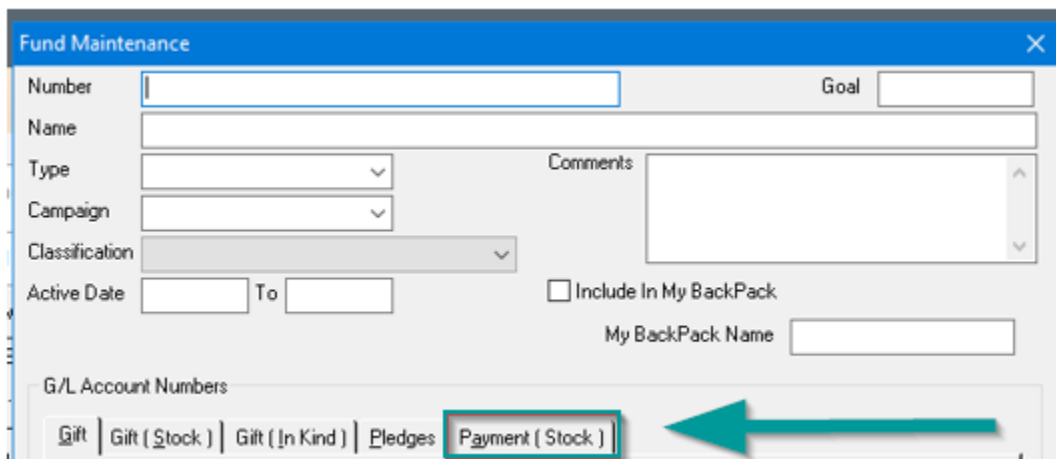


Fund Maintenance Security including the Payment of Stock Tab

A recent enhancement to the fund maintenance section in Alumni to add an additional payment(stock) tab. This is security based.

A fifth tab was added as an enhancement to accommodate payment of stock. Users may get an error when creating a fund that all account numbers are not entered. This is usually the issue.

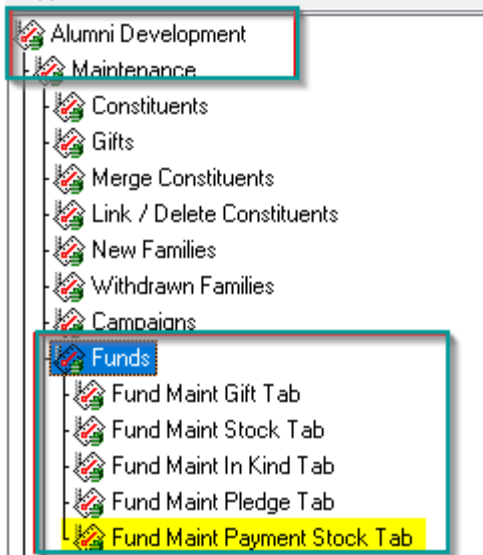
Alumni > Maintenance > Funds > New



The screenshot shows the 'Fund Maintenance' application window. It contains several input fields: 'Number', 'Name', 'Type' (dropdown), 'Campaign' (dropdown), 'Classification' (dropdown), 'Active Date' (range), 'Goal', 'Comments' (text area), 'Include In My BackPack' (checkbox), and 'My BackPack Name'. At the bottom, there is a section for 'G/L Account Numbers' with tabs for 'Gift', 'Gift (Stock)', 'Gift (In Kind)', 'Pledges', and 'Payment (Stock)'. The 'Payment (Stock)' tab is highlighted with a red box, and a green arrow points to it from the right.

Below is the location for the school's IT person to add this new feature to other users who need access to editing/creating new funds in Alumni.

- System Administration Application (must be logged in as the super user).
- File.
- User Maintenance.
- Edit User Profiles.
- Find the user on the left and click to expand their security window. Click on Alumni / Maintenance / Funds. Highlight Funds and Delete it out.
- On the right are the Applications. Open Alumni/Maintenance/Funds and click and drag (a small gray box will appear) over the user to give them the new security.



NOTE: If your school uses Group Security instead of User Security than add it to the applicable Groups.