



GIFTS

CONSULTING SERVICES

ADMINISTRATOR SETUP

Benefits

► **Efficiency**

Streamline your process with the right GIFTS Administrator setting.

► **Meaningful Reports**

Learn how to modify your codes to reflect changes in reporting needs.

► **Data Integrity**

Ensure your system is accurate and up-to-date.

Cost

\$1600 per day
or
\$200 per hour

Contact Us

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Achieve your Goals with MicroEdge Consulting Services

A key advantage of working directly with a MicroEdge product specialist: We know our product better than anyone else. That means we are uniquely qualified to help you configure and maintain your GIFTS system. A review of your system configuration and administration is the best way to ensure you get the most from your technology investment.

Service Description:

Our Administrator Setup Service is designed to help you get the most from your technology investment and improve your operational efficiency. A MicroEdge product specialist will work directly with your GIFTS Administrator to ensure that GIFTS is tailored and customized to meet the specific needs of your organization.

What Will be Covered:

We will focus on six key areas of GIFTS Administration: Working with Codes, Defining System Preferences, Working with Templates, Working with the Reports Library, System Security, and Data Integrity.

Working with Codes

In order to produce meaningful reports and queries, it is necessary to classify the records in your database. We will review how to add, edit, deactivate, delete, or replace codes in order to maintain the integrity of your coding system and to match your tracking needs as they evolve.

Defining System Preferences

GIFTS has been designed to meet the needs of a wide variety of grant making organizations. Since your giving program is unique, you can use preferences to help tailor the system to meet your needs. We will review each of the GIFTS preferences and explain how its use can streamline your process.

Correspondence Templates

Through GIFTS you can create merged correspondence for any request, organization, contact, payment, requirement, or activity. The Product Specialist will review your needs and teach you how to create new customized letter and e-mail templates and modify existing templates.

Working with the Reports Library

The Product Specialist will review how to manage the reports available to your users in the GIFTS Reports Library, including how to change the names and descriptions of standard reports and how to add saved searches to the reports.

System Security

In order to maintain the accuracy of records, GIFTS has a detailed internal system security feature. We will review how to restrict which users have view, edit, add, update, and execute access rights for all major functions and sensitive fields in the system.

Maintaining Data Integrity

In order to maintain data integrity in the GIFTS system our Product Specialist will review your database and show your Administrator how to find and consolidate duplicate records, recalculate GIFTS data and purge documents that have been removed from GIFTS.