

UPDATE GIFTS AND PLEDGES AFTER THEY HAVE BEEN POSTED.

1 Update Posted Gifts and Pledges

All non-financial fields can be changed, including the ID, Appeal code, Notes, List as, Tribute, Acknowledge, Solicitor, and even the Date Received.

3 Change the Distribution and/or Fund

Users with a special keyword are able to change the Distribution and/or Fund. This is perfect when accounting has already made the change in their system and you just want iMIS to be correct!

2 Change Soft Credit IDs and Amounts

Change them, add them, or delete them!

4 Make Adjustments to Unpaid Installments

Easily and efficiently change the dates and amounts of unpaid installments on a pledge.

The screenshot shows the 'FRease - Edit' window with the 'Options' tab selected. The 'Overview' sub-tab is active. The 'Gift Info' section contains fields for ID (205), Transaction # (144), Transaction Date (1/27/2010), Date Received (1/27/2010), Gift Type (PLEDGE), and Gift Amount (\$1,200.00). The 'Apply To' section includes Distribution (GEN), Appeal (TELE), Campaign (ANNUAL), and Fund (GEN). A 'Details' section has fields for List As and Solicitor.

EDIT NOTES, SOFT CREDITS, AND NON-FINANCIAL DETAILS.

The screenshot shows the 'FRease - Edit' window with the 'Options' tab selected. The 'Installments' sub-tab is active. It displays a table with columns for Installment Date, Amount, Prepay, and Invoice Number. The table contains four rows of installment data. Below the table are buttons for 'Add', 'Delete Selected', and a 'Total' field showing \$1,200.00.

Installment Date	Amount	Prepay	Invoice Number
2/27/2010	300.00	\$0.00	0
5/27/2010	300.00	\$0.00	0
8/27/2010	300.00	\$0.00	0
11/27/2010	300.00	\$0.00	0

MODIFY THE DATES AND AMOUNTS FOR UNPAID INSTALLMENTS.

What They're Sayin'

"Kudos! After installing FRease, I was immediately able to use it. Very nice!"

JEAN DAVIS
KAPPA KAPPA GAMMA FRATERNITY

You Got What It Takes?

- Requires iMIS 10.6 or higher
- SQL/SQL Express 2005 or higher
- Latest pricing detail and additional screenshots can be found at: www.csiinc.com/FRease