



Content

While Essential GIFTS® users are able to use most Plus Pack utilities, some utilities require additional modules in order for users to take advantage of all of their features. This document outlines these additional required modules, if any, and describes how each Plus Pack utility is restricted without it.

Note: Only clients using GIFTS 6.7 can install Plus Pack 5.3.

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About GIFTS Plus Pack

The GIFTS Plus Pack is a set of .NET add-on utilities that integrate seamlessly into GIFTS to offer extensive options for updating batches of records, verifying tax status information, verifying watchlists information, updating and adding organizations, batch requirement and payment scheduling, enhanced charting, and enhanced email capabilities. The utilities are built on the Microsoft® .NET platform, and are accessed from within GIFTS for a seamless user experience. For more information, please refer to the *GIFTS Plus Pack User's Guide*.

Using GIFTS Plus Pack with Essential GIFTS

The following section lists the specific modules required to utilize all of the features of each Plus Pack utility, and describes how each Plus Pack utility is restricted without it:

Batch Plus

Essential GIFTS users can update the following Request coding sheets: Fund, Program Area, Geographic Area Served, Internal Program, Population Served and Type of Support. These are the default Coding Sheet tables that come standard in Essential GIFTS. GIFTS users are also able to batch update records based on the Organization or Contact coding sheets.

Charts Plus

Essential GIFTS users can use all of the charting features in Charts Plus, and are only limited by the coding sheets with which they can chart. Users can create charts using the Request coding sheets, but cannot use Organization or Contact coding sheets, which are only available in GIFTS.

Email Plus

Essential GIFTS users that do not have the Correspondence module must have their email preferences modified for Email Plus to work seamlessly with Essential GIFTS. For additional information, contact MicroEdge Technical Support.

Link Plus for use with Outlook

Link Plus cannot be used with Essential GIFTS.



MicroEdge GIFTS® Plus Pack 5.3

USING GIFTS PLUS PACK WITH ESSENTIAL GIFTS

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Payments Plus and Requirements Plus

All Payments Plus and Requirements Plus functionality is available to Essential GIFTS users.

Reminders Plus

Users must have the Correspondence Option for Reminders Plus to work seamlessly with Essential GIFTS.

Tax Status Plus

Users can use all the features of Tax Status Plus to look up and verify tax information. If you would like access to the audit trail activities created by the utility, you must have the optional Calendar module.

Watchlists Plus

Users can use all the features of the Watchlists Plus, but if you would like access to the audit trail activities created by the utility, you must have the optional Calendar module.

Likewise, Essential GIFTS users without the Contacts Option cannot select and search for Contacts; Include in Search Options do not include address, date of birth year, and social security number; and when selecting Organizations to vet, affiliated Contact options are limited to Primary Contacts only.

For additional information related to any of the Plus Pack utilities, contact MicroEdge Technical Support.