GiftWrap 4.0
Post-Conversion Checklist

Congratulations! Your GiftWrap 3.6 data has been converted and your GiftWrap 4.0 login credentials have been sent to you.

If you have not received your GiftWrap 4.0 login, please check your spam filter. The login was sent from giftwrap@pgcalc.com. Please add this address to your contact list and/or configure your mail folder to accept email from this address so that it is not blocked by a spam filter. The giftwrap@pgcalc.com address does not accept incoming messages. Please direct any questions to support@pgcalc.com.

With your credentials, you are ready to log into your GiftWrap 4.0 account for the first time.

Before you begin to work exclusively in GiftWrap 4.0, we highly recommend completing these steps.

1) Synchronizing GiftWrap 3.6 and GiftWrap 4.0

☐ Make sure your GiftWrap 3.6 and GiftWrap 4.0 data are in synch.

Your GiftWrap 4.0 database contains only the data sent to us for conversion. If you made any changes in your GiftWrap 3.6 database since the database was backed up and the file was sent to us, you must enter all the same changes into GiftWrap 4.0.

2) Running Reports and Compare

☐ Run all of the following reports in GiftWrap 3.6 and GiftWrap 4.0 and compare the results.

a) ***Person Summary Report*** *– Run the report. The number of persons should match. (Note: Donor/Beneficiaries and PIF Remaindermen are combined on the Person Summary in GiftWrap 3.6. Report them separately in GiftWrap 4.0 and add the person counts. Exclude Advisors from the comparison.)*
b) ***Gift Summary Report*** *– Run the report for all gifts. The gift count and total gift amount should match.*
c) ***Payment Summary Report*** *– If you store payment information, run the report for the current organization year. The Payment count and Total Payment Amounts should match.*
d) ***1099-R Summary Report*** *– If you store tax information, run the report for the current organization year. The number of people and total amounts should match.*

☐ Test all converted custom check or advice styles, custom uploads, and custom reports.

3) Setting up Roles and User Access

Because of the enhancements to user access in GiftWrap 4.0, GiftWrap 3.6 user accounts do not carry over.

☐ If more than one person needs access to GiftWrap, ensure that additional user accounts are set up by the person with the GiftWrap administrator account (the "Administrator"). Create new user accounts with User Type "Internal" and User Access Mode "Concurrent". (User Type "Remote" applies to only service providers that offer read-only access to their charity customers or umbrella organizations that offer read-only access to affiliates.)

☐ Assign a Role to each new user account.
The Administrator should use the new Roles feature to set up Roles first, and then create the individual user accounts. Two default roles are included; roles may be added or modified if desired.

4) Start running GiftWrap 4.0 exclusively
☐ Keep GiftWrap 3.6 installed for reference.

5) Consolidating organizations and setting up Gift Annuity Pools (optional)
☐ Consider using the new Gift Annuity Pools feature in GiftWrap 4.0 if you have been maintaining separate organizations in GiftWrap for the purpose of reporting on segregated gift annuity pools. *This may be a better approach that could improve reporting and, in some cases, reduce service level fees. Contact support@pgcalc.com to discuss.*

6) Learning about GiftWrap 4.0
☐ Sign up for the free online GiftWrap Orientation if you haven't already done so.
☐ Read the GiftWrap 4.0 release notes to learn about new features that could make your work more efficient and productive.

PG Calc Client Services and Support:
PG Calc's Client Services team is ready to help you get going on GiftWrap 4.0 and welcomes your comments and questions at anytime.

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