GIFT PROCESSING
LUX TRAINING

LAST UPDATED: OCTOBER 2025

UC RIVERSIDE

TABLE OF CONTENTS

LUX
UCR'S ASCEND ON SALESFORCE

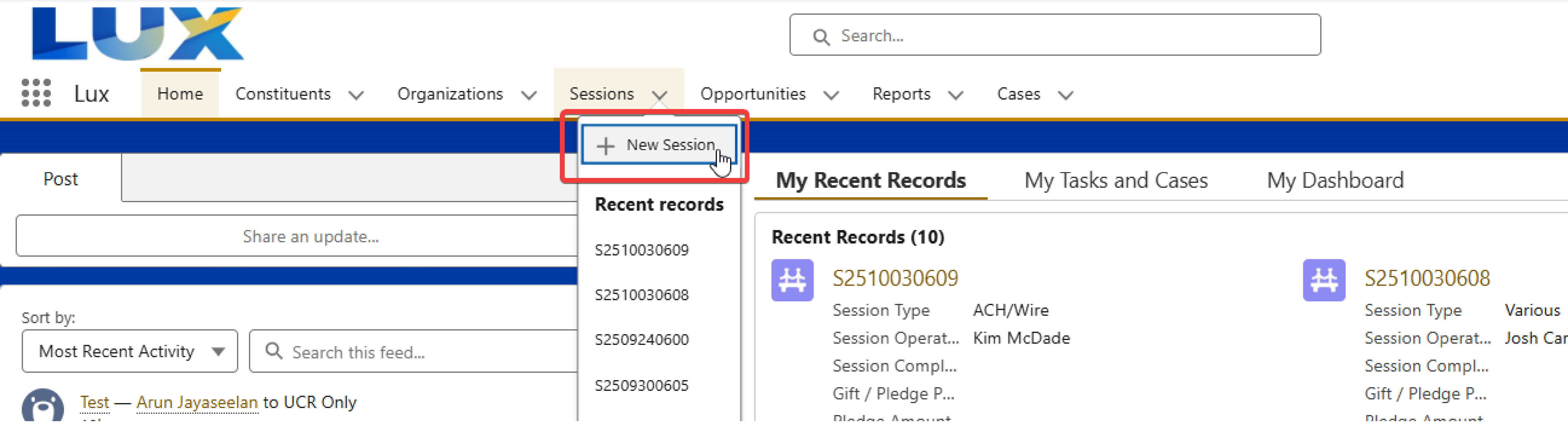
1

START A NEW SESSION

UC RIVERSIDE

START A NEW SESSION

On your *ascend* homepage, click the dropdown arrow next to Sessions, then click New Session.



START A NEW SESSION

You will be redirected to a New Session page. Fill out the required fields with the required information, Indicated with the red * below. Use Naming Convention for Session Description.

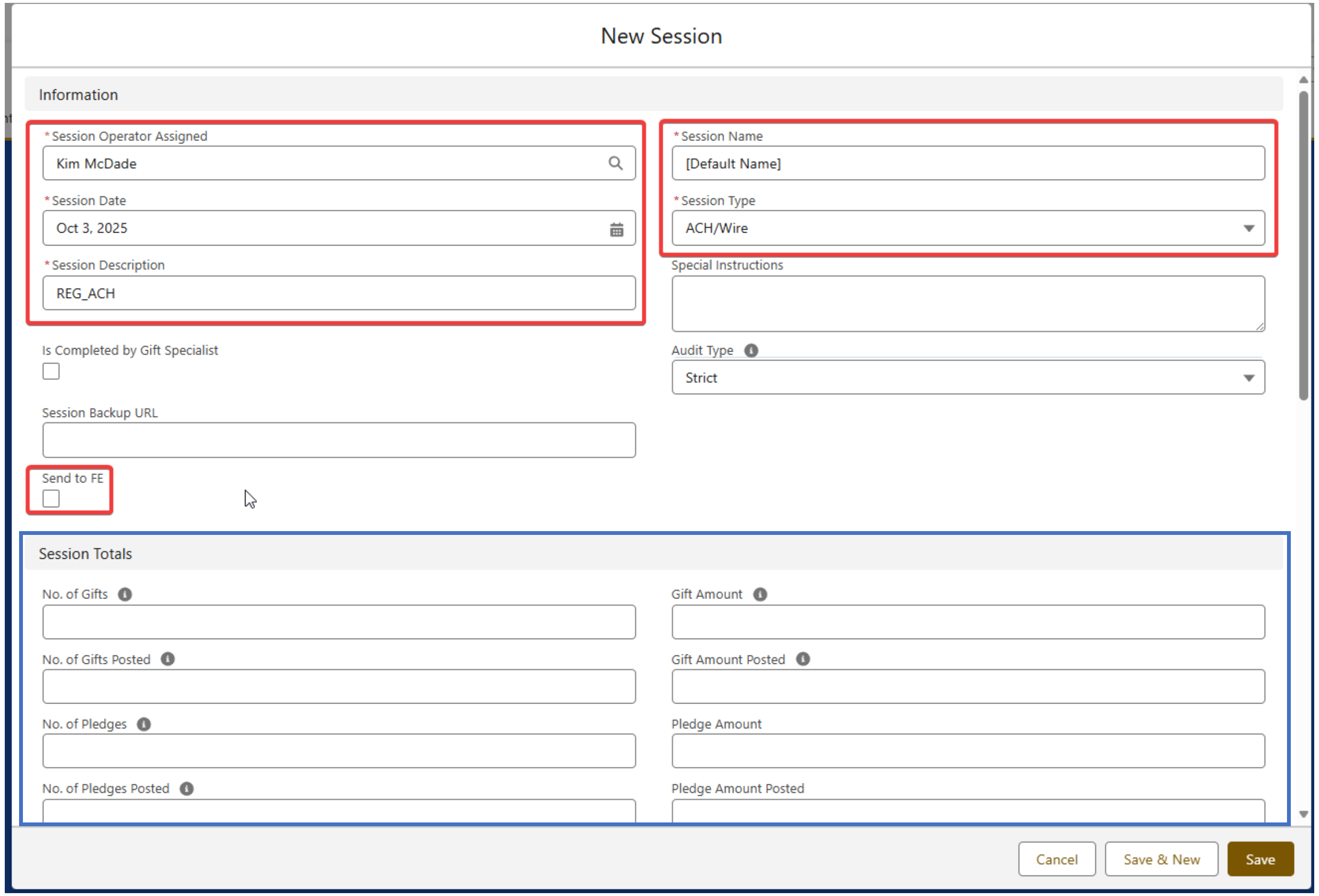
The red boxes below include key fields to pay attention to.

Use Naming Convention for Session Description.

Fill out Projected Session Totals with # of projected gifts and amounts for each category, highlighted in blue below.

If the session is to process Regents Gifts, Gifts of Securities, or Gift/Pledge/Payment Adjustments uncheck "Send to FE" checkbox.

Note: do not modify the data in fields where [Default Name] is present.



Naming Convention for Session Descriptions:

Entity_Gift Source

Entity:

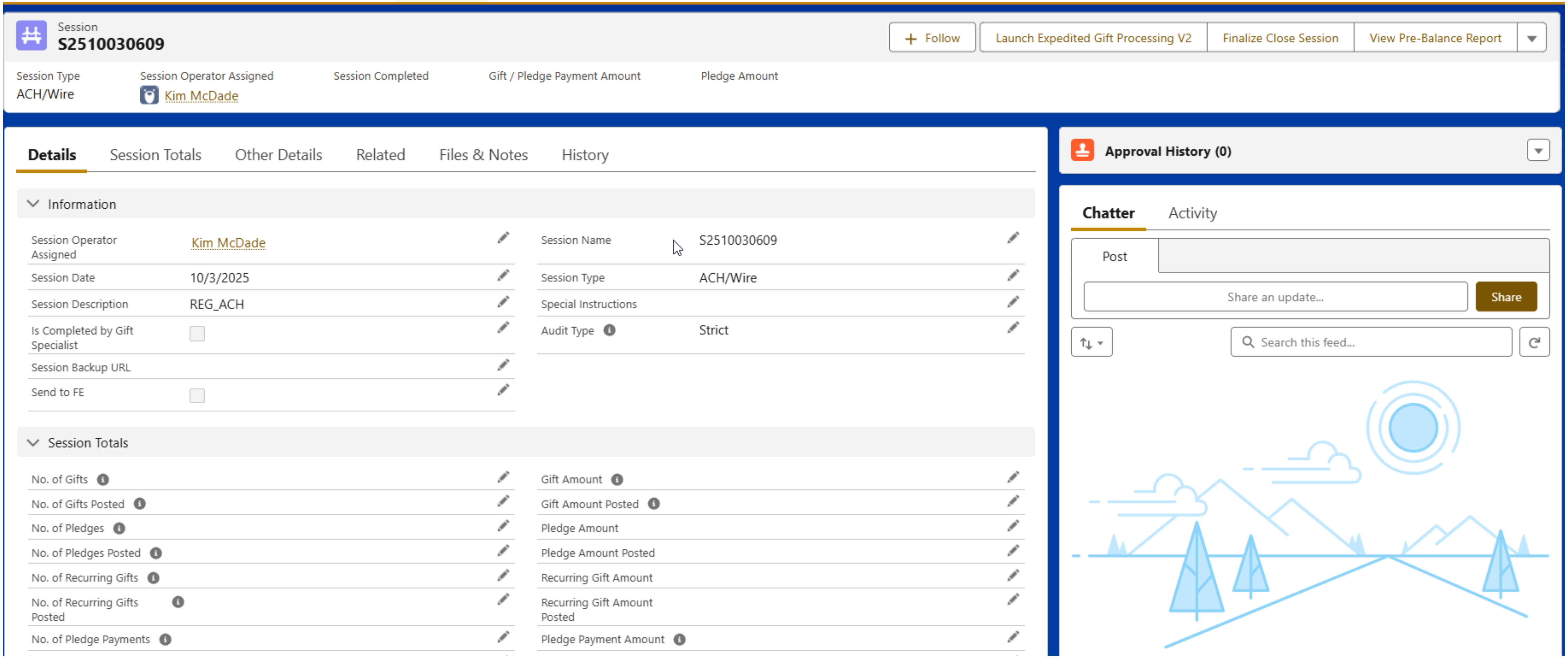
- FDN – Foundation
- REG – Regents

Gift Source:

- ACH – ACH, wire transfers
- CSH – Cash, Checks
- CYB - CyberSource
- GVC - Give Campus
- GIK – Gifts-in-Kind
- PLD – Planned Gift
- PLG – Pledge
- PYD – Payroll Deduction
- REC – Recurring Gift
- SEC – Securities
- VAR - Various

START A NEW SESSION

You will be redirected to the session's record page where you'll be able to process gifts.

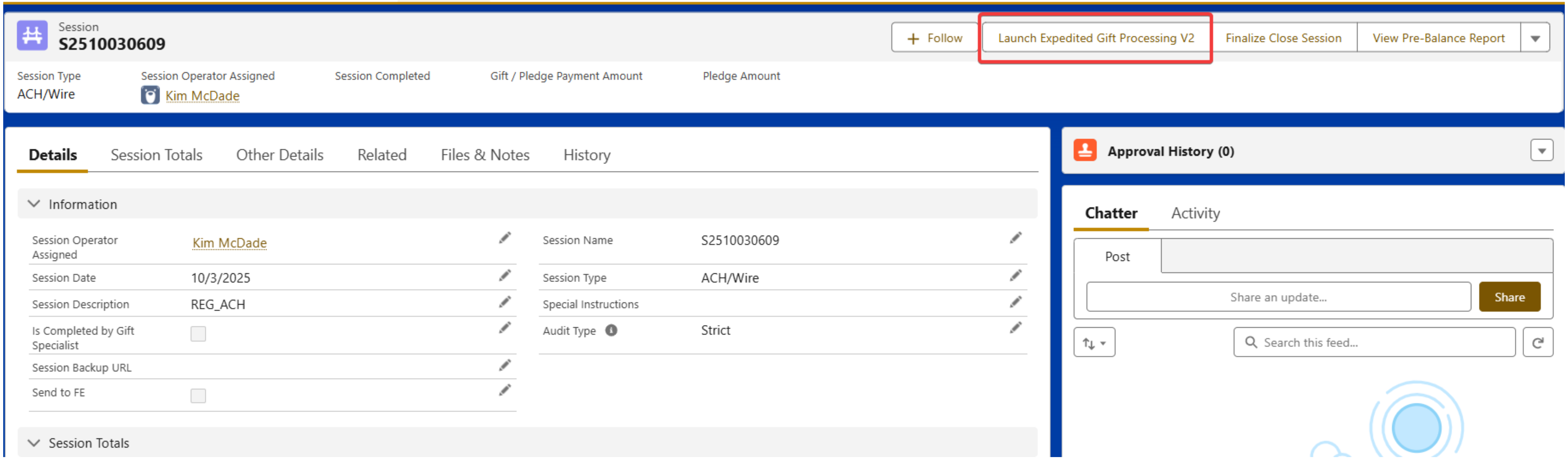


2

PROCESS GIFTS & BATCHES OF GIFTS

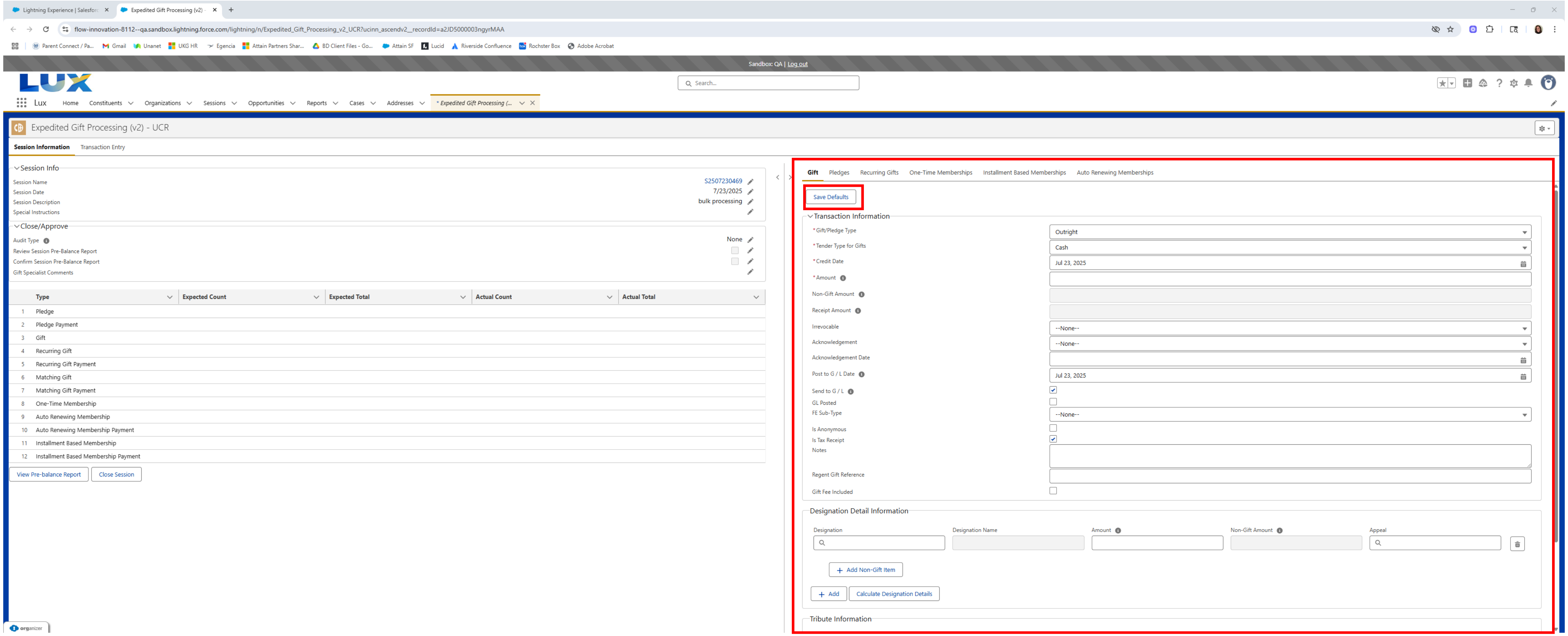
PROCESS GIFTS

On the session's record page, click Launch Expedited Gift Processing V2.



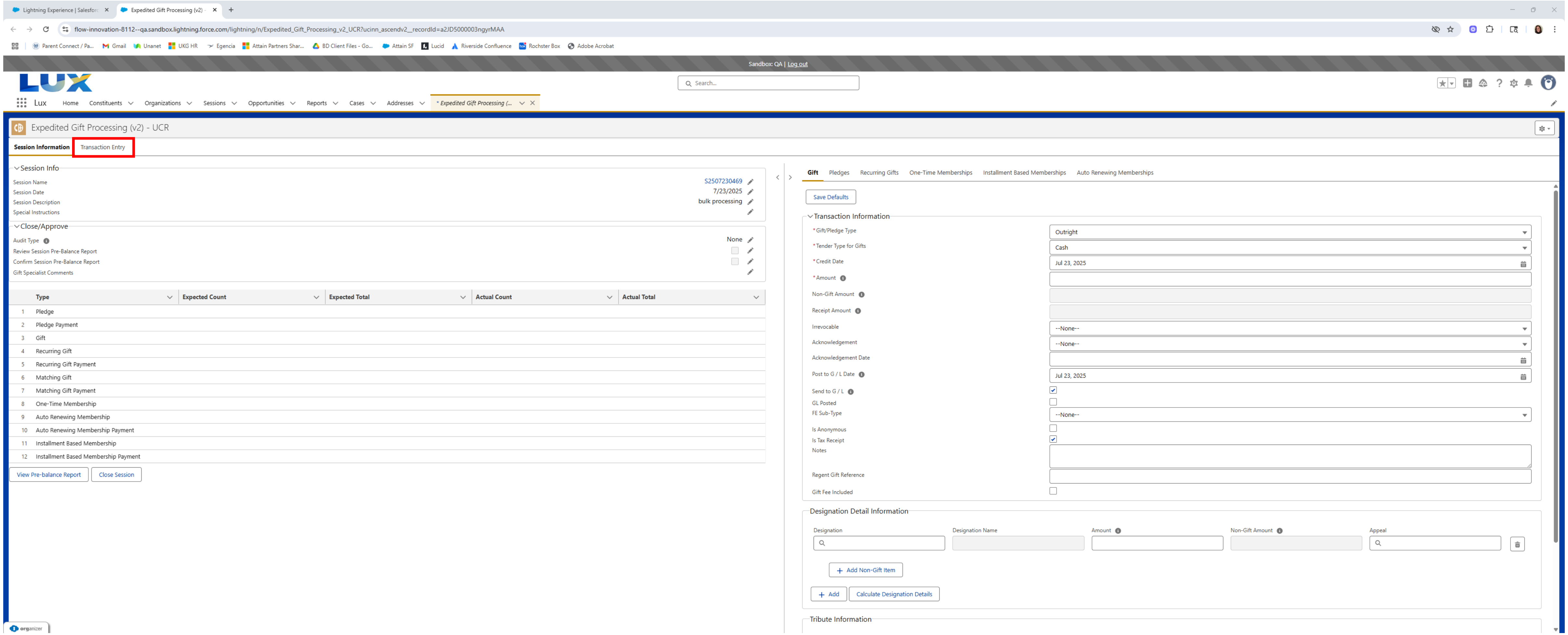
PROCESS GIFTS

You will be redirected to the Expedited Gift Processing screen. If you are processing gifts or pledges that have the same Credit Type, Tender Type, Credit Date, and Amount, you can add the information in the Defaults section on the Session Information tab. Fill out the relevant fields, then click Save Defaults. When you enter the Transaction Entry screen, the information saved here will auto-populate in the related fields. You can only save the defaults for all four fields – it's all or nothing.



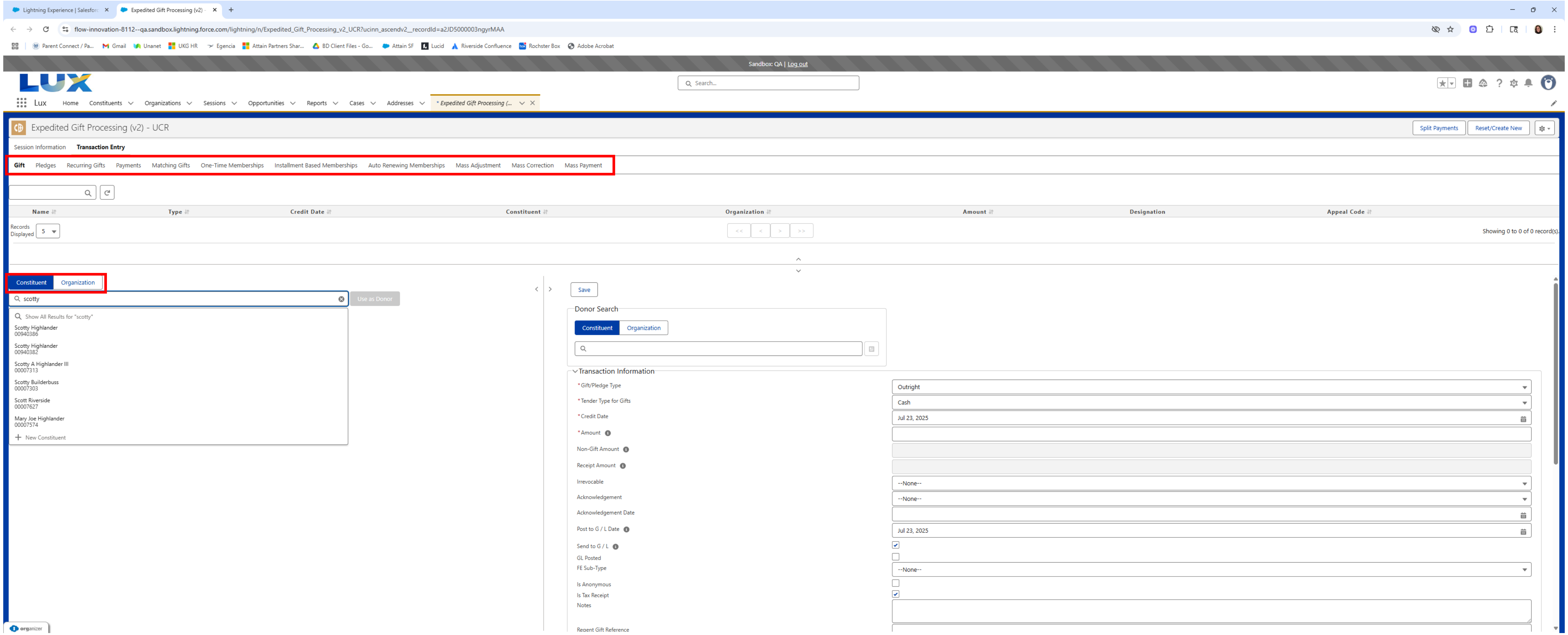
PROCESS GIFTS

Click Transaction Entry.



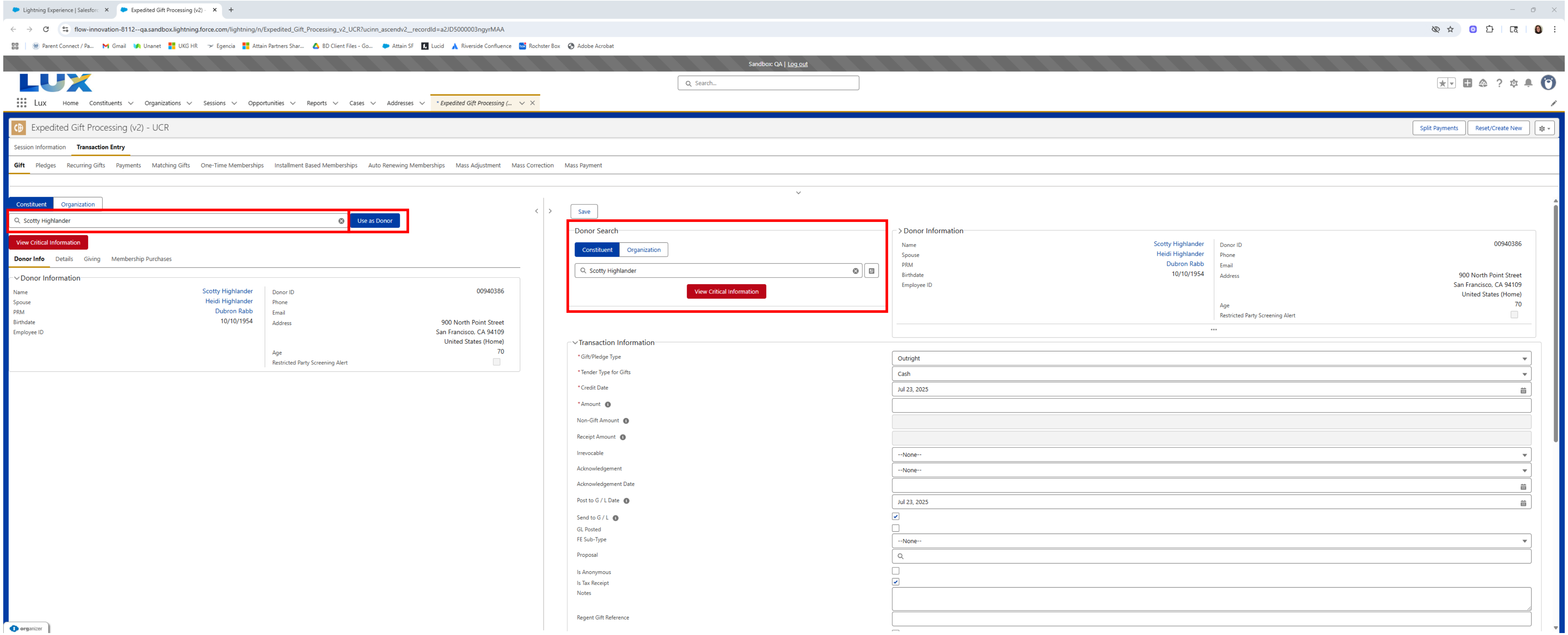
PROCESS GIFTS

Select the type of gift you’re processing, then select whether you’re processing a gift for a constituent or an organization.



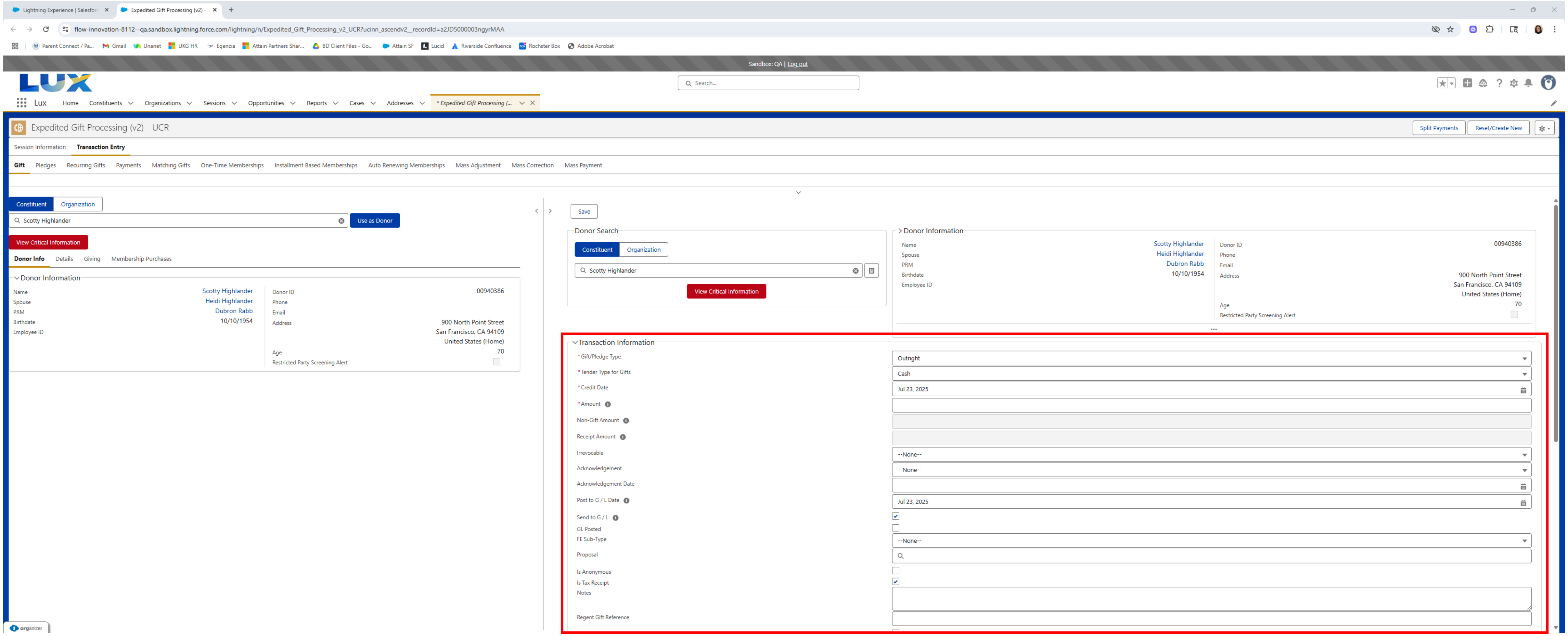
PROCESS GIFTS

To search for the constituent or organization you're processing a gift for, you can use either search bar shown below. If you use the search bar on the left-hand side of the screen, you must click Use as Donor for each new constituent. If you use the bar on the right, the constituent or organization will update automatically.



PROCESS GIFTS

Enter information into the required fields, then press Save. Each type of gift and tender type will require different information and have different required fields. See following slides for more information on each.



LUX
UCR'S ASCEND ON SALESFORCE

2.1

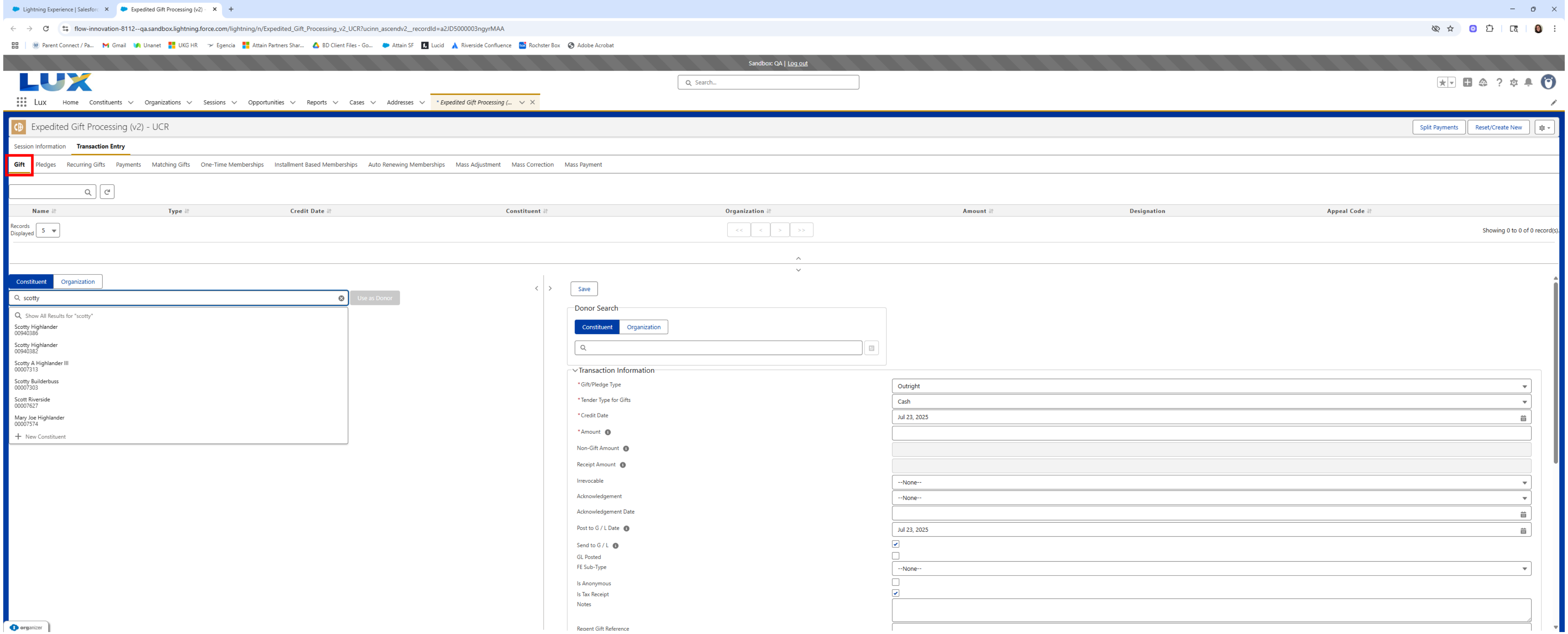
PROCESS OUTRIGHT GIFTS

UC RIVERSIDE

PROCESS GIFTS

OUTRIGHT GIFT

Ensure Gift is selected as the gift type, and ensure the correct constituent or organization is being used as the donor before beginning.



OUTRIGHT GIFT: TRANSACTION INFORMATION (1/2)

Required fields are indicated by the red asterisk.

Gift/Pledge Type: automatically populates with Outright Gift since it was selected at the top of the page.

Tender Type for Gifts: select the payment method from the picklist. Depending on what you select, you might find that different information is required in this screen.

> Example: selecting Personal Check will cause new fields to appear with space to enter the check number, date, and CCRRS confirmation number

Credit Date: date that gift was made by the donor

Amount: total dollar amount of the gift

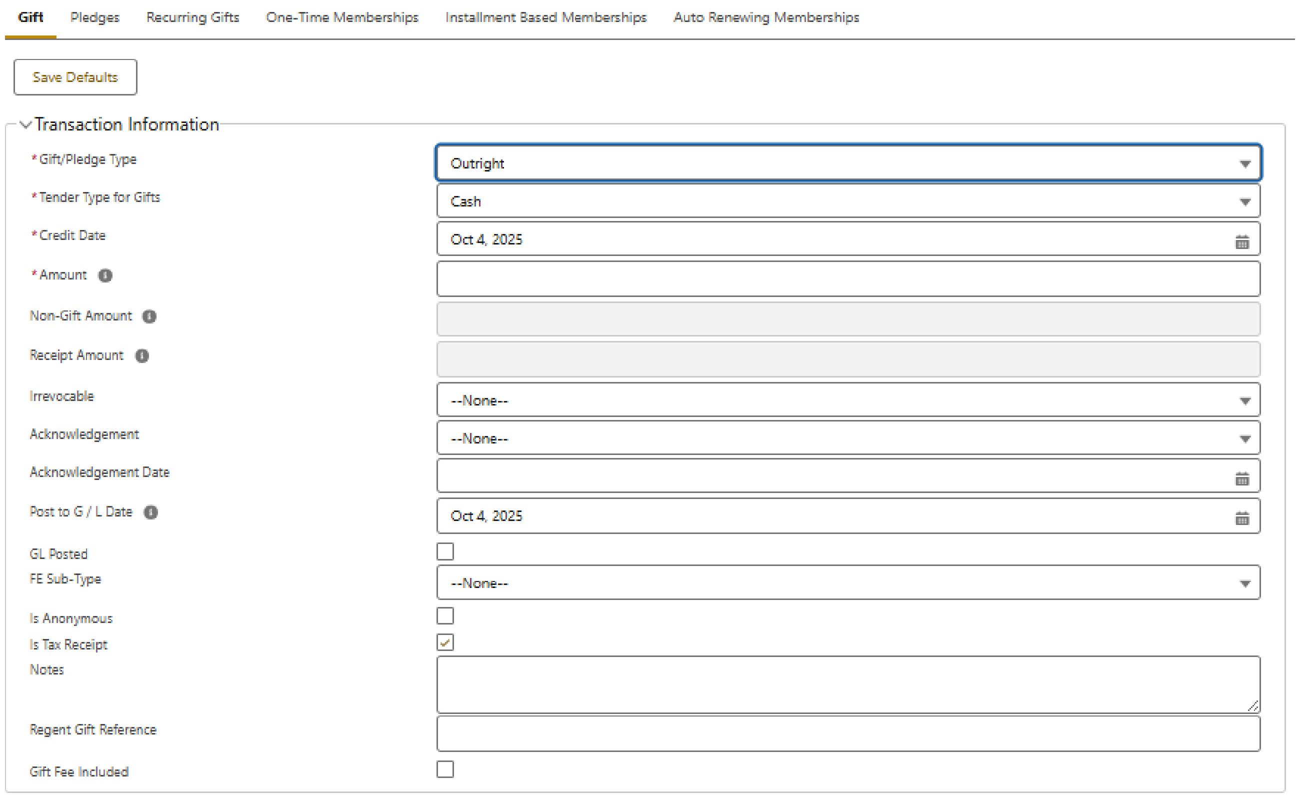
Non-Gift Amount: total dollar amount of any items the constituent received as part of their donation

Receipt Amount: a read-only field that is calculated to show the amount of the payment that is a gift (e.g. Amount minus Non-Gift Amount)

Irrevocable: select if the gift is irrevocable – primarily used for planned gifts

Acknowledgement: this should automatically be updated after the gifts are acknowledged. Only select if we know the gift is not to be acknowledged.

Post to G/L Date: select when the gift should be posted to the general ledger (should be today's date)



OUTRIGHT GIFT: TRANSACTION INFORMATION (2/2)

GL Posted: this should automatically be checked after the gifts are sent to the Foundation G/L each night

FE Sub-Type: don't need to select this – this is updated automatically when the gifts are sent to the Foundation G/L each night

Proposal: if there is an open proposal associated with the gift, enter the proposal's name here to create a related record between the gift and the proposal

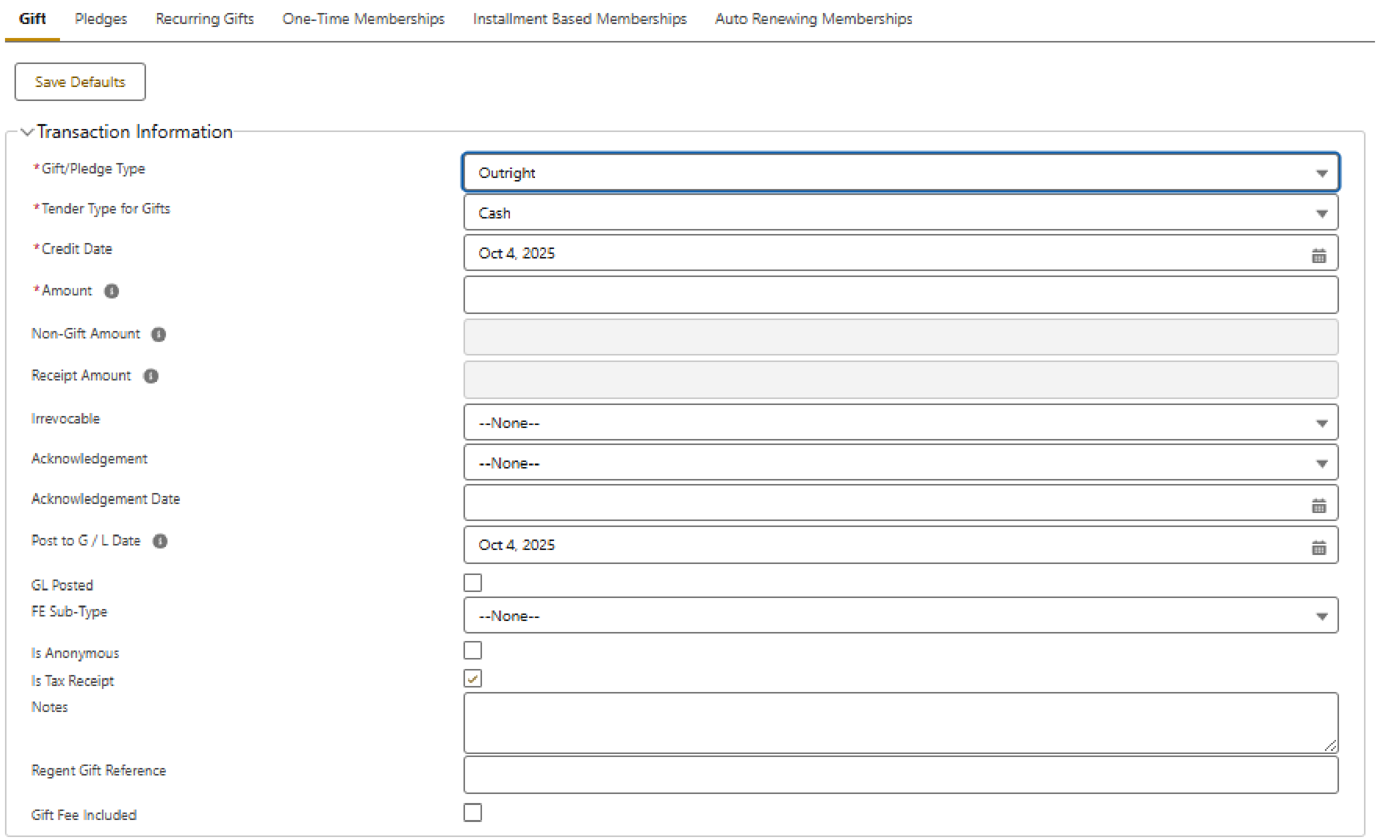
Is Anonymous: check box if the gift should remain anonymous

Is Tax Receipt: this is automatically checked to send the donor a tax receipt; uncheck if no receipt is necessary (e.g. no receipt for adjustments)

Notes: if any additional information about the gift that is not captured somewhere else in the gift process, add it here – these are internal notes and should be used sparingly

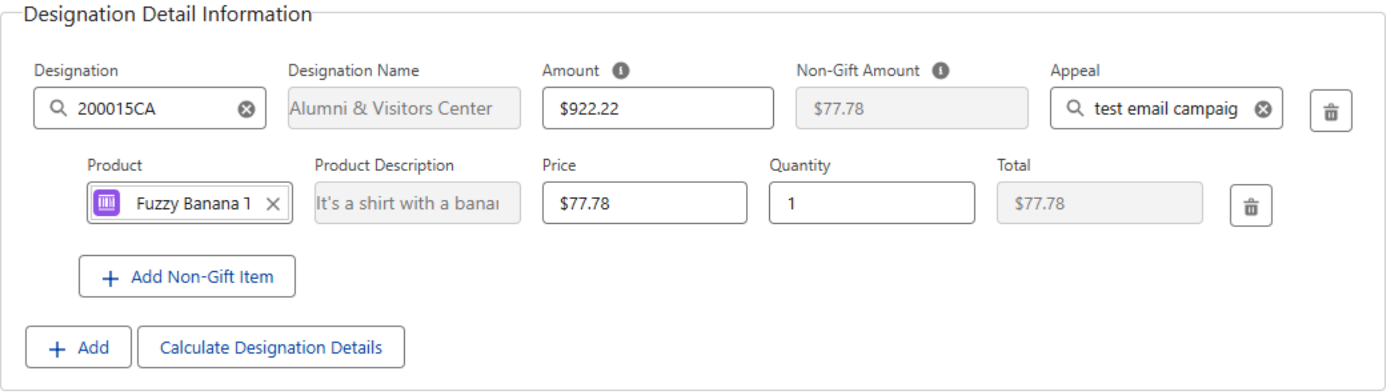
Regent Gift Reference: enter the VCUA Gift Acceptance Form number here

Gift Fee Included: check this box if the donor included the gift fee in the total amount of their donation



PROCESS GIFTS

OUTRIGHT GIFT: DESIGNATION DETAIL INFORMATION



Designation: begin typing the fund's name or number in the field, then select the correct designation from the picklist

Designation Name: this will auto-populate with the Designation's name

Amount: this field is auto-calculated for you that takes the amount you entered in the Transaction Information section and subtracts any non-gift item that you enter here. You should not have to fill this field in!

Non-Gift Amount: this field is auto-calculated based on any non-gift items you add below

Appeal: add the campaign that is associated with this gift

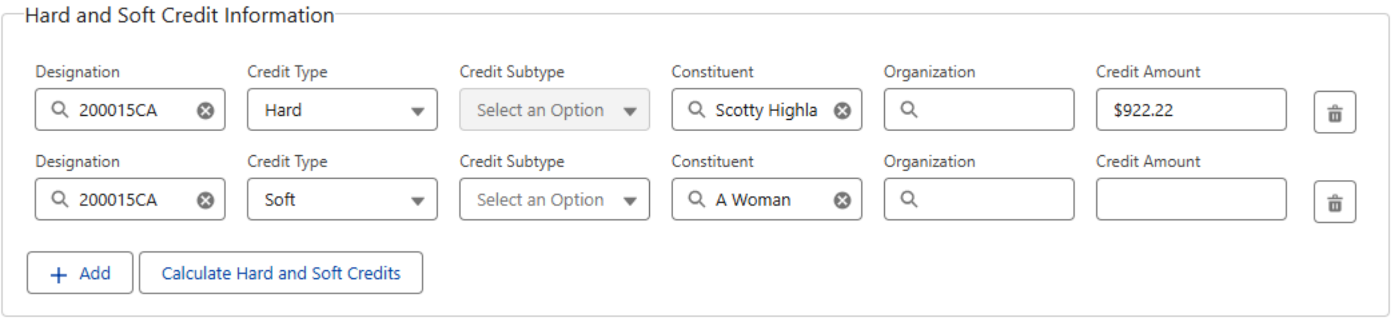
+ Add Non-Gift Item Button: click this if there is an insignia item or fair market value of a ticket associated with the gift. You can add multiple non-gift items by clicking this button more than once

> **Product**: search for the insignia item or ticket fair market value that was given to the constituent and select the correct item
>
> **Product Description**: field auto-populates with the description of the item from its record
>
> **Price**: field auto-populates with the price listed in the product's record
>
> **Quantity**: enter how many items the constituent received

+ Add: adds additional designation (funds) to the gift if the donor is splitting the donation among several designations

Calculate Designation Details: if more than one designation or a non-gift item is added to the gift and the data doesn't automatically re-calculate, you can click this button to have the system re-calculate the gift's split and/or totals

OUTRIGHT GIFT: HARD AND SOFT CREDIT INFORMATION



Designation: the designation that was entered in the Designation Detail section will auto-populate here

Credit Type: select whether the constituent is receiving hard or soft credit from the picklist

Credit Subtype: this field will only be fillable if soft credit is selected as the credit type. Select the subtype of soft credit from the picklist.

Constituent: these fields will auto-populate with the constituent's name, and if the constituent has a spouse, the spouse's name. If you are adding a constituent to the gift, you will need to search for the constituent in this field to add them.

Organization: if there is an organization associated with the gift (e.g., the constituent owns a company and they're donating on behalf of their company), you can add the organization here.

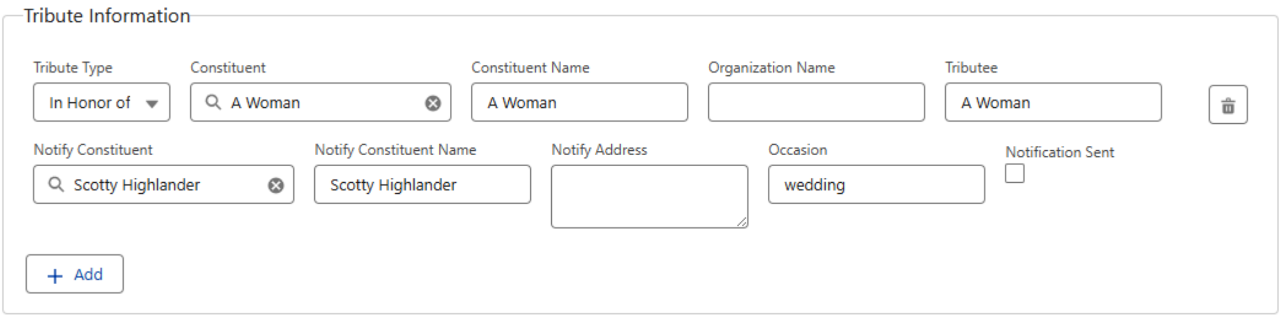
Credit Amount: for the constituents who are automatically on the gift because of relationships, etc. this field will auto-populate with the difference between the total amount of the gift and any non-gift items that have been added onto the gift. You will need to manually add the credit amount for constituents you add to the gift in this screen.

+ Add: add additional constituents to the gift (example: individual at a company instrumental in the company donating; Board of Trustee member who encouraged another donor to give to UCR/UCRF)

Calculate Hard and Soft Credits: this will reset the hard and soft credit information to the original base calculations that the system completed. All modifications will be erased.

PROCESS GIFTS

OUTRIGHT GIFT: TRIBUTE INFORMATION



+ Add: if there is a tribute associated with the gift, click + Add to enter

Tribute Type: select the type of tribute from the picklist

Constituent: use the field to search for the constituent who the gift is being made in honor of/in memory of, if the tributee is in Lux, select the constituent. If not, enter the tributee's name in the Constituent Name field.

Constituent Name: auto-populates based on the constituent selected in the previous field, if tributee is in Lux

Organization Name: if relevant, you may enter an associated organization here

Tributee: auto-populates based on the constituent you select in the Constituent field

Notify Constituent: search for the name of the constituent who wants to be notified when the tribute is made

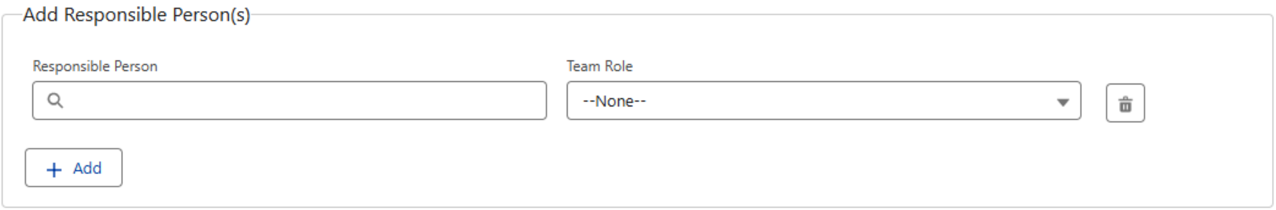
Notify Constituent Name: auto-populates based on the constituent entered in the previous field

Notify Address: if a letter or note should be sent to the constituent to be notified, enter their preferred address here

Occasion: if the tribute is being made in honor of an occasion, enter the occasion here

Notification Sent: check this box if the notification has already been sent to the constituent to be notified. Otherwise, leave unchecked for stewardship team to check when notification has been sent

OUTRIGHT GIFT: ADD RESPONSIBLE PERSON(S)



+ Add: only use this if you need to add an additional person to the gift that is not already listed as an opportunity team member on the associated proposal

Responsible Person & Team Role: once the gift is saved, these fields will auto-populate with the opportunity team listed on the proposal associated with the gift

OUTRIGHT GIFT: PLANNED GIFTS TRANSACTION INFORMATION (1/2)

Required fields are indicated by the red asterisk.

Gift/Pledge Type: select Planned Giving

Tender Type for Gifts: select the payment method from the picklist. Depending on what you select, you might find that different information is required in this screen.

> Example: selecting Personal Check will cause new fields to appear with space to enter the check number, date, and CCRRS confirmation number

Credit Date: date that gift was made by the donor

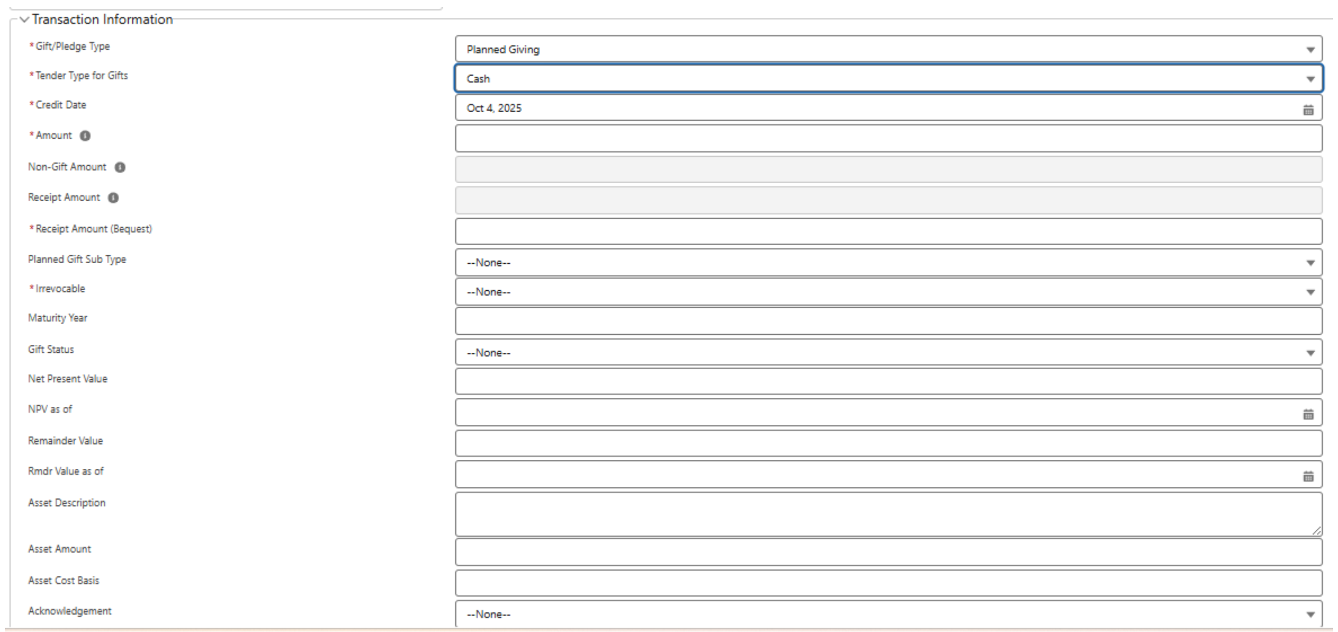
Amount: total dollar amount of the gift

Receipt Amount (Bequest): enter the amount of the gift again

Planned Gift Sub Type: select the type of planned gift (e.g. CGA, CRT, etc.)

Irrevocable: select yes if the gift is irrevocable

Planned Gift Fields: record information as received from Planned Gifts team


Transaction Information
* Gift/Pledge Type	Planned Giving
* Tender Type for Gifts	Cash
* Credit Date	Oct 4, 2025
* Amount	
Non-Gift Amount	
Receipt Amount	
* Receipt Amount (Bequest)	
Planned Gift Sub Type	--None--
* Irrevocable	--None--
Maturity Year	
Gift Status	--None--
Net Present Value	
NPV as of	
Remainder Value	
Rmdr Value as of	
Asset Description	
Asset Amount	
Asset Cost Basis	
Acknowledgement	--None--

OUTRIGHT GIFT: PLANNED GIFTS TRANSACTION INFORMATION (2/2)

Post to G/L Date: select when the gift should be posted to the general ledger (should be date payment was received)

GL Posted: this should automatically be checked after the gifts are sent to the Foundation G/L each night

FE Sub-Type: don't need to select this – this is updated automatically when the gifts are sent to the Foundation G/L each night

Proposal: if there is an open proposal associated with the gift, enter the proposal's name here to create a related record between the gift and the proposal

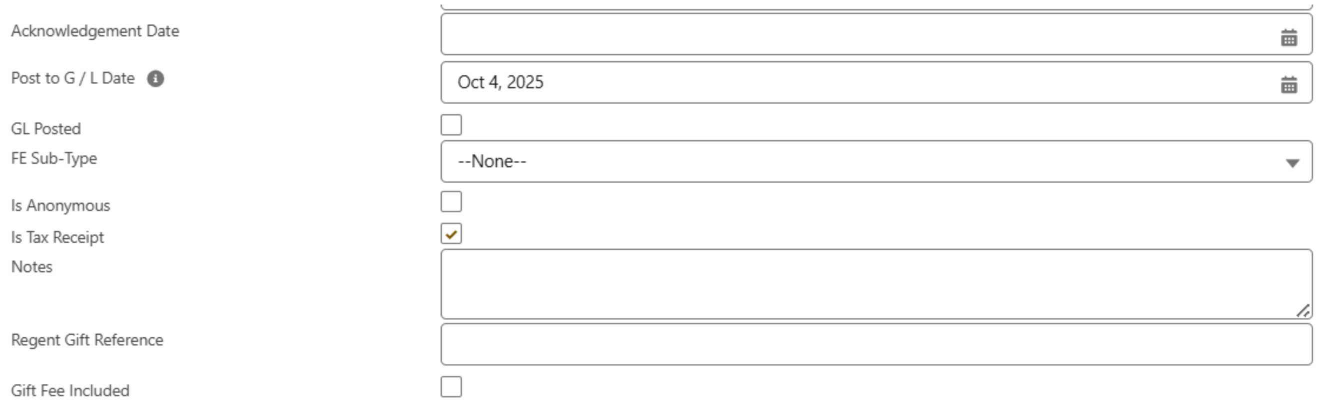
Is Anonymous: check box if the gift should remain anonymous

Is Tax Receipt: this is automatically checked to send the donor a tax receipt; uncheck if no receipt is necessary (e.g. no receipt for adjustments)

Notes: if any additional information about the gift that is not captured somewhere else in the gift process, add it here – these are internal notes and should be used sparingly

Regent Gift Reference: enter the VCUA Gift Acceptance Form number here

Gift Fee Included: check this box if the donor included the gift fee in the total amount of their donation



LUX

UCR'S ASCEND ON SALESFORCE

2.2

CREATE PLEDGES & BEQUEST INTENTIONS

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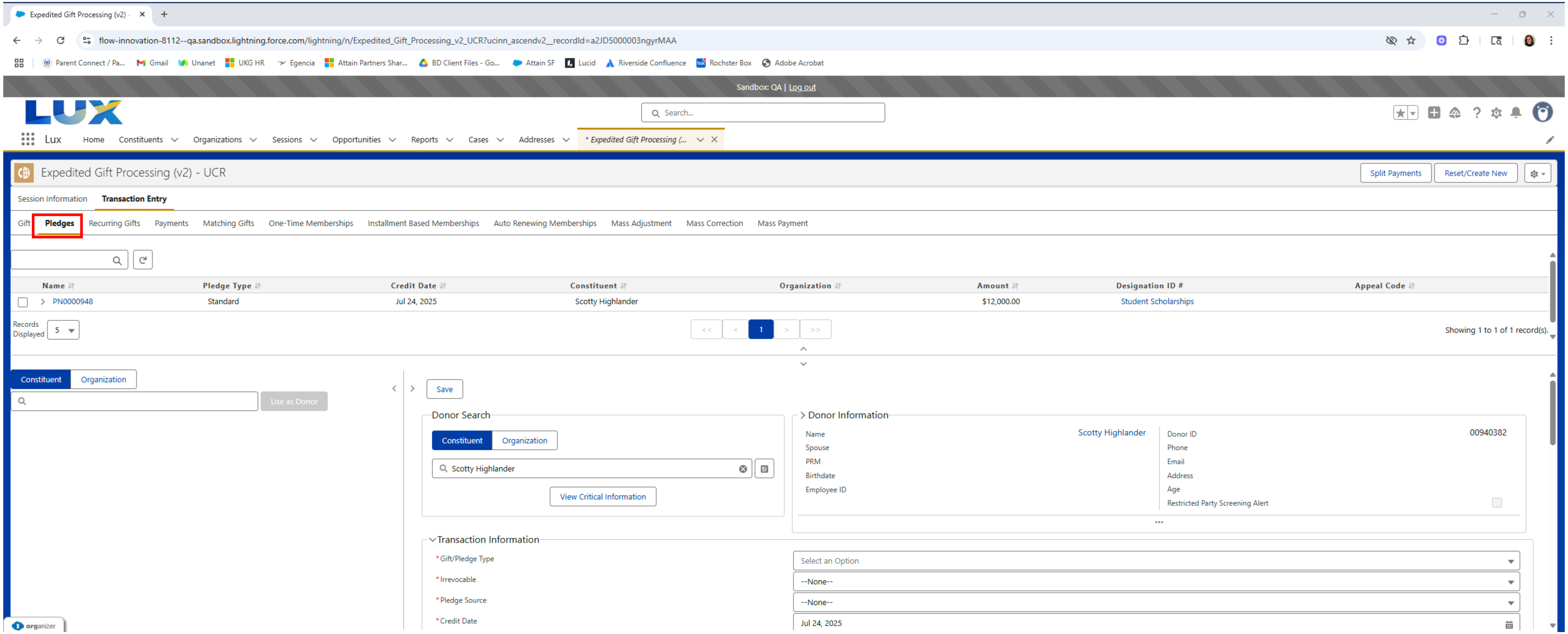
PLEDGES

For both pledged and bequest intention planned gifts, ensure Pledges is selected as the gift type, and ensure the correct constituent or organization is being used as the donor before beginning.



PLEDGES: TRANSACTION INFORMATION

Required fields are indicated by the red asterisk.

Gift/Pledge Type: select the type of pledge from the picklist. Depending on what you select, you might find that different information is required in this screen.

Irrevocable: select yes or no from the picklist – select 'no' unless irrevocable language is explcitly listed in gift agreement

Pledge Source: select the source of the pledge from the picklist

Credit Date: Date the gift/pledge agreement was signed – last date signed by all signatories

Amount: the total amount of the gift over the lifetime of the pledge

Is Anonymous: check this box if the pledge should remain anonymous

Proposal: if there is an open proposal that is associated with the pledge, enter it here to create a related record between the pledge and the proposal

Notes: if any additional information about the pledge that is not captured somewhere else in the pledge process, add it here –these are internal notes and should be used sparingly

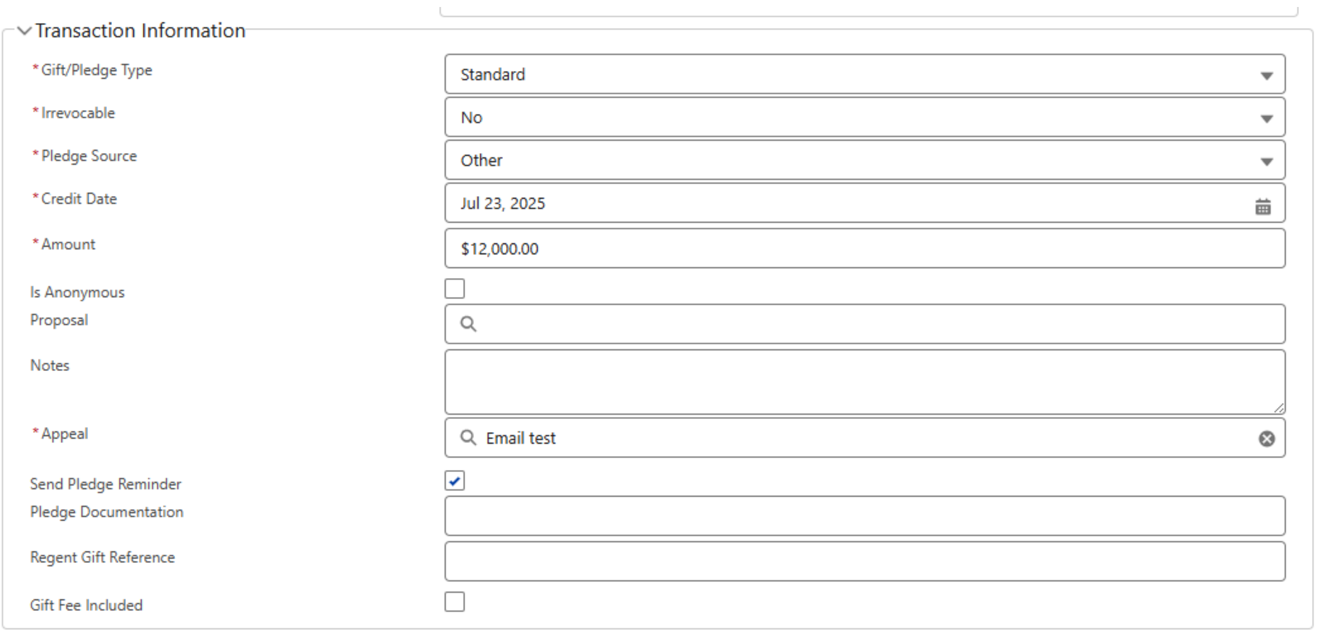
Appeal: search for the campaign/appeal that the pledge stemmed from

Send Pledge Reminder: this box is automatically checked so that constituents receive a notice that their pledge payment is due

Pledge Documentation: copy and paste the URL that links to pledge documentation

Regent Gift Reference: Enter the VCUA Gift Acceptance Form number, if applicable

Gift Fee Included: select this box if the donor included the gift fee in the total amount of the pledge



PLEDGES: TRANSACTION INFORMATION FOR PLANNED GIFTS

Required fields are indicated by the red asterisk.

Gift/Pledge Type: select Planned Giving from the picklist

Planned Gift Subtype: select whether the planned gift is a bequest or life insurance

Planned Gift Fields: record information as received from Planned Gifts team

Irrevocable: select yes or no from the picklist

Pledge Source: select the source of the planned gift from the picklist

Credit Date: date the donor signed the gift agreement or bequest intention form

Amount: the total amount of the gift expected when it comes to maturity

Receipt Amount (Bequest): enter amount that is countable under counting guidelines. For example, if donor's age is 65+, enter the full amount of the planned gift. If the donor's age is <65, enter the net present value of the planned gift.

Is Anonymous: check this box if the pledge should remain anonymous

Proposal: if there is an open proposal that is associated with the planned gift, enter it here to create a related record between the pledge and the proposal

Notes: if any additional information about the gift that is not captured somewhere else in the gift process, add it here –these are internal notes and should be used sparingly

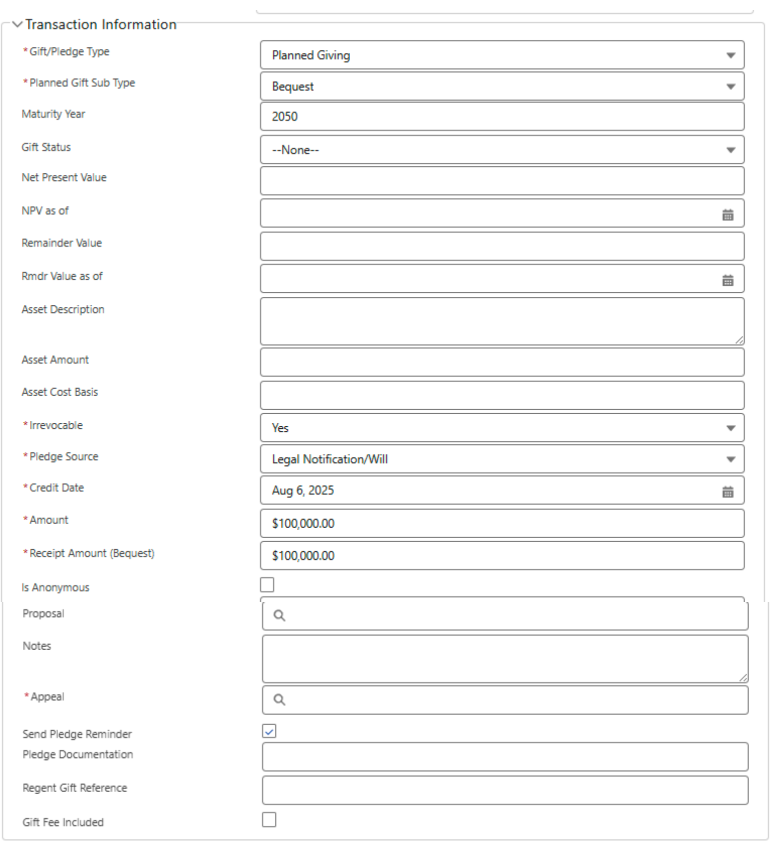
Appeal: search for the campaign/appeal that the pledge stemmed from

Send Pledge Reminder: uncheck this box, as no pledge reminders are sent for planned gifts

Pledge Documentation: copy and paste the URL that links to planned gift documentation

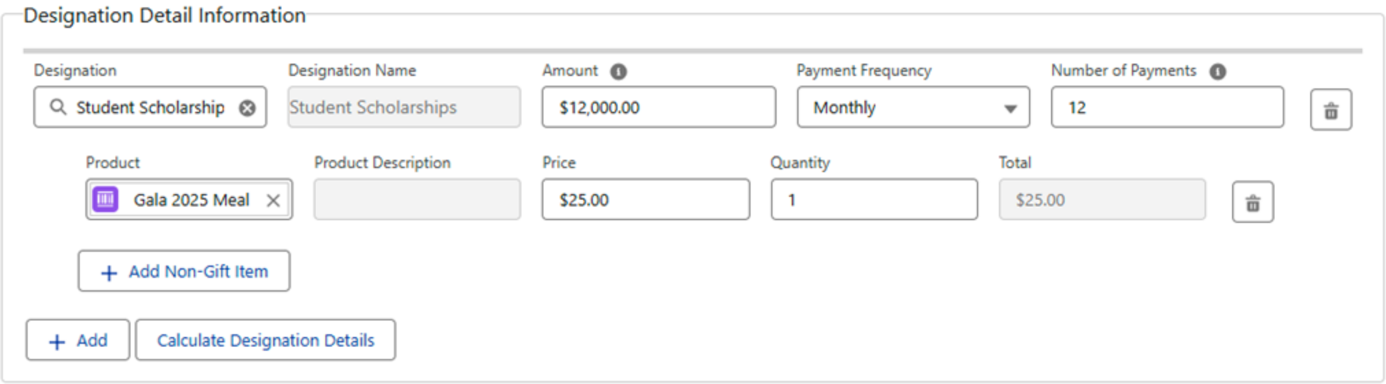
Regent Gift Reference: Enter the VCUA Gift Acceptance Form number, if applicable

Gift Fee Included: select this box if the donor included the gift fee in the total amount of the pledge



PROCESS GIFTS

PLEDGES: DESIGNATION DETAIL INFORMATION



Designation: begin typing the fund's name or number in the field, then select the correct designation from the picklist

Designation Name: this will auto-populate with the Designation's name

Amount: the total dollar amount of the pledge over the lifetime of the commitment

Payment Frequency: select how often the payment will be made from the picklist

Number of Payments: the total number of payments to be made over the lifetime of the commitment

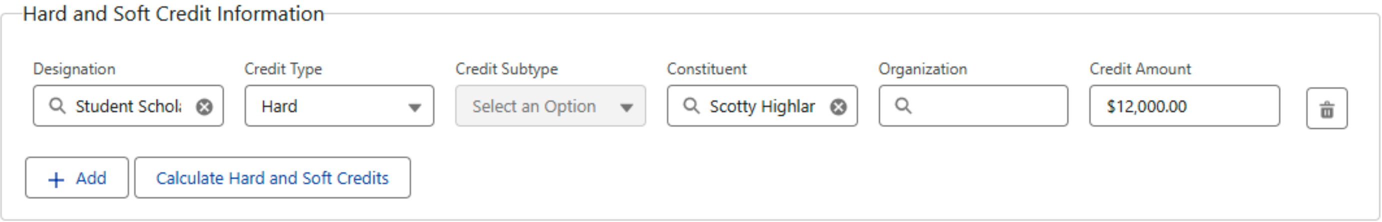
+ Add Non-Gift Item Button: click this if there is an insignia item or fair market value of a ticket associated with the pledge. You can add multiple non-gift items by clicking this button more than once

- **Product**: search for the insignia item that was given to the constituent and select the correct item
- **Product Description**: field auto-populates with the description of the item from its record
- **Price**: field auto-populates with the price listed in the product's record
- **Quantity**: enter how many items the constituent received

+ Add: adds additional designation (funds) to the pledge

Calculate Designation Details: if more than one designation or a non-gift item is added to the pledge and the data doesn't automatically re-calculate, you can click this button to have the system re-calculate the pledge's split and/or totals

PLEDGES: HARD AND SOFT CREDIT INFORMATION



Designation: the designation that was entered in the Designation Detail section will auto-populate here

Credit Type: select whether the constituent is receiving hard or soft credit from the picklist

Credit Subtype: this field will only be fillable if soft credit is selected as the credit type. Select the subtype of soft credit from the picklist.

Constituent: these fields will auto-populate with the constituent's name, and if the constituent has a spouse, the spouse's name. If you are adding a constituent to the gift, you will need to search for the constituent in this field to add them.

Organization: if there is an organization associated with the gift (e.g., the constituent owns a company and they're donating on behalf of their company), you can add the organization here

Credit Amount: for the constituents who are automatically on the gift because of relationships, etc. this field will auto-populate with the difference between the total amount of the gift and any non-gift items that have been added onto the gift. You will need to manually add the credit amount for constituents you add to the gift in this screen.

+ Add: add additional constituents to the gift

Calculate Hard and Soft Credits: this will reset the hard and soft credit information to the original base calculations that the system completed. All modifications will be erased.

PLEDGES: INSTALLMENT INFORMATION

This section will auto-populate based on the Designation, Amount, Payment Frequency, and Number of Payments fields in the Designation Detail Information Section!

Pro-tip: it's best practice to not change the Amounts field in this screen. This part of the process is simply setting up the pledge commitment and changing the monthly payment amounts will change what the constituent is expected to pay. Instead, wait until a payment is made that differs from what is expected, process it, and let the system re-calculate the payments and totals from there.

Designation: auto-populates based on the information entered in the Designation field in the Designation Detail Information section

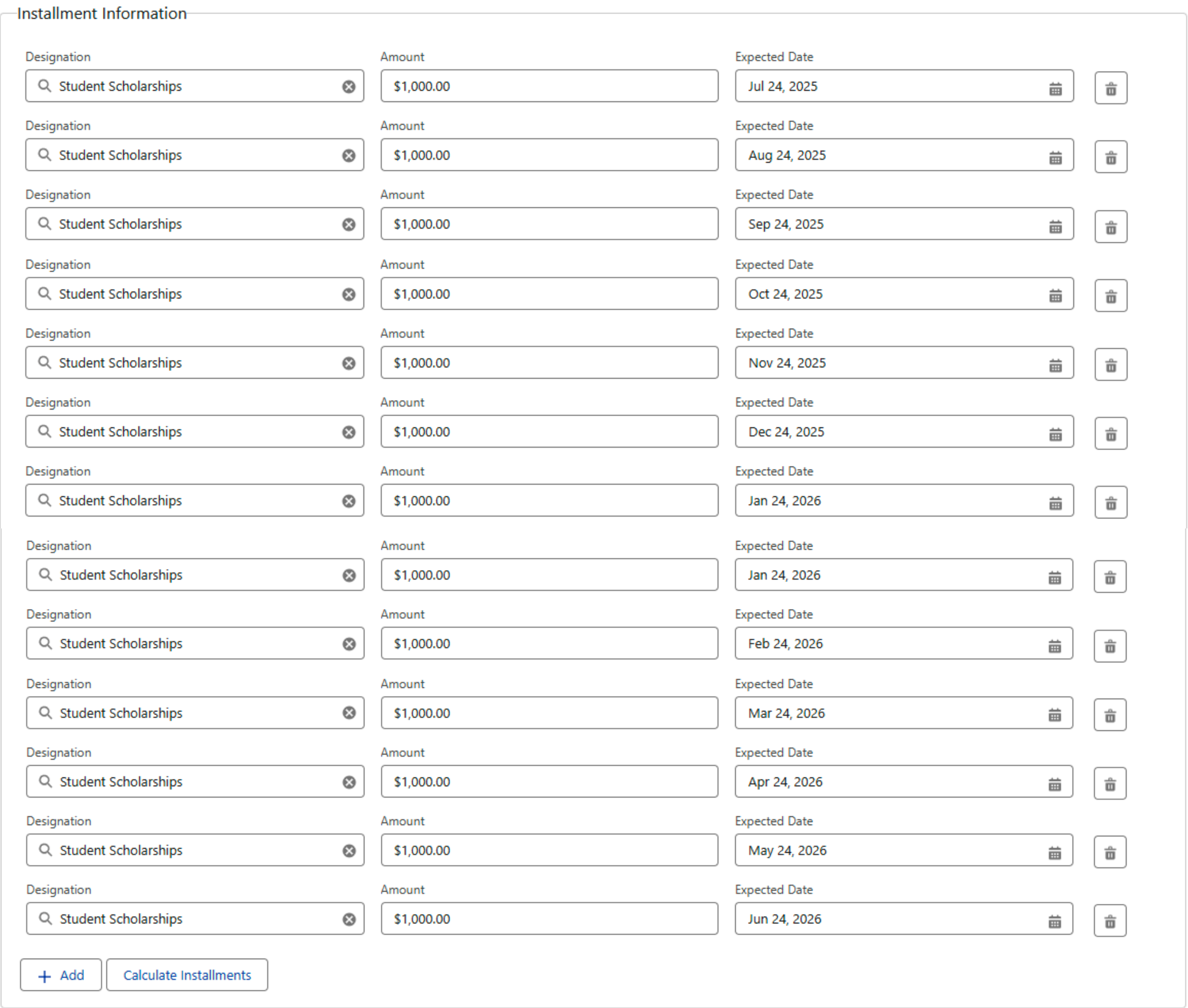
Amount: the dollar amount shown here is created by taking the total Amount field divided by the Number of Payments field. The amounts shown in this section should equal the total lifetime pledge amount.

Expected Date: this field defaults to the starting pledge date of whatever is listed in the Credit Date field in the Transaction Information section and the subsequent payments are calculated based on the Payment Frequency field in the Designation Detail Information section.

- If the constituent wishes to make their payments on a different day of the month, you can change the dates by clicking into the field and selecting the date preferred by the constituent.

+ Add: adds an additional payment row to the expected installments. Best practice would say to change the Number of Payments in the Designation Details section instead.

Calculate Installments: resets the installment payments to the original system calculations and erases all changes that have been made

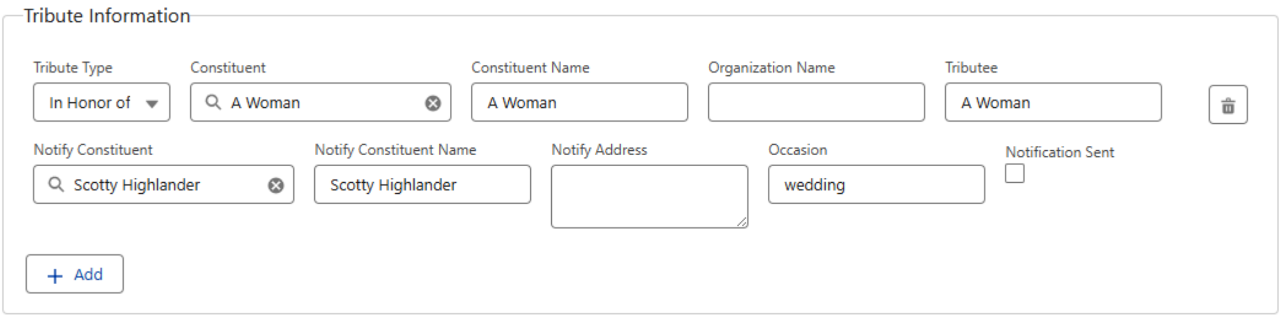


Installment Information

Designation	Amount	Expected Date
Student Scholarships	$1,000.00	Jul 24, 2025
Student Scholarships	$1,000.00	Aug 24, 2025
Student Scholarships	$1,000.00	Sep 24, 2025
Student Scholarships	$1,000.00	Oct 24, 2025
Student Scholarships	$1,000.00	Nov 24, 2025
Student Scholarships	$1,000.00	Dec 24, 2025
Student Scholarships	$1,000.00	Jan 24, 2026
Student Scholarships	$1,000.00	Jan 24, 2026
Student Scholarships	$1,000.00	Feb 24, 2026
Student Scholarships	$1,000.00	Mar 24, 2026
Student Scholarships	$1,000.00	Apr 24, 2026
Student Scholarships	$1,000.00	May 24, 2026
Student Scholarships	$1,000.00	Jun 24, 2026

+ Add | Calculate Installments

PLEDGES: TRIBUTE INFORMATION



+ Add: if there is a tribute associated with the pledge, click + Add to enter

Tribute Type: select the type of tribute from the picklist

Constituent: use the field to search for the constituent who the pledge is being made in honor of/in memory of, if the tributee is in Lux, select the constituent. If not, enter the tributee's name in the Constituent Name field.

Constituent Name: auto-populates based on the constituent selected in the previous field, if tributee is in Lux

Organization Name: if relevant, you may enter an associated organization here

Tributee: auto-populates based on the constituent you select in the Constituent field

Notify Constituent: search for the name of the constituent who wants to be notified when the tribute is made

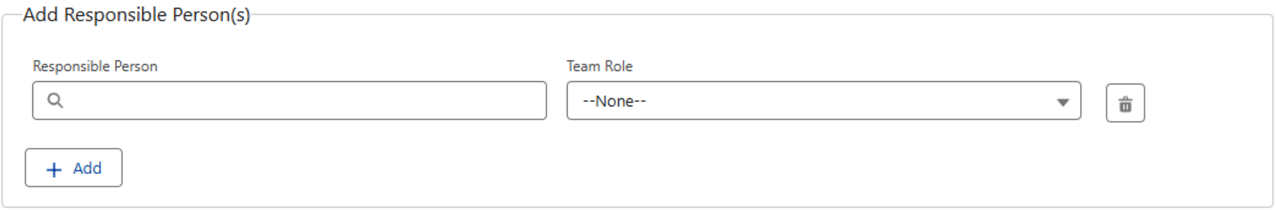
Notify Constituent Name: auto-populates based on the constituent entered in the previous field

Notify Address: if a letter or note should be sent to the constituent to be notified, enter their preferred address here

Occasion: if the tribute is being made in honor of an occasion, enter the occasion here

Notification Sent: check this box if the notification has already been sent to the constituent to be notified

PLEDGES: ADD RESPONSIBLE PERSON(S)



+ Add: only use this if you need to add an additional person to the gift that is not already listed as an opportunity team member on the associated proposal

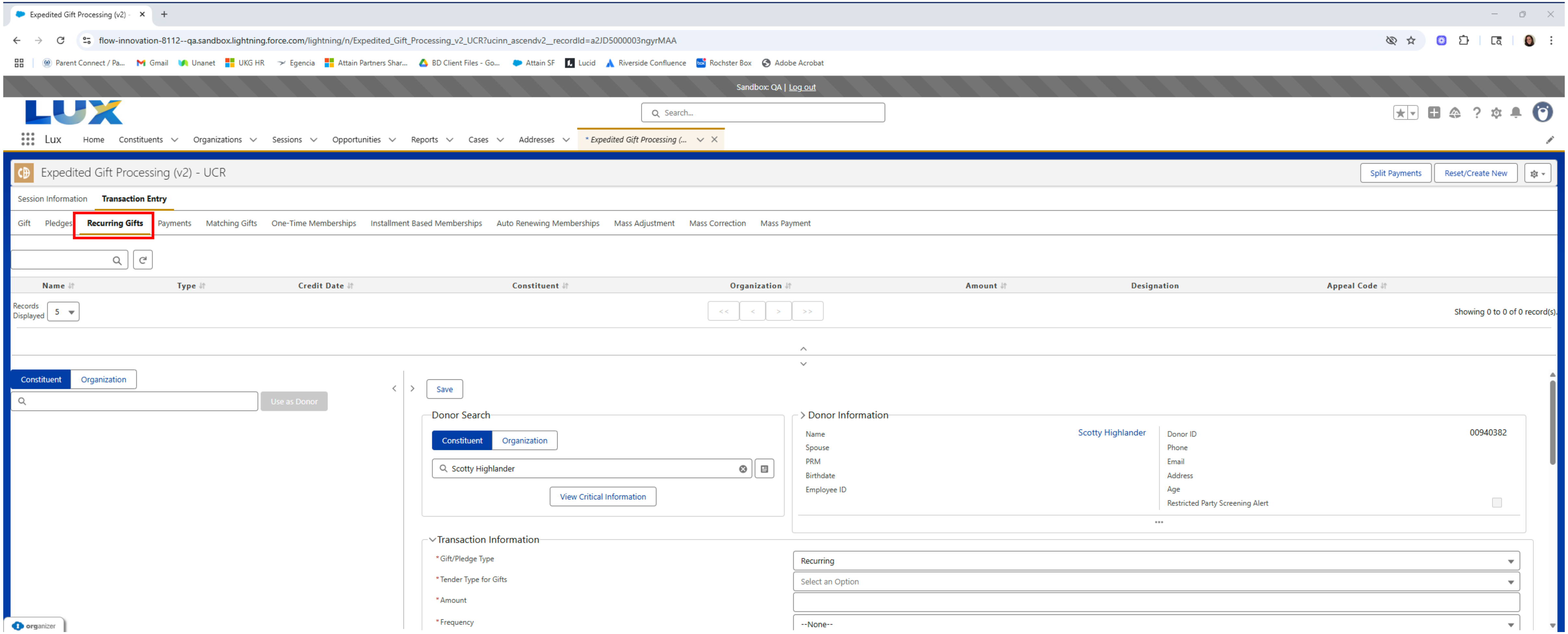
Responsible Person & Team Role: once the gift is saved, these fields will auto-populate with the opportunity team listed on the proposal associated with the gift

2.3

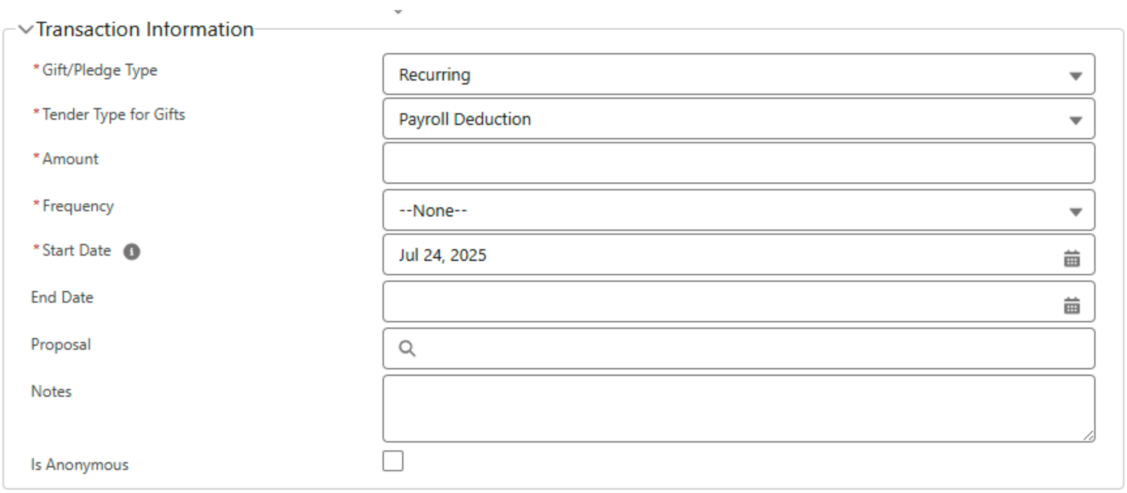
PROCESS RECURRING GIFTS

RECURRING GIFTS

Ensure Recurring Gifts is selected as the gift type, and ensure the correct constituent or organization is being used as the donor before beginning.



RECURRING GIFTS: TRANSACTION INFORMATION



Required fields are indicated by the red asterisk.

Gift/Pledge Type: automatically populates with Recurring since it was selected at the top of the page.

Tender Type for Gifts: select the payment method from the picklist. Depending on what you select, you might find that different information is required in this screen.

> Example: selecting Credit Card will cause new fields to appear with space to enter the Credit Card Type* and Last Four Digits

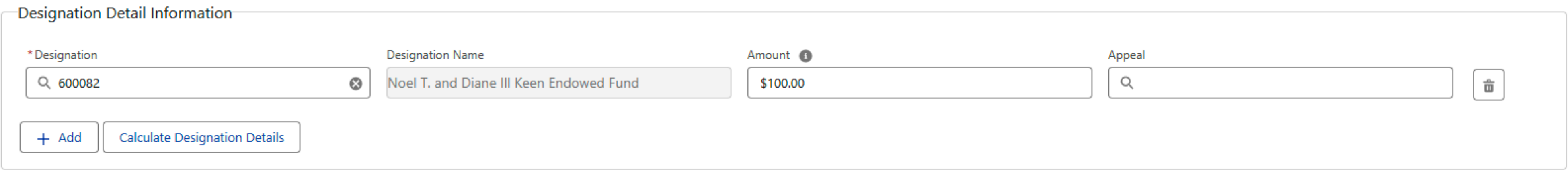
Amount: singular payment amount that will be received at the cadence we set up (NOT the total amount over the lifetime of the commitment)

Frequency: select how often the payment will be made from the picklist

Start Date: when first payment will be made

PROCESS GIFTS

RECURRING GIFT: DESIGNATION DETAIL INFORMATION



Designation: begin typing the fund's name or number in the field, then select the correct designation from the picklist

Designation Name: this will auto-populate with the Designation's name

Amount: auto-populates with the Amount field entered in the Transaction Information Section

Appeal: search for the campaign/appeal that the recurring gift stemmed from

+ Add: adds additional designation (funds) to the recurring gift

Calculate Designation Details: if more than one designation or a non-gift item is added to the recurring gift and the data doesn't automatically re-calculate, you can click this button to have the system re-calculate the gift's split and/or totals

RECURRING GIFT: HARD AND SOFT CREDIT INFORMATION

Designation: the designation that was entered in the Designation Detail section will auto-populate here

Credit Type: select whether the constituent is receiving hard or soft credit from the picklist

Credit Subtype: this field will only be fillable if soft credit is selected as the credit type. Select the subtype of soft credit from the picklist.

Constituent: these fields will auto-populate with the constituent's name, and if the constituent has a spouse, the spouse's name. If you are adding a constituent to the gift, you will need to search for the constituent in this field to add them.

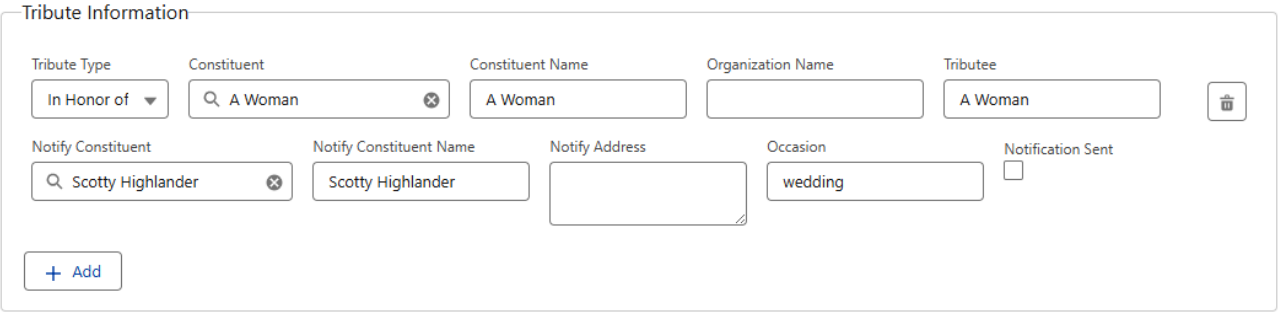
Organization: if there is an organization associated with the gift (e.g., the constituent owns a company and they're donating on behalf of their company), you can add the organization here

Credit Amount: auto-populates with the Amount entered in the Transaction Information section

+ Add: add additional constituents to the gift

Calculate Hard and Soft Credits: this will reset the hard and soft credit information to the original base calculations that the system completed. All modifications will be erased.

PLEDGE: TRIBUTE INFORMATION



+ Add: if there is a tribute associated with the gift, click + Add to enter

Tribute Type: select the type of tribute from the picklist

Constituent: use the field to search for the constituent who the gift is being made in honor of/in memory of, if the tributee is in Lux, select the constituent. If not, enter the tributee's name in the Constituent Name field.

Constituent Name: auto-populates based on the constituent selected in the previous field, if tributee is in Lux

Organization Name: if relevant, you may enter an associated organization here

Tributee: auto-populates based on the constituent you select in the Constituent field

Notify Constituent: search for the name of the constituent who wants to be notified when the tribute is made

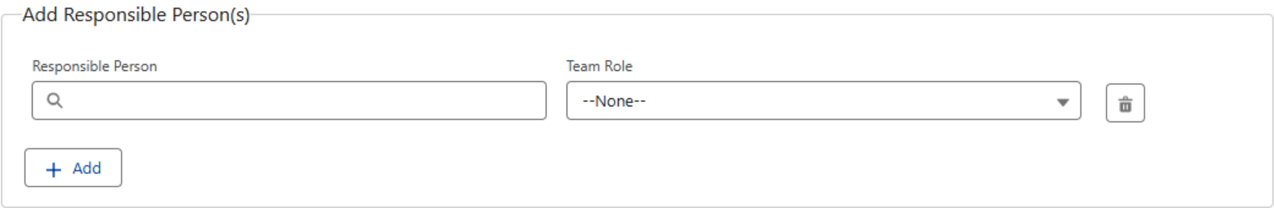
Notify Constituent Name: auto-populates based on the constituent entered in the previous field

Notify Address: if a letter or note should be sent to the constituent to be notified, enter their preferred address here

Occasion: if the tribute is being made in honor of an occasion, enter the occasion here

Notification Sent: check this box if the notification has already been sent to the constituent to be notified. Otherwise, leave unchecked for stewardship team to check when notification has been sent

PLEDGE: ADD RESPONSIBLE PERSON(S)



+ Add: only use this if you need to add an additional person to the gift that is not already listed as an opportunity team member on the associated proposal

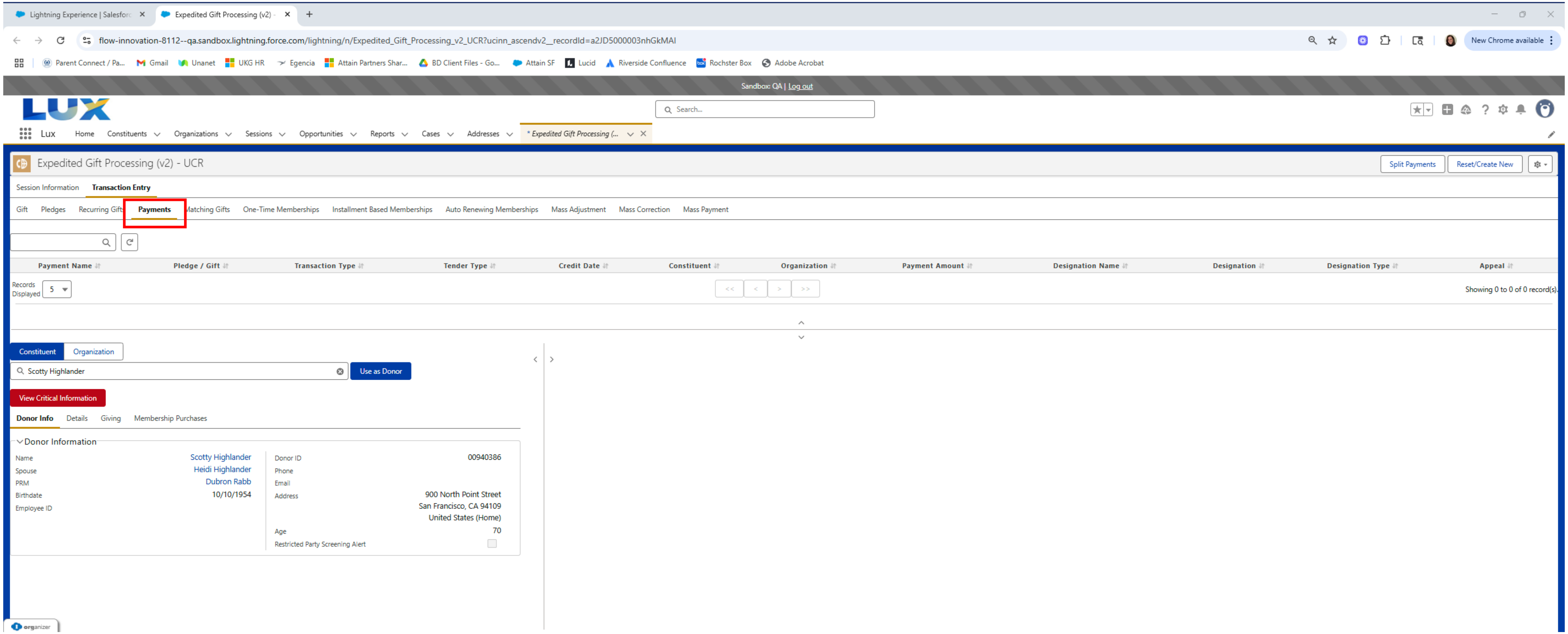
Responsible Person & Team Role: once the gift is saved, these fields will auto-populate with the opportunity team listed on the proposal associated with the gift

2.4

PROCESS PAYMENTS

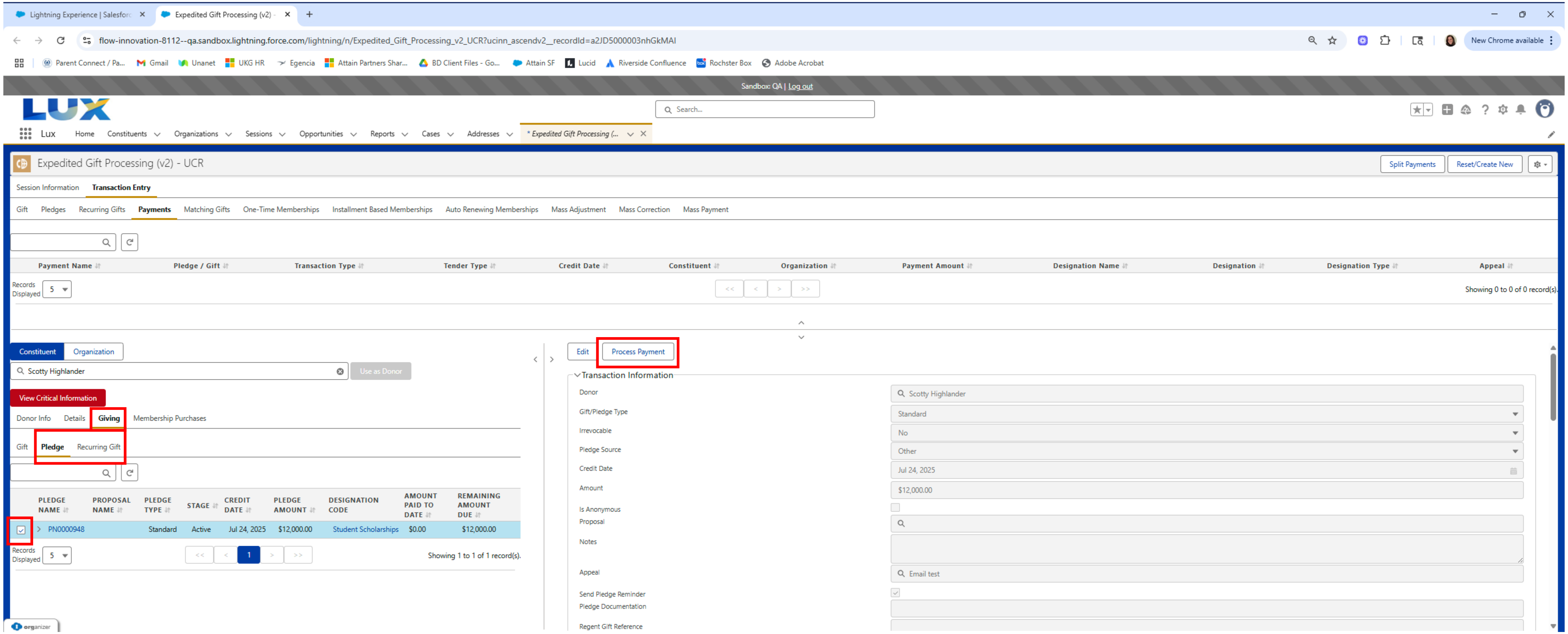
PROCESS PAYMENTS

Ensure Payments is selected as the gift type, and ensure the correct constituent or organization is being used as the donor before beginning.



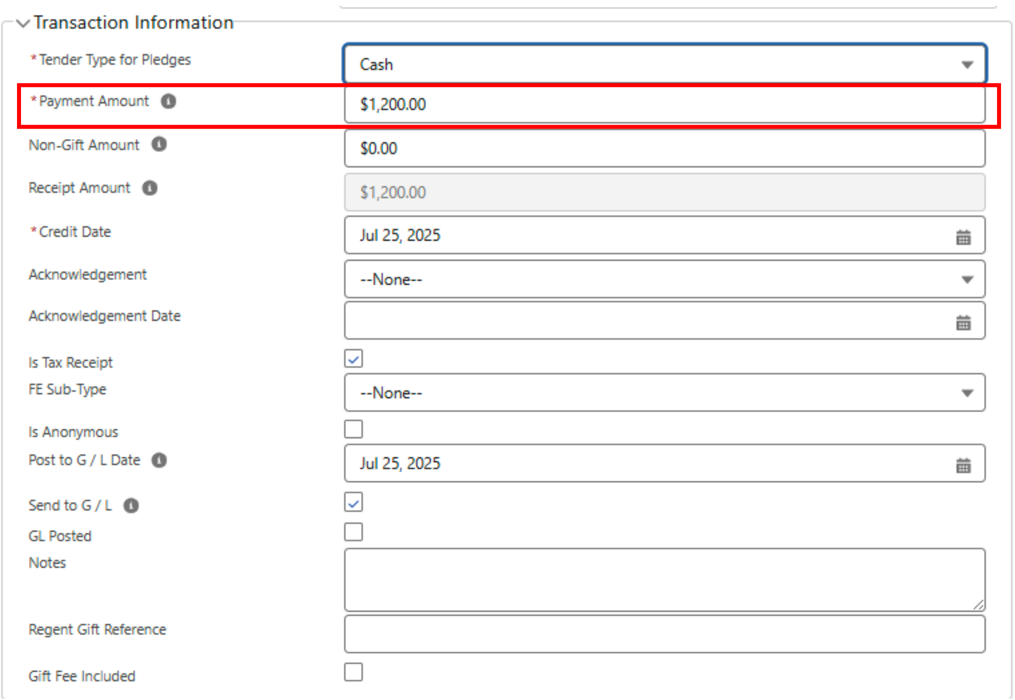
PROCESS PAYMENTS

Search for the donor that is making a payment on a pledge or recurring gift.
In the donor information section on the left-hand side of the screen, click Giving. Then, based on the type of payment you're processing, click either Pledge or Recurring Gift. Find the record for the payment you wish to process, then select the check box next to it. Do not click on the record name – it'll take you to the gift's record page instead of allowing you to process a payment. Click Process Payment.



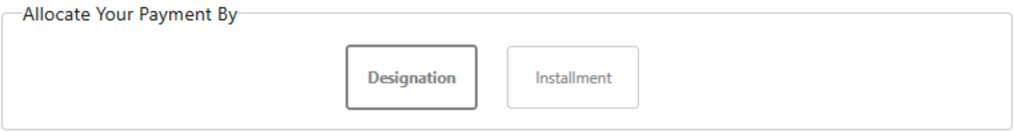
PROCESS PAYMENTS: TRANSACTION INFORMATION

The right side of the screen will now become edit-able. Complete the Transaction Information Section as you would in any gift processing session, but make sure to add the exact payment amount in the Payment Amount field. This will allow the system to re-calculate totals in the next section.

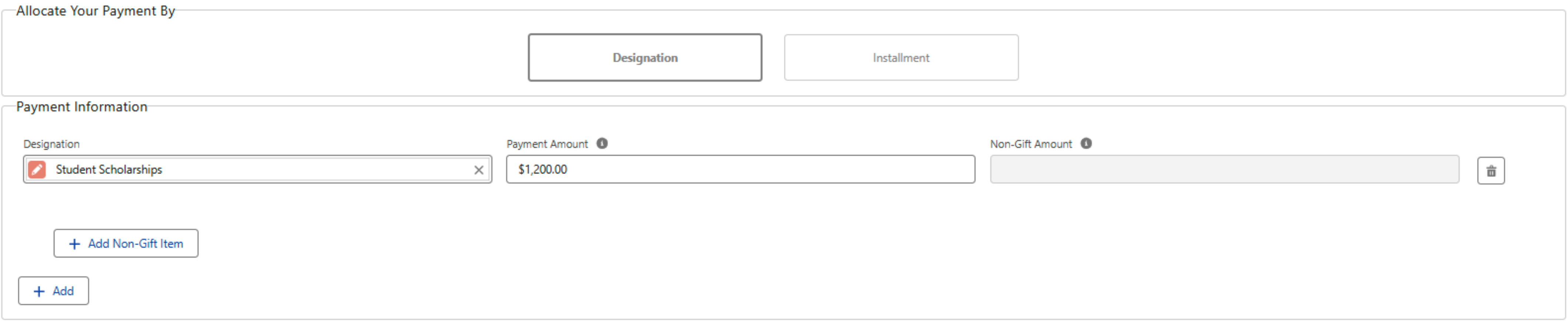


PROCESS PAYMENTS: ALLOCATE YOUR PAYMENT BY & PAYMENT INFORMATION

In the Allocate Your Payment By section, select whether the payment will be allocated based on a designation or an installment.



If you choose to allocate the payment by Designation, ensure that the designation is correct (it will auto-populate based on the designation selected in the original pledge) and the payment amount populated from the Transaction Information section.



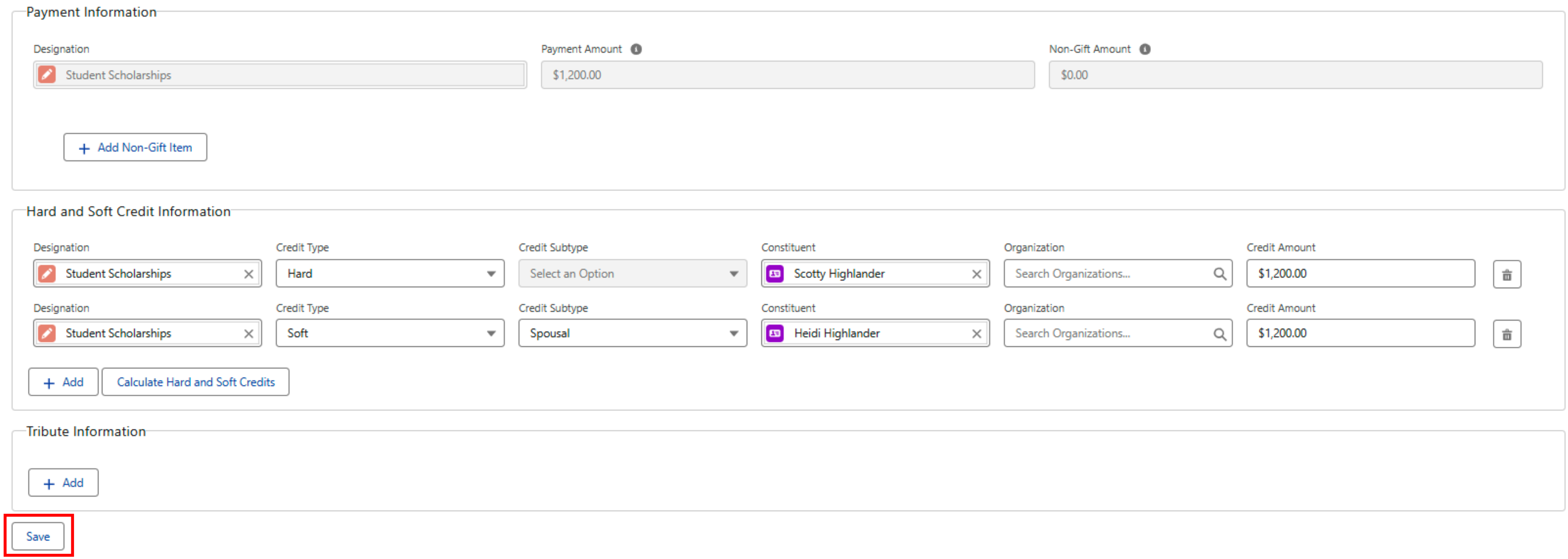
PROCESS PAYMENTS: ALLOCATE YOUR PAYMENT BY & INSTALLMENT INFORMATION

If you choose to allocate the payment by installment, the installment schedule will populate with an additional column for you to add the Amount to Pay. The amount will auto-populate based on the Payment Amount entered in the Transaction Information section. In this example, the monthly payment set up to be $1,000, but the constituent sent in $1,200. You'll notice that the system automatically applied the excess to the next month's payment. If the payment is the correct amount, it will only fill the appropriate field. If the payment is lower than expected, it will add the remainder to the next month's owed amount.

Installment Name	Designation	Amount	Expected Date	Payment Amount	Payment Date	Amount to Pay
INST-250724-1261	Student Scholarships	$1,000.00	Jul 24, 2025	$0.00		$1,000.00
INST-250724-1262	Student Scholarships	$1,000.00	Aug 24, 2025	$0.00		$200.00
INST-250724-1263	Student Scholarships	$1,000.00	Sep 24, 2025	$0.00		$0.00
INST-250724-1264	Student Scholarships	$1,000.00	Oct 24, 2025	$0.00		$0.00
INST-250724-1265	Student Scholarships	$1,000.00	Nov 24, 2025	$0.00		$0.00
INST-250724-1266	Student Scholarships	$1,000.00	Dec 24, 2025	$0.00		$0.00
INST-250724-1267	Student Scholarships	$1,000.00	Jan 24, 2026	$0.00		$0.00
INST-250724-1268	Student Scholarships	$1,000.00	Feb 24, 2026	$0.00		$0.00
INST-250724-1269	Student Scholarships	$1,000.00	Mar 24, 2026	$0.00		$0.00
INST-250724-1270	Student Scholarships	$1,000.00	Apr 24, 2026	$0.00		$0.00

PROCESS PAYMENTS: PAYMENT, HARD & SOFT CREDIT, & TRIBUTE INFORMATION

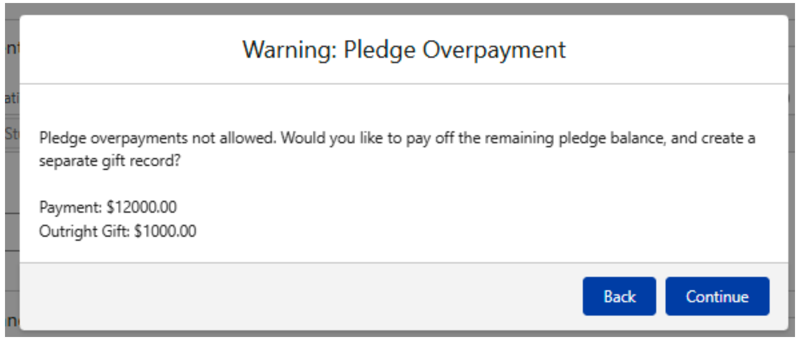
Complete the rest of the entry like you would for any other gift type, then click Save.



PROCESS GIFTS

PROCESS PAYMENTS: OVERPAYMENT

If a constituent ends up paying more than was agreed upon over the lifetime of their pledge, a pop-up will appear when you click Save. If the constituent wants, we can choose to process an outright gift with the balance.



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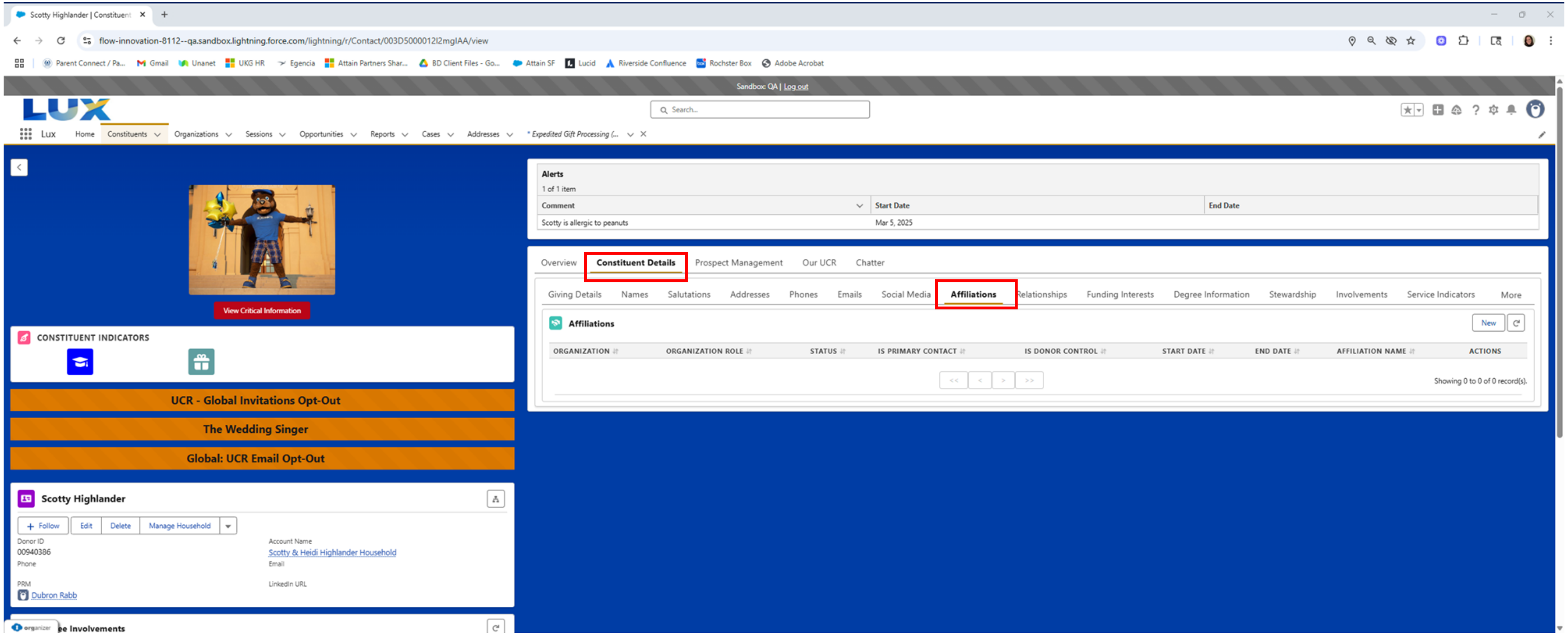
2.5

PROCESS MATCHING GIFTS

UC RIVERSIDE

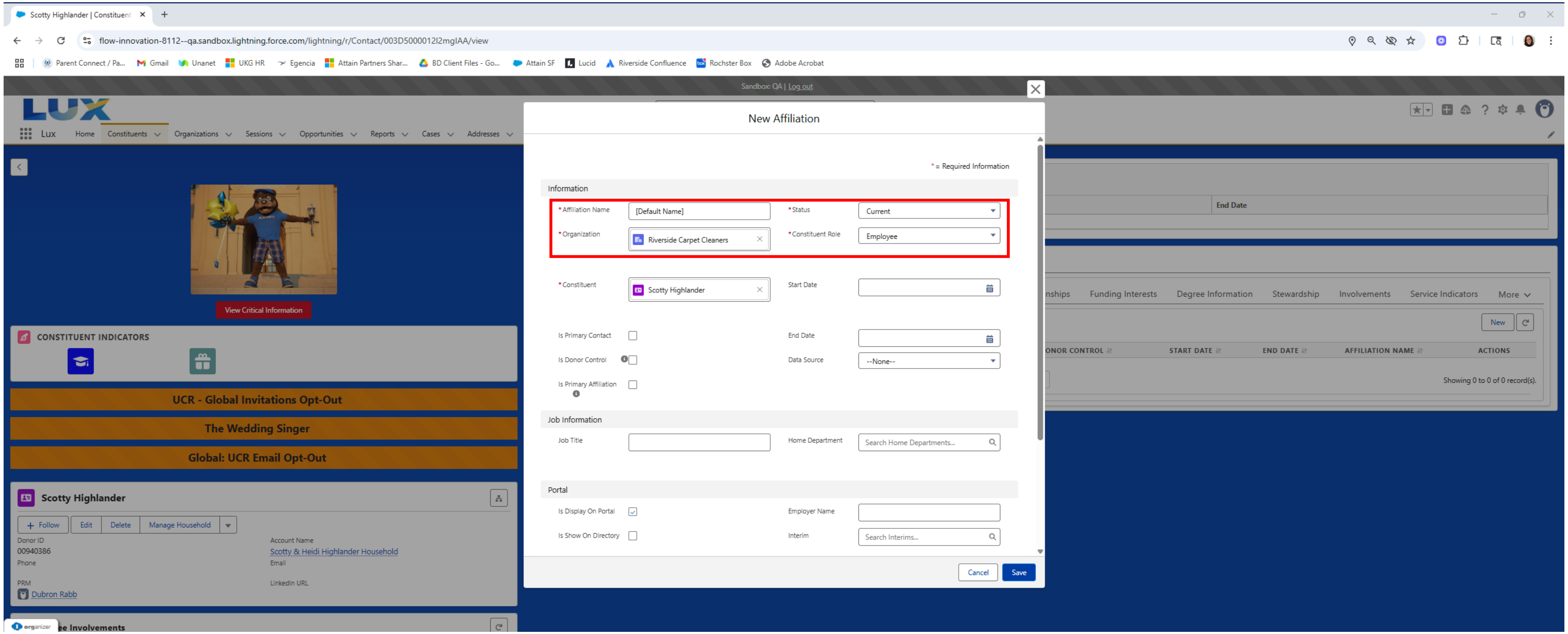
PROCESS MATCHING GIFTS

Before processing any gifts that could be matched by an employer, ensure that there is an affiliation between the employee and the employer documented and that the organization's matching gift ratios are set up properly. To add an affiliation between an employee and an employer, navigate to either the constituent or organization's record, and click into Constituent/Organization Details, then Affiliations.



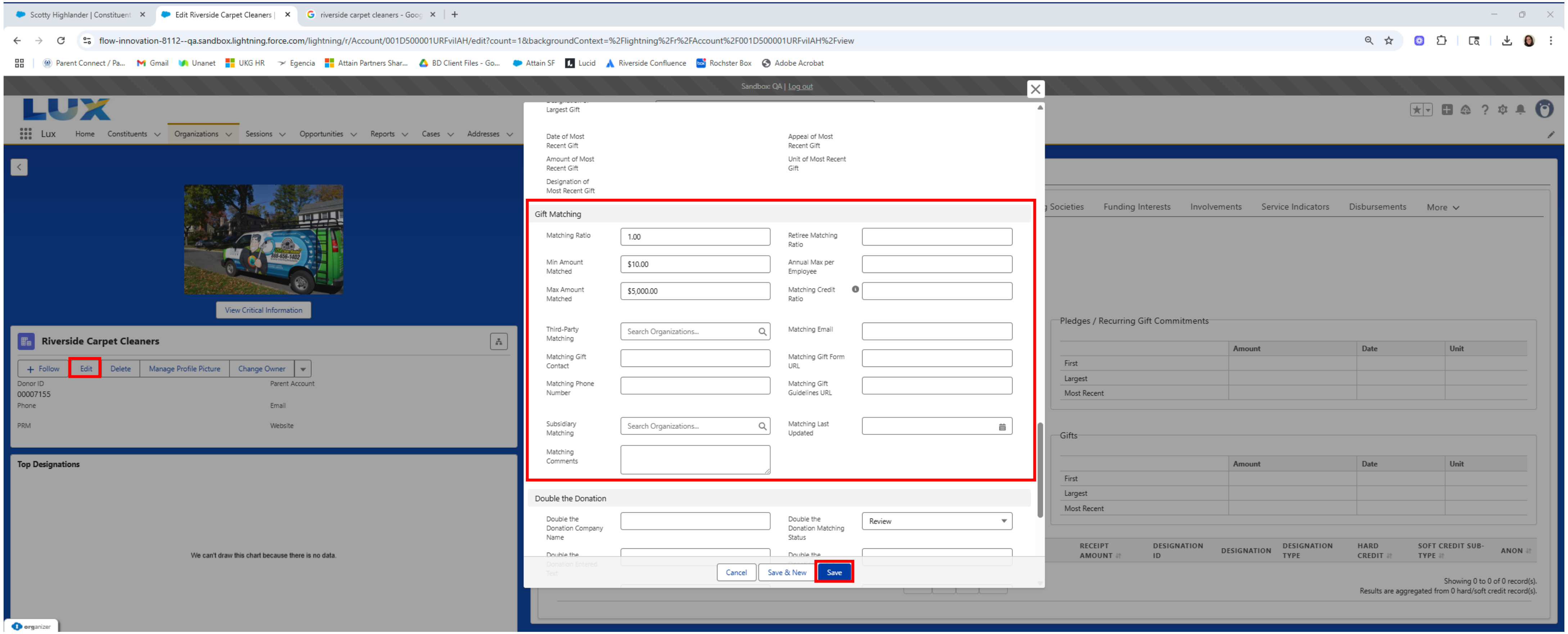
PROCESS MATCHING GIFTS

If there is not an affiliation listed between the employee and the matching gift employer, click New. Then, fill out the required fields and ensure that the Constituent Role is listed as Employee, or, if doing this from the organization's record page, the Organization role is listed as Employer. Click Save.



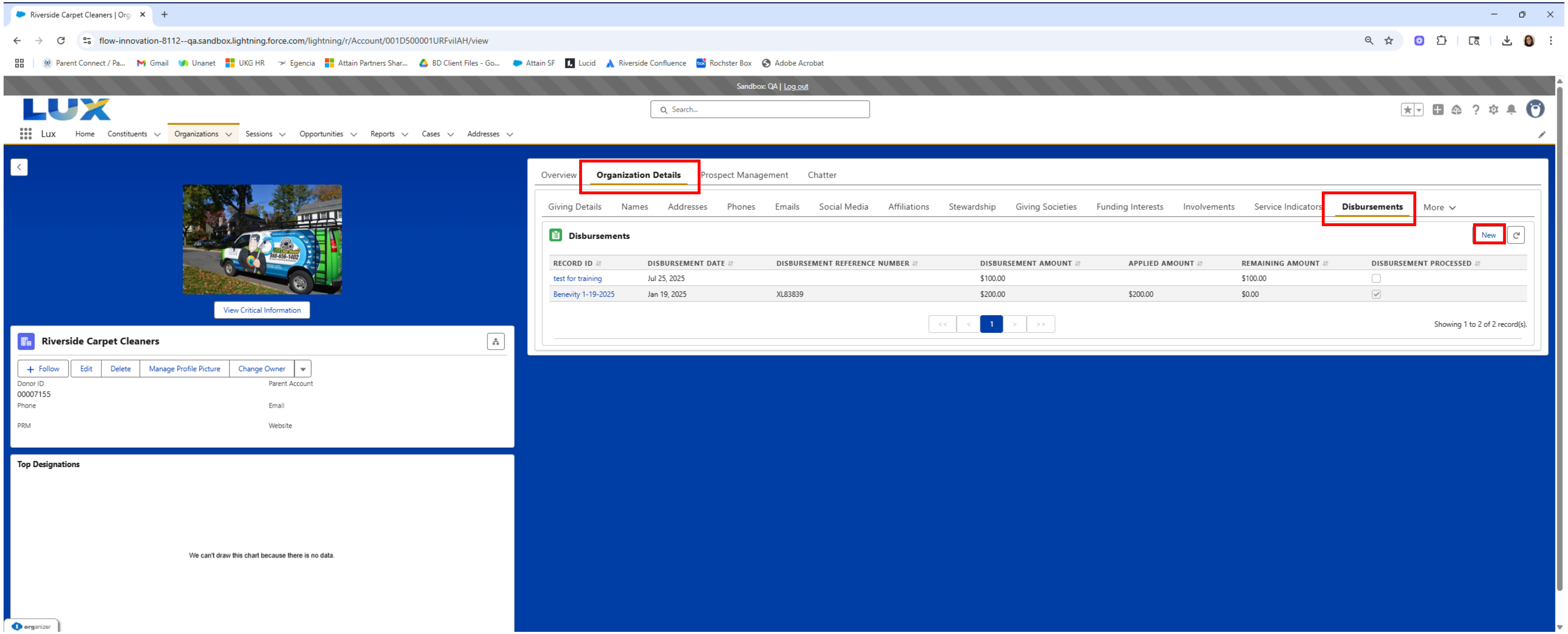
PROCESS MATCHING GIFTS

Next, we need to ensure that the organization's matching gift ratios have been set up. Click into the organization's record page, then click Edit in the Organization Card feature. A popup will appear. Scroll until you reach the Gift Matching section, then fill out the organization's Matching Ratio, and any minimum or maximums that they have indicated. Click Save.



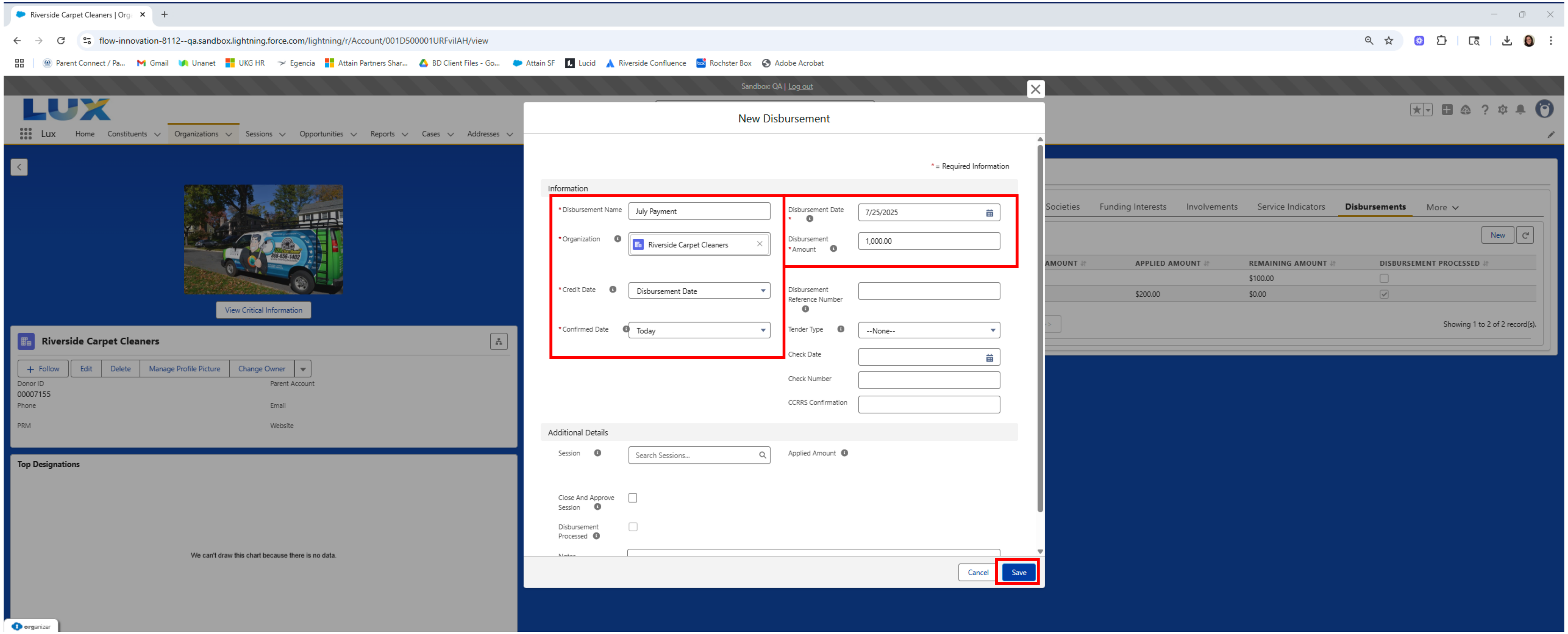
PROCESS MATCHING GIFTS

Now, when a gift is processed for Scotty Highlander, the system will make a note of that donation on his employer's record page. Once an employer sends funds to pay its matching gifts, navigate to the organization's record page, then click the Disbursements subtab in the Organization Details tab. Any disbursements paid out previously will appear in the list view. To search for unpaid claims, though, click New.



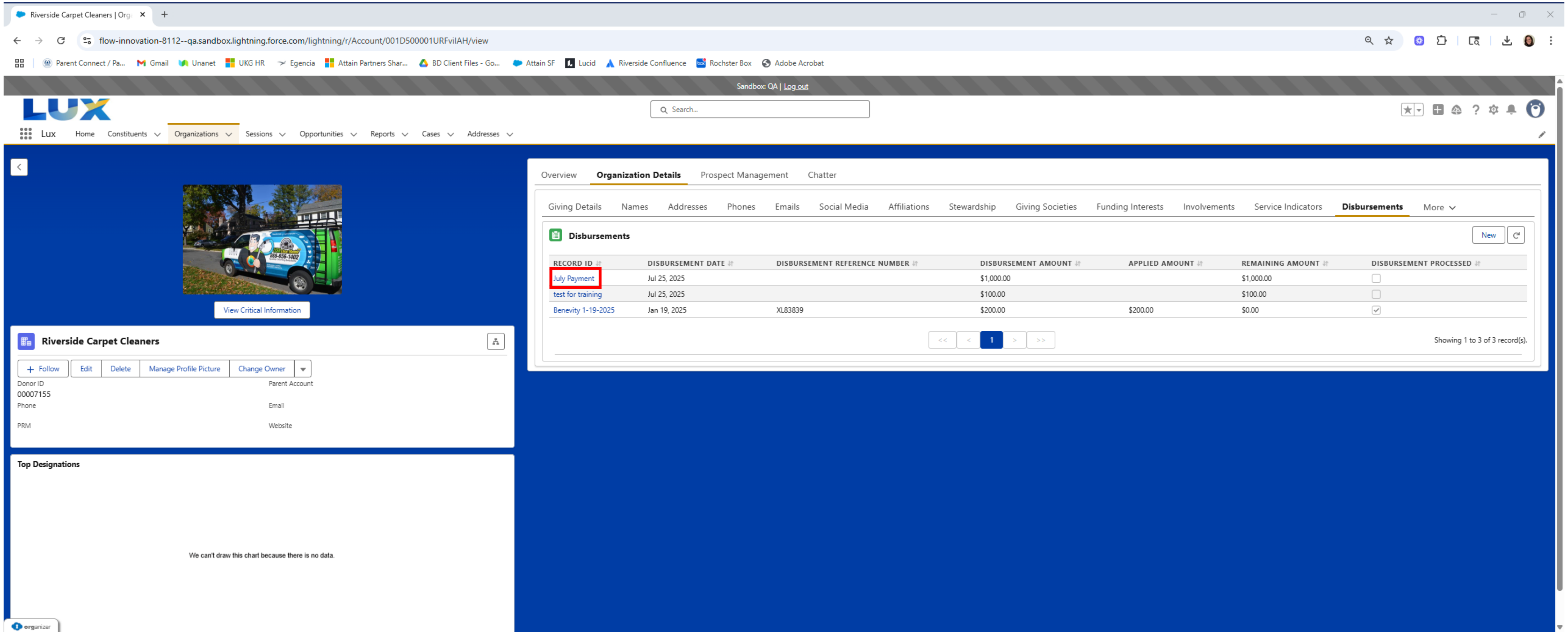
PROCESS MATCHING GIFTS

A popup will appear. Complete the required fields, then click Save.



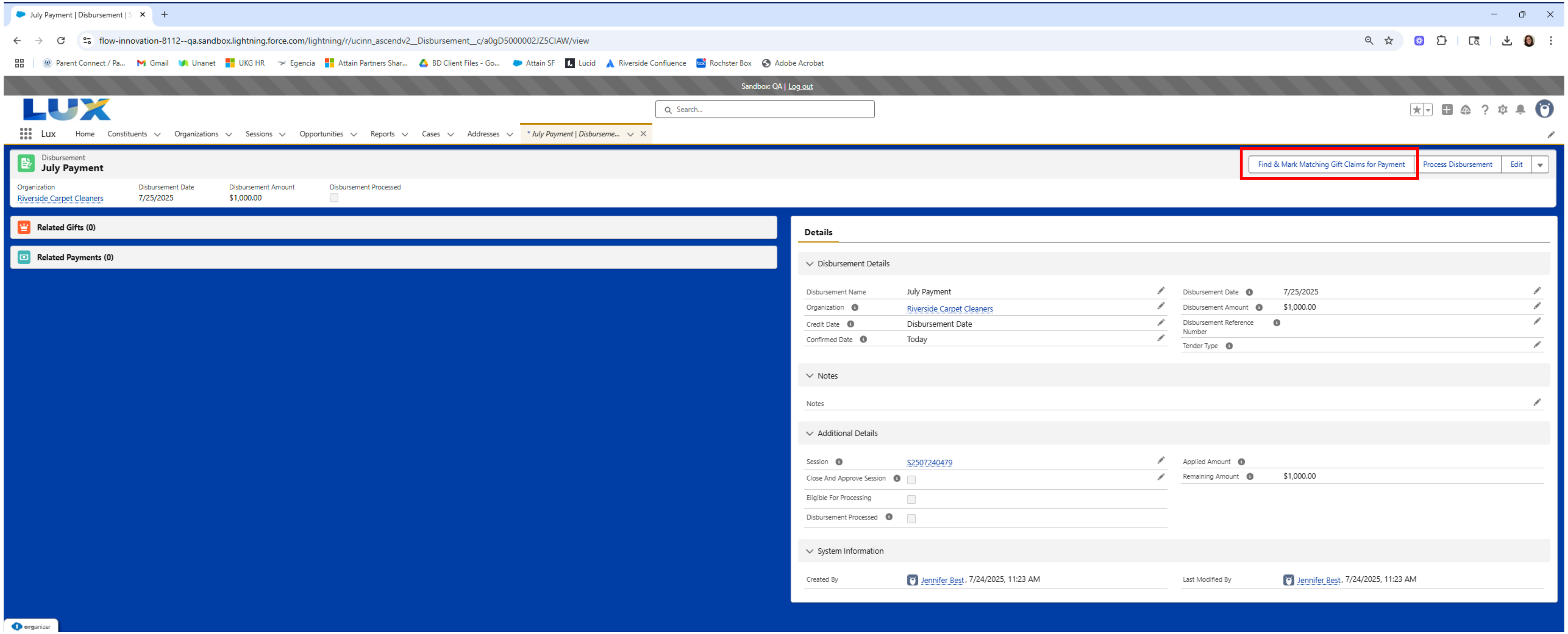
PROCESS MATCHING GIFTS

The disbursement record you just created will appear in the list view. Click on its hyperlinked name.



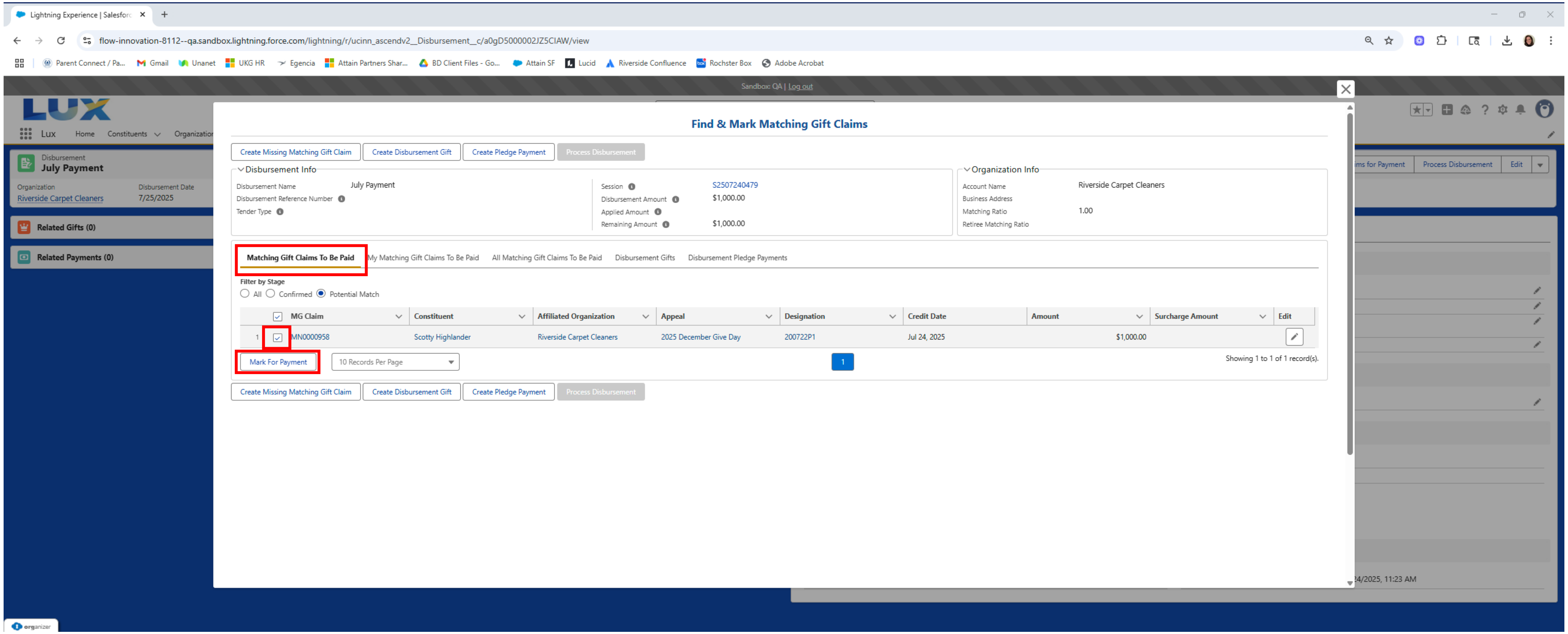
PROCESS MATCHING GIFTS

You will be redirected to the disbursement's record page. Click Find & Mark Matching Gifts for Payment



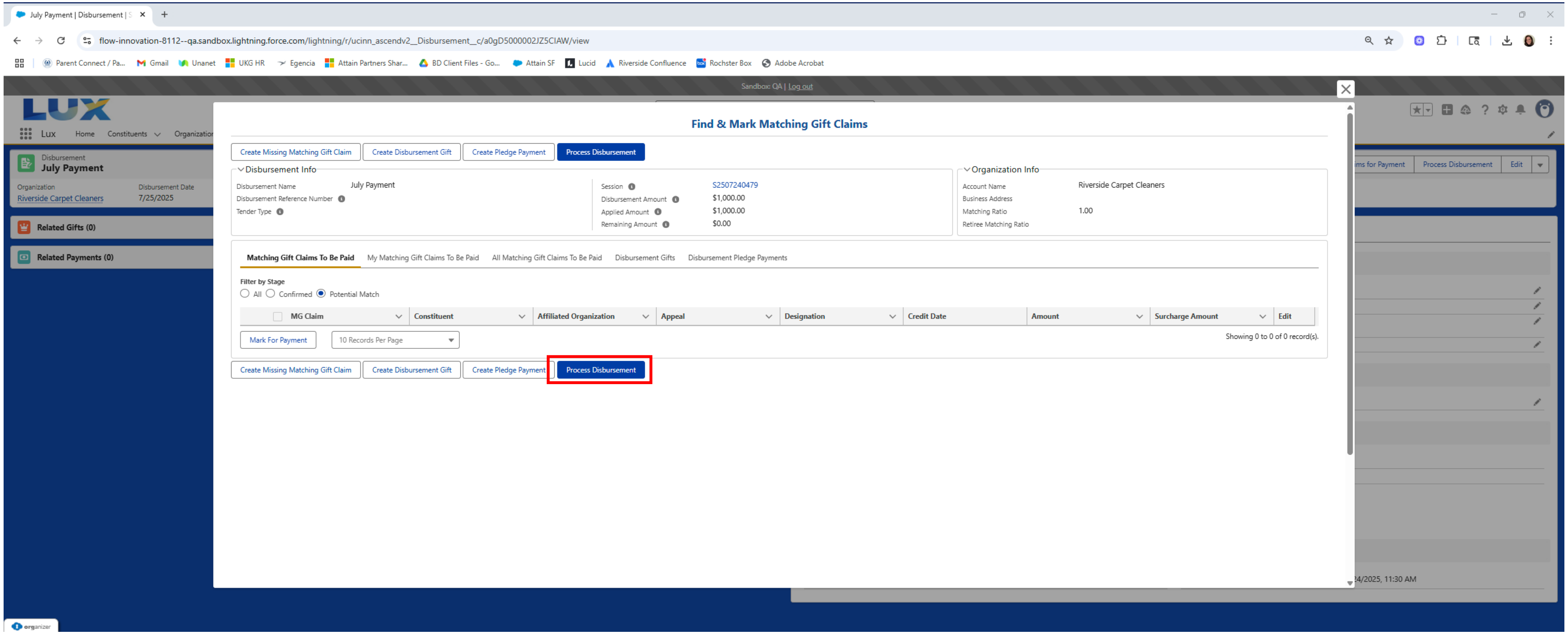
PROCESS MATCHING GIFTS

A popup will appear. Most times, all matching gift claims to be paid will appear in the first tab titled ‘Matching Gift Claims To Be Paid’. However, sometimes you’ll need to click into the ‘All Matching Gift Claims To Be Paid’ tab to see a list of employee donations that the employer needs to match. Select the claims that you wish to process by clicking the check box next to the MG Claim column, then click Mark for Payment.



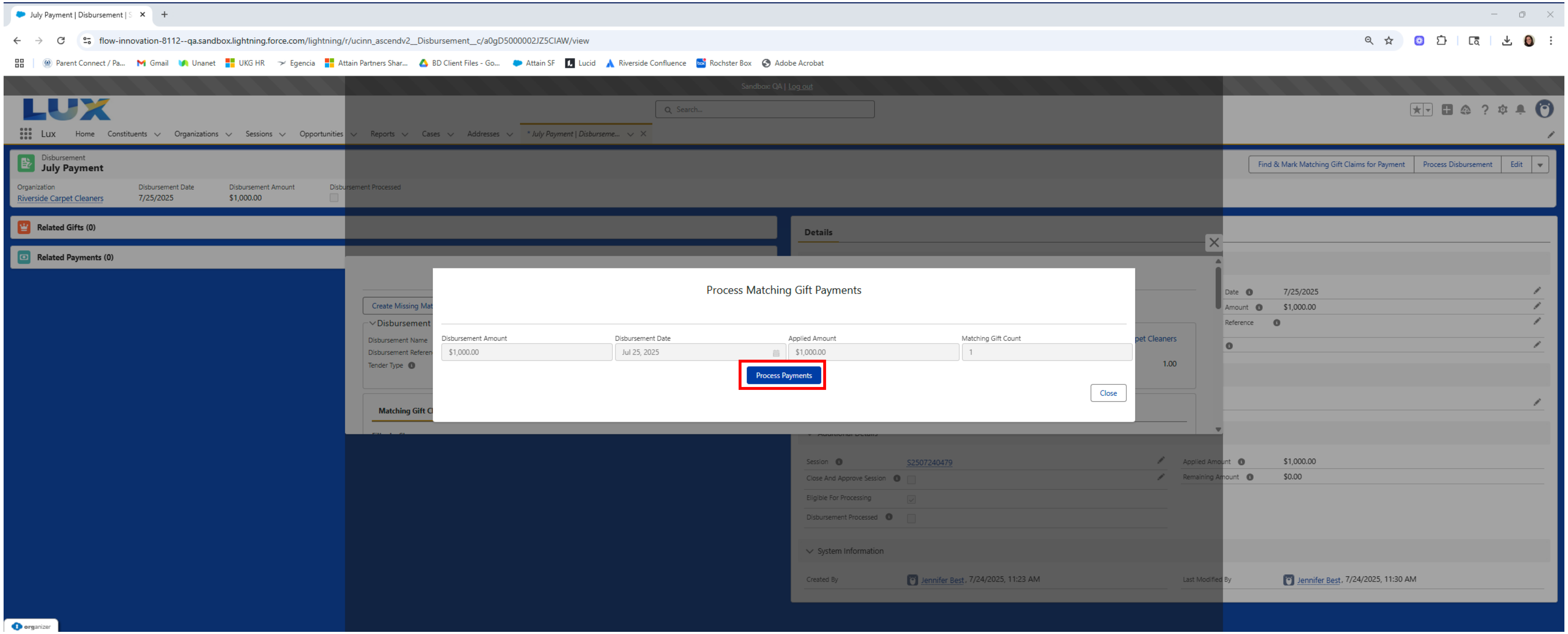
PROCESS MATCHING GIFTS

Once you click Mark for Payment, the claims you marked will disappear, and a Process Disbursement button will appear. If you have marked all the relevant claims to be paid, click on Process Disbursement.



PROCESS MATCHING GIFTS

A popup will appear. Ensure all the information is correct, then click Process Payments. If no errors pop up and you're redirected to the disbursement record page, the payments were applied successfully!



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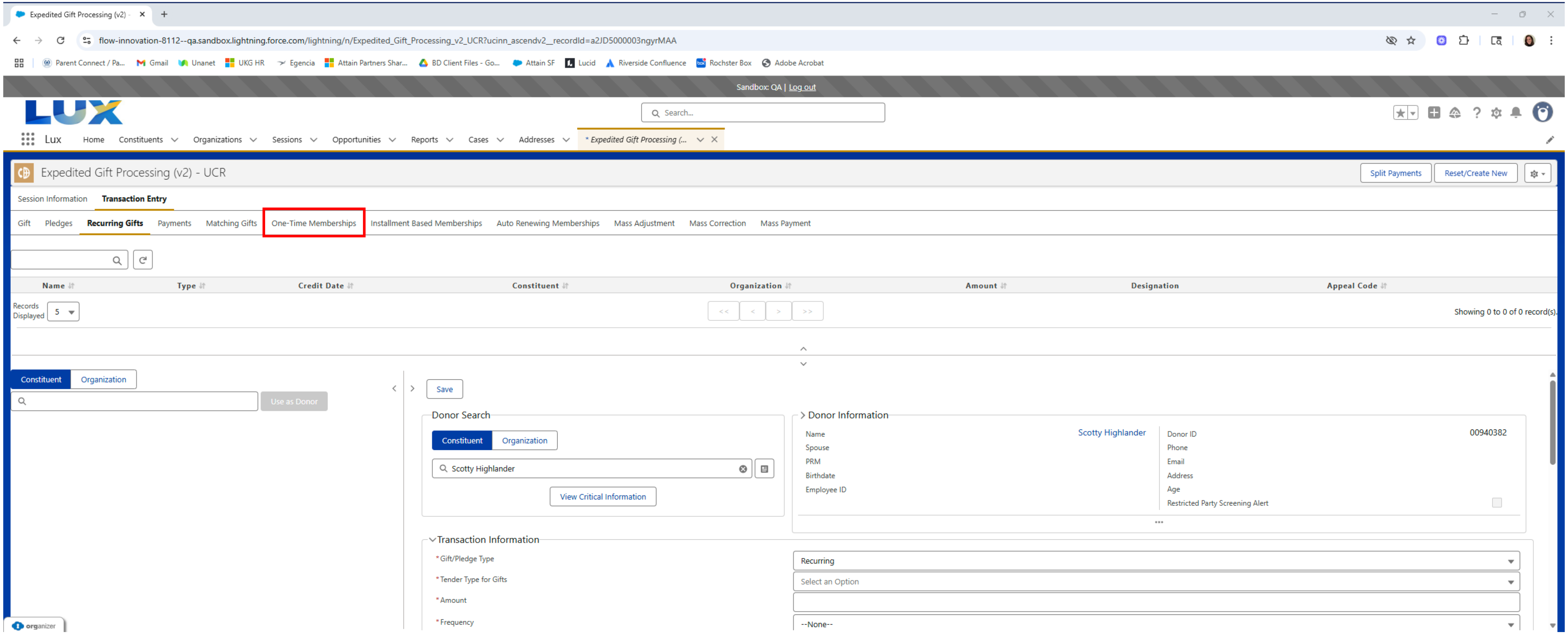
2.6
PROCESS ONE-TIME MEMBERSHIPS

UC RIVERSIDE

ONE-TIME MEMBERSHIPS

Ensure the One-Time Membership gift type is selected, and ensure the correct constituent or organization is being used as the donor before beginning.



ONE-TIME MEMBERSHIP: TRANSACTION INFORMATION

Required fields are indicated by the red asterisk.

Gift/Pledge Type: automatically populates with One-Time Membership since it was selected at the top of the page.

Tender Type for Gifts: select the payment method from the picklist. Depending on what you select, you might find that different information is required in this screen

Example: selecting Personal Check will cause new fields to appear with space to enter the check number, date, and CCRRS confirmation number

Amount: will auto-populate based on what membership is entered in the Membership Information section

Credit Date: date that membership payment was made by the donor

Acknowledgement: this should automatically be updated after the gifts are acknowledged. Only select if we know the gift is not to be acknowledged.

Post to G/L Date: select when the gift should be posted to the general ledger

Send to G/L: leave this box checked

GL Posted: this should automatically be checked after the gifts are sent to the Foundation G/L each night

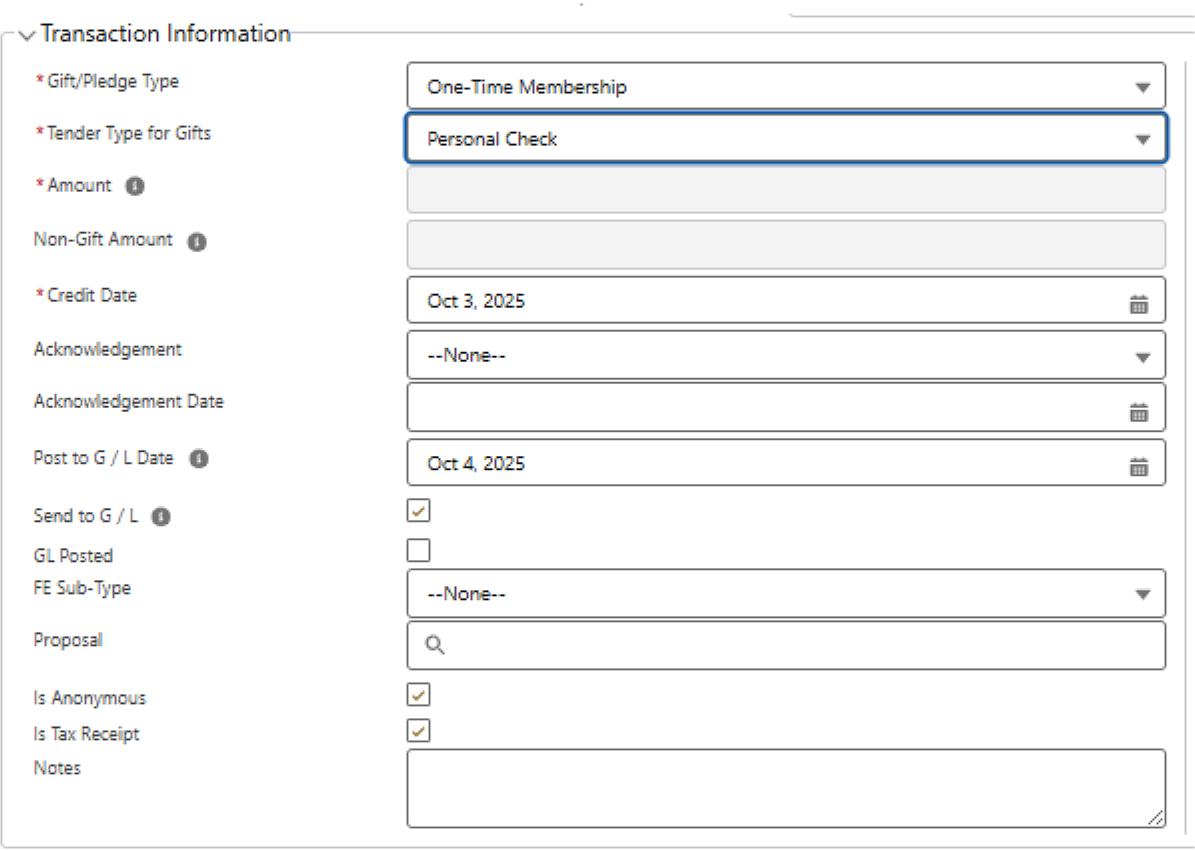
FE Sub-Type: don't need to select this – this is updated automatically when the gift are sent to the Foundation G/Leach night

Proposal: if there is an open proposal associated with the gift, enter the proposal's name here to create a related record between the gift and the proposal

Is Anonymous: check box if the gift should remain anonymous

Is Tax Receipt: this is automatically checked to send the donor a tax receipt; uncheck if no receipt is necessary (e.g. No receipt for adjustments)

Notes: if any additional information about the gift that is not captured somewhere else in the gift process, add it here –these are internal notes and should be used sparingly



ONE-TIME MEMBERSHIP: MEMBERSHIP INFORMATION

Membership Level: begin typing the membership's name or code, then select the correct membership from the picklist

*Designation, Original Amount, Discount Percentage, Non-Gift Amount, Recipient, Anniversary Date, and Expiration Date will all auto-populate based on what membership level you select.

Discount Percentage and Amount: you can enter an amount and it will change the discount percentage, or you can enter a discount percentage and it will change the amount

Appeal: search for and select the campaign that the gift stemmed from

Organization Recipient: add an organization to the record if needed

Joint Recipient: if more than one constituent will be part of the membership based on the payment, add them ere.

Anniversary Date and Expiration Date: change if needed, but will auto-populate to meet the criteria entered in the Transaction Information section

Notes: add any additional information about the gift here

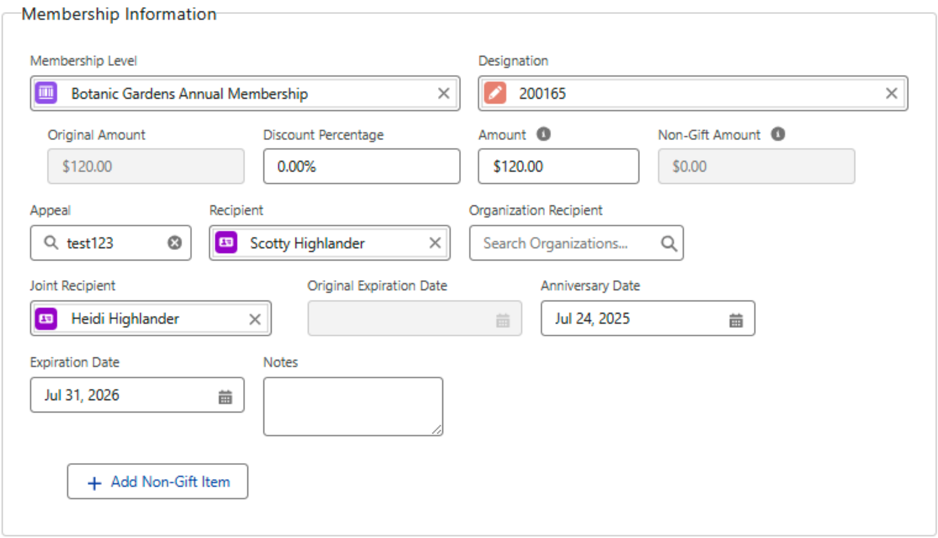
+ Add Non-Gift Item Button: click this if there is an insignia item associated with the pledge. You can add multiple non-gift items by clicking this button more than once

    Product: search for the insignia item that was given to the constituent and select the correct item

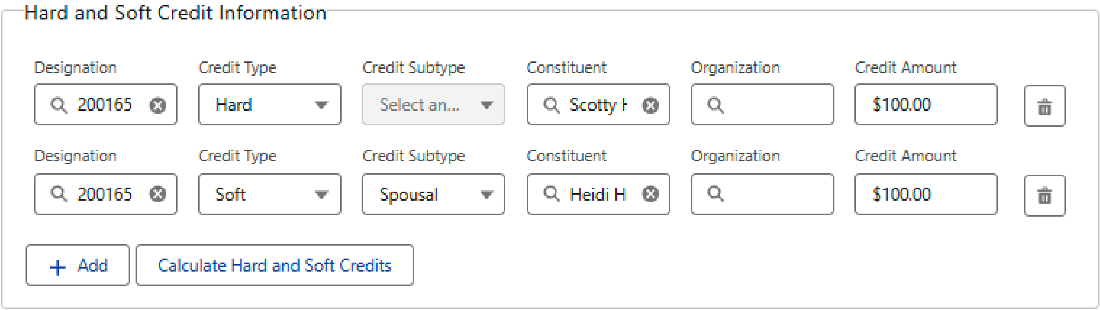
    Product Description: field auto-populates with the description of the item from its record

    Price: field auto-populates with the price listed in the product's record

    Quantity: enter how many items the constituent received



ONE-TIME MEMBERSHIP: HARD AND SOFT CREDIT INFORMATION



Designation: the designation that was entered in the Designation Detail section will auto-populate here

Credit Type: select whether the constituent is receiving hard or soft credit from the picklist

Credit Subtype: this field will only be fillable if soft credit is selected as the credit type. Select the subtype of soft credit from the picklist.

Constituent: these fields will auto-populate with the constituent's name, and if the constituent has a spouse, the spouse's name. If you are adding a constituent to the gift, you will need to search for the constituent in this field to add them.

Organization: if there is an organization associated with the gift (e.g., the constituent owns a company and they're donating on behalf of their company), you can add the organization here

Credit Amount: this field will auto-populate based on the price of the membership

+ Add: add additional constituents to the gift

Calculate Hard and Soft Credits: this will reset the hard and soft credit information to the original base calculations that the system completed. All modifications will be erased.

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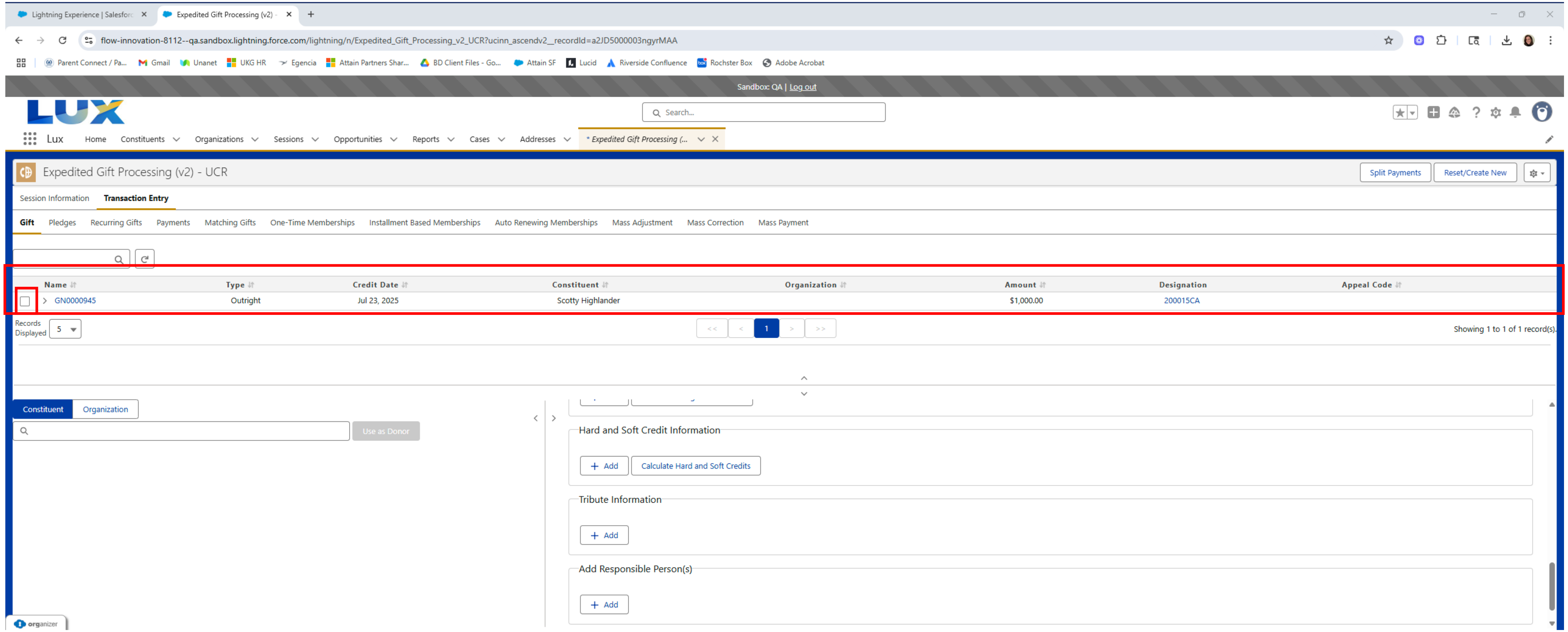
3

FINALIZE, CLOSE, & APPROVE SESSION

UC RIVERSIDE

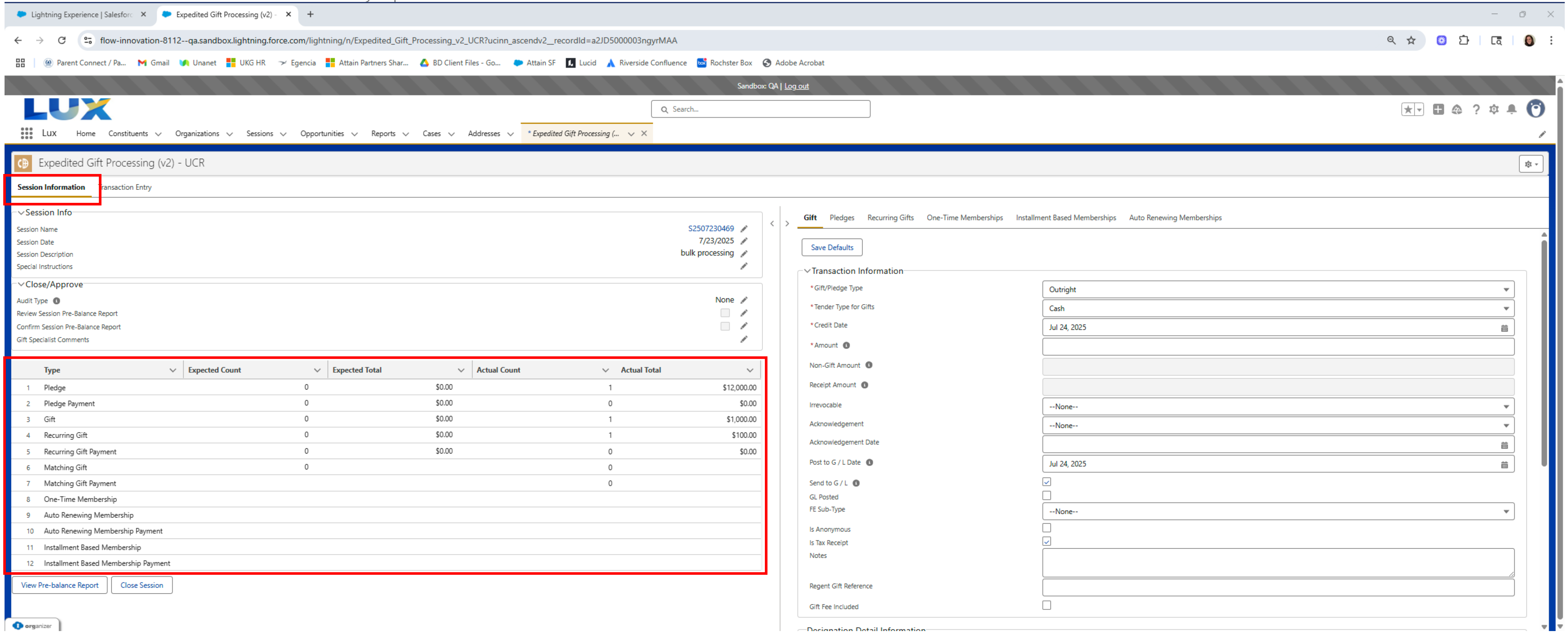
FINALIZE, CLOSE, & APPROVE SESSION

When all the gifts, pledges, and payments have been processed, you can check to make sure they were saved by looking in the related list at the top of each gift type tab. Any records entered during the session should appear in the appropriate list. If you need to edit a gift or payment from the session you're working on before it's processed, click the check box next to the gift in this screen and the information will populate in the fields below for you to change.



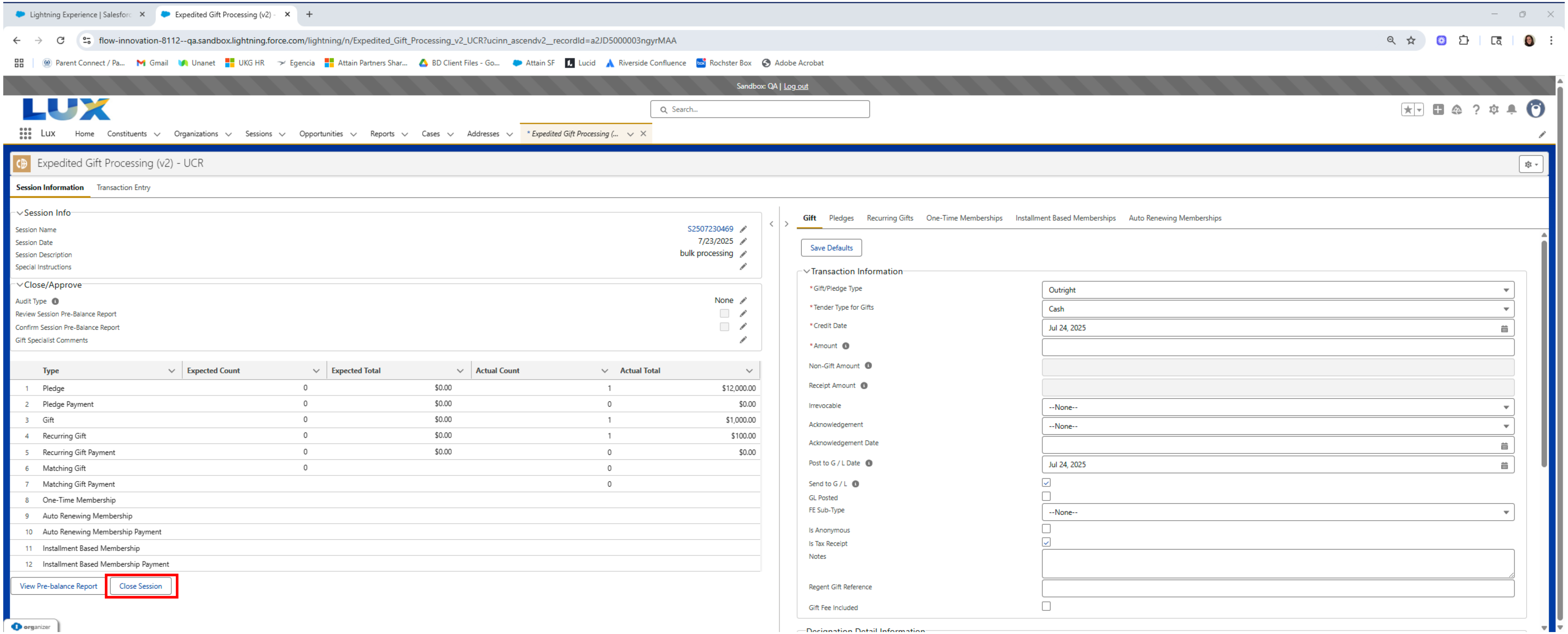
FINALIZE, CLOSE, & APPROVE SESSION

Navigate back to the Session Information tab and check the table on the lower lefthand side of the screen to ensure that the totals for the gifts, payments, recurring gifts, etc. that you entered are accurate. If everything matches, you are ready to move on to the next step. If not, review your calculations and make necessary updates.



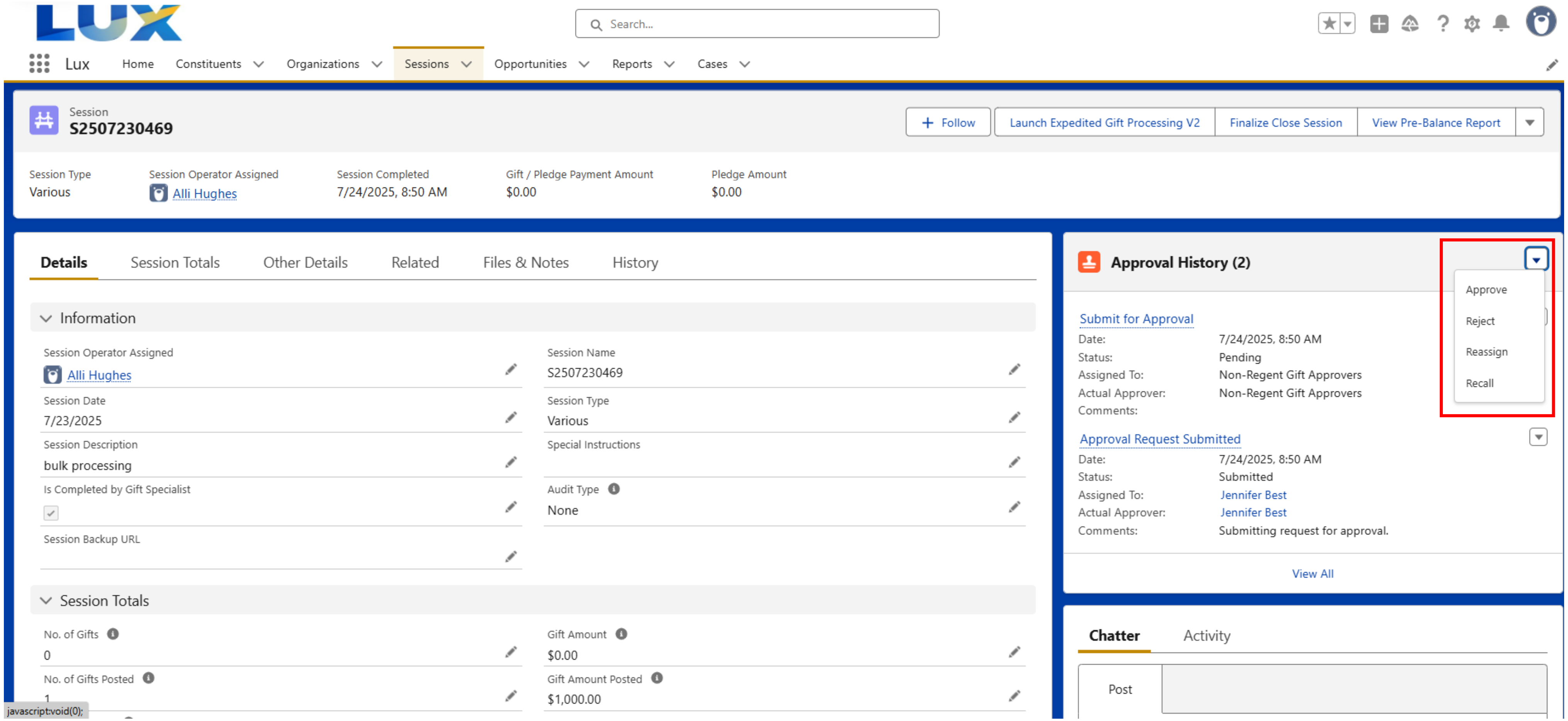
FINALIZE, CLOSE, & APPROVE SESSION

If everything looks accurate, click Close Session. This will trigger the system to send the session to an approver who will review the session and approve, decline, or request modifications on the batch.



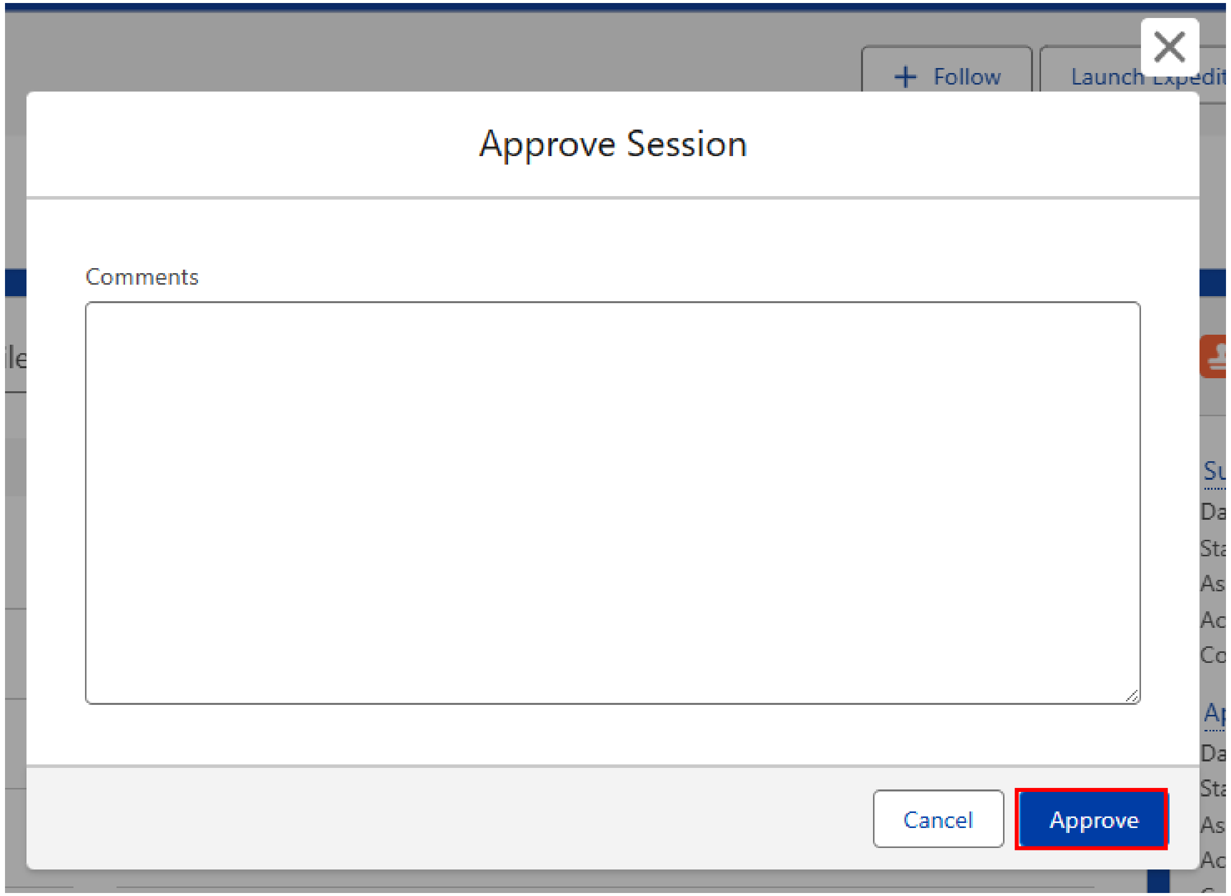
FINALIZE, CLOSE, & APPROVE SESSION

A notification will be sent to the approver. Navigate to the session's record page and review the transactions. Then, click the dropdown arrow in the Approval History section and select whether the session is approved, rejected, needs to be reassigned to a different approver, or if the session needs to be recalled for a different approval outcome.



FINALIZE, CLOSE, & APPROVE SESSION

A popup will appear asking to confirm the selection. Click the blue button (in this case, the session is being approved). Depending on what action you're taking, the gifts will either be processed, sent back to the gift processer for modification, or reassigned to a different approver,

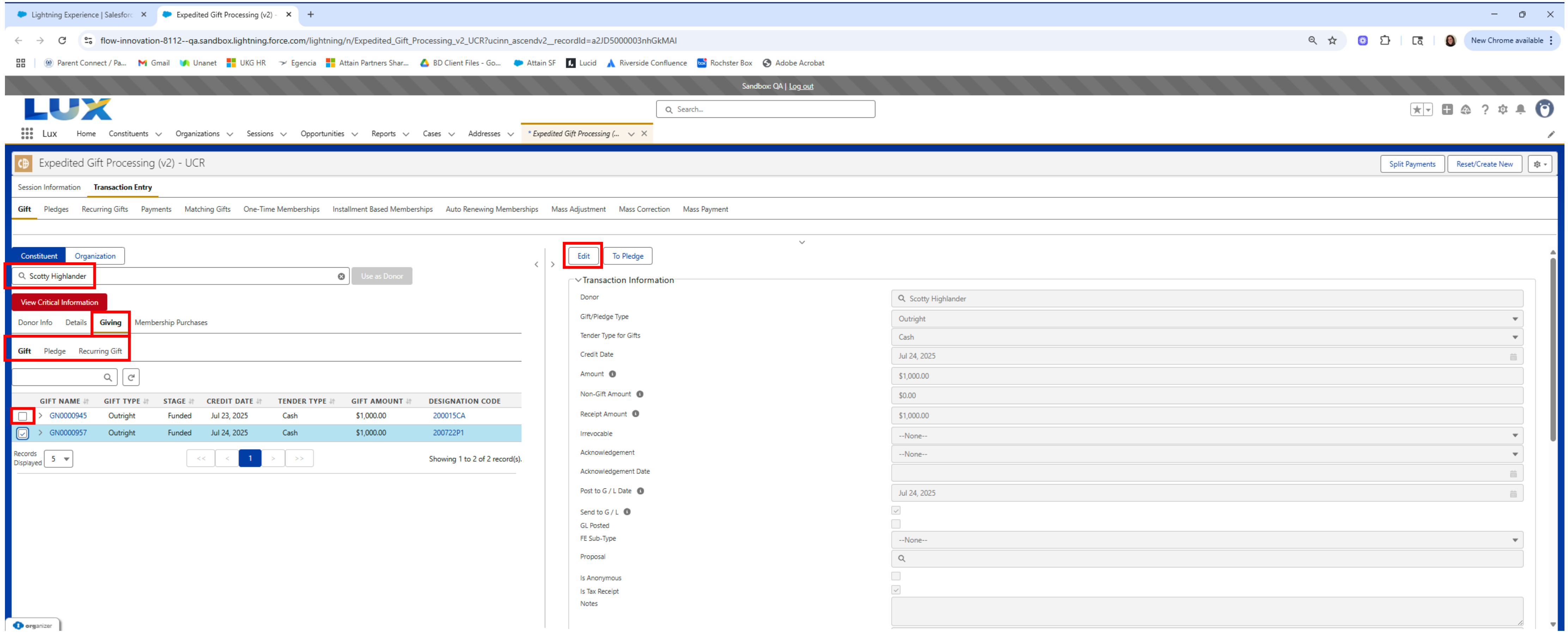


4

ADJUSTMENTS

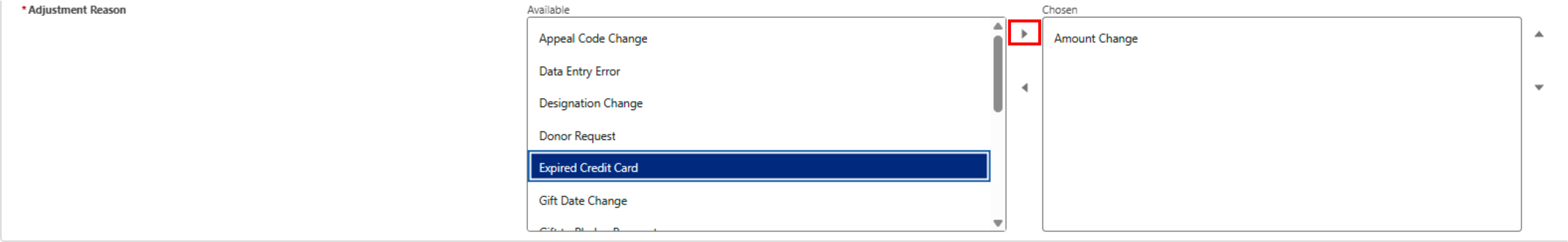
ADJUSTMENTS

Once a payment has been processed, we may find that it needs to be corrected. To do this, search for the constituent or organization whose gift requires correction in the search bar on the lefthand side of the page. Select the correct constituent, then click into the Giving tab. From there, select the type of gift that needs to be corrected, then select the record that you're fixing by clicking the check box next to the gift. Do not click the gift record hyperlink as it will take you to the gift's record page instead of allowing you to process the correction. The gift's information will populate on the righthand side of the screen. Click Edit.



ADJUSTMENTS

Edit whatever information you need to, then select the reason(s) for your adjustment in the Adjustment Reason list in the Transaction Information section. Simply select one or more reasons, then click the arrow to the right. Once you have finished with the adjustment, click Save. The adjustment will process once you close out the current session you're working on.



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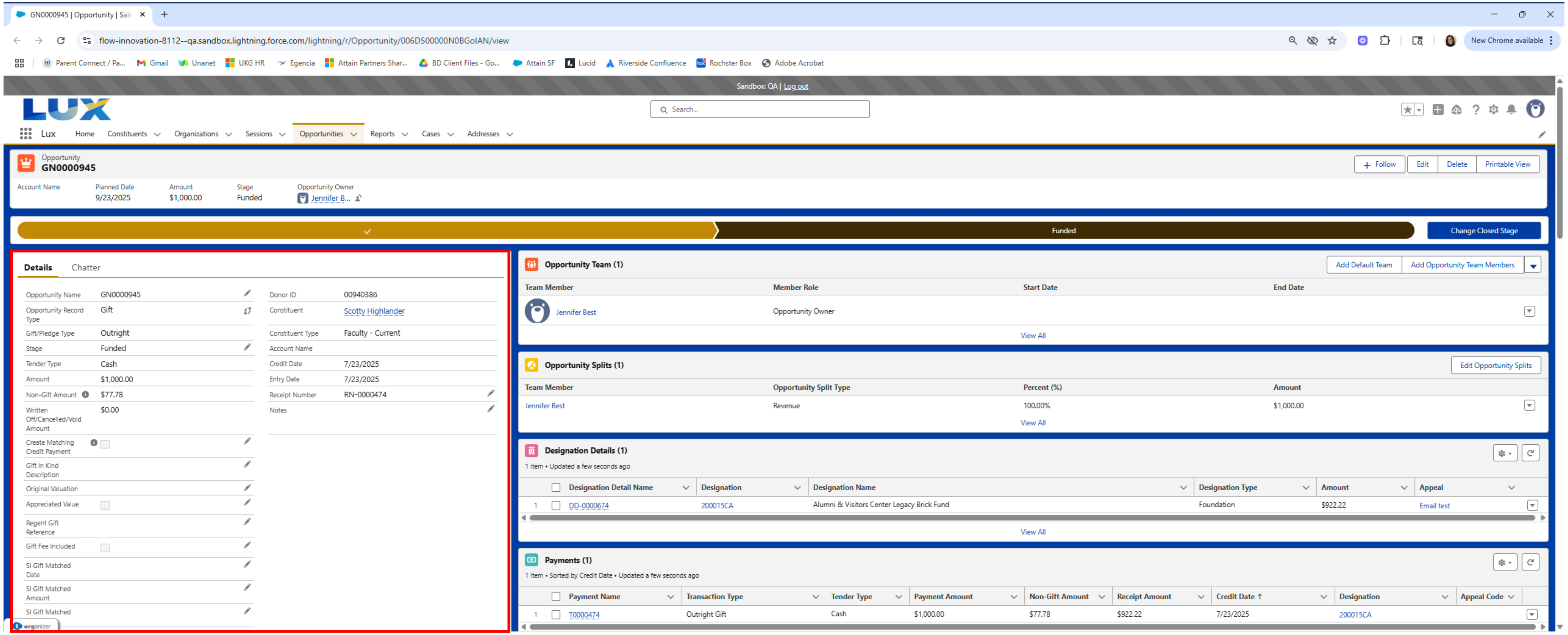
5

VIEW & EDIT GIFT RECORDS

UC RIVERSIDE

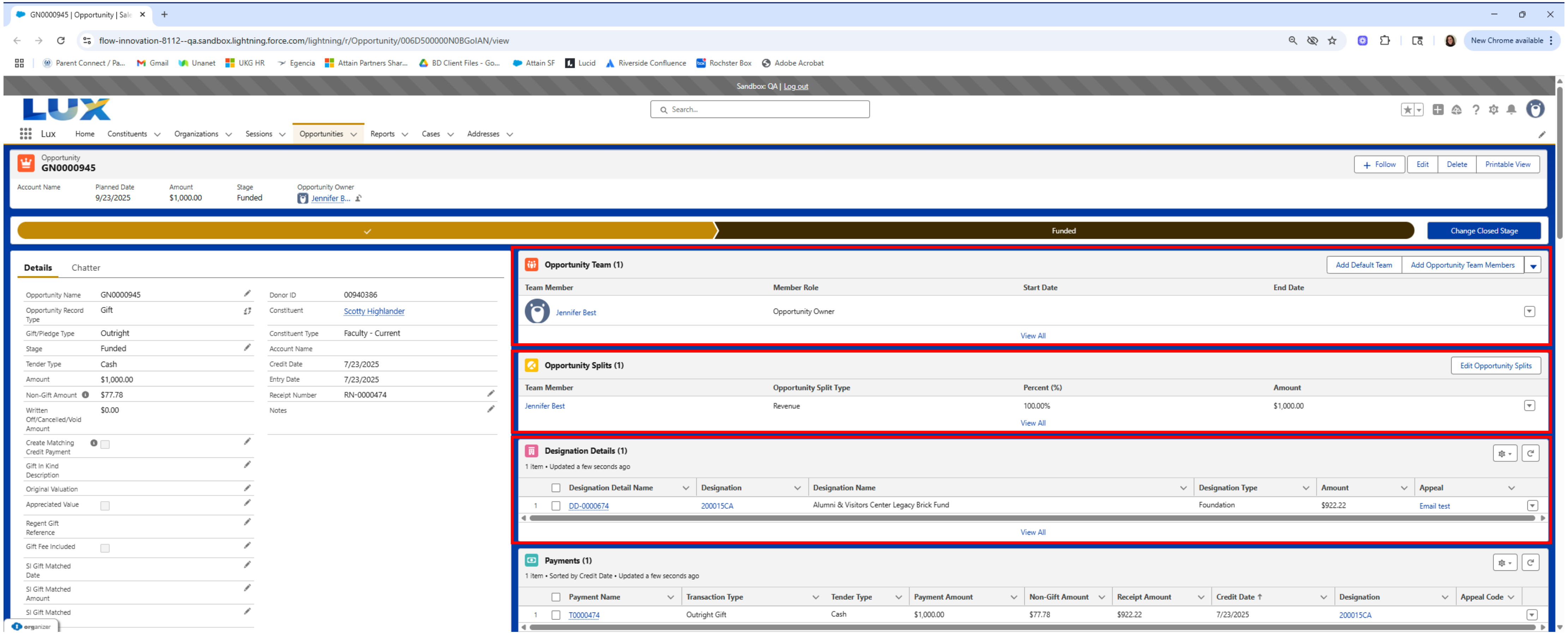
GIFT RECORDS: VIEW

Once a gift, pledge, recurring gift, or payment is processed, a gift record will be generated. To access the record, you can search for the gift or click on its hyperlinked name in any location you see it. Once on the record page, the Details section will show you relevant information about the gift.



GIFT RECORDS: VIEW

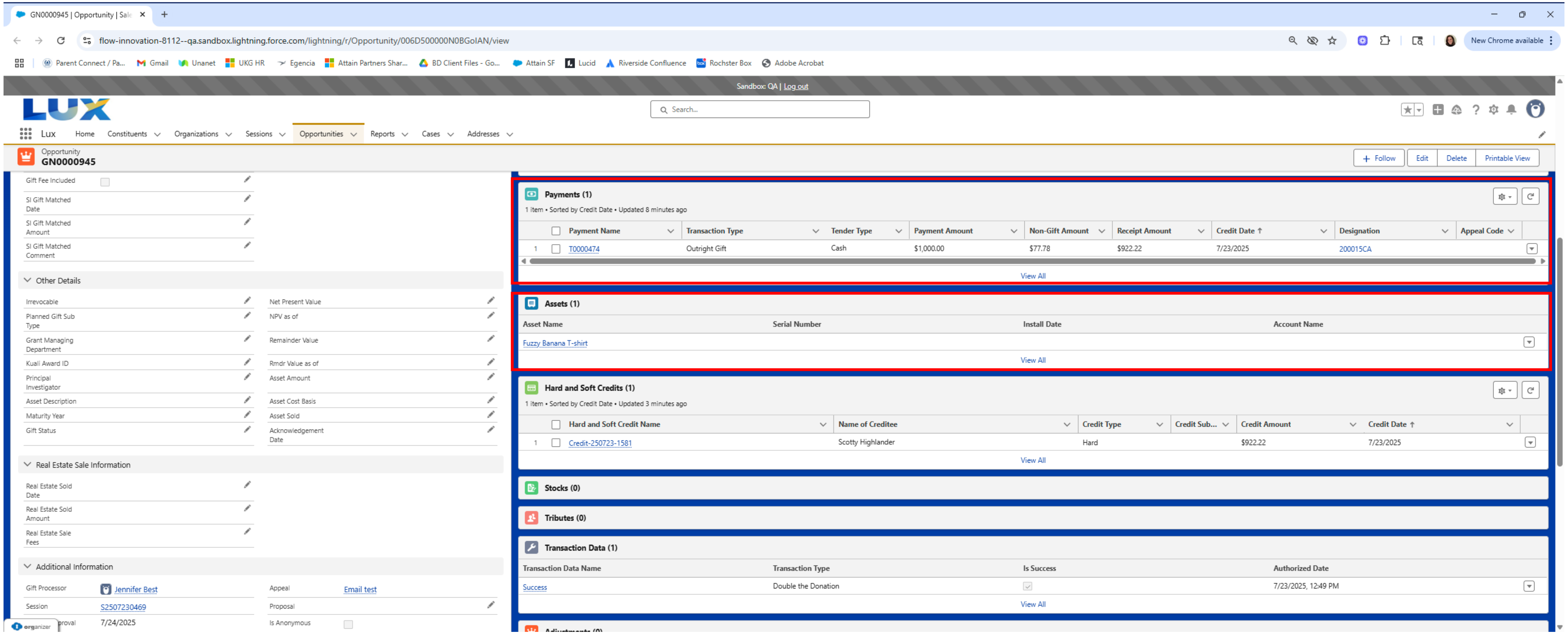
Opportunity Team: shows who processed the gift or participated in processing the gift
Opportunity Splits: if the payment that was received covered more than one gift, the split will show here
Designation Details: highlights which designation(s) the gift went toward



GIFT RECORDS: VIEW

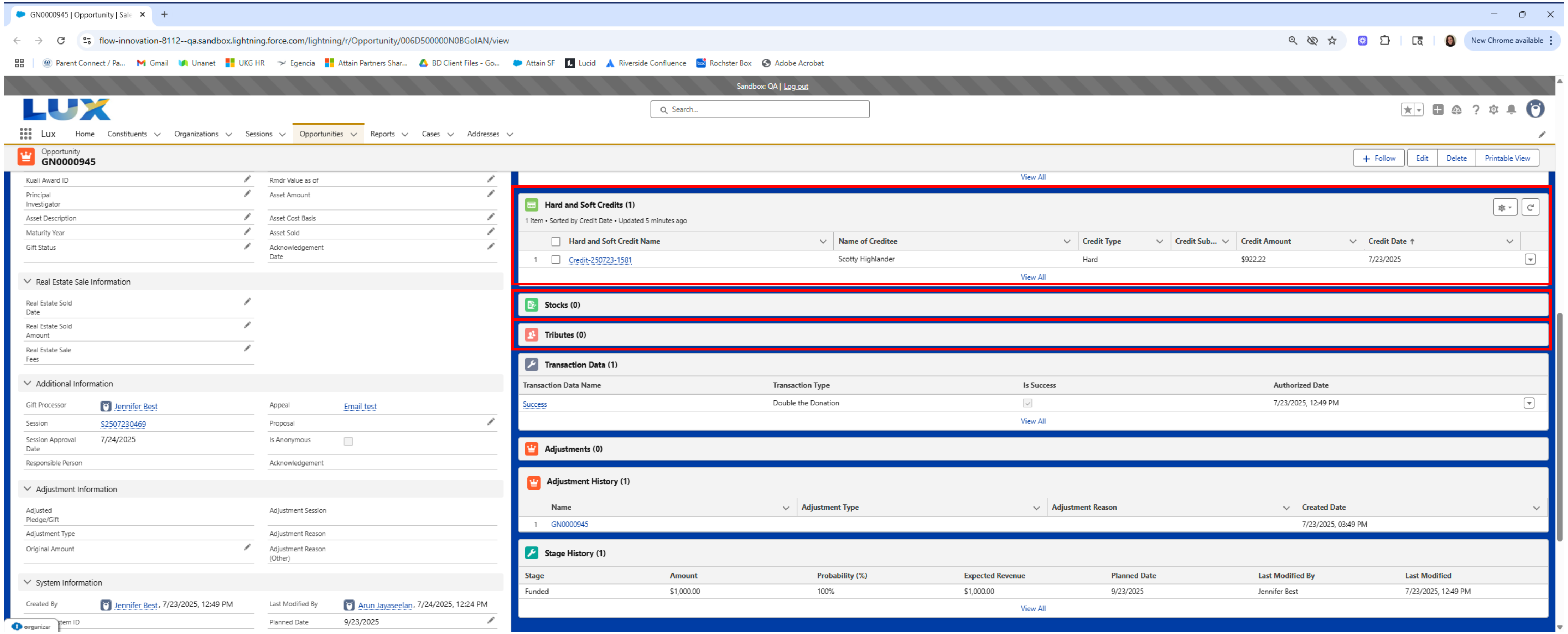
Payments: shows any payments that have been made. If this is an outright gift, you will only see one payment. If this is a pledge or recurring gift, you will see multiple payments as the constituent begins paying their commitment

Assets: if any non-gift (or insignia) items were part of the gift they will show up here



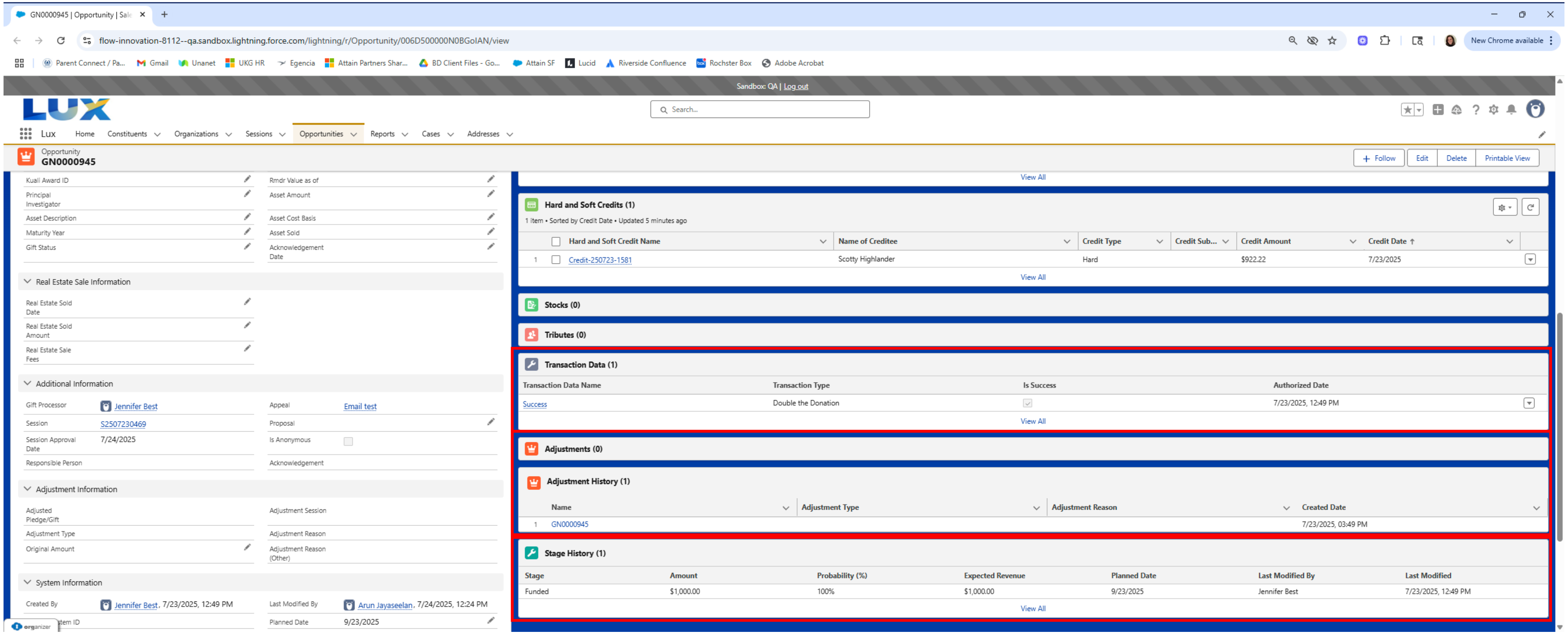
GIFT RECORDS: VIEW

Hard and Soft Credits: shows which constituents received hard and soft credit for the gift
Stocks: shows stocks associated with the gift
Tributes: if the gift was made in honor of or in memory of someone, that information will appear here



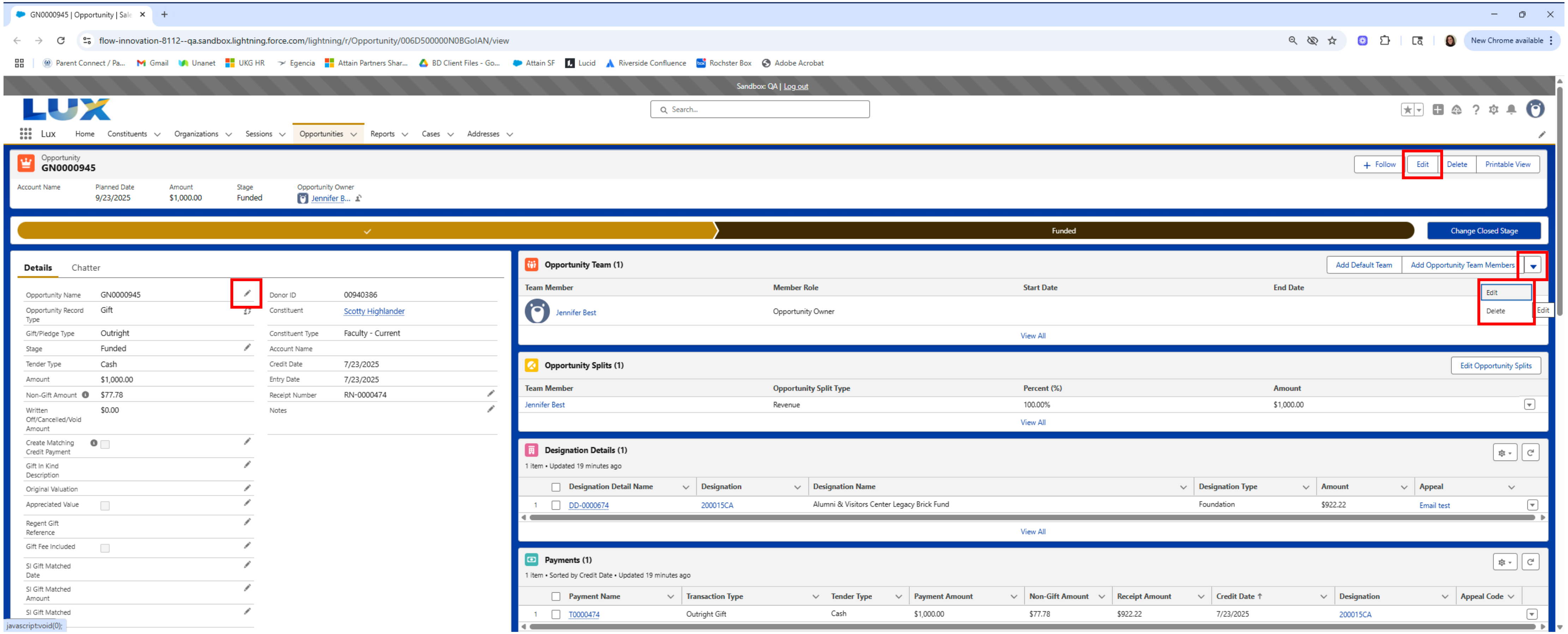
GIFT RECORDS: VIEW

Transaction Data: shows Double the Donation information and matching gift information
Adjustments & Adjustment History: if the gift was adjusted after it was submitted, the adjustment(s) and data about when they were adjusted will appear here
Stage History: gives details on when the gift was funded



GIFT RECORDS: EDIT

If you have the ability to edit a gift record, you can do so by clicking Edit, or by clicking the pencil icon next to any field. You may also edit information in any of the sections on the righthand side of the screen by clicking the dropdown arrow, then selecting Edit. This should only be used for information that doesn't impact the general ledger. For example, adding the appropriate information related to the student initiative match details.



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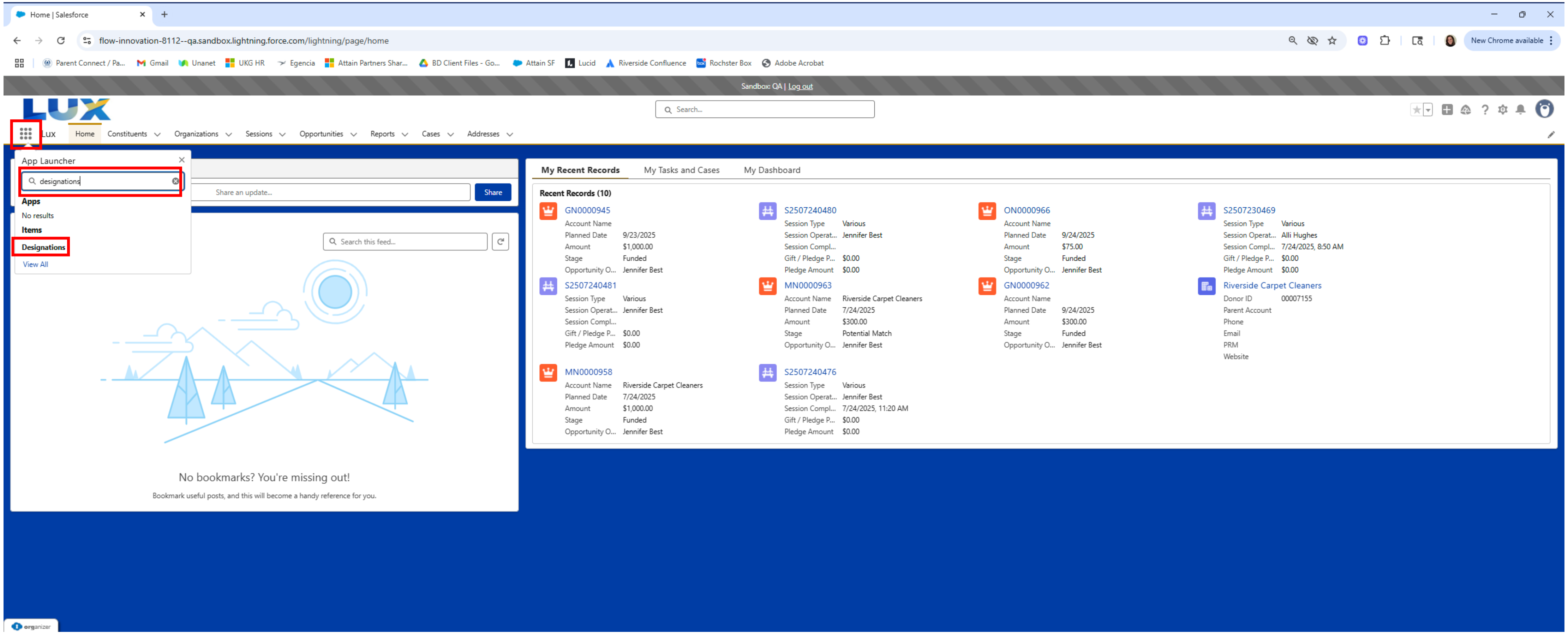
6

VIEW, EDIT, & CREATE DESIGNATIONS

UC RIVERSIDE

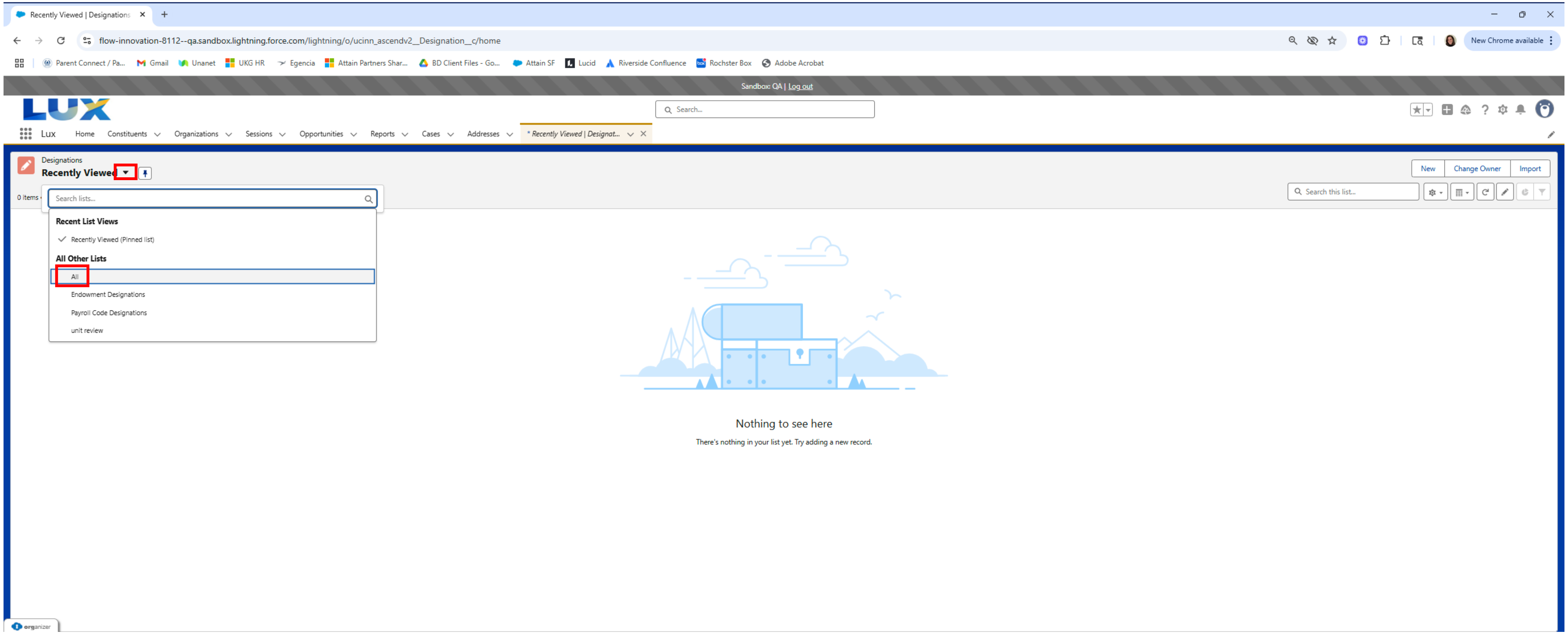
DESIGNATIONS

Type Designations in the App Launcher, then select the Designations search result.



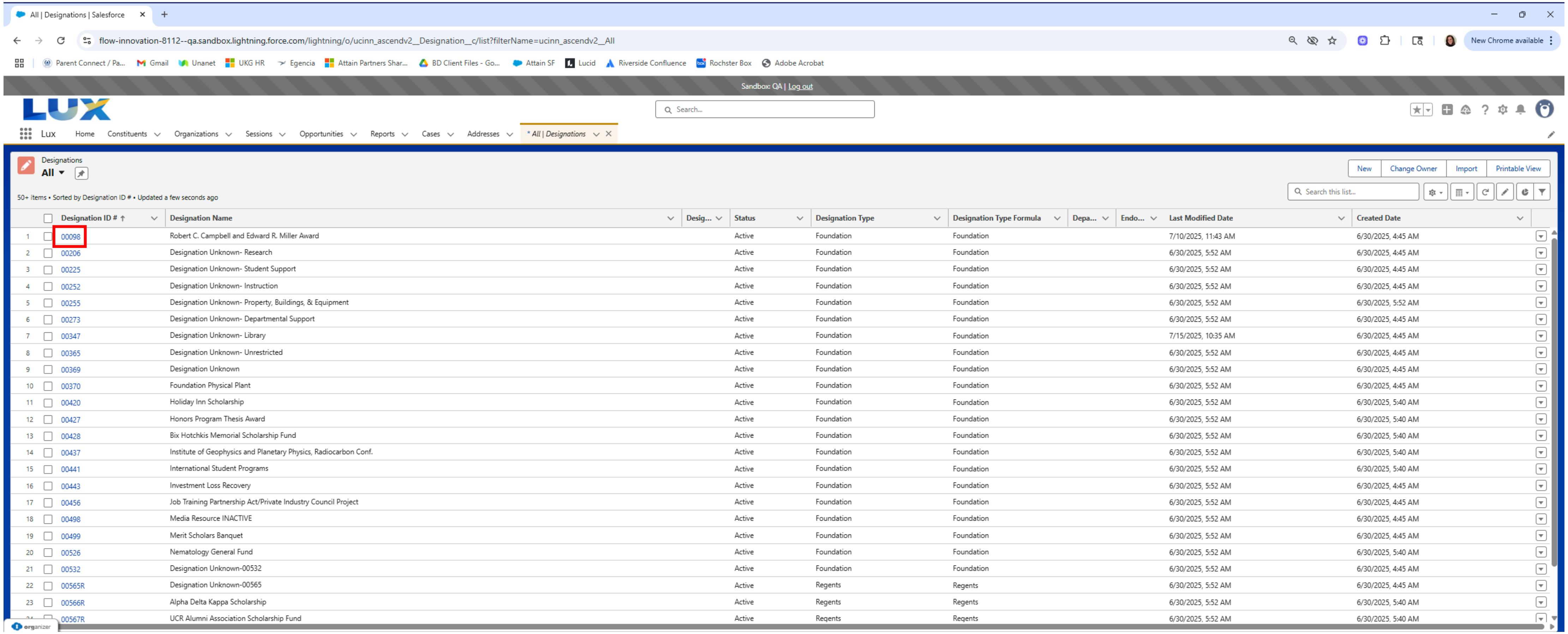
DESIGNATIONS

To view all of the Designations in the system, click the dropdown arrow next to Recently Viewed, then select All.



DESIGNATIONS

To view a specific designation, click on the hyperlinked Designation ID. You will be redirected to the designation's record page.



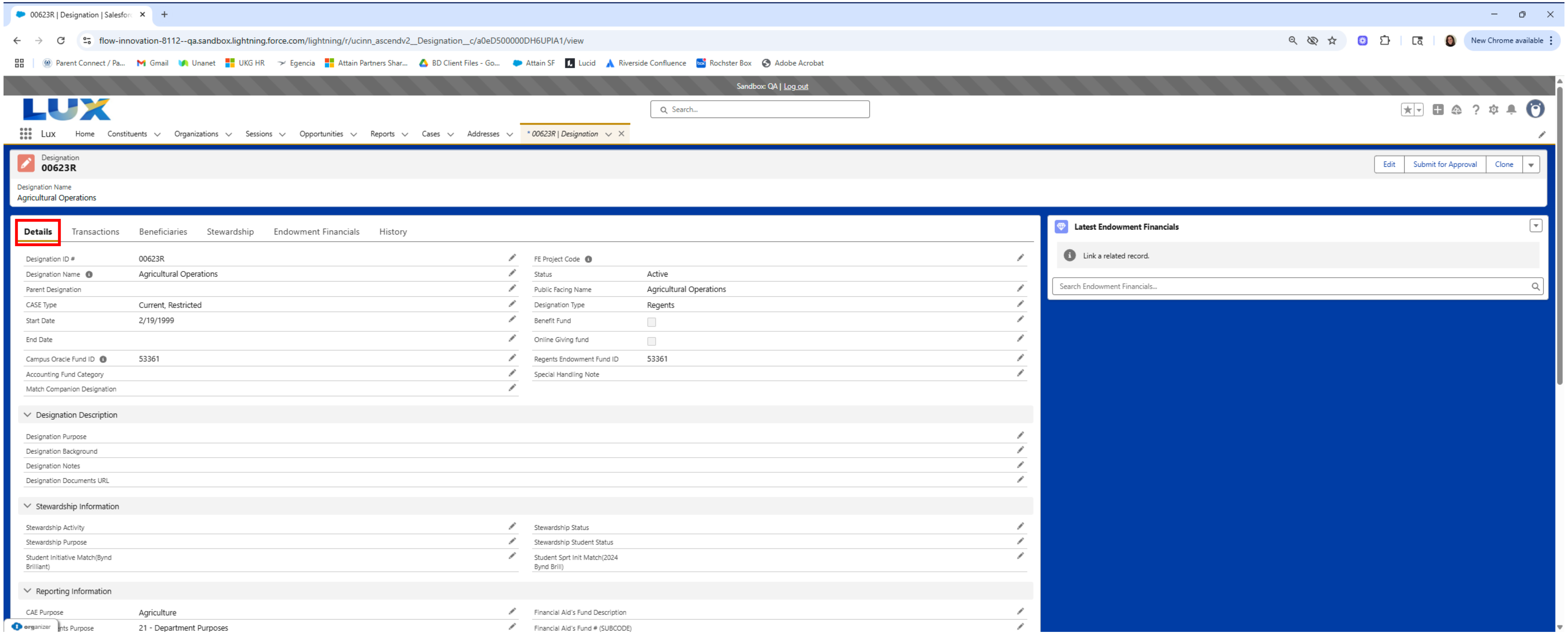
Designations
All

50+ items • Sorted by Designation ID # • Updated a few seconds ago

	Designation ID #	Designation Name	Desig...	Status	Designation Type	Designation Type Formula	Depa...	Endo...	Last Modified Date	Created Date
1	00098	Robert C. Campbell and Edward R. Miller Award		Active	Foundation	Foundation			7/10/2025, 11:43 AM	6/30/2025, 4:45 AM
2	00206	Designation Unknown- Research		Active	Foundation	Foundation			6/30/2025, 5:52 AM	6/30/2025, 4:45 AM
3	00225	Designation Unknown- Student Support		Active	Foundation	Foundation			6/30/2025, 5:52 AM	6/30/2025, 4:45 AM
4	00252	Designation Unknown- Instruction		Active	Foundation	Foundation			6/30/2025, 5:52 AM	6/30/2025, 4:45 AM
5	00255	Designation Unknown- Property, Buildings, & Equipment		Active	Foundation	Foundation			6/30/2025, 5:52 AM	6/30/2025, 5:52 AM
6	00273	Designation Unknown- Departmental Support		Active	Foundation	Foundation			6/30/2025, 5:52 AM	6/30/2025, 4:45 AM
7	00347	Designation Unknown- Library		Active	Foundation	Foundation			7/15/2025, 10:35 AM	6/30/2025, 4:45 AM
8	00365	Designation Unknown- Unrestricted		Active	Foundation	Foundation			6/30/2025, 5:52 AM	6/30/2025, 4:45 AM
9	00369	Designation Unknown		Active	Foundation	Foundation			6/30/2025, 5:52 AM	6/30/2025, 4:45 AM
10	00370	Foundation Physical Plant		Active	Foundation	Foundation			6/30/2025, 5:52 AM	6/30/2025, 4:45 AM
11	00420	Holiday Inn Scholarship		Active	Foundation	Foundation			6/30/2025, 5:52 AM	6/30/2025, 5:40 AM
12	00427	Honors Program Thesis Award		Active	Foundation	Foundation			6/30/2025, 5:52 AM	6/30/2025, 5:40 AM
13	00428	Bix Hotchkis Memorial Scholarship Fund		Active	Foundation	Foundation			6/30/2025, 5:52 AM	6/30/2025, 5:40 AM
14	00437	Institute of Geophysics and Planetary Physics, Radiocarbon Conf.		Active	Foundation	Foundation			6/30/2025, 5:52 AM	6/30/2025, 5:40 AM
15	00441	International Student Programs		Active	Foundation	Foundation			6/30/2025, 5:52 AM	6/30/2025, 5:40 AM
16	00443	Investment Loss Recovery		Active	Foundation	Foundation			6/30/2025, 5:52 AM	6/30/2025, 4:45 AM
17	00456	Job Training Partnership Act/Private Industry Council Project		Active	Foundation	Foundation			6/30/2025, 5:52 AM	6/30/2025, 4:45 AM
18	00498	Media Resource INACTIVE		Active	Foundation	Foundation			6/30/2025, 5:52 AM	6/30/2025, 4:45 AM
19	00499	Merit Scholars Banquet		Active	Foundation	Foundation			6/30/2025, 5:52 AM	6/30/2025, 4:45 AM
20	00526	Nematology General Fund		Active	Foundation	Foundation			6/30/2025, 5:52 AM	6/30/2025, 5:40 AM
21	00532	Designation Unknown-00532		Active	Foundation	Foundation			6/30/2025, 5:52 AM	6/30/2025, 4:45 AM
22	00565R	Designation Unknown-00565		Active	Regents	Regents			6/30/2025, 5:52 AM	6/30/2025, 4:45 AM
23	00566R	Alpha Delta Kappa Scholarship		Active	Regents	Regents			6/30/2025, 5:52 AM	6/30/2025, 5:40 AM
24	00567R	UCR Alumni Association Scholarship Fund		Active	Regents	Regents			6/30/2025, 5:52 AM	6/30/2025, 5:40 AM

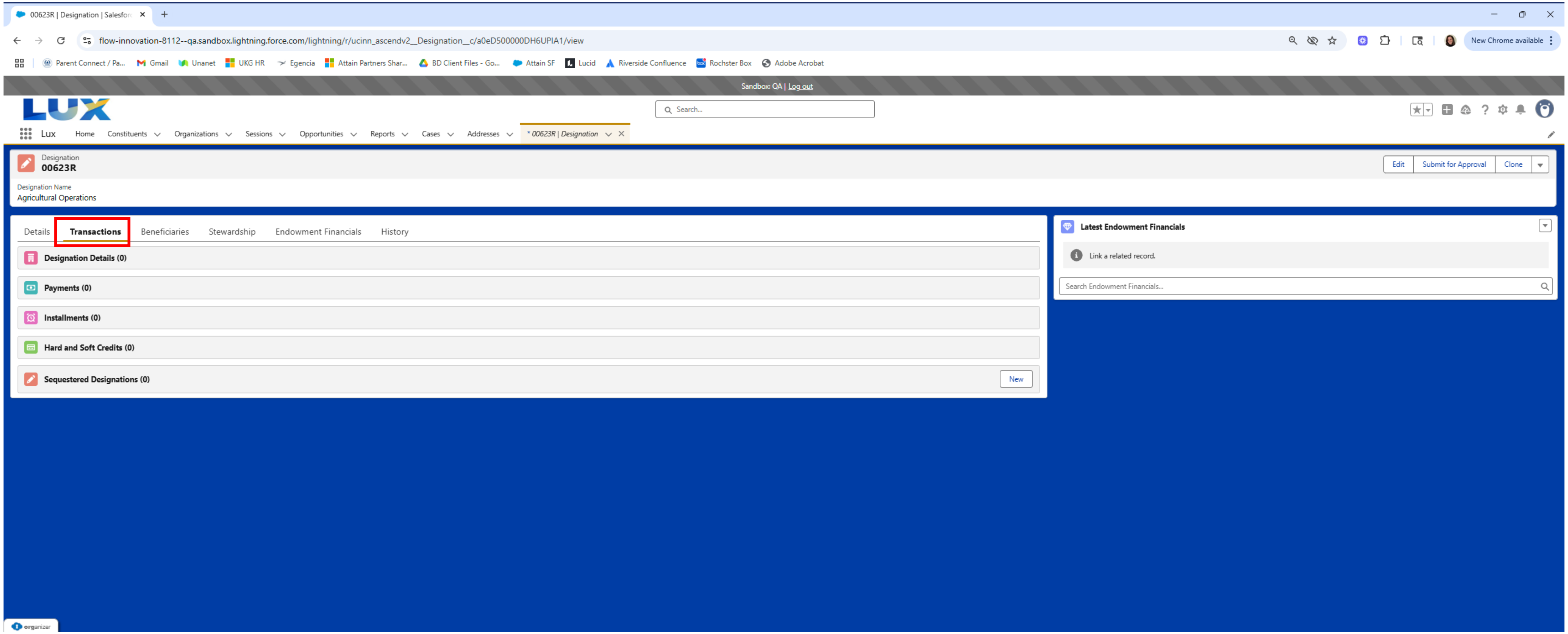
VIEW DESIGNATIONS: DETAILS

The Details tab gives information about the designation's history, what it's used for, and summaries on its financials.



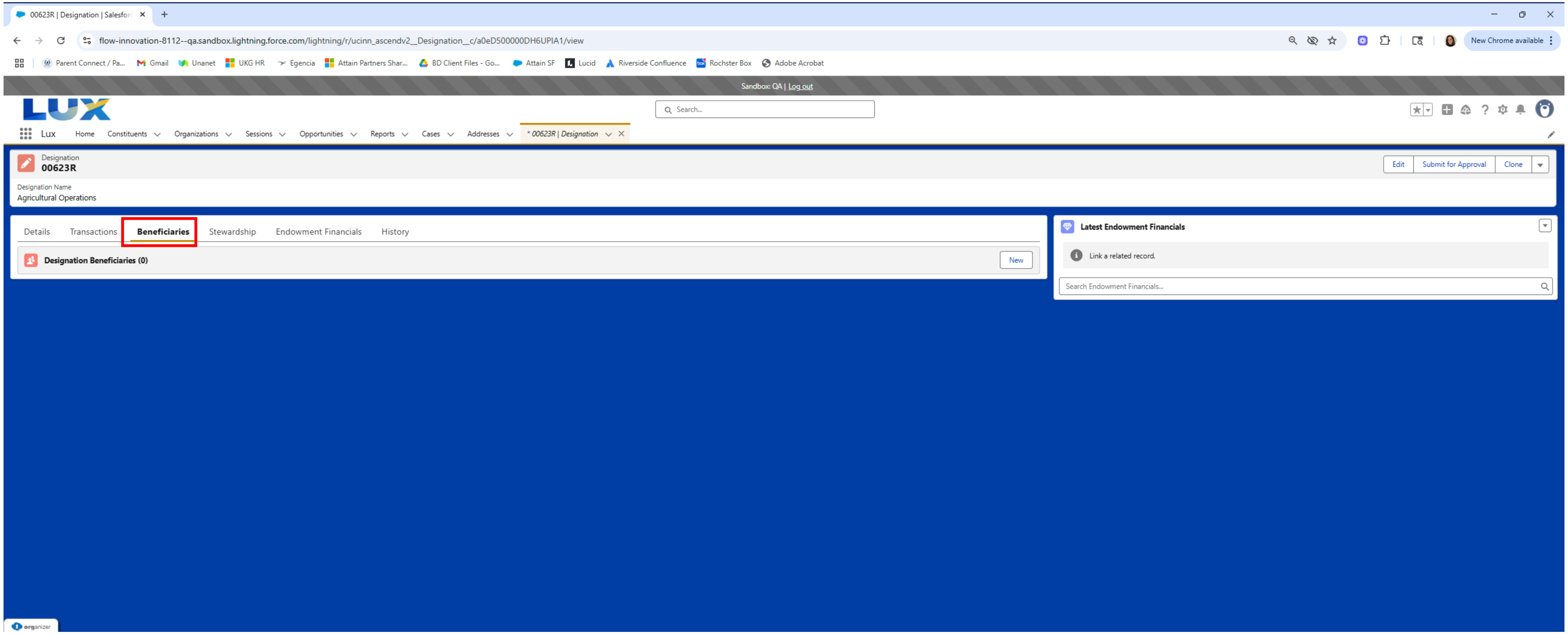
VIEW DESIGNATIONS: TRANSACTIONS

The Transactions tab showcases any payments and gifts that were made to the designation. You can see details on the constituent/organization that donated and the amount they donated.



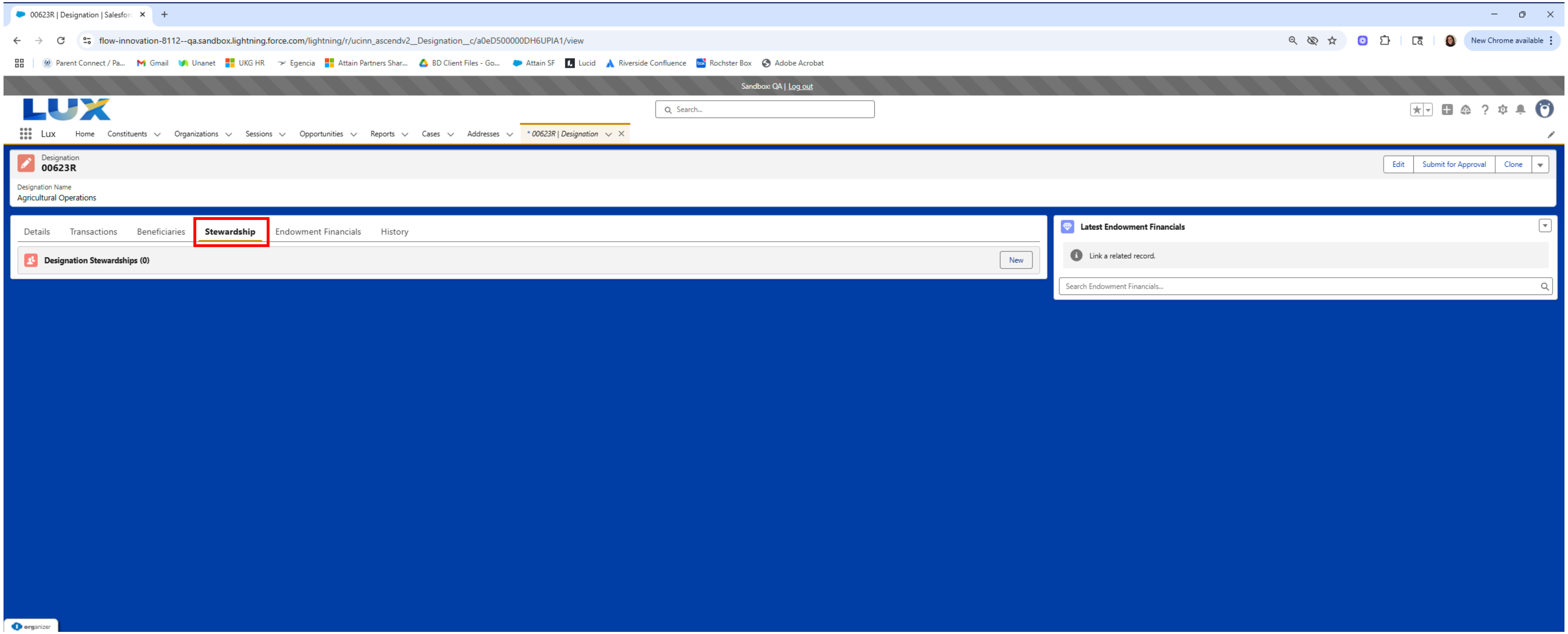
VIEW DESIGNATIONS: BENEFICIARIES

If the designation used for a scholarship or pays out to any beneficiaries, the Beneficiaries tab will show details on who benefits, when they received the benefits, and how much they received.



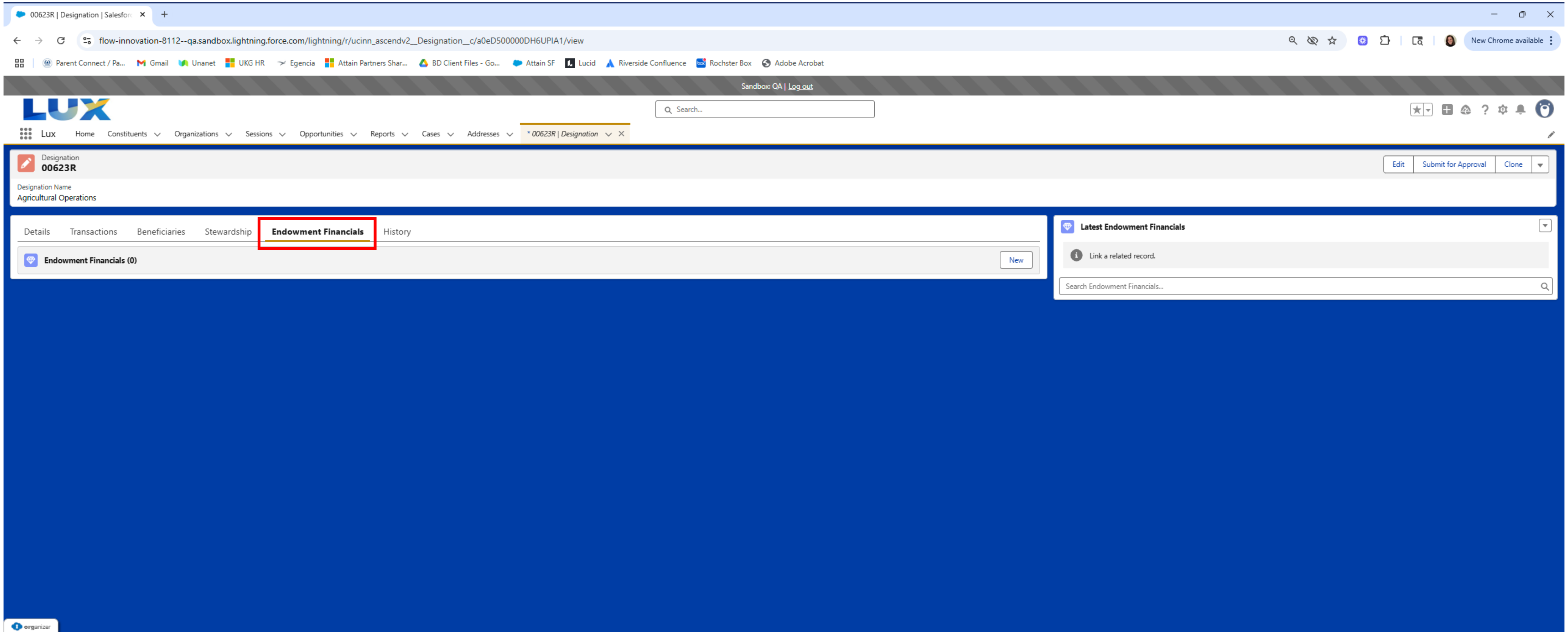
VIEW DESIGNATIONS: STEWARDSHIP

If a constituent or organization is the founding donor or receives endowment reports for the designation, you can see information about them here.



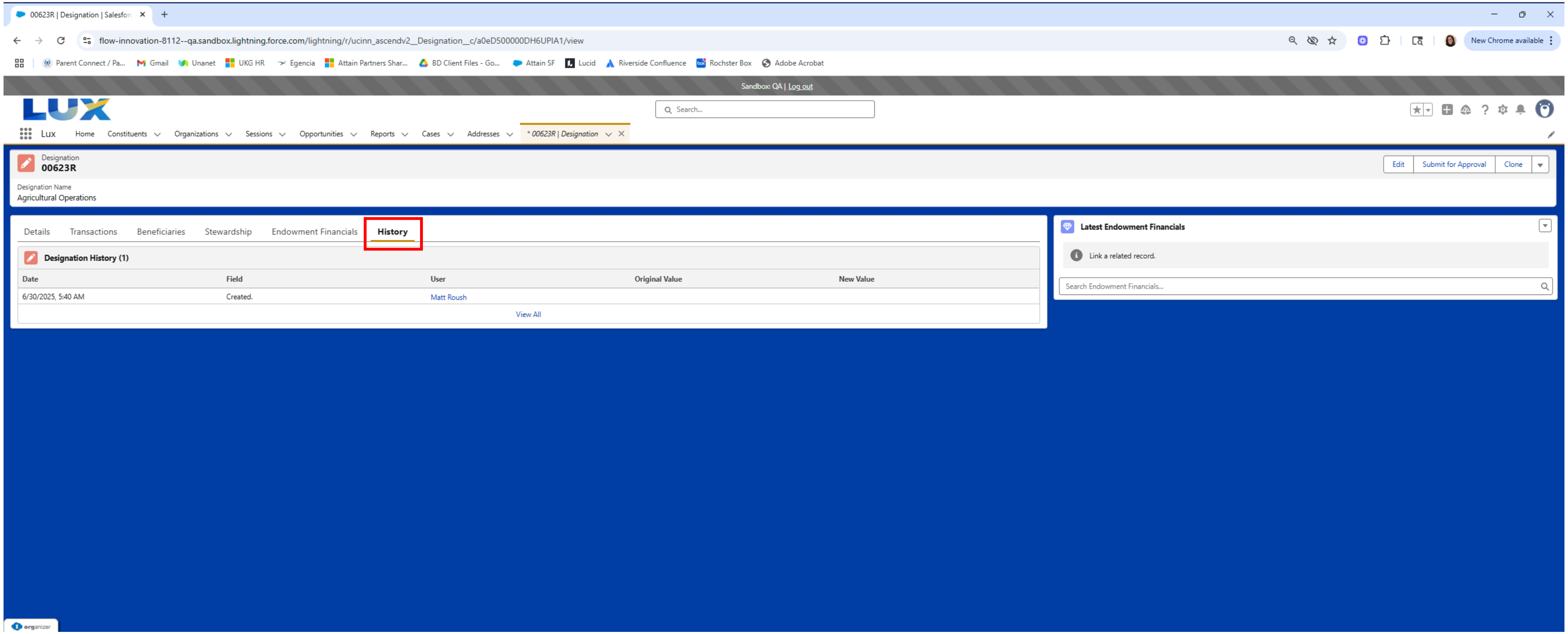
VIEW DESIGNATIONS: ENDOWMENT FINANCIALS

The Endowment Financials tab shows how much money is in the endowment and a history of the endowment totals. This will be updated annually after the annual external audit is complete.



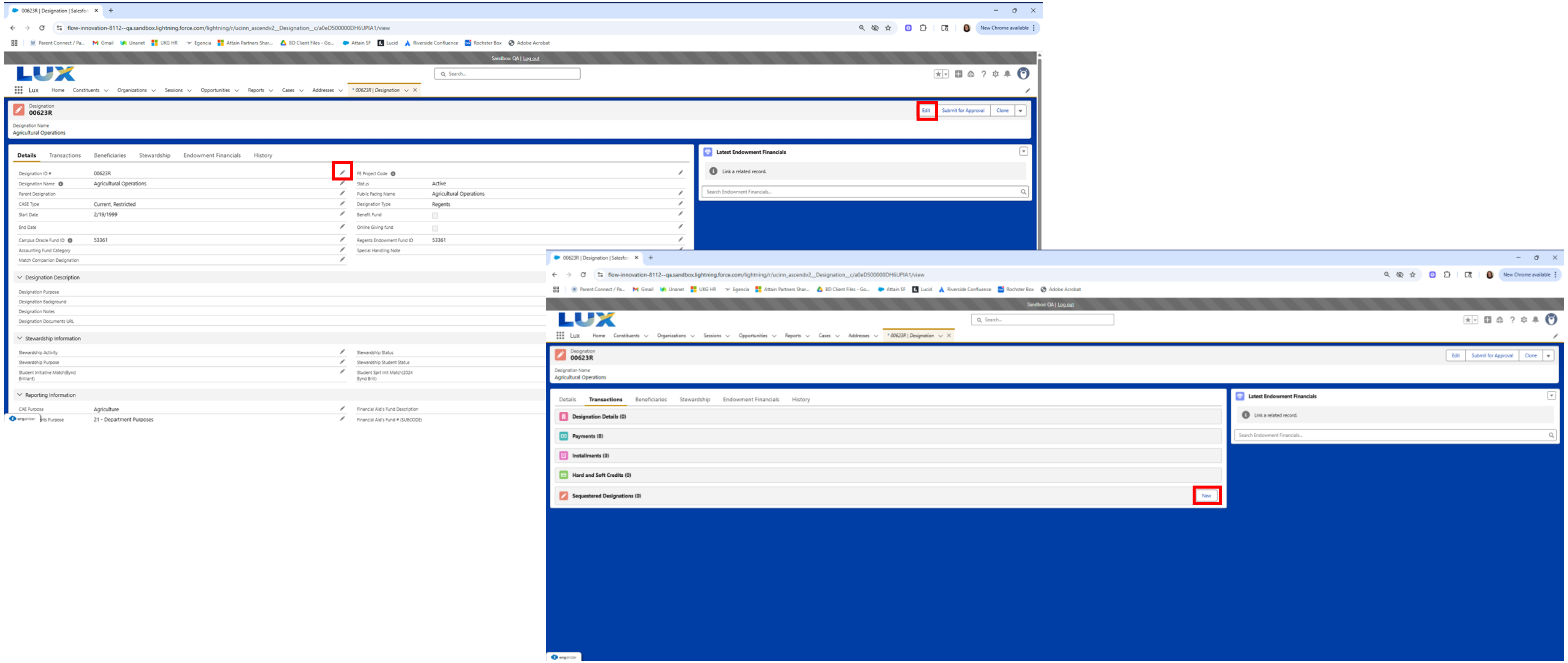
VIEW DESIGNATIONS: HISTORY

The History tab shows information on when the designation was created and when it has been updated.



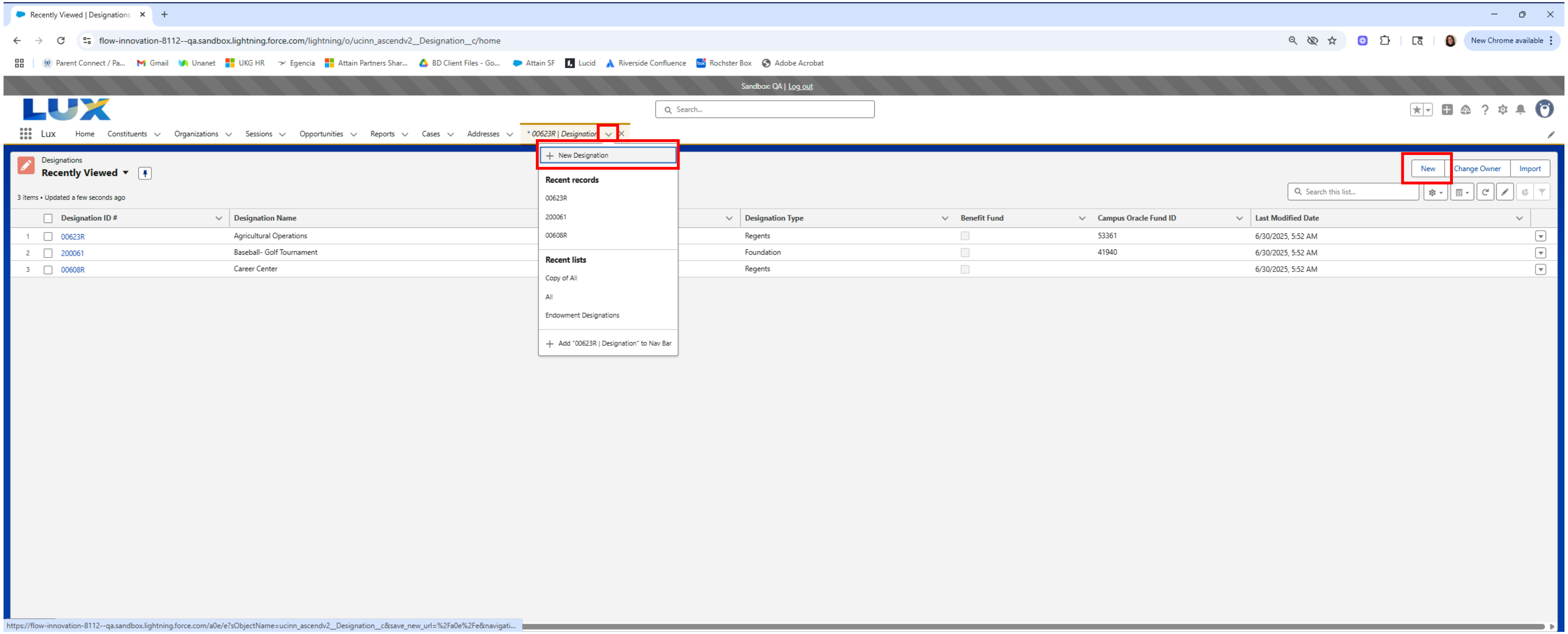
EDIT DESIGNATIONS

Editing a designation requires the right permissions. If you have the permission and need to edit a designation, you can click Edit or any pencil icon to modify fields on the Details tab. Editing information on subsequent tabs (like Transactions) is limited to certain information, as most of the data on those tabs is being pulled over from other records. If you have the ability to edit the information, you will see a New button that allows you to add new records. Or, to edit a record, click the dropdown arrow next to the record, then click Edit.



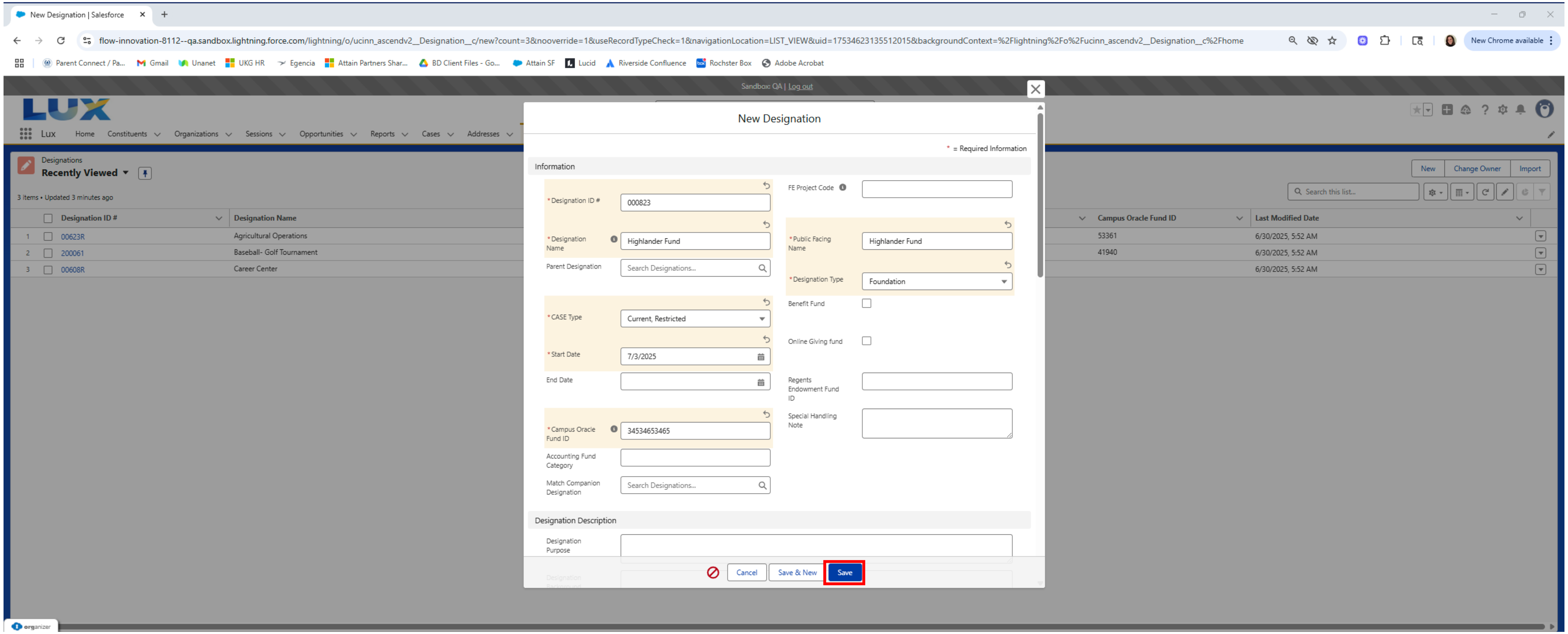
CREATE DESIGNATIONS

To create a new designation, you may either click the dropdown arrow next to Designation, then click New Designation, or you can click New in the Designation list view.



CREATE DESIGNATIONS

A popup will appear. Complete the required fields, then click Save. If you need to modify the information after clicking save, simply navigate to the designation's record page, then follow the steps to edit the designation.



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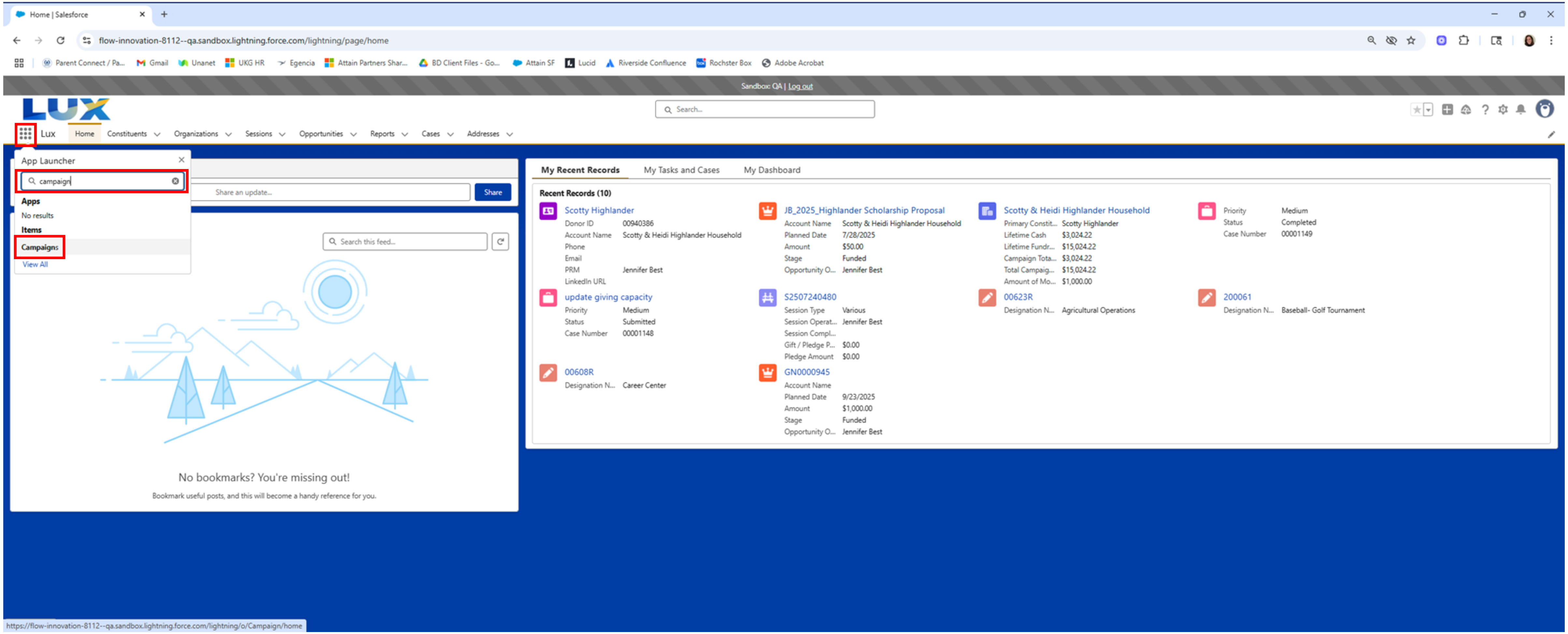
7

CAMPAIGNS

UC RIVERSIDE

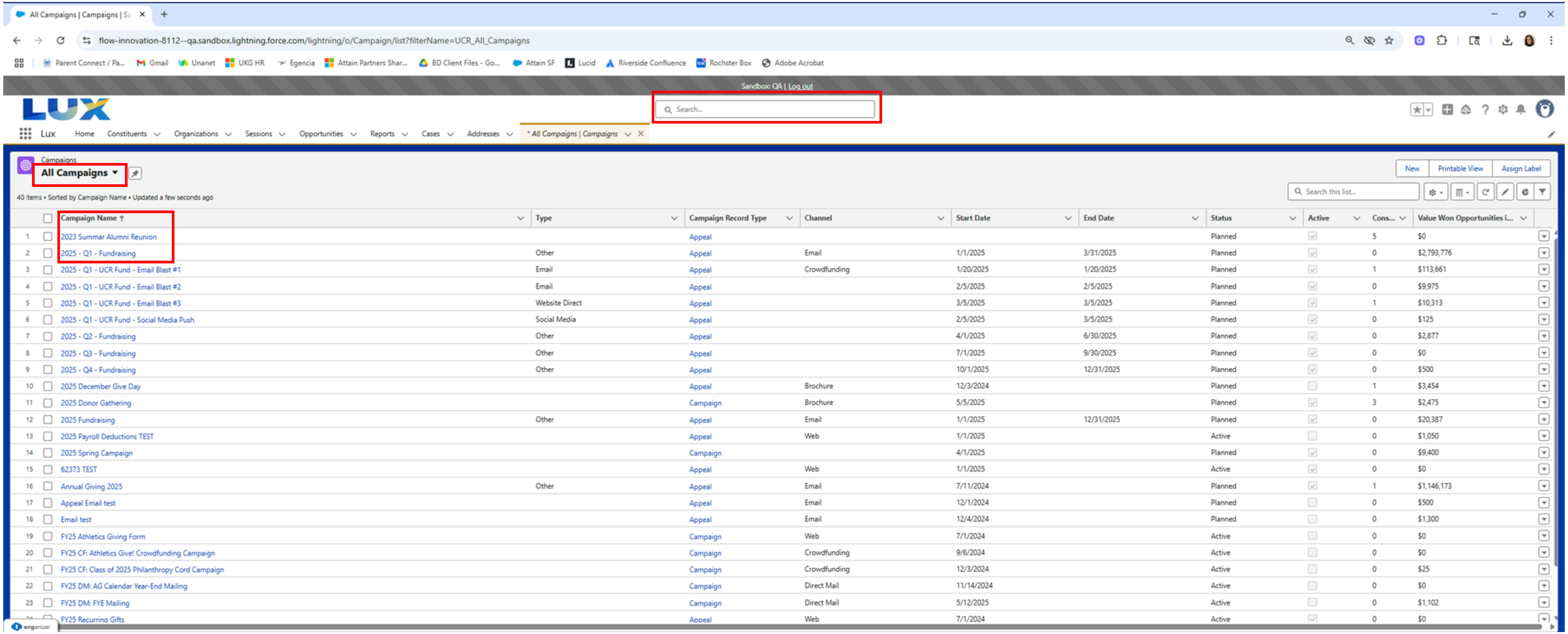
VIEW CAMPAIGNS

In the App Launcher, begin typing Campaigns, then select Campaigns.



VIEW CAMPAIGNS

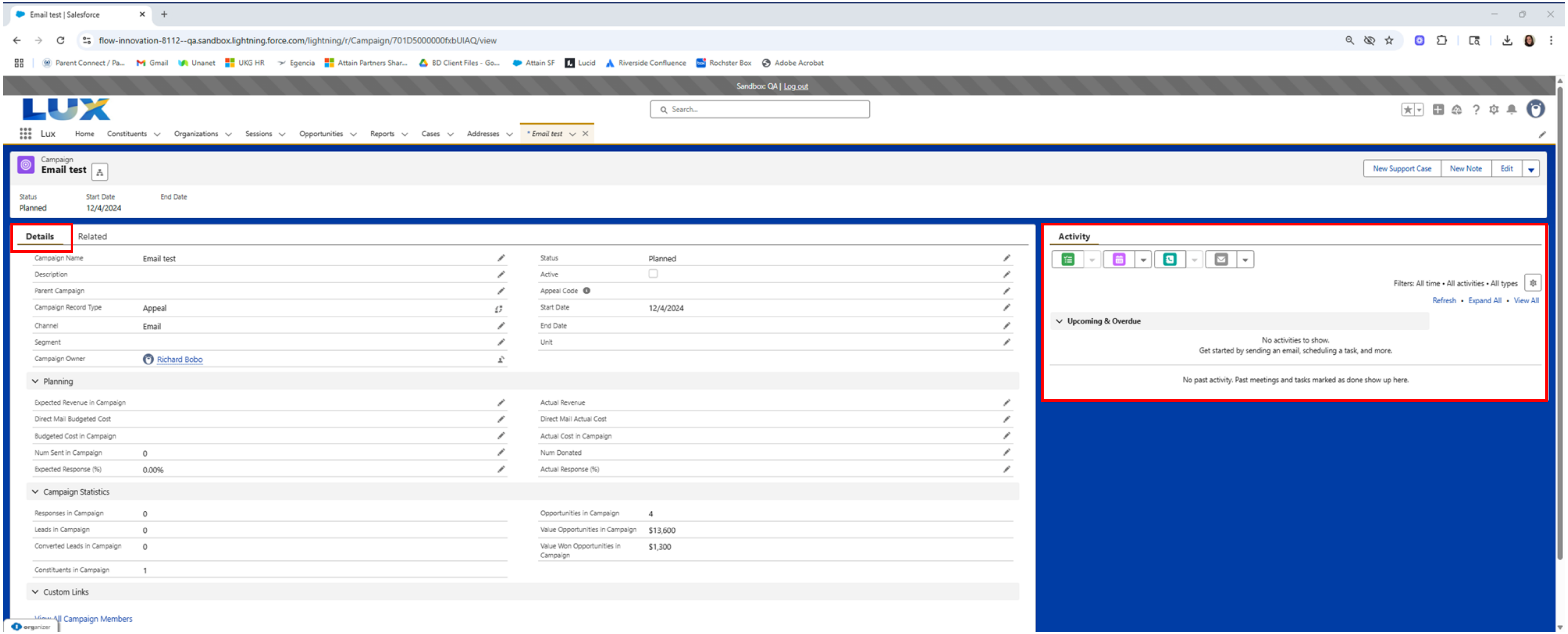
Change the list view to All Campaigns, then select the campaign you wish to view by clicking its hyperlinked campaign name. You may also search for campaigns by name in the global search bar.



	Campaign Name	Type	Campaign Record Type	Channel	Start Date	End Date	Status	Active	Cons...	Value Won Opportunities i...
1	2023 Summar Alumni Reunion		Appeal				Planned		5	$0
2	2025 - Q1 - Fundraising	Other	Appeal	Email	1/1/2025	3/31/2025	Planned		0	$2,793,776
3	2025 - Q1 - UCR Fund - Email Blast #1	Email	Appeal	Crowdfunding	1/20/2025	1/20/2025	Planned		1	$113,661
4	2025 - Q1 - UCR Fund - Email Blast #2	Email	Appeal		2/5/2025	2/5/2025	Planned		0	$9,975
5	2025 - Q1 - UCR Fund - Email Blast #3	Website Direct	Appeal		3/5/2025	3/5/2025	Planned		1	$10,313
6	2025 - Q1 - UCR Fund - Social Media Push	Social Media	Appeal		2/5/2025	3/5/2025	Planned		0	$125
7	2025 - Q2 - Fundraising	Other	Appeal		4/1/2025	6/30/2025	Planned		0	$2,877
8	2025 - Q3 - Fundraising	Other	Appeal		7/1/2025	9/30/2025	Planned		0	$0
9	2025 - Q4 - Fundraising	Other	Appeal		10/1/2025	12/31/2025	Planned		0	$500
10	2025 December Give Day		Appeal	Brochure	12/3/2024		Planned		1	$3,454
11	2025 Donor Gathering		Campaign	Brochure	5/5/2025		Planned		3	$2,475
12	2025 Fundraising	Other	Appeal	Email	1/1/2025	12/31/2025	Planned		0	$20,387
13	2025 Payroll Deductions TEST		Appeal	Web	1/1/2025		Active		0	$1,050
14	2025 Spring Campaign		Campaign		4/1/2025		Planned		0	$9,400
15	62373 TEST		Appeal	Web	1/1/2025		Active		0	$0
16	Annual Giving 2025	Other	Appeal	Email	7/11/2024		Planned		1	$1,146,173
17	Appeal Email test		Appeal	Email	12/1/2024		Planned		0	$500
18	Email test		Appeal	Email	12/4/2024		Planned		0	$1,300
19	FY25 Athletics Giving Form		Campaign	Web	7/1/2024		Active		0	$0
20	FY25 CF: Athletics Give! Crowdfunding Campaign		Campaign	Crowdfunding	9/6/2024		Active		0	$0
21	FY25 CF: Class of 2025 Philanthropy Cord Campaign		Campaign	Crowdfunding	12/3/2024		Active		0	$25
22	FY25 DM: AG Calendar Year-End Mailing		Campaign	Direct Mail	11/14/2024		Active		0	$0
23	FY25 DM: FYE Mailing		Campaign	Direct Mail	5/12/2025		Active		0	$1,102
24	FY25 Recurring Gifts		Appeal	Web	7/1/2024		Active		0	$0

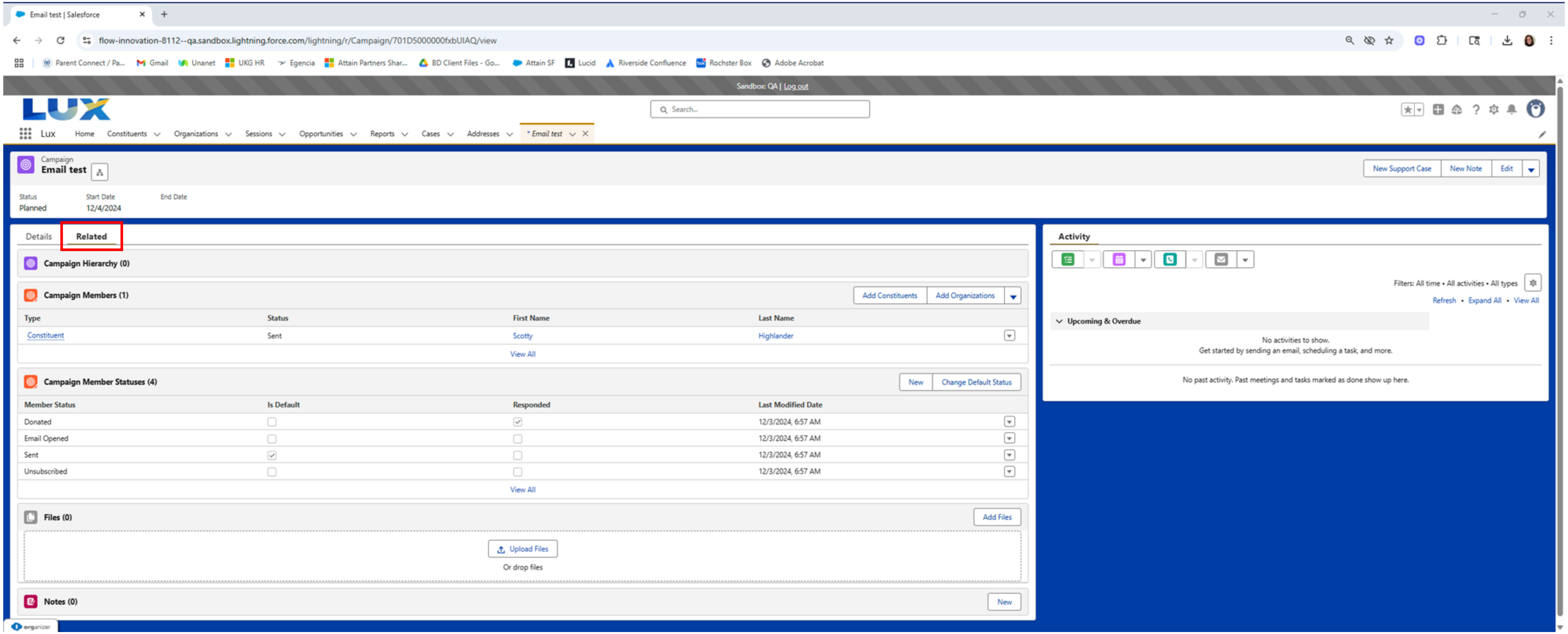
VIEW CAMPAIGNS

You will be redirected to the campaign's record page. The Details tab gives high-level information about the campaign. The Activities section will show you all updates, communications, and action taken on the campaign.



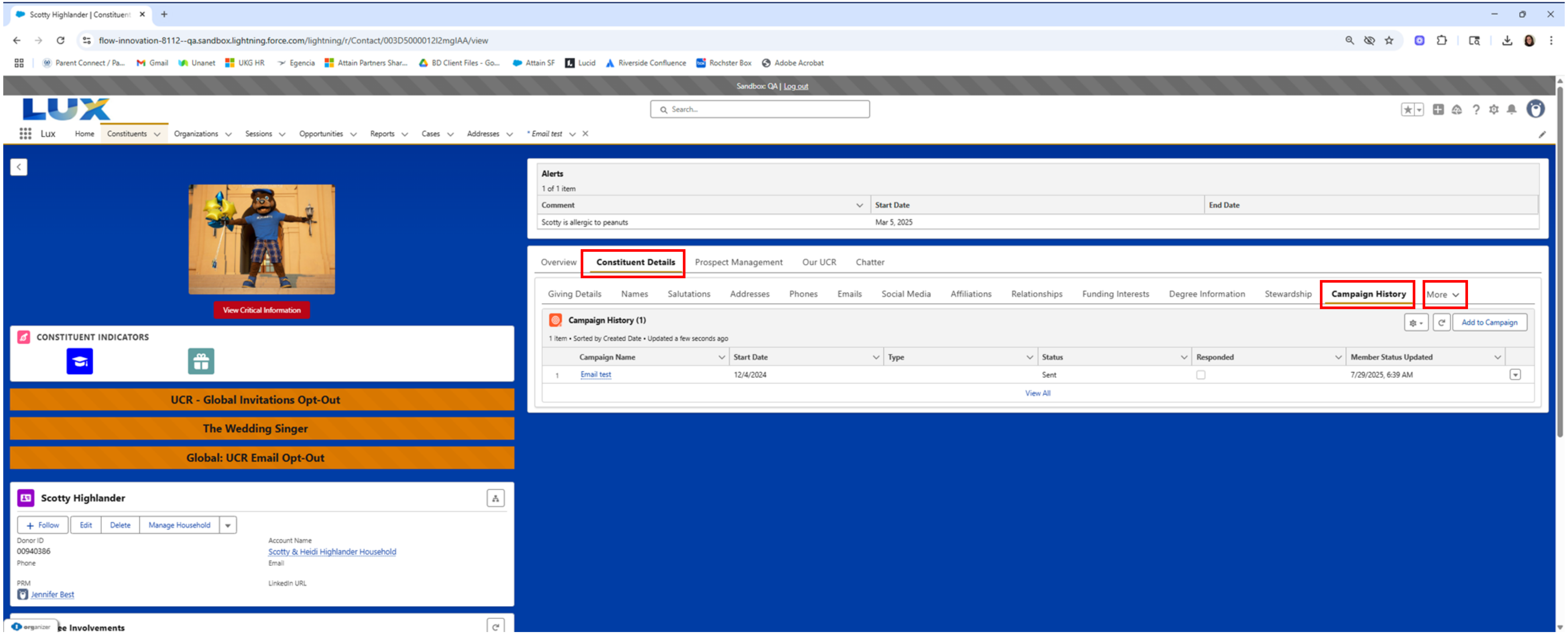
VIEW CAMPAIGNS

The Related tab will show any other campaign, constituent/organization, campaign status, and files/notes related to the campaign.



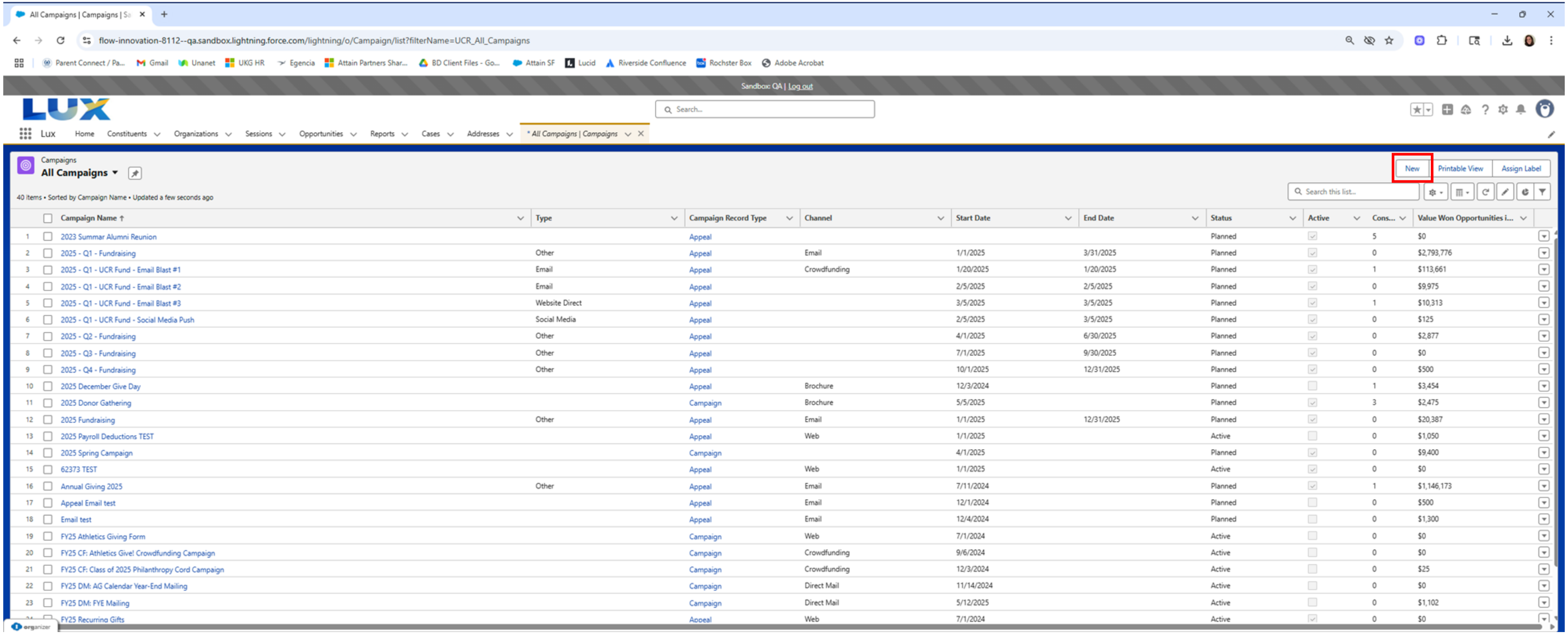
VIEW CAMPAIGNS: CONSTITUENT/ORGANIZATION RECORD

To see which campaigns a constituent or organization has been part of, navigate to their record page, then to the Constituent Details tab. Then, click the Campaign History subtab (you may have to click more to find the Campaign History subtab). The list here will show all current and former campaigns the constituent was involved in.



CREATE A CAMPAIGN

From the campaign list view, click New.



	Campaign Name	Type	Campaign Record Type	Channel	Start Date	End Date	Status	Cons...	Value Won Opportunities i...
1	2023 Summar Alumni Reunion		Appeal				Planned	5	$0
2	2025 - Q1 - Fundraising	Other	Appeal	Email	1/1/2025	3/31/2025	Planned	0	$2,793,776
3	2025 - Q1 - UCR Fund - Email Blast #1	Email	Appeal	Crowdfunding	1/20/2025	1/20/2025	Planned	1	$113,661
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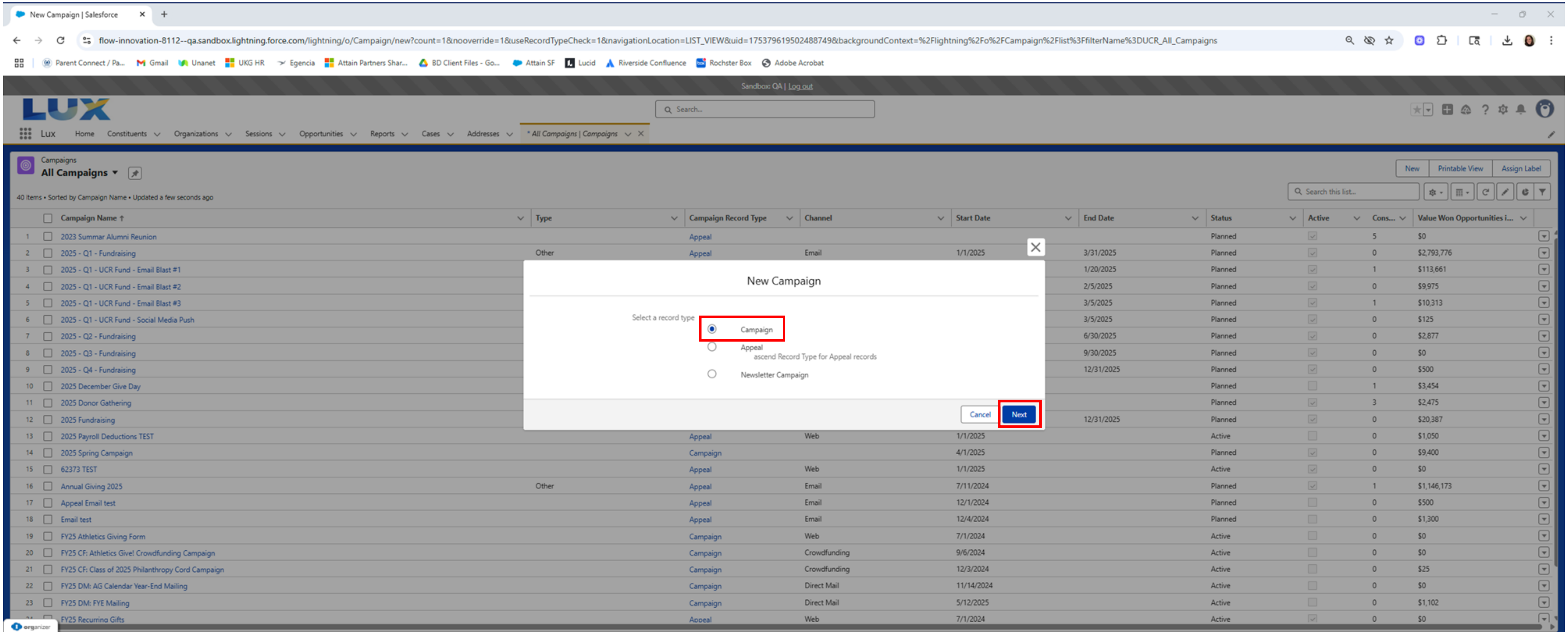
6	2025 - Q1 - UCR Fund - Social Media Push	Social Media	Appeal		2/5/2025	3/5/2025	Planned	0	$125
7	2025 - Q2 - Fundraising	Other	Appeal		4/1/2025	6/30/2025	Planned	0	$2,877
8	2025 - Q3 - Fundraising	Other	Appeal		7/1/2025	9/30/2025	Planned	0	$0
9	2025 - Q4 - Fundraising	Other	Appeal		10/1/2025	12/31/2025	Planned	0	$500
10	2025 December Give Day		Appeal	Brochure	12/3/2024		Planned	1	$3,454
11	2025 Donor Gathering		Campaign	Brochure	5/5/2025		Planned	3	$2,475
12	2025 Fundraising	Other	Appeal	Email	1/1/2025	12/31/2025	Planned	0	$20,387
13	2025 Payroll Deductions TEST		Appeal	Web	1/1/2025		Active	0	$1,050
14	2025 Spring Campaign		Campaign		4/1/2025		Planned	0	$9,400
15	62373 TEST		Appeal	Web	1/1/2025		Active	0	$0
16	Annual Giving 2025	Other	Appeal	Email	7/11/2024		Planned	1	$1,146,173
17	Appeal Email test		Appeal	Email	12/1/2024		Planned	0	$500
18	Email test		Appeal	Email	12/4/2024		Planned	0	$1,300
19	FY25 Athletics Giving Form		Campaign	Web	7/1/2024		Active	0	$0
20	FY25 CF: Athletics Give! Crowdfunding Campaign		Campaign	Crowdfunding	9/6/2024		Active	0	$0
21	FY25 CF: Class of 2025 Philanthropy Cord Campaign		Campaign	Crowdfunding	12/3/2024		Active	0	$25
22	FY25 DM: AG Calendar Year-End Mailing		Campaign	Direct Mail	11/14/2024		Active	0	$0
23	FY25 DM: FYE Mailing		Campaign	Direct Mail	5/12/2025		Active	0	$1,102
24	FY25 Recurring Gifts		Appeal	Web	7/1/2024		Active	0	$0

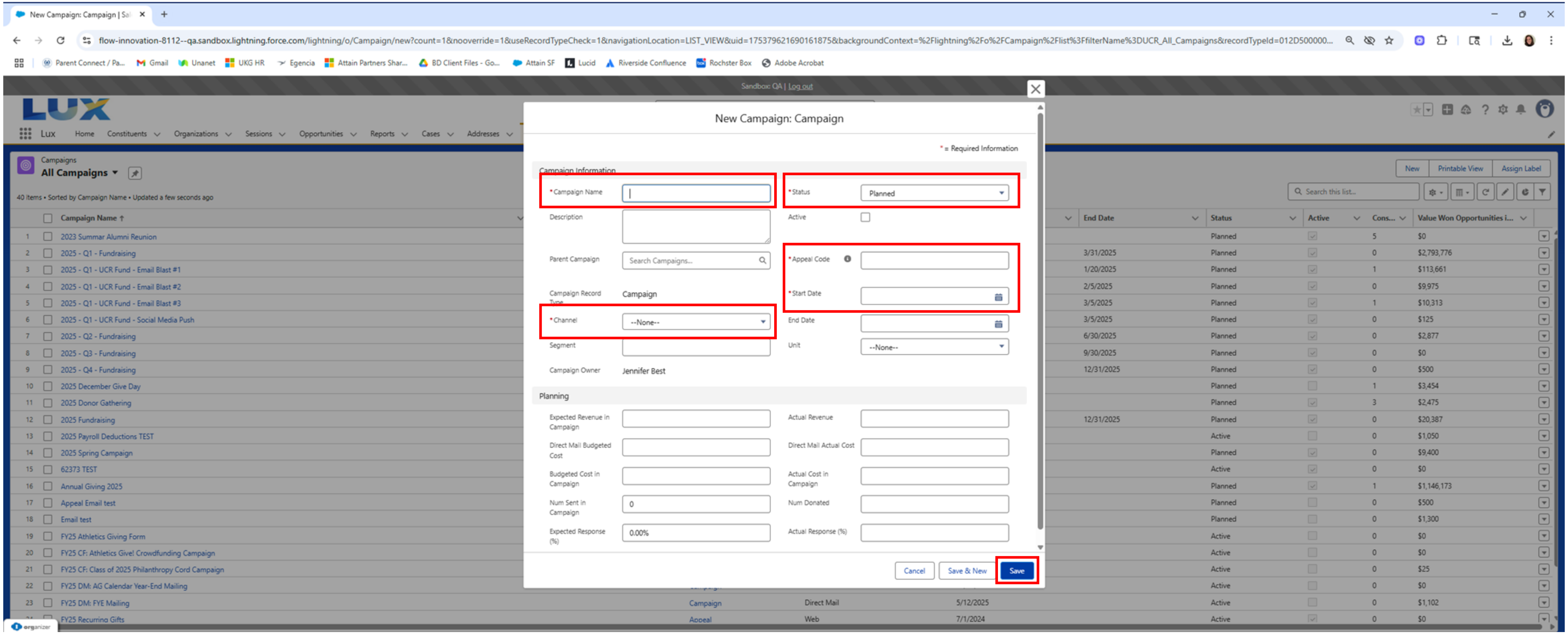
CREATE A CAMPAIGN

A popup will appear. Select the type of campaign you want to create, then click Next.



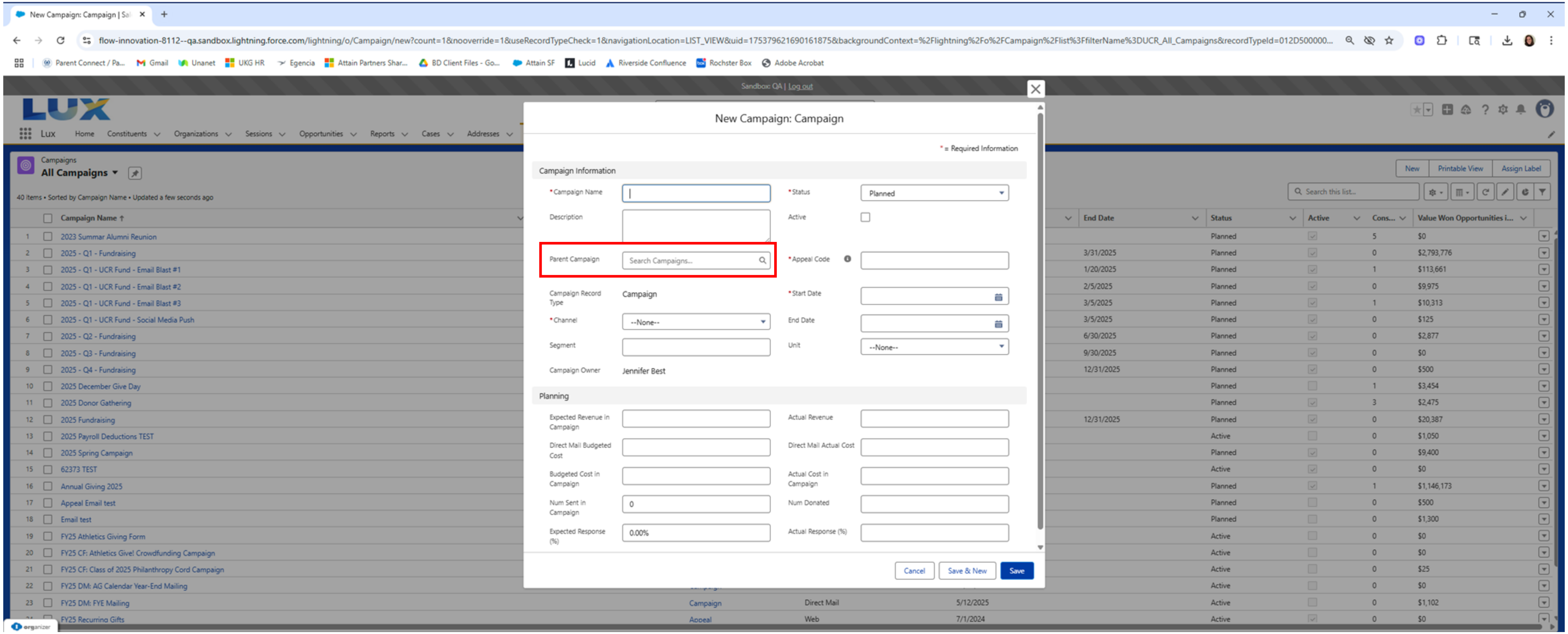
CREATE A CAMPAIGN

A new popup will appear. Fill in the required fields and any other information you have, then click Save.



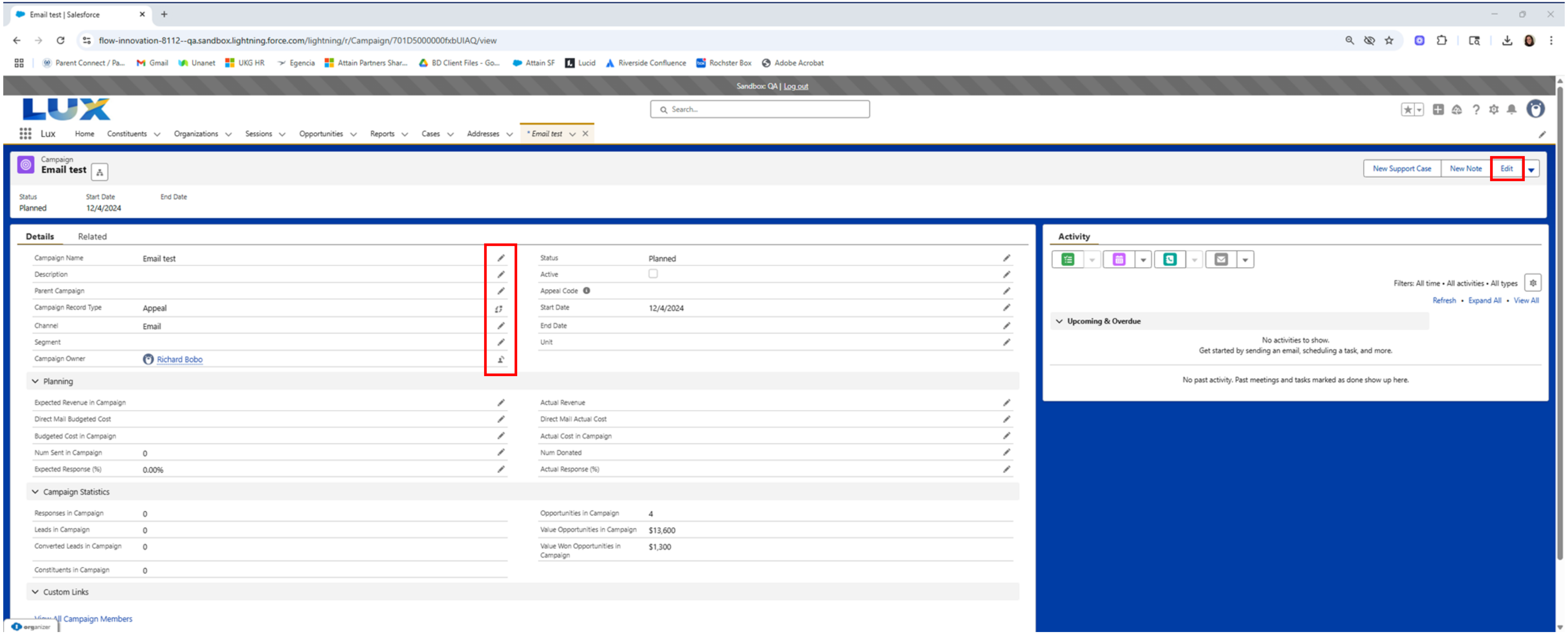
CREATE A CAMPAIGN: PARENT CAMPAIGN

If there is a larger campaign that's related to the campaign you're creating (e.g., 2025 emails is the large campaign and you're creating one for Q1 of 2025), you can add the larger campaign as the parent. Doing this will like the campaign records and will allow you to see the data presented as a whole.



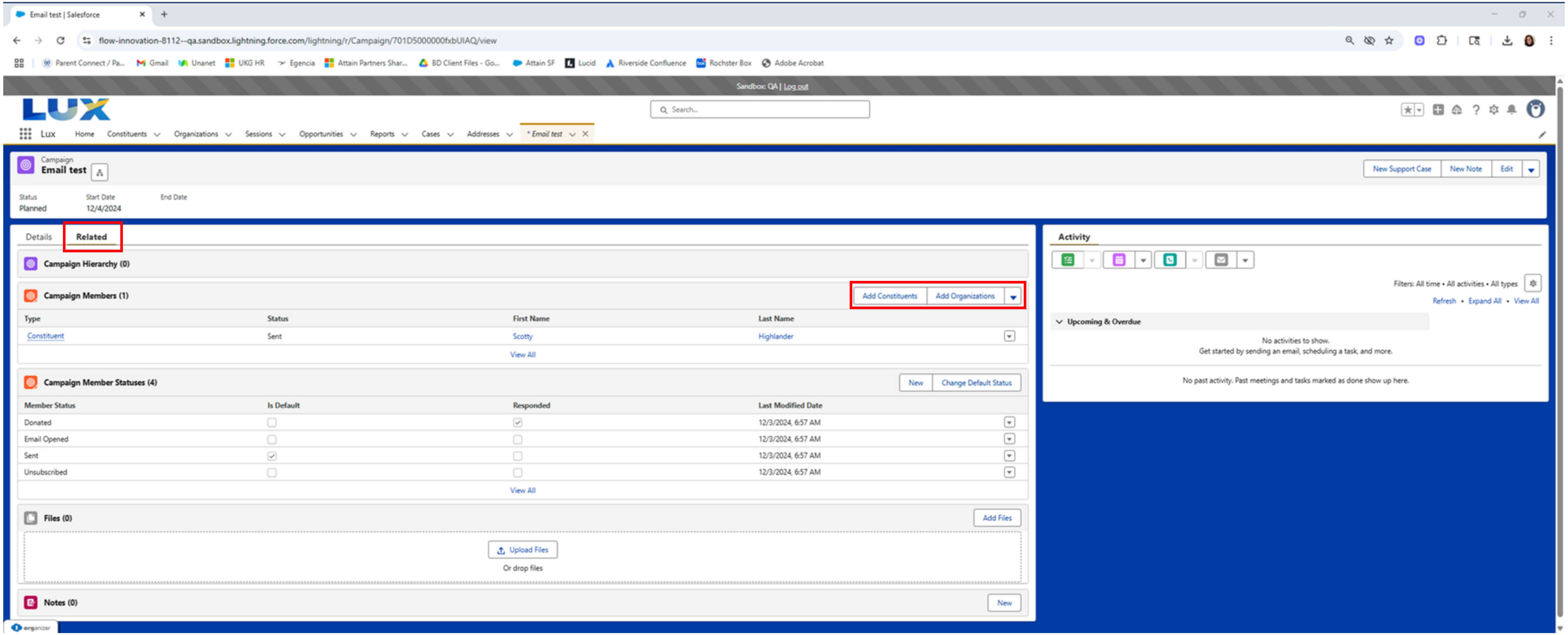
MANAGE A CAMPAIGN

Navigate to the campaign's record page. To edit any details about the campaign, click Edit, or on any pencil icon in the Details tab.



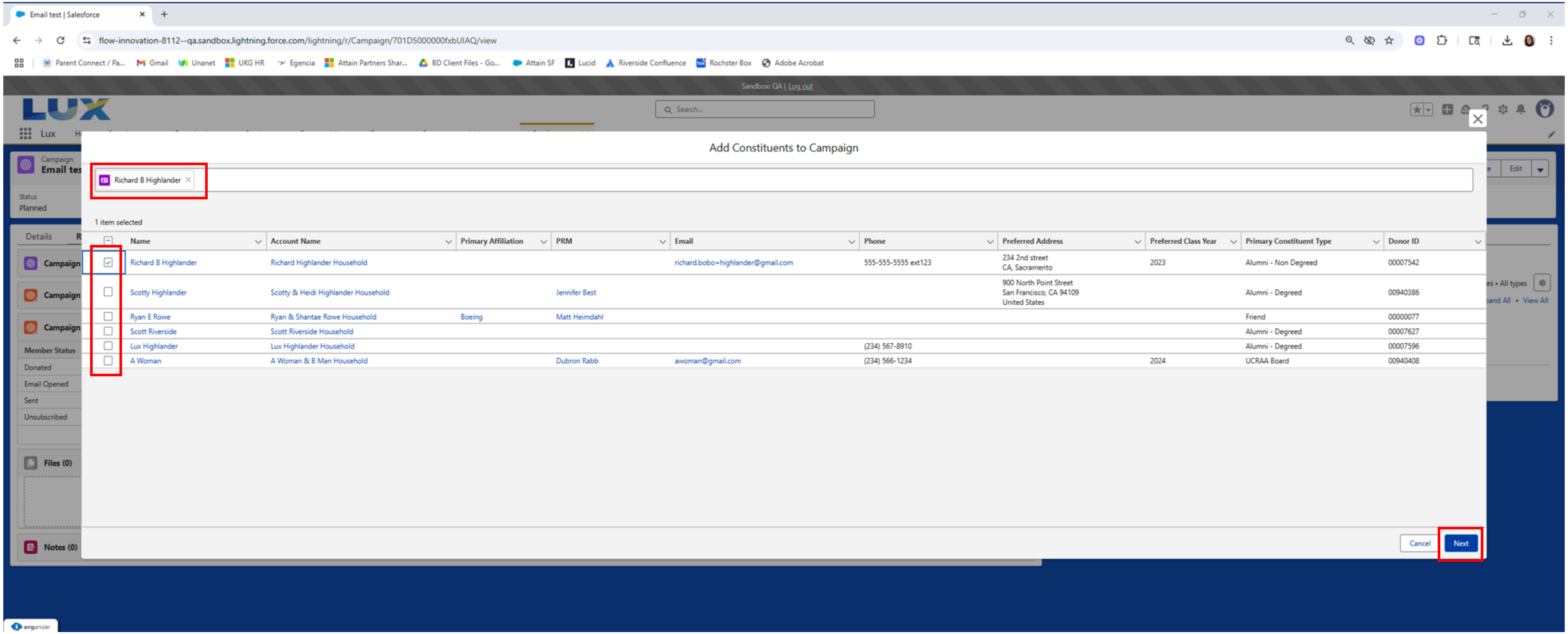
MANAGE A CAMPAIGN

To add or modify members, statuses, files, or notes, navigate to the Related tab. To add members to a campaign from this record page, click Add Constituents (or Organizations).



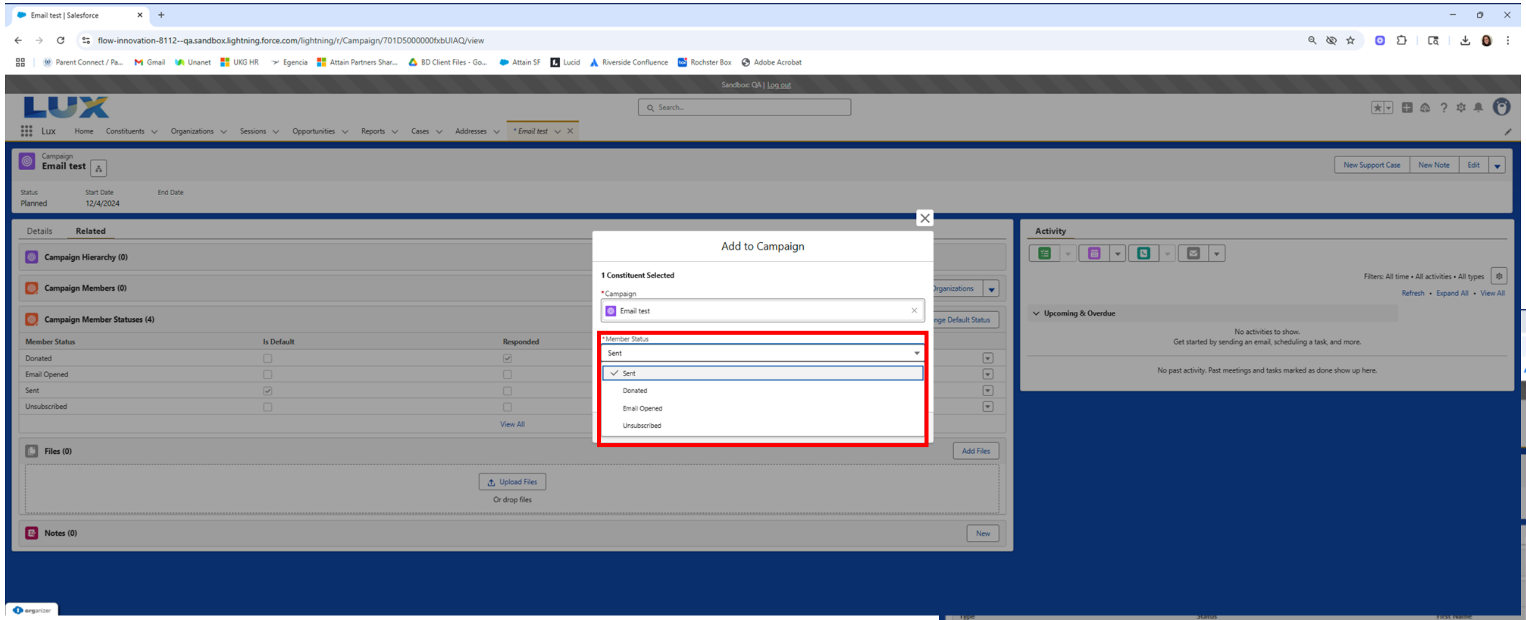
MANAGE A CAMPAIGN

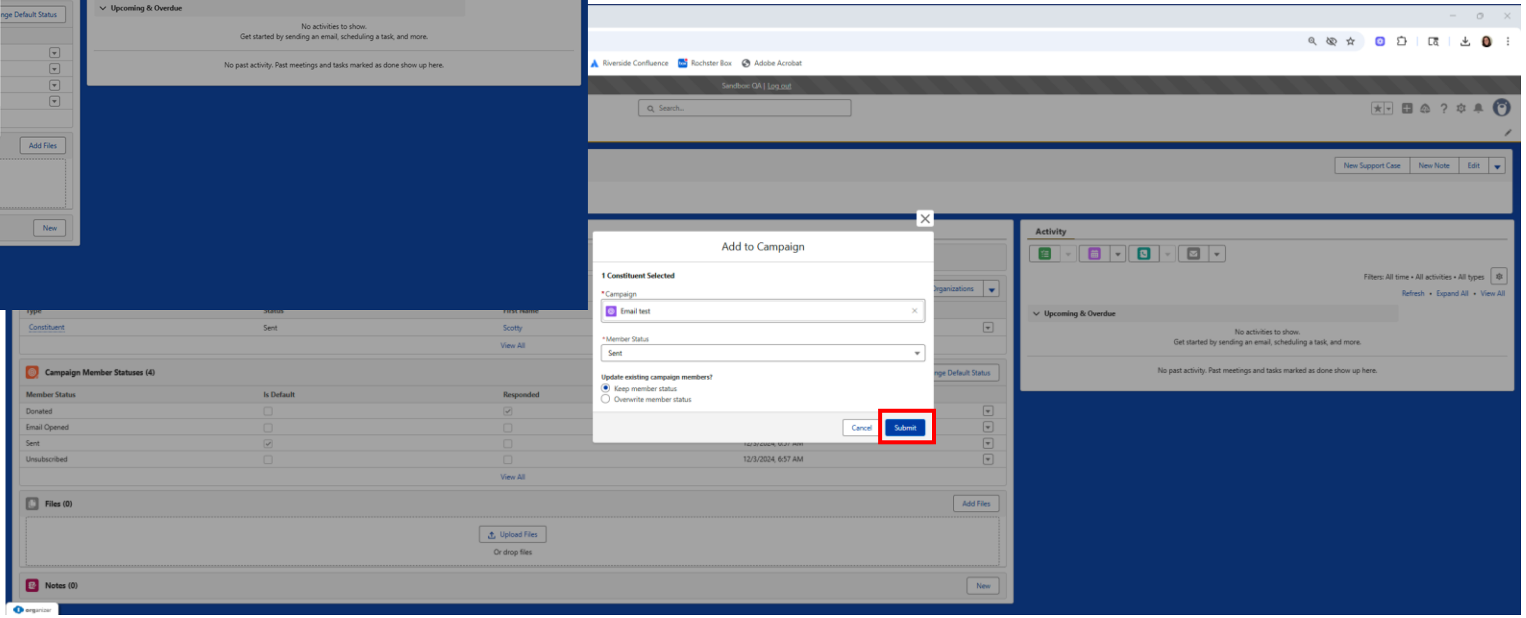
A popup will appear. Search for and select the constituents you wish to add to the campaign, then click Next.



MANAGE A CAMPAIGN

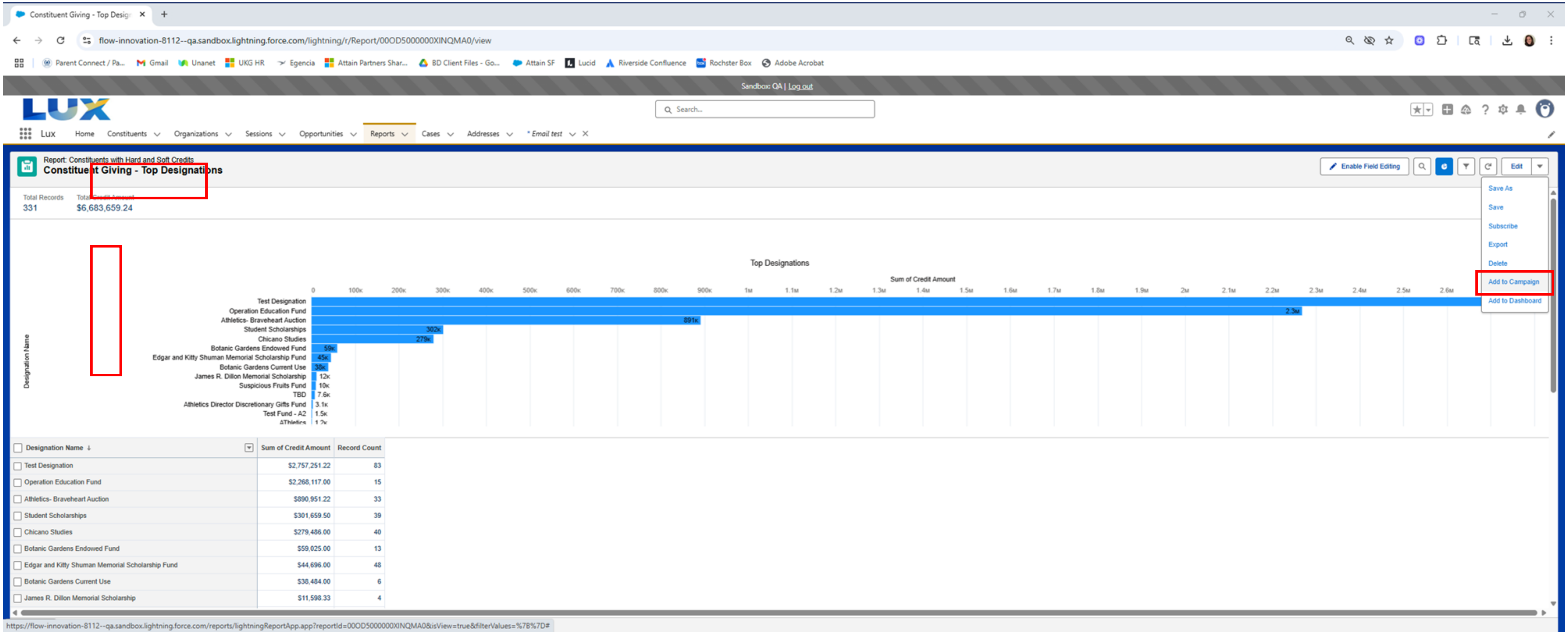
A new popup will appear. Select the status of the campaign for the new member(s), then click Submit.





MANAGE A CAMPAIGN

You can also add campaign members directly from a report. Once you have the report customized to your liking, click the dropdown arrow next to Edit, then select Add to Campaign. The constituents/organizations active on the report will be added to the campaign you choose.



LUX
UCR'S ASCEND ON SALESFORCE

8

MOBILE APP

UC RIVERSIDE

MOBILE APP

The Salesforce mobile app is available for all Lux users to download. Please refer to the Mobile App 101 training in the LMS for more detail.