

Gifts and Benefits

Capture and report on received or donated gifts and hospitality or benefit details.

Functionality

- ✓ Ability to capture gift details as either donated or received.
- ✓ Ability to capture gift date.
- ✓ Ability to approve or reject gifts.
- ✓ Ability to bypass manager approval for smaller gift amounts.
- ✓ Ability to set different approvers for set gift value ranges.
- ✓ Ability to specify gift recipient or donor.
- ✓ Ability to state reason for gift acceptance/donation.
- ✓ Ability to report on gifts by quarter, financial year and gift type.
- ✓ Ability to report on gifts by type, status or threshold.
- ✓ Ability to review gifts pending approval.
- ✓ Ability to attach documents or other support documents related to the gift.

Security Roles

Gifts Manager	Full access (Create, Read, Update and Delete) to all gifts and workflow tasks assigned to them.
Gifts User	Create, view and edit their own gifts.
Administrator	Administration access to all objects and ability to make configuration changes