# Welcome to GIFTS 6.6 and IGAM 6.0

This document contains a summary of interface changes and fixes to known issues included in the GIFTS 6.6 and IGAM 6.0 release.

# Content

## What's included in GIFTS 6.6?

GIFTS 6.6 includes the following enhancements and fixes for a number of known issues.

Enhancements include:

- New IRS 990 Columns for Ad Hoc Request Reports
- IGAM Resubmission
- IGAM Simplify Support
- IGAM UTF-8 Support

## How do I get the GIFTS 6.6 and IGAM 6.0 Upgrade?

The GIFTS 6.6 and IGAM 6.0 upgrade are free to all current GIFTS 6.4/IGAM 5/5.5 users current on Maintenance and Support. To obtain the necessary files to upgrade to GIFTS 6.6/IGAM 6.0, please send an email to upgrade_inquiries@microedge.com. The process will take 3-5 business days.

## Will GIFTS 6.6 require upgrading other MicroEdge related products?

If you currently have Plus Pack 5.2.1 installed, please be sure to also request Plus Pack 5.2.2. You will need to install the new Plus Pack 5.2.2 and Reminders Plus in order to update for the new bug fixes. Please refer to the *GIFTS 6.6 Upgrade Guide* for more details.

## GIFTS Support

The GIFTS_6.6.zip you download contains all setup files and all user documentation. Refer to the Docs folder in this zip file for the *GIFTS Installation and Technical Reference Guide*, which will lead you through the upgrade process.

Please contact Technical Support if you have additional questions about the updating of your installation to GIFTS 6.6.

Telephone: (877)704-3343
Email: Helpdesk@microedge.com

# New Features for GIFTS 6.6

The following new features have been added with the GIFTS 6.6 upgrade.

## Ad Hoc Reporting Update for IRS 990

To allow users to create 990 reports which meet changing IRS standards, five new 990 related columns can now be added to 990 Report or new Request ad-hoc reports as calculated columns. This will enable users to update the reports to match changing IRS requirements and customize it to their needs.

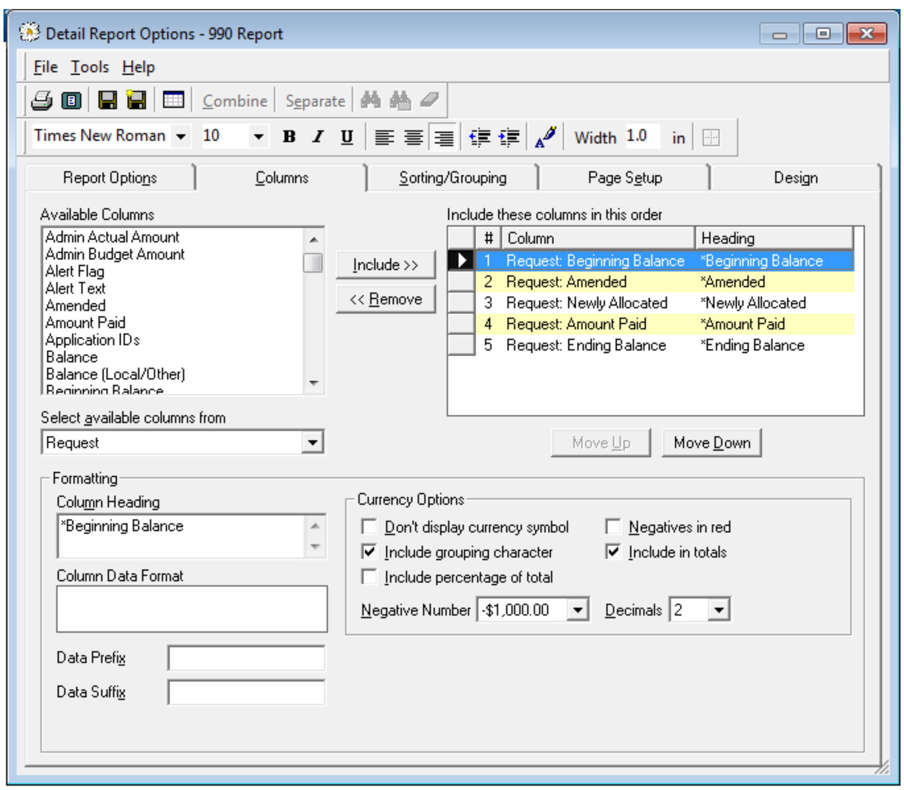
For Requests, the columns available include:

- Amended
- Amount paid
- Beginning balance
- Ending balance
- Newly allocated

These IRS 990 calculated columns will have the ability to be combined with other columns in ad-hoc reports, just like existing columns.

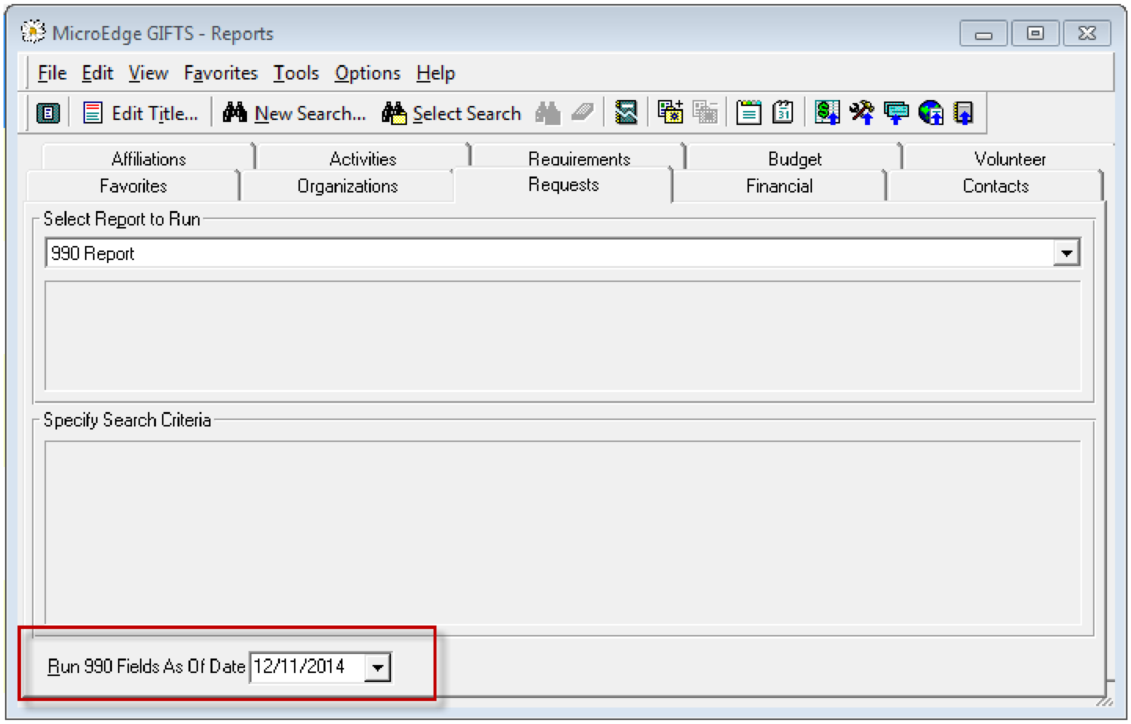
No search filters will allowed to be applied to these columns.

Users will simply perform a Request search, then click **Print**. The Columns tab on the Print Requests form will have the new columns listed under Available Columns.



When added to an Ad-hoc report and Previewed or Printed, the calculations will be made for the current fiscal year by default. The report can also be saved to the Report library.

When a user runs the report from the Report library, there will be an option to set an 'As Of Date', if desired in the Run Report window. This date will decide what Fiscal year the columns are calculated for.




The table below describes each new calculated column:

| Column | Description |
|---|---|
| Beginning Balance | This column shows the unpaid balance of the approved Request at the beginning of the "current" fiscal year (based on the 'As of date').<br>It is calculated as follows:<br>• If the Request was approved during the current fiscal year, the beginning balance is zero ($0.00). (The grant amount will be included in the Newly Allocated column.)<br>• If the Request was approved before the "current" fiscal year, the beginning balance is the original grant amount plus the amount of any grant amendments made before the current fiscal year minus the total amount of any Payments made before the current fiscal year. (The total amount of any grant amendments made during the current fiscal year will be included in the Amended column.) |
| Newly Allocated | If the Request was approved during the current fiscal year, the original grant amount is shown here. Otherwise, the Newly Allocated amount is zero ($0.00). |
| Amended | The sum of the amounts of all grant amendments made during the current fiscal |

| | |
|---|---|
| | year. If the Request had no grant amendments made during the current fiscal year, the Amended amount is zero ($0.00). |
| Amount Paid | The sum of the amounts of all paid, refunded, and voided Payments that meet the following criteria:<br>• The Fiscal Year of the Payment is the “current” fiscal year.<br>• The Payment Date falls before the report’s “as of” date. |
| Ending Balance | The Beginning Balance plus the Newly Allocated amount plus the Amended column amount minus the Amount Paid. |

# IGAM Updates

## Requests and Requirements Resubmission

**NOTE:** This feature is only available to clients with the IGAM module.

GIFTS users can now send back an application or a requirement that was submitted online to allow the grantee to make changes and resubmit back into GIFTS. The Resubmission process can be initiated while considering an application or from the Request or Requirement form within GIFTS. Publishing a resubmission will notify the grantee of the action.

The applicant cannot initiate the resubmission. It must be requested by the grantmaker first.

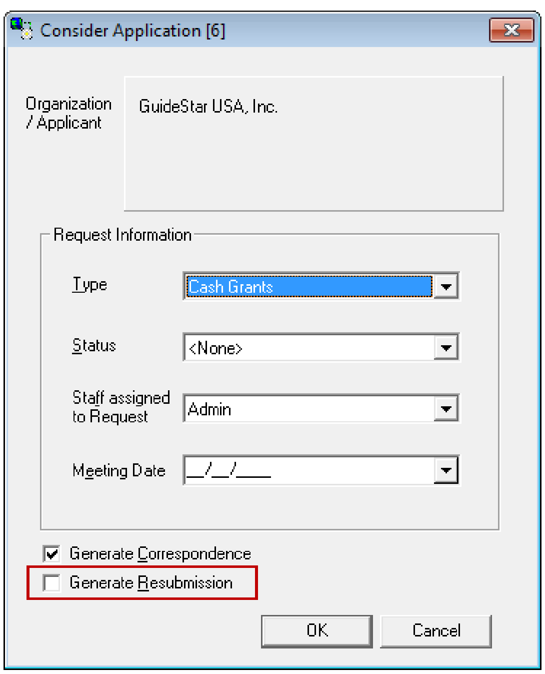
## Initiating Resubmissions

There are two ways of initiating a resubmission request:

- During the Consider process, an IGAM user can check the **Generate Resubmission** box.
- A GIFTS user can also click the **Publish Resubmission** option in the Actions menu when viewing an open Request or Requirement record.

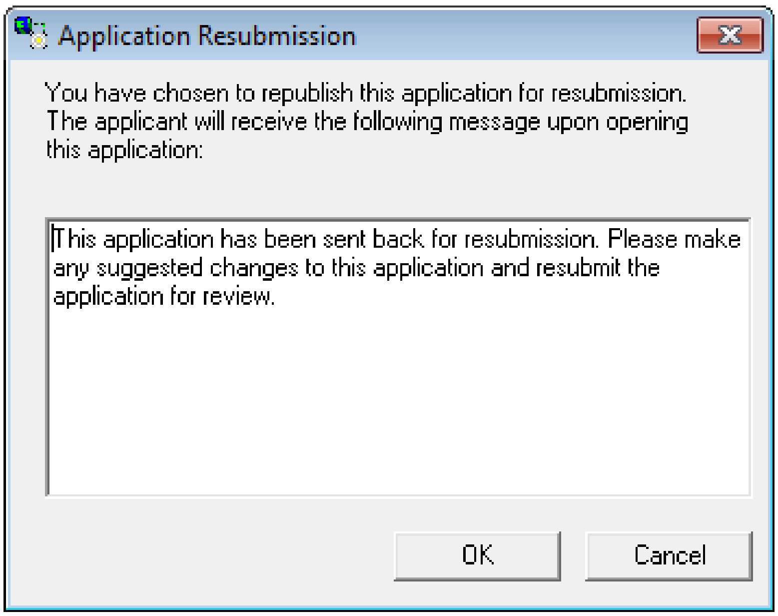
## From IGAM

When a user is considering applications or requirements submitted online, there will be a new 'Generate Resubmission' option available to them provided that there is an email address associated with the applicant. This will allow the user to send a message back to the applicant as part of the consider process. The application or requirement will still upload into GIFTS.




**NOTE:** If the highlighted record does not have an associated email attached, this checkbox will be grayed out/disabled.

When the user Considers the application with the 'Generate Resubmission' check box a form will open to allow them to customize a message to the applicant. This message will be included in an email that will automatically send to the applicant as well as be displayed when they open the resubmission application or requirement when logged into the IGAM site.




The default text message in the Text box can be changed in the IGAM Form Designer.

*"This application has been sent back for resubmission. Please make any suggested changes to this application and resubmit the application for review."*

## Processing the Resubmission

After clicking **OK**, the following occurs:

- For applications that have an account, a new application will be created on the server and associated with it.
    - The new application will be an editable copy of the selected one.
        - It will not matter if the original app's Form is inactive.
        - If the Form has been modified, these changes will not be reflected in the new application.
    - If the Form had a quiz or any authentication options (IRS lookup, Form Password), they will be removed/ignored.
    - All data that was on the original application will default to the new application:
        - Editable fields remain editable.
        - Read-only & hidden fields remain read-only & hidden.
    - The attachments from the original application will be ignored.
- The original application will be moved to the "View Historical Applications" folder.

- Its Disposition will display “Requested Resubmission”
- A new value for the Resubmission Requested Date will be stored and displayed in the grid
- A request will be created in GIFTS

- A process monitor (batch) or a message box (single) will confirm the successful completion of this process:

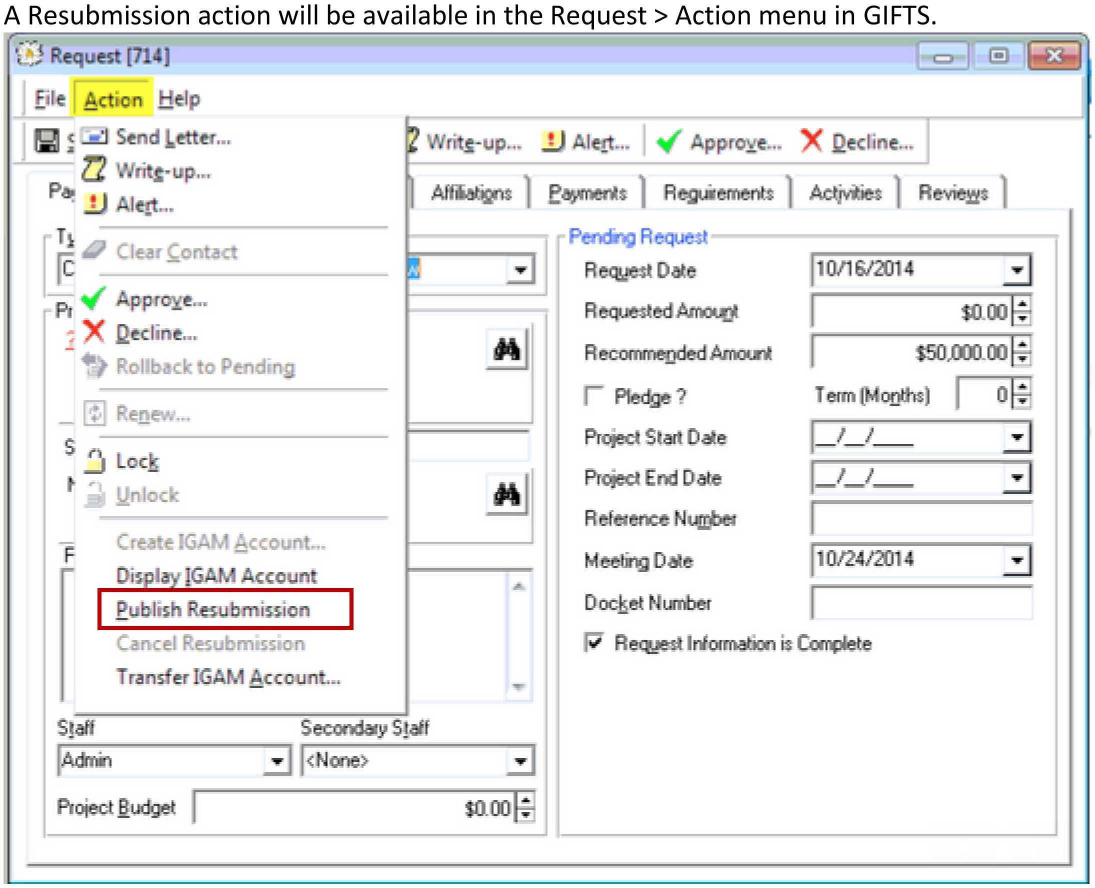
  *A resubmission has been requested for Application [Server Side ID].*

  - If the process was done in batch, and one or more apps did not have an account, this will be reported in the process monitor as well.

    *A resubmission cannot be requested for Application [Server ID] because there is no account associated with it.*

## From Requests

A Resubmission action will be available in the Request > Action menu in GIFTS.




The process will be the same as described during the Retrieval/Consider process except:

- If one of the following conditions is true, the resubmission action will not take place:
  - Request is declined.

- Request has an open Stage 2.
- Request is approved.
- Request is not associated with an IGAM account.

- If the user chooses to publish for resubmission during the consider process, the **Generate Stage 2** button will become grayed out/disabled.
- If there is an open application for resubmission, the **Generate Stage 2** action will be grayed out.
- GIFTS will determine which application is the most recently considered for that request, and use it to copy.
- An Activity record will be created and attached to the Request. This will be a type of history activity for "Resubmission Requested". It will have the following properties:

| Field | Value |
|---|---|
| Organization ID | Organization for the Request. |
| Contact ID | Primary Contact for the Request |
| Request ID | Current Request |
| Staff ID | The user logged in to GIFTS who performed the Action. |
| Done User ID | Same as Staff |
| Done Flag | Yes |
| Class | History |
| Type | Resubmission Requested |
| Due Date | Current Date |
| Done Date | Current Date |
| Notes | Resubmission requested for Application [Server ID]. A new Application [new Server ID] has been created. |
| Change User | User logged into GIFTS who performed the action. |
| Change Date | Current Date |
| Branch | Branch ID of the Request, if Branch Security configuration. |

## From Requirements

The same Resubmission action will be available in the Requirement > Action menu in GIFTS.

- If one of the following conditions is true, the resubmission action will not take place:
  - The Requirement has been flagged as done.

  - Requirement has an existing published requirement.
  - Requirement has an existing resubmission request.

- GIFTS will need to determine which application is the most recently considered for that requirement, and use it to copy.
- An Activity record will be created and attached to the Requirement. This will be a type of history activity for "Resubmission Requested". It will have the following properties:

| Field | Value |
|---|---|
| Organization ID | Organization for the Requirement. |
| Contact ID | Primary Contact for the Requirement |
| Requirement ID | Current Requirement |
| Staff ID | The user logged in to GIFTS who performed the Action. |
| Done User ID | Same as Staff |
| Done Flag | Yes |
| Class | History |
| Type | Resubmission Requested |
| Due Date | Current Date |
| Done Date | Current Date |
| Notes | Resubmission requested for Requirement [Requirement ID]. A new Application [new Server ID] has been created. |
| Change User | User logged into GIFTS who performed the action. |
| Change Date | Current Date |
| Branch | Branch ID of the Request, if Branch Security configuration. |

## Changes to Active Form/Deactivation

Currently, when making changes to an Active form, or deactivating a form, the user is asked whether to allow any in-progress applications to be submitted. This function does not apply to resubmission applications.

If the user wishes to remove the resubmission application, they must use the "Cancel Resubmission" action available in "View Historical Applications" or Request/Requirement record.

The same logic is applied for Automatic Deactivation.

## Notifying Applicants

In addition to the instructional text placed on page 1 of the copied resubmission application, the user will be presented with an option to generate correspondence when using the resubmission action.

## Cancel Resubmission

After requesting a resubmission, there will be an option in the "View Historical Applications" Action menu to "Cancel Resubmission". This action will be available for both Requests and Requirements where a resubmission application has been published.

The Cancel Resubmission option is also available in the Actions menu in GIFTS when viewing the Request or Requirement record. This action will be grayed out/disabled if the highlighted record (single record only) does not have a resubmission requested.

**NOTE:** When canceling a resubmission from GIFTS, an extra check is done to make sure that the resubmitted application does not already exist as a Pending Application, in addition to not being submitted. If it does, an error will occur stating, "Resubmission application could not be canceled. Application has already been submitted".

When the action is selected, a form will launch where the user can customize a message for the applicant. The default text is stored on the server and can be changed in the messages section of the global form design.

- **Instructional Text**

  *You have chosen to cancel the resubmission request. Applicants who attempt to access their Form will receive the following message instead:*
- **Text box** (vertical scroll only). Initially, the default text will be as defined below; however, the text the user last entered will be remembered.

  *This form is no longer available for online submission. We apologize for the inconvenience*.
- **OK/Cancel** command

## Retrieval & Workspace Changes

Both the Pending & History folders of IGAM will display a Resubmission column.

The Resubmission Requested Date will be available as a column in the History folder only.

## Linking Resubmissions

Linked Organizations and Contacts will not carry over from the previous application, and the user will be asked to relink. Only the Request ID will carry over.

## Considering Resubmissions

Since there is a Request ID associated with the Resubmission, the Request data will be updated with the data from the resubmission.

Requirements, upon retrieval, will be updated with the data from the resubmission.

## Considerations for Application Transfer

When pushing for resubmission, the application will be pushed to the applicant associated with the latest submission.

# Simplify for Online Applicants

**NOTE:** The Simplify database contains profiles of organizations that are registered as tax-exempt organizations with the IRS and requires an annual subscription to Guidestar.

## What is Simplify?

Project Simplify grew out of recommendations from the Grants Managers Network's Project Streamline, which found that grantseekers wrestle with application and reporting practices that often are disproportionately burdensome. The main finding was that applicants fill out numerous applications for funding requests and have to re-key the same commonly asked fields in each application, often taking the applicant organization endless amounts of time.

Most applications include the same core elements, such as organizational data, contact information, a board of directors list, financial statements, and so on. Project Simplify is a *Data-sharing* and *Standards-setting* process that helps funders more easily access this frequently used information from grantees. *Standards-setting* creates a consistent format for core organizational information. *Data-sharing* happens through the GuideStar Exchange database, which already connects nonprofits with current and potential supporters. Nonprofits enter their core information once, and then it is automatically added to every grant application they complete for any participating funder. The service is provided at no cost to the nonprofits (grant applicant / grant recipient), however all funders must pay GuideStar an annual fee of $750 in order to access GuideStar Exchange data.

Introducing the ability to pull Guidestar Exchange data into applications through Simplify provides funders with the ability to have their applicants auto-populate their application forms.

## How does Simplify work?

Applicants often apply for funding from multiple organizations. When they are filling out online applications they often have to re-enter standard information such as Name, Address, City, State, Tax ID, Contact information over and over again for each unique application they are filling out.

All nonprofits now can fill out a standard organizational profile on GuideStar's Exchange database (Project Simplify). For online applications that participate in the GuideStar Exchange database sync (Project Simplify), the applicant will be able to pull in their GuideStar Exchange database (Project Simplify) profile information and automatically fill in the matching fields on the application.

## How do I enable Simplify for my online application forms?

To enable Simplify for your GIFTS site, please contact MicroEdge Services at Services@Microedge.com.

Once enabled for your site, to enable Simplify on an application form the "Require applicants to enter U.S. Tax ID" option has to be checked in the application form setup **Properties**. If it is not checked, a Tax ID request will not be displayed to the applicant.

The entry of the applicant's Tax ID will, in turn, enable Simplify to pull data from the Guidestar Data Exchange.

## How does this change how online applications work?

With Simplify turned on, applicants will be given the option to identify their organization with an EIN number when filling out an application form and have up to date information from the Guidestar Exchange Database auto-populate corresponding fields in the form.

This will not only save time for applicants, but will also ensure that the data is accurate and up to date.

## How will it look to an applicant?

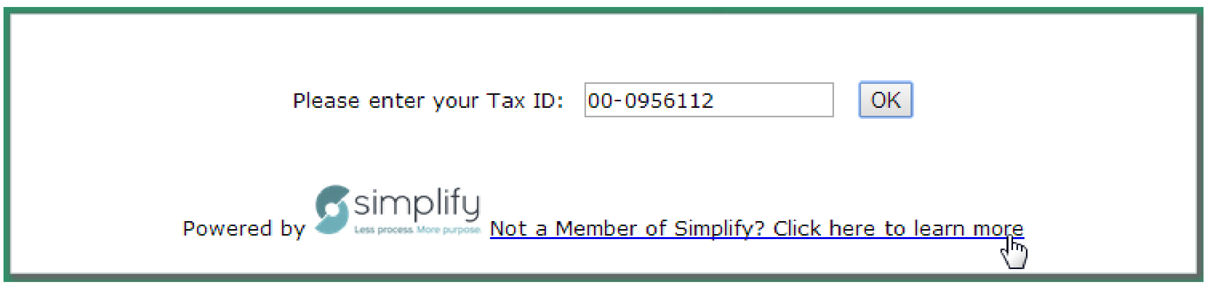
With Simplify turned on, applicants will be prompted to enter their Organization's Tax ID before the application form is opened. This prompt is identical to the window that comes up for an application form when Requiring Tax ID, except with a few extra items to accommodate Simplify.

**NOTE:** This prompt will not occur for Stage 2 application forms.

Keep in mind that not all applicants that arrive at this application will be Simplify members, and therefore will not have any Exchange Data saved with GuideStar. For this reason, there are multiple options when arriving at this window to accommodate different types of users/applicants.

### *Simplify Logo and Link*

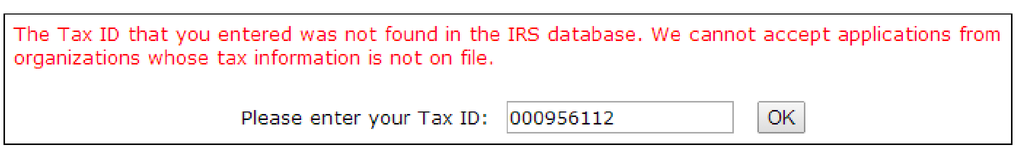
With Simplify on, below the Tax ID field will be the Simplify logo and a link to a site where applicants can learn more about Simplify.




**NOTE:** The 'Powered by' text before the Simplify logo will initially also be supported in French and Spanish.

### *Procedure and Validation Rules:*

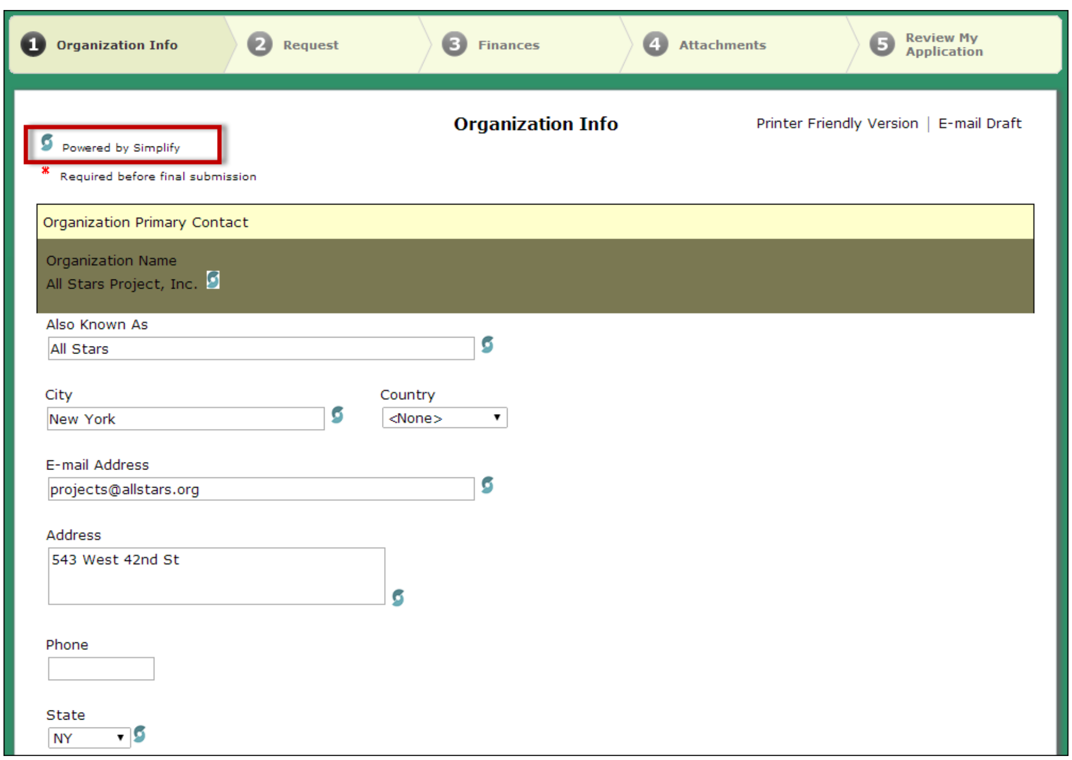
- The applicant cannot skip the step to enter a Tax ID before beginning the application form.
- If the "Require Tax ID to be on file in the IRS database" option is also checked, this check will occur before the Simplify request gets sent (to make sure that the Tax ID is on the IRS database).
    - If the Tax ID entered is not on the IRS database, an error message will appear.




    - If the Tax ID entered is on the IRS database, the system will proceed to check if the Tax ID is on the GuideStar Exchange database.

  - If the Tax ID is valid, the applicant will be taken to the Eligibility Quiz, if it exists.
  - If there is no Eligibility Quiz, the applicant will be taken directly to the application form where data from the GuideStar Exchange and IRS BMF will have been filled in.

- If the "Require Tax ID to be on file in the IRS database" option is not checked, and the Tax ID entered is on the IRS BMF or GuideStar Exchange database, the system will continue to the eligibility quiz (if required), or go straight to the application form and pull in the pertinent exchange data as well as IRS BMF data IF available.
  - If the Tax ID is not found, an error message will appear.
  - Clicking **OK** without modifying the Tax ID will take the applicant to the quiz or application form. The fields on the application will need to be entered manually.
  - Clicking **OK** after changing the Tax ID will cause the system to recheck the Tax ID.
- Simplify data will take precedence over data found in the IRS BMF.
- A simplify logo will be displayed at the top left of an application form that has been successfully populated with exchange data.
- If a field being filled with exchange data is on the application more than once, fill all like fields with the same data.
- Simplify fields must be present on the application form to be populated, but may be hidden.
- Any fields filled in by Simplify can be overwritten by the applicant if needed.



## How do GuideStar Exchange fields match up with GIFTS and GIFTS fields?

The following tables list the fields available through GuideStar Exchange, along with their matching field in the GIFTS or GIFTS database.

**NOTE:** Fields listed in Purple do not exist in the standard GIFTS and GIFTS database. Clients will have to create custom fields using the GIFTS Customizer or Blueprint module with the specifications included in order to match the fields in the Simplify database.

### *Organization Fields*

| GuideStar Field | Field in GIFTS/Online Database |
|---|---|
| EIN | Tax ID |
| Organization Name | Name |
| Also Known As (AKA) | a.k.a. |
| Doing Business As (DBA) name | Record Type: Organization<br>Field Name: Doing_Business_As<br>Standard Label: Doing Business As<br>Type: Text<br>Maximum: 50 |
| Formerly Known As (FKA) name | Record Type: Organization<br>Field Name: Formerly_Known_As<br>Standard Label: Formerly Known As<br>Type: Text<br>Maximum: Long Text |
| Government Registered Name | Legal Name |
| Government Issued Ruling Year<br>(The year the recognizing government registered this organization as a nonprofit.) | Record Type: Organization<br>Field Name: Government_issued_ruling_year<br>Standard Label: Government Issued Ruling Year<br>Type: Long Number, No Decimal |
| Reason for Nonprivate Foundation Status | Record Type: Organization<br>Field Name:<br>Reason_for_Nonprivate_Foundation_Status<br>Standard Label: Reason for Nonprivate Foundation Status<br>Type: Long Text |
| Incorporation year | Record Type: Organization<br>Field Name: Incorporation_Year<br>Standard Label: Incorporation Year<br>Type: Long Number, No Decimal |
| Mission Statement | Record Type: Organization<br>Field Name: Mission_Statement<br>Standard Label: Mission Statement<br>Type: Long Text |
| Geographic Areas Served Narrative | Record Type: Organization<br>Field Name: geographic_areas_served_narrative<br>Standard Label: geographic areas served narrative<br>Type: Long Text |

| GuideStar Field | Field in GIFTS/Online Database |
| --- | --- |
| Impact Statement | Record Type: Organization<br>Field Name: Impact_Statement<br>Standard Label: Impact Statement<br>Type: Long Text |
| CEO Comments<br>(Text provided by the NPO explaining, from the NPO's CEO's perspective, the mission, activities, and impact of the NPO.) | Record Type: Organization<br>Field Name: CEO_Comments<br>Standard Label: CEO Comments<br>Type: Long Text |
| Funding Sources | Record Type: Organization<br>Field Name: Funding_Sources<br>Standard Label: Funding Sources<br>Type: Long Text |

### *Telephone Fields*

| GuideStar Field | Field in Gifts Database |
| --- | --- |
| Primary Phone Number | Phone |
| Primary Fax Number | Fax |

### *Address Fields*

| GuideStar Field | Field in Gifts Database |
| --- | --- |
| Primary Address (line 1) | Address |
| Primary Address (line 2) | Address |
| City | City |
| State/Province/Territory | State |
| Country | Country |
| Postal Code | Postal Code |
| Postal Code extension | Record Type: Organization<br>Field Name: postal_code_plus<br>Standard Label: postal code plus<br>Type: Long Number, No Decimal |

### *URL Fields*

| GuideStar Field | Field in Gifts Database |
| --- | --- |
| Website URL | WWW Address |

### *Email Fields*

| GuideStar Field | Field in Gifts Database |
| --- | --- |
| Primary Email Address | E-mail |

### *NTEE Fields*

| GuideStar Field | Field in Gifts Database |
| --- | --- |
| NTEE Code | Record Type: Organization<br>Field Name: NTEE_code<br>Standard Label: NTEE code<br>Type: Text |

*Financial Fields*

| GuideStar Field | Field in Gifts Database |
|---|---|
| Fiscal Year Start Date<br>(First day of the NPO's fiscal year.) | Record Type: Organization<br>Field Name: fiscal_year_start<br>Standard Label: Fiscal Year Start<br>Type: Date |
| Fiscal Year End Date<br>(Last day of the NPO's fiscal year.) | Record Type: Organization<br>Field Name: fiscal_year_end<br>Standard Label: Fiscal Year End<br>Type: Date |
| Contrib Gifts Grants<br>(The amount of money donated via contributions, gifts, and grants to this organization.) | Record Type: Organization<br>Field Name: contrib_gifts_grants_amount<br>Standard Label: Contrib Gifts Grants<br>Type: Currency |
| Program Service Revenue<br>(Program service revenue including government fees and contracts.) | Record Type: Organization<br>Field Name: program_service_revenue_amount<br>Standard Label: Program Service Revenue<br>Type: Currency |
| Membership Dues | Record Type: Organization<br>Field Name: membership_dues_amount<br>Standard Label: Membership Dues<br>Type: Currency |
| Special Events Net Income<br>(Net Income acquired from special events not included as part of programs.) | Record Type: Organization<br>Field Name: special_events_net_income_amount<br>Standard Label: Special Events Net Income<br>Type: Currency |
| Other Revenue Description | Record Type: Organization<br>Field Name: other_revenue_description<br>Standard Label: Other Revenue Description<br>Type: Long Text |
| Other Revenue | Record Type: Organization<br>Field Name: other_revenue_amount<br>Standard Label: Other Revenue<br>Type: Currency |
| Total Revenue | Record Type: Organization<br>Field Name: total_revenue_amount<br>Standard Label: Total Revenue<br>Type: Currency |

| GuideStar Field | Field in Gifts Database |
|---|---|
| Program Expenses | Record Type: Organization<br>Field Name: program_expenses_amount<br>Standard Label: Program Expenses<br>Type: Currency |
| Administration Expenses | Record Type: Organization<br>Field Name: administration_expenses_amount<br>Standard Label: Administration Expenses<br>Type: Currency |
| Fundraising Expenses | Record Type: Organization<br>Field Name: fundraising_expenses_amount<br>Standard Label: Fundraising Expenses<br>Type: Currency |
| Payments to Affiliates | Record Type: Organization<br>Field Name: payments_to_affiliates_amount<br>Standard Label: Payments to Affiliates<br>Type: Currency |
| Other Expenses Description | Record Type: Organization<br>Field Name: other_expenses_description<br>Standard Label: Other Expenses Description<br>Type: Long Text |
| Total Expenses | Record Type: Organization<br>Field Name: total_expenses_amount<br>Standard Label: Total Expenses<br>Type: Currency |
| Total Assets | Record Type: Organization<br>Field Name: total_assets_amount<br>Standard Label: Total Assets<br>Type: Currency |
| Total Liabilities | Record Type: Organization<br>Field Name: total_liabilities_amount<br>Standard Label: Total Liabilities<br>Type: Currency |
| Net Assets Fund Balance EOY<br>(Net Assets or Fund Balance at the end of year.) | Record Type: Organization<br>Field Name:<br>net_assets_fund_balance_eoy_amount<br>Standard Label: Net Assets Fund Balance EOY<br>Type: Currency |

### *Contact Fields*

**NOTE:** Only Organization primary contact fields in GIFTS will match to the Primary contact fields in the Simplify database.

| GuideStar Field | Field in Gifts Database |
|---|---|
| Prefix<br>(Title that precedes a first name or an initial. For example, Mr., Mrs., and Dr. are name prefixes.) | Prefix |
| First Name | First Name |
| Middle Name | Middle |
| Last Name | Last Name |
| Suffix<br>(A part of a name that follows the last name. For example, Jr. and Sr. are name suffixes.) | Suffix |
| Title | Title |
| Status | Record Type: Contact<br>Field Name: status<br>Standard Label: Status<br>Type: Text |
| Start Month | From |
| End Month | To |
| Email Address | E-mail |
| Compensation | Record Type: Contact<br>Field Name: Compensation<br>Standard Label: Compensation<br>Type: Currency |
| Bio | Record Type: Contact<br>Field Name: Bio<br>Standard Label: Bio<br>Type: Long Text |
| Primary Phone | Phone |

## Update to UTF-8 Character Encoding

In order to bring IGAM up to modern international standards, it has been updated to support UTF-8 browser character encoding which is the world standard for representing all languages.

Please note that GIFTS does not support UTF-8 and certain international characters may not appear as entered on IGAM application/requirement forms.

# Known Issues Fixed in GIFTS 6.6

The following **GIFTS 6.x known issues** have been fixed in this GIFTS 6.6 release:

| ID | Title |
|---|---|
| 256266 | GIFTS was displaying "Payments Status ID" instead of "Reviews Status ID" during an Advanced search using GIFTS.exe. |
| 258071 | GIFTS 6.5 Upgrade failed to upgrade database if Admin user was inactive. |
| 261110 | Client indicated that efforts to rename the Worksheet Title when exporting to Excel failed. |
| 263596 | Exporting with 28 or more columns caused GIFTS to not do anything. |
| 265322 | Gifts Preferences were available to users without permission to access that form. |
| 268163 | Issues occurred when exporting to Excel using UK regional settings. |
| 270783 | The Replace Code functionality in the Administrator's module needed to be optimized to better handle records with many codes. |
| 271835 | Client reports that transfer related requirements using GIFTS was not working in GIFTS 6.5. |
| 271994 | Client reported export to Excel was very slow when exporting many records (over 2k). |
| 270384 | Error occurred when creating matching gifts with Oracle backend. |
| 275999 | Reviews - Request Coding Sheet displaying Volunteer Interest instead of Fund code. |
| 279284 | Non-USD Currency field was exported as a general field instead of currency in Excel. |
| 279767 | GIFTS Essential - Secondary Grouping Header was not printing the sub level description. |
| 284848 | Client was not seeing any of the request custom fields when creating a calculated field. |
| 286063 | Mail system text in Email section of preferences was updated to <None> when selection is set in text (not list). |
| 286674 | Tax Status 2 was not reflecting correct Description value of Tax Status entry in GIFTS database |
| N/A | Client reported getting Incorrect User Name / Password when switching modules. |
| 287730 | GIFTS Plus Tax Status Lookup/Verify could not handle NULL foundation_code (tax status 2) |
| N/A | Updated the Help menu links. |

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| 205991 | Creating a new contact affiliated with one organization and then affiliating that contact with another organization caused the Affiliations to not appear immediately in the Organizer when zooming on the newly created Contact and going to Affiliations tab. |
| 203623 | Carriage return in Project Title caused issues with various A/P export formats. |
| 292560 | Tax ID truncated at 20 characters and did not warn user. |
| 292269 | Client reported budget was not reflecting negative balance in GIFTS 6.4 |
| 294089 | GIFTS AP export - First row was not properly formatted when no options were checked. |
| 294803 | When the Volunteer Gifts Affiliation was manually created, period end recipient emails did not get sent to that volunteer gift contact. |

# Known Issues Fixed in IGAM 6.0

The following **IGAM known issues** have been fixed in this IGAM 6.0 release:

| ID | Title |
|---|---|
| 271002 | Resolved issue with missing IGAM application if the backup fails, and the write/update to the original fails. |
| 288353 | Client was getting error when considering a IGAM application “Cannot insert duplicate key row in object “dbo.Contact_Ext’. |
| 286498 | IGAM deactivation message truncated and defaulted to system/default message if longer than 255 chars. |
| 210119 | Client’s IGAM application CONTACT links were updating Contacts without checking the “update GIFTS” option when linking. |
| 252962 | Contact custom boolean fields were ignored when set to Required. |
| 253455 | Groups of fields in IGAM forms caused the Title of the group to appear twice to the applicant if the groups started with a hidden field. |
| 276469 | Non US clients were not able to utilize the Deactivation Date when creating a new form. |
| 281386 | Requirement Forms - code percentage fields were not populating from GIFTS Values. |
| 284838 | IGAM Application XML beccame out of sync with actual attachment files. |
| 273407 | Client reported that the # attachments column in the submitted applications report did not count attachment field attachments. |
| 274084 | Currency fields failed to render label correctly if not filled in when field was marked as Required. |

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| 210119 | Links were updating Contacts without the user checking the "Update GIFTS" option when linking. |
| 277802 | Default Forgot Password text needed to be changed to match button. |
| 279876 | Contacts were not updating properly when linked from IGAM. |
| 278655 | Attach application feature with email application was not consistent/did not work. |
| 279667 | Client reported that when filling out the IGAM login with email and password -> ENTER takes you to create an account when New Applicant is a button instead of link. |
| 289752, 264947 | Resolved issue with user being able to Submit or Save and Finish later when previewing application forms. |
| 27200 | Resolved issue with no Form Title, Stage 1 Form, or Stage 2 form options being available when Sorting. |
| 278655 | Client reported that the attach application check box did not function. |
| 279667 | If the New Applicant link was set to button, it would be the focus when hitting the Enter key. |
| 287935 | When using Safari for submitting an IGAM application, dates were displaying only in US date format (mm/dd/yyyy) even though Regional Settings and related date settings were set to UK. |
| 288285 | Code percentage was not enforced, allowing submission when validation should prevent |
| 288559 | With Oracle backend, Applications.Country value >20 chars did not truncate which caused insertion into Applications to fail. |
| 287879, 288020, 288614 | IGAM retrieval did not recognize file with same name as in application xml. |
| 286069 | Error when linking organization if the Org name contained brackets and a space. |
| 288879 | Resolved issue with incorrect Account URL populating the Account URL merge field. |
| 282968 | Resolved issue with error handling in Attachments. |
| 289419 | Hidden fields were not hidden when there was a field to the right of it. |
| 288597 | Chrome input fields extended past frame on Account Login. |