Submitted by [Brad Ambelang](https://www.gmnetwork.org/users/ambelang) on October 30, 2012 - 7:12am.

Hi Isabella, we've been using GIFTS Online since earlier this year and though it's been a challenge to convert from Essential GIFTS, we're quite happy with it's functionality so far. We use it with IGAM and have also gone paperless. I'm in Milwaukee also, if you have any interest in coming over to take a look, let me know. Brad Ambelang The Brico Fund 414-272-2747 bma@bricofund.org

Submitted by [Pat LaCour](https://www.gmnetwork.org/users/patlacour1) on July 11, 2013 - 3:05pm.

We upgraded from Gifts 6.4 (Access-based) to GO in late December, 2012.  It has been a very bumpy ride.  I have not been as satisfied as I had hoped.  I have even asked for a plan to go back to a local database, but ME has not responded.  As Jamie mentioned, the recent upgrade has made correspondence more reliable; however, the CCs in document templates do not work yet.

Ad Hoc reports can be generated fairly easily; however, there is NO WAY to sum sub-categories in a report.  As a example, today I want a list of grants sorted by geographic area.  I can set up the query for the report, format the sorting order, but there's no way to sum the number or dollar amount that has been granted in each geographic area UNLESS IT IS EXPORTED TO EXCEL.  The exports from GO to Excel work fine, but it takes additional time to format them so that they are "pretty" and one must manually scroll through the report to find the appropriate section breaks, enter the formulas for the subtotals and totals.

Here are suggestions assuming that you make the decision to move to GO -- 1) if you use reports with sub categories, save the ad hoc reports to your report library. 2) make sure that the technicians move the custom reports over to GO.  That's the only way to get them in the future.

Other issues:  In Gifts 6.4 with the Plus Pack, one could attached documents and email to grant records in Gifts directly from Outlook.  That is not possible in GO.  Emails and attached documents must be saved to a local folder and then uploaded to GO.  Also, in Gifts 6.4 scheduled payments and requirements (Site visits, reports,etc.) could be downloaded to staff calendars.  If it is possible in GO, I don't know how.  These 2 features were the first two that we discovered to be non-functional so that tells how important these were to our staff.

In Gifts 6.4, with the Plus Pack, one could generate batch emails and attach documents.  This is not possible in GO.

In GO it is possible to modify the VIEW, but it is not possible to modify the column widths permanently.  When one clicks off one page and returns, the column widths return to the default size.  I believe that this may be an upcoming enhancement.

In Gifts 6.4 it was possible to automatically schedule reports upon approval of grants.  This is not possible in GO; however, the ME service desk techs helped set up Requirements/reporting schedule for specific grant types.

Scheduling payments for approved grants does work better than the Gifts 6.4 version. There is a way to schedule multiple grant payments without opening each payment individually to change it.  This works ONLY at the time of the grant approval.  Thereafter, each payment record must be accessed individually to change it.

I also suggest that you look at some of the other discussions within this site.  I recall something recently about having to click OKAY for each email when sending batch email.  In Gifts 6.4, one could click OK and set a time for the system to have the permission to send emails. During that period of time, message could be generated and sent without having to click through each one.

The ability to have multiple dashboards in GO 4.0 is helpful.  The Grant Manager can "create" dashboards for all users.  Further, users can share dashboards with other users who have the same permission levels.  At this time Grant Managers can share dashboards only with other grant managers.  There is a enhancement request to change this so that Grant Managers can share dashboards with all users. There are 2 different processes for creating dashboards and for sharing.

In GO, there is no way to change coding as a batch process.

I would be happy to discuss this further and suggest work-arounds for you if necessary.

Pat LaCour Accounting & Systems Manager The Rapides Foundation 1101 Fourth Street, Suite 300 Alexandria, LA 71301 (318) 443-3394/(800) 994-3394 Fax (318) 443-8312

Submitted by [Jamie Amagai](https://www.gmnetwork.org/users/jamie-holtzclaw-amagai) on June 26, 2013 - 2:21pm.

Hi TeQuion -

We moved to Gifts Online in January 2012. I was pleased with the implementation process and have been happy with the product . At each update, it gets more customizable and more powerful. I've gotten mostly quick responses from tech support when I've had questions and feel that they've resolved most issues in a reasonable timeframe. Some issues have been scheduled for resolution in a future upgrade.

When we were thinking of moving to a hosted solution, I did a thorough review of the other vendors out there and GO was the product that best met our needs.

We don't use online application or reporting (we handle that by email) so I needed a product that didn't charge me for that functionality if I wasn't going to use it and GO met that requirement as well. But I wanted to make sure it was available in case we go that route in the future, and it is.

I'm happy to chat if you have more questions - 202-912-2905 or jamagai@summitfdn.org

Here are a couple of other related discussions you may want to check out as well.

<https://www.gmnetwork.org/groups/discussion/7070>

<https://www.gmnetwork.org/groups/discussion/7723>

Jamie Amagai | The Summit Charitable Foundation |

I do want to let you know though, that when I am at a real loss on a status, I will call the IRS Exempt Organizations Hotline toll free number, which you've already done.  (877) 829-5500.  I will also look over the 990, and ask to see the actual 501c3 ltr.

If you can't find anything in either of those documents, then call the IRS again and ask if they can confirm whether they are in good standing and also if they are a supporting organization or a public charity (Guidestar says they are)...did Guidestar list a 990 or financial statements.(The 990 has that page that shows their exact status.)  What I saw about them is they have very small revenues, and their business info sounds more like a non profit consulting firm.  But I didn't look too closely.

If it were me, I would take ER to be really safe if you really want to fund them.  Hopefully other members can provide some input!

Submitted by [John Bateman](https://www.gmnetwork.org/users/johnwbateman) on September 24, 2013 - 8:42am.

Timely thread for us... Recently, after reviewing the IRS Revenue Procedure that allows foundations to rely on third party sources of information from the IRS BMF, I realized that TaxPlus doesn't date its IRS BMF data pull. I didn't see this idea posted in the Power ME portal yet, so I went ahead and added one: "Tax Plus noting date of download from IRS BMF."

Don't forget you can also download the BMF extract (in sections) for free from [http://www.irs.gov/uac/SOI-Tax-Stats-Exempt-Organizations-Business-Master-File-Extract-(EO-BMF)](http://www.irs.gov/uac/SOI-Tax-Stats-Exempt-Organizations-Business-Master-File-Extract-%28EO-BMF%29). Of course, if you're already paying for a service to pull from the IRS BMF....

Thanks for the topic.
JB

John W. Bateman

Administrative Officer

The Peter and Carmen Lucia Buck Foundation, Inc.

Submitted by [Suki OKane](https://www.gmnetwork.org/users/suki-okane) on September 23, 2013 - 10:35am.

I second (third) that promotion in PowerME,

Meanwhile: A free alternative to GuideStar $$: http://www.grantr.com
So far it's been lockstep with Pub 78 and http://apps.irs.gov/app/eos/

$0.02,
Suki

suki o'kane director of administration walter and elise haas fund

Submitted by [Stephanie Randolph](https://www.gmnetwork.org/users/srandolph) on September 23, 2013 - 7:54am.

I recently contacted the helpdesk to ask how often the database was updated.  Here is the response from Kenny Hiu:

"The update to the Tax Status Verify database is depending on the IRS Pub 78 database. On a regular basis, we check for updates every 3 weeks with our source. If IRS had updated their DB most recently after our regular check in,  the updated data will be applied at the next scheduled update."

I did put in a request for a product enhancement that would include listing, in a prominent location, the date of the last update.  I felt this would give me more confidence in their information and hold them to a higher level of accountablility.

I would encourage other users to put in a similar request.

Stephanie