide the letter's date. This eliminates most reasons to look up the actual letter.
Charitable Organization	A flag indicating that the Organization is a public charity. The automatic Tax Status warning features only apply to Organizations flagged as charitable. If this flag is not on, the right portion of the screen is blank. Once it is turned on, the appropriate fields for tracking Tax Status are displayed.
Cumulative Index Revision/Page No.	This field is used to record the date of the revision in which the Organization is found and the page number. This can make reference to the listing much easier.
Last Verified By	The person who verified the information.
Last Verified On	The date on which the information was last verified.
Next Verification On	The data on which the information should be verified again. This information can be used to produce a list of Organizations whose Tax Status is due for verification.
Tax Status	A list of Tax Status values and effective dates. The "As of" date of each status is defined immediately to the right of the status.
As of	For each status that you define, you can enter the appropriate "As of" date.

Entering Organization Background Information

The Background tab can capture incidental information the Organization's background and mission, an A.K.A. name, a Sort As name, Vendor Number, and whether or not the Organization is a United Way Organization.

Field	Description
Background	The Background is an unlimited text field that can be included on the write-up. This information may also be provided to the Board as part of the data used to review and approve or reject a Request.
A.K.A.	Entering a common name or acronym (such as UCLA for the University of California at Los Angeles) here will make it easier for users to find the Organization when they run searches. If a user searches for the A.K.A. name instead of the proper name, they'll still be able to find the Organization. Another use for the AKA name is to record an Organization's "old" name when the name changes or when they merge with or are absorbed by another Organization.

Field	Description
Sort as	This is the name used to sort the Organization for reporting purposes. GIFTS creates an appropriate sort name automatically; in most cases it is the same as the Organization's name. The sort typically eliminates articles (like "the") from the beginning of names, expresses numbers as text (SIX for 6), and places the entire name in upper-case characters. **Example:** An Organization named "The Make a Wish Foundation" would sort under "T." People looking for the Organization on a listing or in a report would look under "M". By entering the sort name as "MAKE A WISH, THE" the Organization is listed under "M" as expected.
Vendor No.	The Vendor Number is a user-assigned identification number for the Organization; in general, your accounting department or the department that cuts your checks assigns the Vendor Numbers for payees. This field is not required.
United Way	Indicates whether the Organization is a United Way Organization.

Working with the Organization's Coding Sheet

When entering data, you need to use consistent terms to classify your information. To address this issue, GIFTS has a *Coding Sheet* for each of your Organizations that allows you to choose classifications from a set categories defined by your GIFTS administrator. These classifications are displayed on the Coding tab of your Organization records.

Example: You can classify an Organization as a "Health & Human Services / Child Health" Organization.

Tip: The Coding Sheet for an Organization can serve as the default Coding Sheet for the Requests that you enter for that Organization. If the Request Coding Sheet uses the same category as the Organization, the classifications that you enter for the Organization are automatically inserted into each new Request for that Organization.

Note: If your GIFTS administrator specified any categories on the Organization Coding Sheet as *required*, you cannot save a new Organization until you have entered a code in that category.

This section includes basic information about entering Coding Sheet data. For more comprehensive information, please refer to "Working with Coding Sheets" on page 23.

Adding Codes To classify the Organization, highlight the category in which you wish to supply a code and click Add. The codes defined for that category are displayed.

To add a code, highlight it and click Insert. The code is displayed on the Coding Sheet. To add a code to another category, you can click on it to display its coding without closing the Code Selection window. When you are finished adding codes, choose File ➤ Close from the Code Selection menu.

Primary and Secondary Codes Some categories allow you to select more than one code. If more than one code is specified for a category, the *primary code* is displayed in blue, and the *secondary codes* are displayed in green.

For an explanation of how primary and secondary codes are used in GIFTS reports and correspondence, please refer to "Primary and Secondary Codes" on page 27. To make a secondary code the primary code within a category, highlight it and click the Primary button at the bottom of the Coding Sheet.

Removing Codes To remove a code, highlight it and click Remove.

When the Coding Sheet information is complete, you can click on the other Organization tabs to work with or view other information—the Coding Sheet is saved automatically. If you are finished working with this Organization, click Save and Close to save the Organization and return to the GIFTS Organizer.

Entering Organization Affiliations

Affiliations are "pointers" between Organization records and the Contact records of the people who are involved with the Organization. There are also Affiliations between Requests and Contacts, and you can affiliate a Contact with any Organization or Request in your system.

The Affiliations tab of the Organization record provides information on all of the Contacts affiliated with the Organization and its Requests, including the Primary Contact identified on the Organization tab.

Click Edit Affiliation to open and edit the selected Affiliation record.

You can also click Add Affiliation to add a secondary Affiliation, or Edit Contact to edit the Contact referred to in the selected Affiliation.

The columns in the Affiliations tab of an Organization display the following data:

Column	Description
Contact	Lists the affiliated Contact's name, Affiliation Title, and Affiliation Address.
Request	For Request Affiliations, this column lists the Request's ID, Reference Number, Disposition, Disposition Date, and Project Title. Otherwise blank.
Affiliation	The Role designated for the Contact in the Affiliation, and the Affiliation term (To and From dates).
Notes	Any notes entered in the Affiliation record.

Column	Description
Audit	The dates on which the Affiliation record was created and last modified, and the Login ID's of the users who created and last modified the record.

Filtering Affiliation Records Filtering options are available above the grid:

Filter	Description
Role	Select from a list of Affiliation Roles to see only those Affiliations in which the affiliated Contact took that role.
Type	Limit the list to Organization Affiliations or Request Affiliations only. (Request Affiliations in this case would be all Affiliations for all Requests associated with the Organization.) Select <All> to see both types of Affiliations.
Include Closed Affiliations	Select this check box to include closed Affiliations in the list. Clear the check box to see only active Affiliations.

You can click Add Affiliation or Edit Affiliation to work with the Affiliations for this Organization. To view of modify the Contact record for an affiliated Contact, click Edit Contact. For complete information about working with Organization Affiliations, please refer to the *GIFTS User's Guide*.

Organization Subsidiaries

If you work with Organizations that are subsidiaries of a larger parent Organization—such as academic departments within a university—you can link them to the parent Organization. You can then track Requests and Payments for the entire parent Organization as well as for its individual subsidiaries. For more information, please refer to the *GIFTS User's Guide*.

Holding Gifts for an Organization

When an Organization is placed on 'Hold,' new gifts entered for that Organization are assigned a Disposition of Pending (regardless of whether the gift would otherwise be Approved or Declined). Pending gifts cannot be batched for period-end processing, and therefore are not processed or Declined until the Hold is removed.

Note: Placing an Organization on Hold does not affect gifts that have already been entered. The Hold will only affect gifts entered after the Organization is placed on Hold.

When the Organization's Hold is removed, GIFTS searches for all of the Organization's Pending gifts and—if the gift and its Donor are not on hold—GIFTS evaluates the gift and changes its Disposition to either Approved or Declined (according to the guidelines and limits for your giving program).

The following sections describe how to add and remove Organization Holds.

Placing an Organization on Hold

When an Organization is placed on 'Hold,' new gifts entered for that Organization are assigned a Disposition of Pending (regardless of whether the gift would otherwise be Approved or Declined). To place an Organization on Hold:

1. Open the Organization record and go to the Emp Gifts tab.
2. Check the Hold Employee Gifts box.
3. Enter any notes you wish to make regarding the hold in the Hold Notes field.
4. Click Save and Close. The Organization is now on Hold.

Removing an Organization Hold

When an Organization's Hold is removed, GIFTS searches for all of the Organization's Pending gifts and—if the gift is itself is not on hold and there

is no hold on the Donor—GIFTS evaluates the gift and changes its Disposition to either Approved or Declined.

To remove an Organization Hold:

1. Open the Organization record and go to the Emp Gifts tab.
2. Clear the Hold Employee Gifts box. The Hold Notes are removed.
3. Click Save and Close. The Pending gifts for the Organization are evaluated.

Deleting an Organization

You can delete an Organization only if there are no matching gifts or volunteer gifts associated with the Organization. If there are gifts for the Organization, you must first either delete the gifts or change the Organization for the gifts.

To delete an Organization:

1. From the Organizations folder of the GIFTS Organizer, open the Organization record.
2. From the Organization menu, choose File ➤ Delete. You are prompted to confirm your intentions.
3. Click Yes. The Organization is deleted.

7 Reporting

To retrieve and present the information that you have entered into Employee GIFTS, you can produce reports from the GIFTS Organizer or use the GIFTS Report Library.

In This Chapter

Printing or Exporting from the Organizer **2**

Producing GIFTS Reports **4**

Printing or Exporting from the Organizer

From the Organizer, you can print and export *ad hoc reports* that include the information displayed in the Organizer grid. To create an ad hoc report, you use the Organizer's search and display options to retrieve the information you want—then print or export the data.

GIFTS users have additional formatting, grouping, and sorting options for their ad hoc reports. In addition, they can save their ad hoc reports—complete with search criteria, Views, grouping, sorting, and special formatting—to the GIFTS Report Library, allowing all GIFTS users to run the report like a standard report.

This section describes the basics of ad hoc reporting; for more information, please refer to the *GIFTS User's Guide*. (The *Guide* contains separate ad hoc reporting chapters for GIFTS and Essential GIFTS.) You can modify ad hoc reports to meet your needs with the following options:

Include, Remove, and Combine Columns By default, each folder displays the information that meets the general needs of most companies. You can choose to display a wide variety of other columns or to remove columns that you don't need.

Specify Search Criteria In addition to the search you might use to find the records you want to print, GIFTS users can specify search criteria for specific columns of data as well.

Sort Order By default, each folder has a sort order in which the records are displayed. Payments, for example, are sorted according to their scheduled date. You can sort records based on a number of properties—like Organization Name or Grant Amount—and choose whether the order is sort ascending or descending. In case two or more records have the same value in the sorting property, you can set secondary properties by which to sort them.

Grouping Records included in the report can not only be sorted; they can be grouped together in categories you specify. For example, if you printing records from the Request folder of the Organizer, you may choose to group the records by the Program Area designation in the Request Coding Sheet.

Printed Format For printed reports, you can choose the font and justification used for the headers and report data. You can also include subheaders for each group of records in the report and grand total information at the end of the report.

Export Format If you choose to export the report to your spreadsheet program, you can modify it as you would any other spreadsheet document. Other export formats are available as well, such as HTML or PDF.

To print or export an ad hoc report:

1. Use the search features of the GIFTS Organizer to display the records you wish to include.
2. Choose the columns and sort order that you wish to use for the report.
   - To add, remove, or rename columns, choose View ➤ Show Columns from the GIFTS menu.
   - To modify the sort order, choose View ➤ Show Sorts from the GIFTS menu.
3. If you are printing the report, you can adjust the size of a report column by clicking on the vertical line that divides it from the adjacent column and then dragging the line to the desired width. You can also click the right mouse button on the header of a column to exclude it from the printed report.
4. Highlight each of the records you wish to include in the report. To select all of the records in the Organizer, press CTRL+A.
5. Print or export the report.

   - To print the report, choose File ➤ Print from the main menu. The Print Setup options are displayed. (These options are different for GIFTS and Essential GIFTS users. For information about these options, including the grouping and subtotal options, please refer to the *GIFTS User's Guide*.)
   - To export the contents of the Organizer grid to Excel or to another file format, select File ➤ Export ➤ [Excel/HTML] from the main menu, depending on how you want to export the data.

Producing GIFTS Reports

Employee GIFTS includes reports that provide detailed information on individual gifts, summary information for Donors and recipient Organizations, and statistical data for analysis.

Tip: *Using GIFTS Reports* includes printed samples and descriptions of the Matching GIFTS and Volunteer GIFTS reports.

This section includes basic instructions for running these standard GIFTS reports, as well as how to run ad hoc reports you have saved to the Report Library. For more detailed information about GIFTS standard reports, please refer to *Using GIFTS Reports*.

Step 1: Choosing a Report

To choose a report:

1 Choose View ➤ Reports from the main menu to go to the GIFTS Report Library.

2 Click the Matching or Volunteer tab to go to the report folder for matching gifts or volunteer gifts.

3 From the Select Report to Run list, choose the report you wish to run.

Step 2: Selecting Records

Before you run the report, you need to determine which records you want to appear in the report. Most likely you don't want to run the report for all of the records in your database, but—for example—you want to limit the report to matches from within a certain time period.

Note: If you use Branch Security, your reports do not include data that you do not have permission to see.

To enter search criteria that determine which records are included in the report:

1 From the Report Library menu, choose Edit ➤ Search ➤ New Search. The Quick Find search options are displayed.

2 Enter the search criteria.

To create your search criteria, you use the same search features that you use in the Organizer. The principles are the same—the only difference is that instead of choosing the records to be displayed in the Organizer, you're choosing the records to be included in a report.

Note: The search criteria do not modify the format or structure of report; they determine which records are included in the report.

3 Click Find Now when you have entered the necessary criteria. You are returned to the Reports view, where the criteria are now displayed.

Tip: To save the criteria for later use, click the Save button. For more information about saved searches, please refer to the *GIFTS User's Guide*.

Step 3: Setting the "As of" Date for Financial Reports

If you are running a financial report, see "Setting the 'As of' Date for Financial Reports" on page 20 for information about setting the report's 'as of' date.

Step 4: Editing the Report Titles

GIFTS provides three lines for the title of the report: a large heading in bold, and then two subheadings. You can alter the main title and subtitles so that anyone who reads the report will know exactly what they are looking at.

By default, the main title is set to the name of the report you chose, and—if your GIFTS administrator has set up the system to do so—the first subtitle displays the search criteria, if any, that you specified. You can modify these titles as necessary:

To edit the report titles:

1. From the Report Library menu, choose Edit ➤ Report Title. The title fields are displayed.
2. Edit the titles, as desired.
3. Click OK to save your changes and return to the Report Library.

Step 5: Running the Report

To view your report after you have specified the necessary options, choose File ➤ Run Report from the Report Library menu. The report is generated and displayed in the report viewer.

Rank	Donor Name	Number of Gifts	Percent of Total	Gift Amount	Percent of Total	A
1	Humphries, Mortimer	14	7.1%	$25,200.00	9.7%	$32,
2	Andrews, Kim	12	6.1%	$22,300.00	8.6%	$21,
3	Karrington, Michelle	6	3.1%	$15,000.00	5.8%	$19,

Note: The total number of records displayed on the viewer toolbar is based on the internal structure of the report. This total often differs from the "Grand Total" count in the report itself, which may be based on different criteria.

You can use the viewer's toolbar to navigate within the report.

Icon	Name	Description
	Beginning of Report	Go to the first page of the report.
	Previous Page	Go to the previous page.
	Next Page	Go to the next page.
	End of Report	Go to the end of the report.
100%	View	Set the percentage of the zoom.

Important Note to Client/Server Users: The End of Report button *terminates* the report if you click it while the report is still processing. For instance, if you click this button while an alphabetically-sorted report is in progress, it truncates the report so that only records between A and F (for example) are shown. Note that the report is not necessarily finished processing when the first page is displayed; wait until the toolbar indicates that the report is "100%" complete.

Step 6: Printing or Exporting the Report

When the report has finished processing, you can print it by clicking the Print button on the viewer toolbar.

To export the report, click the export button on the report viewer toolbar. You are prompted to choose an export format and a filename for the exported data. You can export it to a variety of file formats appropriate for word processors, spreadsheets, Internet browsers, and other applications.

Note: GIFTS reports have been created using Crystal Reports®, and the export function of the report viewer is a function of Crystal Reports. Business Objects, the maker of Crystal Reports, documents many limitations to the export feature due to the significant differences between Crystal Reports and the software packages to which it can export.

In particular, reports that are exported to Microsoft Word may require extensive reformatting. If this is the case, consider exporting your report to another format, such as Microsoft Excel or the rich text format, that may retain more of the formatting that you need.

8 Importing Donors

This chapter describes how to import donor information from an external system into the GIFTS database.

In This Chapter

About the Donor Import **2**

How Donors are Created and/or Updated **5**

Running an Import **9**

Canceling and Re-doing Imports **13**

Donor Import File Layouts **14**

About the Donor Import

Employee GIFTS includes a Donor import that you can use to populate and update your GIFTS database with donor information tracked in other systems. You can import donor data from any system provided that you can export it to ASCII data files that conform to the import file format described in this chapter.

Other imports are supported by the optional GIFTS Import Module, as described in "About the GIFTS Import Module".

You can use the Import facility of the GIFTS Administrator Module to verify the formatting of your Donor import files and run the import. The import can create and update GIFTS Donor records, and produces a report listing all of the affected records. In addition, GIFTS maintains a history of all imports, allowing you to re-run reports for individual imports as often as necessary.

You can "re-do" an import if the import process is interrupted or if you need to cancel the import before it is complete. Be sure to read "Canceling and Re-doing Imports" on page 13 for important information about this feature.

About the GIFTS Import Module

In addition to the Donor import included with Employee GIFTS and the Matching Gifts Summary import included with the standard GIFTS product, clients who purchase the optional GIFTS Import Module can import detailed grants management and matching gifts data, Organization data, Contact data, and grant summary data.

Note: MicroEdge provides conversion utilities for many grants management products, including MicroEdge's DOS-based products, Riverside Grants, Riverside Matching Gifts, Grants Manager, and Award. For information about these utilities, please contact MicroEdge Technical Support.

The GIFTS Import Module includes the following imports.

Import Type	Description
Detailed Request Import	This comprehensive import includes detailed information about Approved, Pending, and Declined Requests. This import can include multiple Payments and/or Grant Requirements for each imported Request, and either background information concerning Organizations or long descriptions of Requests. *This import cannot be used to update records.*
Grant Summary Import	This import can be used to import summary information about Requests, including information about the grantee Organization and a single Payment. This import may also be used to convert data from other systems if you only need summary information for historical purposes. *This import cannot be used to update records.*
Detailed Matching Gifts Import	This import is used to populate your database, most often with data from a legacy system. It includes individual gift records, including the Donor and recipient Organization information. In addition, this type of import groups Approved gifts into batches and creates the appropriate grant and payment information. *This import cannot be used to update records.*

Import Type	Description
Organizations Import	This import can be used to import detailed information about grantee Organizations. Each imported record can include the Organization's Vendor Number, name, address, Primary Contact, Tax ID, telephone number and extension, fax number, e-mail address, and Web site address. *This import cannot be used to update records.*
Contact Import	This import is used to import detailed information about Contacts, and can import multiple Affiliations between a Contact and grant requests and organizations. *This import cannot be used to update records.*

How Donors are Created and/or Updated

With any database system, it is important to avoid the duplication of records so that your reports and queries are accurate. For example, you wouldn't want a report that divides a donor's gifts between two "duplicate" Donor records that in fact represent the same person.

During Donor imports, GIFTS searches your database for matching records before importing a new Donor. If a duplicate record is found, the new data is used to update the existing Donor record so that you can avoid the creation of duplicate records.

The process that the system uses to search for duplicate records is known as *matching logic*.

Donor Matching Logic

GIFTS attempts to match the Donors in your import file with the Donors already existing in GIFTS. GIFTS first attempts to match the Donors based on their Social Security Number or Employee ID. If a match is found in this way, the existing Donor in GIFTS is updated with the information from the import file.

Use the Employee GIFTS preferences specify whether you identify Donors by their Social Security Number or Employee ID.

If an imported donor is matched with a Contact record in the GIFTS database, that person's record is updated to indicate that he or she is also a Donor.

Since the import uses the donor's Social Security Number or Employee ID to find the appropriate matches in GIFTS, it is important that you use unique values in the Social Security Number or Employee ID field of each

Donor. Otherwise, GIFTS would find incorrect matches based on duplicate ID information.

If no match is found on the Social Security Number or Employee ID, GIFTS attempts to match the Donor by searching the last name, first name, middle name, and date of birth fields. If a match is found on all four of these fields, and the person is specifically listed in the database as a Donor, the existing record in GIFTS is updated with the information from the import file.

If no match is found in any way, or if a match is found on last name, first name, middle name, and date of birth but the person has been entered into GIFTS as a Contact and not a Donor, a new Donor record is created.

Code Matching Logic

The import includes the Donor Class field, which is *coded* in GIFTS with specific values used to consistently classify and process your data. For example, your Donor Class codes can be 'Full Time,' 'Part Time,' and 'Retired.'

The codes in the system from which you are importing donors may not be the same as the codes you have established in GIFTS.

If this is the case, your import may create 'duplicate' codes that have the same meaning. Duplicate codes can make it extremely difficult to obtain accurate reports and queries from your database. Duplicate Donor Class codes can lead to errors in the entry and calculation of your matching gifts.

Note: If duplicate codes are created by an import, you can use the Code Replace feature described in the *GIFTS Administrator's Guide* to replace the duplicates with the correct code.

During the Matching Gifts Detail and Donor imports, GIFTS attempts to match the imported codes with the existing codes in GIFTS. If no exact match is found, a new code is created in GIFTS.

Tip: A good way to ensure that your Donor Class codes are accurate is to create your Donor Class codes in GIFTS by importing donors from your external system. GIFTS creates Donor Class codes during the import. Then,

your codes in GIFTS will be exactly the same as the codes in your external system.

Note: If you are using GIFTS Branch Security, the Donor import does not create new codes for Donor Branch/Division. If the verification process finds Division codes that do not already exist, GIFTS requires that you add the codes before proceeding. This design ensures that you do not compromise the security of your data by inadvertently creating new branches in GIFTS.

A match is made when an imported Description and/or Code value matches an existing code in GIFTS. The following examples illustrate how the code matching logic works. (Note that no changes are ever made to the existing codes in GIFTS.)

	Import Code	GIFTS Code	Match?	GIFTS Code After Import
1	Code:FT Desc: Full Time	Code:FT Desc: Full Time	✔	Code:FT Desc: Full Time
2	Code:FT Desc: Full Time	Code:FULL Desc: Full- Time	✔	Both codes reside in GIFTS as “duplicates”
3	Code:[blank] Desc: Full Time	Code:[blank] Desc: Full-Time		Both codes reside in GIFTS as “duplicates”
4	Code:FULL Desc: Full Time	Code:FT Desc: Full Time	✔	Code:FT Desc: Full Time
5	Code:F Desc: On Furlough	Code:F Desc: Full-Time	✔	Code:FT Desc: Full Time
6	Code:[blank] Desc: Full Time	Code:FT Desc: Full Time	✔	Code:FT Desc: Full Time
7	Code:FT Desc: Full Time	Code:[blank] Desc: Full Time	✔	Code:[blank] Desc: Full Time

Note that the fifth match is improper, since the Descriptions ‘On Furlough’ and ‘Full Time’ are intended to represent different Donor Classes.

Important: If any codes in the Donor Class table contain duplicate Descriptions, the Description in the import file is matched against the first

matching Description found. Therefore, Descriptions may be mapped incorrectly if more than one Donor Class code has the same Description.

Running an Import

Before You Begin: Make sure that you have ASCII files that conform to the standard file layouts described in "Donor Import File Layouts" on page 14.

This procedure describes how to run a Donor import. Import processing involves the following steps:

1. Verifying the Import File
2. Running the Import

Caution: Before you verify or import data, ensure that you have a valid backup of your GIFTS database. In case of problems, it may become necessary to restore the backup in order to continue working.

Step 1: Verifying the Import Files

The Verify phase of the import is used to identify the Import Type and to ensure that there are no errors in the import files. Note that if you exit the import window at any point after the verify is complete, you will have to re-run the verification process.

When you verify an import file, GIFTS obtains the Import Type from the control file, confirms that each record contains the appropriate number of fields, and confirms that the summary information specified in the control file reflects the actual contents of the import.

Important: If you are importing a large amount of data, the verification process can take some time. Be aware that if you exit the Import utility before you have completed the import, you will have to re-verify the import file when you re-enter the Import utility. Ensure that you have a valid backup of your existing database before you verify your import data.

To verify an import file:

1. Log in to the GIFTS Administrator Module.

2 From the Administrator menu, choose File ➤ Import. The import options are displayed.

You can ignore the Organization Matching Logic options. They don't apply to Donor imports.

3 In the File Name field, enter the path to the import's control file. You can click Browse to search for the file.

4 Click Verify to scan the import files. A Process Log is displayed, listing any errors or anomalies that are encountered in the file.

❖ If the verification is successful, a summary of the import data is displayed.

❖ If there are informational messages or verification process is not successful, a detailed description of the errors found is displayed in the log. You can click Print or Save As to keep the log for your records.

It is necessary to refer to this information in order to correct any errors that may have occurred. Please refer to "Verification Messages and Errors" on page 11 if you receive an error message.

Note that the Import button is not available until the verification process has been run successfully.

Verification Messages and Errors

The importing of data is a complex process that can result in permanent changes to your system, so the verification process notifies you not only of errors within your import file, but also of any notable changes that your import will cause.

For instance, your import may include a new Donor Class code. The process log details such changes so that you can ensure that the effect of your import reflects your intentions.

If GIFTS encounters an error in the structure or format of the import files, a message similar to the following is displayed.

Other errors related to the import are displayed in the lower right portion of the Import window. If you encounter any of these specific error messages, you must correct the errors them you may proceed with the import. Messages in the process log, on the other hand, can be either informational or in regard to an error.

If you require assistance in identifying and/or resolving problems related to your import, please contact MicroEdge Technical Support.

Step 2: Running the Import

Once you have verified the Donor import file, you are ready to proceed with your import.

Caution: Before you verify or import data, ensure that you have a valid backup of your database. In case of problems with the import process, it may become necessary to restore the backup in order to continue working.

To run the import:

1. Click the Import button. A message reminds you to ensure that you have a valid backup of your database.
2. Click Yes. The import begins, and a log of the import's progress is displayed.

When the import is complete, the Donors report is displayed in the report viewer. If the log remains open, click the Print or Save As button to keep the log for your records, and review each message carefully. If you need help interpreting any of the messages, please contact MicroEdge Technical Support.

Canceling and Re-doing Imports

While an import is in progress, you can cancel it by clicking the Cancel button. Be aware that the cancel button does not delete any of the records that were imported before you clicked Cancel; it simply stops the import.

After canceling an import, you can run the import later or make changes to the import file and then re-do the import. The Import utility determines that you are re-doing an import if the date-and-time stamp in the control file of the import matches the date-and-time stamp from your earlier attempt.

Since, the re-do does not delete any of the Donor information that was imported before the first attempt of the import was canceled, any changes you make to the files between the first import attempt and the re-do are used to update the Donors that were successfully imported on the first attempt.

Important: If you make corrections to an import file, be sure that all of the Donors in the re-do file match (as described in "Donor Matching Logic" on page 5) the successfully imported Donors from your first attempt. Otherwise, you run the risk of importing duplicate Donor records.

Donor Import File Layouts

Donor imports are made up of two files: a *control* (header) file containing a single record with summary information for the import, and a *data* file containing one record for each Donor to be imported.

To keep track of these files, we recommend that you create a system for naming them. For instance, you can start each filename with "DN" to indicate that it is a Donor import file, and follow this with the date of the import.

The Control and Data Files must have the same name, but have different DOS filename extensions. Instead of the .TXT extension normally used for ASCII text files, the control file must have a file extension of .CTL and the data file must have an extension of .DON. So, for instance, a pair of Donor import files could have the following names:

File	Name
Control File	DN041798.CTL
Data File	DN041798.DON

General File Requirements

GIFTS import files are flat ASCII text files that consist of lines, or rows, of text that are delimited into *fields* by tab characters. Each line ends with a carriage return and represents an individual *record*.

The *control file* must include a single line with summary information about the import, and the *data file* should have one line for each donor to be imported. Each field within the donor's line contains information—such as the donor's name and birth date—to be included in his or her Donor record.

GIFTS import files must conform to the following specifications:

- The fields within each record (row) are tab delimited (ASCII character 9). No other tab characters may appear anywhere in the data that are not field delimiters (including description fields).

- A carriage return (ASCII character 13) and a line-feed (ASCII character 10) terminate each record.
- There is one record per line.
- All blank fields are treated as null entries.
- All times in 24-hour format. (example 20:00)
- Numeric fields (with the exception of currency fields) contain:
  - no decimal point (for example, 1234)
  - no commas
  - leading negative signs, when appropriate

The imports are sensitive to the Regional Settings Control Panel of Microsoft® Windows®. The format of the currency and date fields in your import files must comply to the format specified by your workstation's Regional Settings.

The following requirements, and the sample values shown in this publication, are for the "English (United States)" setting only. If you are using a different Regional Setting, these requirements may be different.

- Currency fields contain:
  - a decimal point (for example, 30000.00)
  - no commas
  - leading negative signs, when appropriate
- All dates in mm/dd/yyyy format.

Control File Layout

	Field Name	Description	GIFTS Format / Example	Req
1	File Type	Literal that indicates to GIFTS that this is an import file.	15 fixed characters (literal): GFW_IMPORT_FILE	✔
2	Import Type	Literal that indicates to GIFTS what type of import file this is.	Fixed characters (literal): DONORS	✔
3	Import Description	Description for Donor file.	Limited to 255 characters. Example: Donors from HR	✔
4	Import Date	The date that this import was created.	Date Format: Example: 08/25/1998	✔
5	Import Time	The time that this import was created	Time format: Example: 20:00	✔
6	Total Number of Donors	Total number of Donors to be imported.	Limited to 8 digits. Example: 00001290	✔

Data File Layout

	Field Name	Description	GIFTS Format / Example	Req
1	SSN	The Social Security Number of the Donor.	Required if a Donor Employee ID has not been supplied. Limited to 20 characters.	(✔)
2	Employee ID	The social security number or Employee ID of the Donor.	Required if a Donor SSN has not been supplied. Limited to 20 characters.	(✔)
3	Last Name	The last name of the Donor.	Limited to 50 characters.	✔
4	First Name	The first name of the Donor.	Limited to 50 characters.	
5	Middle Name	The middle name of the Donor.	Limited to 50 characters.	
6	Salutation	The salutation of the Donor.	Limited to 100 characters. Example: Dear Sir	

	Field Name	Description	GIFTS Format / Example	Req
7	Position	Position Title of the Donor.	Limited to 100 characters. Example: Director	
8	Prefix	Donor name prefix.	Limited to 50 characters. Example: Dr.	
9	Suffix	Donor name suffix.	Limited to 50 characters. Example: Jr.	
10	Division Description	The Description value of the Division/Branch to which this Donor belongs. The Description must already exist in GIFTS; the import does not create new branches.	Limited to 255 characters. *Required if the Branch Security option for GIFTS is active.*	(✔)
11	Department	Department of the Donor.	Limited to 30 characters.	
12	Donor Class Description	Description of Donor Class.	Limited to 255 characters. Example: Full Time	
13	Date of Birth	Date of Birth of the Donor	Date Format: Example: 04/10/1954	
14	Donor Notes	Comments	Limited to 253 characters.	
15	Start Date	The date the Donor was hired.	Date Format: Example: 01/30/1985	
16	Termination Date	The date the Donor left the company, or that his or her eligibility for participation in employee gifts ceased.	Date Format: Example: 08/25/1998	
17	Retire Date	The date the Donor retired.	Date Format: Example: 09/15/1997	
18	Death Date	The date the Donor died.	Date Format: Example: 03/01/1999	
19	Spouse Name	The Donor's spouse name	Limited to 50 characters. Example: Melissa	

	Field Name	Description	GIFTS Format / Example	Req
20	Home Address 1	The first line of the Donor's home address.	The combined length of the address fields (1,2, and 3) cannot exceed 255 characters.	
21	Home Address 2	The second line of the Donor's home address.		
22	Home Address 3	The third line of the Donor's home address.		
23	Home City	The city where the Donor resides.	Limited to 50 characters.	
24	Home State	The state, province, or county where the Donor resides.	Limited to 20 characters.	
25	Home Postal Code	The postal code where the Donor resides.	Limited to 20 characters.	
26	Home Country	The country where the Donor resides.	Limited to 50 characters.	
27	Home Phone	The phone of the Donor.	Limited to 30 characters. Format as desired. Example: (304) 343-9937	
28	Home Fax	The fax of the Donor.	Limited to 30 characters. Format as desired. Example: (304) 343-9121	
29	Business Address 1	The first line of the address of the business.	The combined length of the address fields (1,2, and 3) cannot exceed 255 characters.	
30	Business Address 2	The second line of the address of the business.		
31	Business Address 3	The third line of the address of the business.		
32	Business City	The city where the Donor's business resides.	Limited to 50 characters.	
33	Business State	The state, province, or county where the Donor's business resides.	Limited to 20 characters.	

	Field Name	Description	GIFTS Format / Example	Req
34	Business Postal Code	The postal code where the Donor's business resides.	Limited to 20 characters.	
35	Business Country	The country where the Donor's business resides.	Limited to 50 characters.	
36	Business Phone	The phone number of the business.	Limited to 30 characters. Format as desired. Example: (304) 421-9200	
37	Business Phone Extension	The phone extension for the business.	Limited to 30 characters. Example: 250	
38	Business Fax	The fax number of the business.	Limited to 30 characters. Format as desired. Example: (304) 421-9293	
39	Hold Gifts	If a Donor is on hold, matches made for the Donor cannot be approved.	Yes or No (literal). Defaults to NO Example: YES	
40	Hold Gifts Remarks	Reason the Donor may not have matches approved.	Limited to 255 characters. *Use only if the Hold Gifts field is YES.*	
41	Merge Donor	System use only.	Leave empty	
42	VIP Flag	Indicates whether the Donor is a VIP.	Yes or No (literal). Defaults to NO. Example: NO	
43	Filler	For future use.	Leave empty	
44	Filler	For future use.	Leave empty	
45	Filler	For future use.	Leave empty	
46	Filler	For future use.	Leave empty	
47	Filler	For future use.	Leave empty	
48	Filler	For future use.	Leave empty	
49	Filler	For future use.	Leave empty	

Index

A

A.K.A. name, Organization 16
ad hoc reports
    defined 2
Affiliations
    for Organizations 20
alerts 20
as of date, financial reports 20
Audit Trail 37
Award Amount, calculation of 22

B

Background, Organization 16
batch
    adding gifts to 6
    checking the status of 7
    deleting 8
    removing gifts from 6
branch security
    reporting with 5
Branch Security, setting up 8
Branch/Division codes 12
branch-specific Donors 8
break point 22, 25

C

check writer 23
classifications, creating 11
Code Tables 11
    number of levels 39
    number of selections 39
codes
    creating 13
    editing 13
Coding Sheet setup 37
columns, grid
    hiding 17
    re-sizing 16
Contacts,relationship with Donors 8
correspondence
    setting up templates 33
    to Donors 29
    to recipients 27
creating
    a grant for a single gift 38
    classification codes 13
    grants for a batch of gifts 12
currency
    entering 22
currency fields 22

D

data conversions 3
dates
    entering 21
Death Date 13
default
    Coding Sheet classifications 42
    employer 16
deleting
    batches of gifts 8
    Donors 24
    Organizations 24
documentation
    conventions 5-7
    on CD 10
Donor Class codes 12
Donor correspondence 29

Donor Gift Type codes 12
Donor is a VIP 6, 13
Donors
branch-specific 8
coding 17
deleting 24
editing 11
holding gifts for 20
relationship with Contacts 8
searching for 2
transferring to another branch 22

E

editing
codes 13
currency fields 22
date fields 21
numeric fields 21
text fields 18
employee ID mask 18
employer, default 16
end-of-period processing, See period-end processing 29
Essential GIFTS modules 5
events, for letter templates 33

F

financial reports as of date 20
Fiscal Year 13
fixed matching 22

G

Gift Amount 18
gifts
Audit Trail 37
data entry tips 31
deleting 44
entering 11
holding 34
removing hold from 35
searching for 2
transferring to another branch 42
giving programs, setup 20
grid
hiding columns 17
re-sizing columns and rows 16
groups, user 6
adding 6
definition 3
deleting 6
editing 6
guidelines 22
deleting periods and rates 44
modifying periods and rates 44
setup 20

H

height, grid rows 16
highlighting items 13
history
of a Donor 27
of a recipient Organization 29
holding
a gift 34
gifts for a Donor 20
gifts for an Organization 22
hours 18

I

icons, used in this manual 5

import
errors 11
messages 11
input mask, employee ID 18

L

limits
deleting 45
modifying 45
limits, setup 27
logging in
as a different user 12
to GIFTS 10

M

Main toolbar 14
marking Payments as Paid 13
mask, employee ID 18
Match Hold Reason codes 12
matching gift
Award Amount 18
Gift Amount 18
Matched Amount 18
matching gift, See also gifts 18
matching guidelines 24
matching logic, import 5
for classification codes 6

N

Next button 32

O

online Help 8
Organization Class 24, 30
Organization Class codes 12
Organizations
A.K.A. name 16
Background 16
deleting 24
employee gifts Contact 12
holding gifts for 22
Primary Contact 10
searching for 2
Sort as 17
tax status 13
United Way flag 17
Vendor Number 17

P

password
changing 11
setting 11
passwords 10
payments
exporting 22
marking as 'Paid' 23, 24
PDF *See* Portable Document Format (PDF)
period-end processing
activating 4
creating grants 12
generating Donor correspondence 29
generating recipient correspondence 27
permission sets
working with 4
Portable Document Format (PDF),
documentation on CD 10
preferences 16
prefix, of Donor 12
Previous button 32
Primary Branch 8
primary codes 27

Q

Quick Help 14

R

rates 22
read-only branches 8
recipient correspondence 27
recipient Organizations, See Organizations 1
reports
    as of date 20
    generating 4
Request Type and Status codes 13
Retire Date 13
rows (grid), re-sizing 16

S

schedule of gifts to be paid 10
searching
    for Donors 2
    for gifts 2
    for Organizations 2
secondary codes
    defined 27
security 3
selecting items 13
setup
    classification codes 11
    correspondence templates 33
    Donor Coding Sheet 37
    giving programs 20
    limits 27
    matching periods and rates 22
    overview 2
    preferences 16
    security 3
Sort as, Organizations 17
spell checking 19
spouse match 17
Spouse Name 14
Start Date 13
Start Date Period 21
stepped matching 22
subsidiaries 21
subtitles, of reports 6
suffix, of Donor 12

T

termination date 13
text fields 18
titles
    for Standard Reports 6
toolbar
    Main 14
transferring
    Donors to another branch 22
    gifts to another branch 42

U

undo
    'out-of-period' grant creation 41
    creation of grants for a batch 14
United Way flag 17
user groups
    adding 6
    definition 3
    deleting 6
    editing 6
users 9

V

variable matching 22

Vendor Number 17
verifying
    gift eligibility 22
    import files 9
    matching rates 24
verifying award limits 25
viewing
    Donor history 27
    Organization history 29
volunteer gift
    Award Amount 18
    hours 18
volunteer gift, See also gifts 18

W

width, grid columns 16
workflow 8
writing checks 23

Z

Zooming 9