



REQUESTING AND MANAGING GIFTS TIPSHEET

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[View individual gift request](#)

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Viewing all existing gift requests

<ul style="list-style-type: none"> ➤ Access the TOS website and log in 	See 'TOS Registration and Login TipSheet' for assistance												
<ul style="list-style-type: none"> ➤ All of the existing gift requests for your agency are displayed. This view is based on the information you provided when you registered for the site. If you are seeing gifts for another agency, please use the contact us link on the Tree of Sharing home page 													
<ul style="list-style-type: none"> ➤ The row color indicates the status of a gift request: <ul style="list-style-type: none"> ○ Highlighted and red print – awaiting approval from Agency Contact and TOS ○ No highlight black print – approved by both Agency contact and TOS admin ○ Highlighted and black print – approved by Agency Contact and awaiting TOS 	<table border="1" data-bbox="721 1268 1073 1629"> <tr> <td style="background-color: yellow;">4</td> <td style="background-color: yellow;">F</td> <td style="background-color: yellow;">1</td> </tr> <tr> <td style="background-color: yellow;">5</td> <td style="background-color: yellow;">F</td> <td style="background-color: yellow;">2</td> </tr> <tr> <td>6</td> <td>F</td> <td>12</td> </tr> <tr> <td style="background-color: yellow;">7</td> <td style="background-color: yellow;">M</td> <td style="background-color: yellow;">15</td> </tr> </table>	4	F	1	5	F	2	6	F	12	7	M	15
4	F	1											
5	F	2											
6	F	12											
7	M	15											



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Add gift requests

Access the TOS website and log in	See 'TOS Registration and Login TipSheet' for assistance
<ul style="list-style-type: none">➤ All of the existing gift requests for your agency are displayed. This view is based on the information you provided when you registered for the site. If you are seeing gifts for another agency, please email or call the TOS administrators	
<ul style="list-style-type: none">➤ Select 'Gift Tags'	
<ul style="list-style-type: none">➤ All of the existing gift requests for your agency are displayed. This view is based on the information you provided when you registered for the site. If you are seeing gifts for another agency, please use the contact us link on the Tree of Sharing home page	
<ul style="list-style-type: none">➤ Select Add (the plus symbol)	





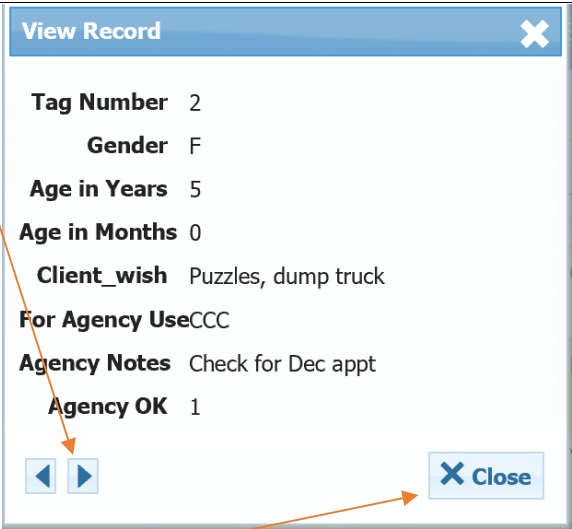
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<ul style="list-style-type: none">➤ Tag number is auto generated and is read only➤ Select Male or Female from the Gender drop down field➤ Enter Age<ul style="list-style-type: none">○ Rules: Enter age in years or months but not both○ For ages <u>2 years and up</u> enter years○ For ages <u>Under 2 years (23 months or less)</u> enter months➤ Enter Client_wish. Field is free text. Please provide specifics and follow the TOS guidelines for gifts.➤ Enter For Agency Use. This is a three-character field that the agency can use for its own gift management needs.➤ Agency notes – is a free text field that will not print on the gift tags. Do not include personal identifiable information in this field.➤ Agency OK – This is for Agency Contact use only. They will check this box after they have reviewed the gift request. This check box indicates to the TOS administration that the agency contact has reviewed and approved this gift request. You will not see this box unless you are an Agency Contact.	<p>The screenshot shows a form titled "Add Record" with a close button (X) in the top right corner. The form contains the following fields and controls:</p> <ul style="list-style-type: none">Tag Number: A text input field.Gender: A dropdown menu with a downward arrow.Age in Years: A text input field.Age in Months: A text input field.Client_wish: A text input field with "Characters left: 95" below it.For Agency Use: A text input field with "Characters left: 3" below it.Agency Notes: A text input field.Agency OK: A checkbox.At the bottom right, there are two buttons: "Submit" (with a document icon) and "Cancel" (with an X icon).
<ul style="list-style-type: none">➤ Select Submit if the information entered is correct. The entered information will be saved and the screen will return to the gift grid.➤ Select Cancel if you wish to discard the entered information. None of the entered information will be saved and the screen will return to the gift grid.	<p>This is a close-up of the "Submit" and "Cancel" buttons from the form. The "Submit" button has a document icon, and the "Cancel" button has an X icon.</p>



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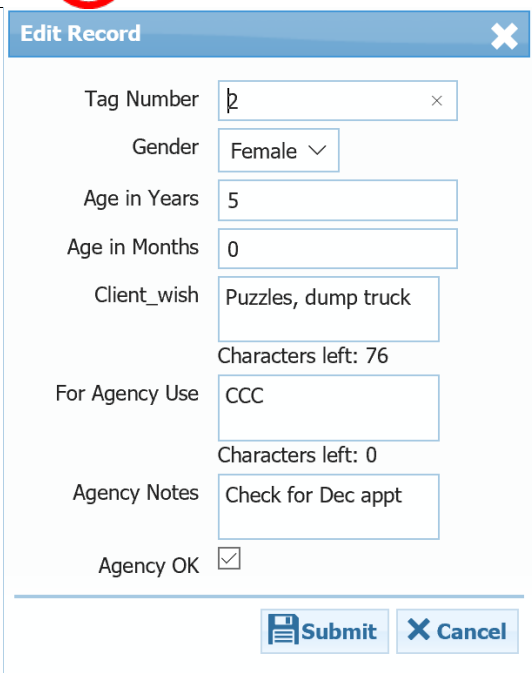

View individual gift requests

<ul style="list-style-type: none"> ➤ Access the TOS website and log in 	See 'TOS Registration and Login TipSheet' for assistance
<ul style="list-style-type: none"> ➤ All of the existing gift requests for your agency are displayed. This view is based on the information you provided when you registered for the site. If you are seeing gifts for another agency please email or call the TOS administrators 	
<ul style="list-style-type: none"> ➤ Click on the row of the gift request you want to view <ul style="list-style-type: none"> ○ Note: this takes you to the form view of the gift request. It has the same information as the row you are viewing in the grid. ➤ Select View (the paper with a folded corner symbol) 	
<ul style="list-style-type: none"> ➤ Use the forward and backward arrows to move between gift requests. 	
<ul style="list-style-type: none"> ➤ Select Close when done and the screen will return to the gift grid view. 	

Edit gift requests



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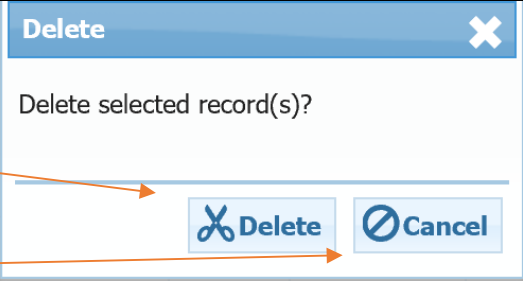
<ul style="list-style-type: none"> ➤ Access the TOS website and log in 	<p>See 'TOS Registration and Login TipSheet' for assistance</p>
<ul style="list-style-type: none"> ➤ All of the existing gift requests for your agency are displayed. This view is based on the information you provided when you registered for the site. If you are seeing gifts for another agency please email or call the TOS administrators 	
<ul style="list-style-type: none"> ➤ Click on the row of the gift request you want to edit 	
<ul style="list-style-type: none"> ➤ Select Edit (the pencil symbol) 	
<ul style="list-style-type: none"> ➤ Select the field you would like to edit. 	
<ul style="list-style-type: none"> ➤ Make your changes. 	
<ul style="list-style-type: none"> ➤ Select Submit if the information entered is correct. The entered information will be saved and the screen will return to the gift grid view. 	
<ul style="list-style-type: none"> ➤ Select Cancel if you wish to discard the entered information. None of the entered information will be saved and the screen will return to the gift grid view. 	

Delete gift requests


<ul style="list-style-type: none"> ➤ Access the TOS website and log in 	<p>See 'TOS Registration and Login TipSheet' for assistance</p>
<ul style="list-style-type: none"> ➤ All of the existing gift requests for your agency are displayed. This view is based 	



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<p>on the information you provided when you registered for the site. If you are seeing gifts for another agency please email or call the TOS administrators</p>	
<p>➤ Click on the row of the gift request you want to edit</p> <p>➤ Select Delete (the waste can symbol)</p>	
<p>➤ Select Delete to delete the record. The entered information will be deleted and the screen will return to the gift grid view.</p> <p>➤ Select Cancel if you do not want to delete the record.</p>	

Search gift requests

<p>➤ Access the TOS website and log in</p>	<p>See 'TOS Registration and Login TipSheet' for assistance</p>
<p>➤ All of the existing gift requests for your agency are displayed. This view is based on the information you provided when you registered for the site. If you are seeing gifts for another agency, please use the contact us link on the Tree of Sharing home page</p>	
<p>➤ Any column that has a clear box at the top can be searched</p> <p>➤ Enter the value that you would like to search for into the box. Examples of helpful searches:</p> <ul style="list-style-type: none"> ○ Enter 0 in 'Agency OK' to find all gifts that have not been approved by the agency contact. ○ Enter M in 'gender' to find all males. ○ Enter a specific agency code in the agency use field 	