



GIFT PROCESSING LUX TRAINING

LAST UPDATED: OCTOBER 2025

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START A 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.

New Session

Information

*Session Operator Assigned

Kim McDade

*Session Date

Oct 3, 2025

*Session Description

REG_ACH

*Session Name

[Default Name]

*Session Type

ACH/Wire

Special Instructions

Audit Type

Strict

Is Completed by Gift Specialist

☐

Session Backup URL

Send to FE

☐

Session Totals

No. of Gifts

No. of Gifts Posted

No. of Pledges

No. of Pledges Posted

Gift Amount

Gift Amount Posted

Pledge Amount

Pledge Amount Posted

Cancel

Save & New

Save

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.



Session

S2510030609

+ Follow

Launch Expedited Gift Processing V2

Finalize Close Session

View Pre-Balance Report

Session Type

Session Operator Assigned

Session Completed

Gift / Pledge Payment Amount

Pledge Amount

ACH/Wire



Kim McDade

Details

Session Totals

Other Details

Related

Files & Notes

History

Information

Session Operator Assigned

Kim McDade

Session Date

10/3/2025

Session Description

REG_ACH

Is Completed by Gift Specialist

☐

Session Backup URL

Send to FE

☐

Session Name

S2510030609

Session Type

ACH/Wire

Special Instructions

Audit Type ⓘ

Strict

Session Totals

No. of Gifts ⓘ

No. of Gifts Posted ⓘ

No. of Pledges ⓘ

No. of Pledges Posted ⓘ

No. of Recurring Gifts ⓘ

No. of Recurring Gifts Posted ⓘ

No. of Pledge Payments ⓘ

Gift Amount ⓘ

Gift Amount Posted ⓘ

Pledge Amount

Pledge Amount Posted

Recurring Gift Amount

Recurring Gift Amount Posted

Pledge Payment Amount ⓘ

Approval History (0)

Chatter

Activity

Post

Share an update...

Share

↑↓

Search this feed...



2

PROCESS GIFTS & BATCHES OF GIFTS

PROCESS GIFTS

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

Session

S2510030609

+ Follow

Launch Expedited Gift Processing V2

Finalize Close Session

View Pre-Balance Report

Session Type

ACH/Wire

Session Operator Assigned

Kim McDade

Session Completed

Gift / Pledge Payment Amount

Pledge Amount

Details

Session Totals

Other Details

Related

Files & Notes

History

Information

Session Operator Assigned

Kim McDade

Session Date

10/3/2025

Session Description

REG_ACH

Is Completed by Gift Specialist

☐

Session Backup URL

Send to FE

☐

Session Name

S2510030609

Session Type

ACH/Wire

Special Instructions

Audit Type ⓘ

Strict

Approval History (0)

Chatter

Activity

Post

Share an update...

Share

↕

Search this feed...

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.

LUX

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* Expedited Gift Processing (...)

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Expedited Gift Processing (v2) - UCR

Session Information

Transaction Entry

Session Info

Session Name
\$2507230469
Session Date
7/23/2025
Session Description
bulk processing
Special Instructions

Close/Approve

Audit Type
Review Session Pre-Balance Report
Confirm Session Pre-Balance Report
Gift Specialist Comments

Type

Expected Count

Expected Total

Actual Count

Actual Total

1 Pledge

2 Pledge Payment

3 Gift

4 Recurring Gift

5 Recurring Gift Payment

6 Matching Gift

7 Matching Gift Payment

8 One-Time Membership

9 Auto Renewing Membership

10 Auto Renewing Membership Payment

11 Installment Based Membership

12 Installment Based Membership Payment

View Pre-balance Report

Close Session

Gift

Pledges

Recurring Gifts

One-Time Memberships

Installment Based Memberships

Auto Renewing Memberships

Save Defaults

Transaction Information

* Gift/Pledge Type
Outright

* Tender Type for Gifts
Cash

* Credit Date
Jul 23, 2025

* Amount

Non-Gift Amount

Receipt Amount

Inevocable
--None--

Acknowledgement
--None--

Acknowledgement Date

Post to G / L Date
Jul 23, 2025

Send to G / L
☒

GL Posted
☐

FE Sub-Type
--None--

Is Anonymous
☐

Is Tax Receipt
☒

Notes

Regent Gift Reference

Gift Fee Included
☐

Designation Detail Information

Designation

Designation Name

Amount

Non-Gift Amount

Appeal

+ Add Non-Gift Item

+ Add

Calculate Designation Details

Tribute Information

PROCESS GIFTS

Click Transaction Entry.

Lightning Experience | Salesforce

Expedited Gift Processing (v2)

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/n/Expedited_Gift_Processing_v2_UCR?ucinn_ascendv2_recordId=a2ID5000003ngyMAA

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LUX

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Expedited Gift Processing (v2) - UCR

Session Information Transaction Entry

Session Info

Session Name S2507230469
Session Date 7/23/2025
Session Description bulk processing
Special Instructions

Close/Approve

Audit Type None
Review Session Pre-Balance Report
Confirm Session Pre-Balance Report
Gift Specialist Comments

Type	Expected Count	Expected Total	Actual Count	Actual Total
1 Pledge				
2 Pledge Payment				
3 Gift				
4 Recurring Gift				
5 Recurring Gift Payment				
6 Matching Gift				
7 Matching Gift Payment				
8 One-Time Membership				
9 Auto Renewing Membership				
10 Auto Renewing Membership Payment				
11 Installment Based Membership				
12 Installment Based Membership Payment				

View Pre-Balance Report Close Session

Gift Pledges Recurring Gifts One-Time Memberships Installment Based Memberships Auto Renewing Memberships

Save Defaults

Transaction Information

* Gift/Pledge Type Outright

* Tender Type for Gifts Cash

* Credit Date Jul 23, 2025

* Amount

Non-Gift Amount

Receipt Amount

Inevocable --None--

Acknowledgement --None--

Acknowledgement Date

Post to G / L Date Jul 23, 2025

Send to G / L ☒

GL Posted ☐

FE Sub-Type --None--

Is Anonymous ☐

Is Tax Receipt ☒

Notes

Regent Gift Reference

Gift Fee Included ☐

Designation Detail Information

Designation

Designation Name

Amount

Non-Gift Amount

Appeal

+ Add Non-Gift Item

+ Add Calculate Designation Details

Tribute Information

PROCESS GIFTS

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

Lightning Experience | Salesforce

Expedited Gift Processing (v2)

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/n/Expedited_Gift_Processing_v2_UCR?ucinn_ascendv2_recordId=a2ID500003ngyrMAA

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Sandbox: QA | Log out

LUX

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Star Add ? Settings Profile

Expedited Gift Processing (v2) - UCR

Split Payments Reset/Create New

Session Information Transaction Entry

Gift Pledges Recurring Gifts Payments Matching Gifts One-Time Memberships Installment Based Memberships Auto Renewing Memberships Mass Adjustment Mass Correction Mass Payment

Search

Name	Type	Credit Date	Constituent	Organization	Amount	Designation	Appeal Code
Records Displayed 5							
Showing 0 to 0 of 0 records							

Constituent Organization

scotty

Use as Donor

Show All Results for "scotty"

Scotty Highlander 00940386

Scotty Highlander 00940382

Scotty A Highlander III 00007315

Scotty Builderbus 00007303

Scott Riverside 00007627

Mary Joe Highlander 00007574

New Constituent

Save

Donor Search

Constituent Organization

Search

Transaction Information

* Gift/Pledge Type

* Tender Type for Gifts

* Credit Date

* Amount

Non-Gift Amount

Receipt Amount

Irrevocable

Acknowledgement

Acknowledgement Date

Post to G / L Date

Send to G / L

GL Posted

FE Sub-Type

Is Anonymous

Is Tax Receipt

Notes

Recent Gift Reference

Outright

Cash

Jul 23, 2025

--None--

--None--

Jul 23, 2025

☒

--None--

☐

☒

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.

Lightning Experience | Salesforce

Expedited Gift Processing (v2)

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/n/Expedited_Gift_Processing_v2_UCR?ucinn_ascendv2_recordId=a2ID5000003ngyrMAA

Parent Connect / Pa... | Gmail | Unanet | UKG HR | Egcia | Attain Partners Shar... | BD Client Files - Go... | Attain SF | Lucid | Riverside Confluence | Rochester Box | Adobe Acrobat

Sandbox: QA | Log out

LUX

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Expedited Gift Processing (v2) - UCR

Split Payments | Reset/Create New

Session Information | Transaction Entry

Gift | Pledges | Recurring Gifts | Payments | Matching Gifts | One-Time Memberships | Installment Based Memberships | Auto Renewing Memberships | Mass Adjustment | Mass Correction | Mass Payment

Constituent | Organization

Q Scotty Highlander

Use as Donor

View Critical Information

Donor Info | Details | Giving | Membership Purchases

Donor Information

Name

Scotty Highlander

Donor ID

00940386

Spouse

Heidi Highlander

Phone

PRM

Dubron Rabb

Email

Birthdate

10/10/1954

Address

900 North Point Street
San Francisco, CA 94109
United States (Home)

Employee ID

Age

70

Restricted Party Screening Alert

Save

Donor Search

Constituent | Organization

Q Scotty Highlander

View Critical Information

Donor Information

Name

Scotty Highlander

Donor ID

00940386

Spouse

Heidi Highlander

Phone

PRM

Dubron Rabb

Email

Birthdate

10/10/1954

Address

900 North Point Street
San Francisco, CA 94109
United States (Home)

Employee ID

Age

70

Restricted Party Screening Alert

Transaction Information

* Gift/Pledge Type

Outright

* Tender Type for Gifts

Cash

* Credit Date

Jul 23, 2025

* Amount

Non-Gift Amount

Receipt Amount

Irrevocable

Acknowledgement

Acknowledgement Date

Post to G / L Date

Jul 23, 2025

Send to G / L

☒

GL Posted

☐

FE Sub-Type

--None--

Proposal

Is Anonymous

☐

Is Tax Receipt

☒

Notes

Regent Gift Reference

organizer

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.

Lightning Experience | Salesforce

Expedited Gift Processing (v2)

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Sandbox: QA | Log out

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Expedited Gift Processing (v2) - UCR

Session Information

Transaction Entry

Gift

Pledges

Recurring Gifts

Payments

Matching Gifts

One-Time Memberships

Installment Based Memberships

Auto Renewing Memberships

Mass Adjustment

Mass Correction

Mass Payment

Constituent

Organization

Q

Scotty Highlander

Use as Donor

View Critical Information

Donor Info

Details

Giving

Membership Purchases

Donor Information

Name

Scotty Highlander

Donor ID

00940386

Spouse

Heidi Highlander

Phone

PRM

Dubron Rabb

Email

Birthdate

10/10/1954

Address

900 North Point Street
San Francisco, CA 94109
United States (Home)

Age

70

Restricted Party Screening Alert

Save

Donor Search

Constituent

Organization

Q

Scotty Highlander

View Critical Information

Donor Information

Name

Scotty Highlander

Donor ID

00940386

Spouse

Heidi Highlander

Phone

PRM

Dubron Rabb

Email

Birthdate

10/10/1954

Address

900 North Point Street
San Francisco, CA 94109
United States (Home)

Age

70

Restricted Party Screening Alert

Transaction Information

* Gift/Pledge Type

Outright

* Tender Type for Gifts

Cash

* Credit Date

Jul 23, 2025

* Amount

Non-Gift Amount

Receipt Amount

Irrevocable

--None--

Acknowledgement

--None--

Acknowledgement Date

Jul 23, 2025

Post to G / L Date

Jul 23, 2025

Send to G / L

☒

GL Posted

☐

FE Sub-Type

--None--

Proposal

Is Anonymous

☐

Is Tax Receipt

☒

Notes

Regent Gift Reference



2.1

PROCESS OUTRIGHT GIFTS

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.

Lightning Experience | Salesforce

Expedited Gift Processing (v2)

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/n/Expedited_Gift_Processing_v2_UCR?ucinn_ascendv2_recordId=a2ID5000003ngyrMAA

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Sandbox: QA | Log out

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Expedited Gift Processing (v2) - UCR

Session Information Transaction Entry

Gift Pledges Recurring Gifts Payments Matching Gifts One-Time Memberships Installment Based Memberships Auto Renewing Memberships Mass Adjustment Mass Correction Mass Payment

Search

Name	Type	Credit Date	Constituent	Organization	Amount	Designation	Appeal Code
Records Displayed 5							
Showing 0 to 0 of 0 records							

Constituent Organization

scotty

Use as Donor

Show All Results for "scotty"

Scotty Highlander 00940386

Scotty Highlander 00940382

Scotty & Highlander III 00007315

Scotty Builderbus 00007303

Scott Riverside 00007627

Mary Joe Highlander 00007574

New Constituent

Save

Donor Search

Constituent Organization

Search

Transaction Information

* Gift/Pledge Type

* Tender Type for Gifts

* Credit Date

* Amount

Non-Gift Amount

Receipt Amount

Irrevocable

Acknowledgement

Acknowledgement Date

Post to G / L Date

Send to G / L

GL Posted

FE Sub-Type

Is Anonymous

Is Tax Receipt

Notes

Recent Gift Reference

Outright

Cash

Jul 23, 2025

--None--

--None--

Jul 23, 2025

☒

☐

--None--

☐

☒

PROCESS GIFTS

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)

GiftPledgesRecurring GiftsOne-Time MembershipsInstallment Based MembershipsAuto Renewing Memberships

Save Defaults

Transaction Information

* Gift/Pledge Type

Outright

* Tender Type for Gifts

Cash

* Credit Date

Oct 4, 2025

* Amount ⓘ

Non-Gift Amount ⓘ

Receipt Amount ⓘ

Irrevocable

--None--

Acknowledgement

--None--

Acknowledgement Date

Post to G / L Date ⓘ

Oct 4, 2025

GL Posted

☐

FE Sub-Type

--None--

Is Anonymous

☐

Is Tax Receipt

☒

Notes

Regent Gift Reference

Gift Fee Included

☐

PROCESS GIFTS

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

GiftPledgesRecurring GiftsOne-Time MembershipsInstallment Based MembershipsAuto Renewing Memberships

Save Defaults

Transaction Information

* Gift/Pledge Type

Outright

* Tender Type for Gifts

Cash

* Credit Date

Oct 4, 2025

* Amount ⓘ

Non-Gift Amount ⓘ

Receipt Amount ⓘ

Irrevocable

--None--

Acknowledgement

--None--

Acknowledgement Date

Post to G / L Date ⓘ

Oct 4, 2025

GL Posted

☐

FE Sub-Type

--None--

Is Anonymous

☐

Is Tax Receipt

☒

Notes

Regent Gift Reference

Gift Fee Included

☐

OUTRIGHT GIFT: DESIGNATION DETAIL INFORMATION

Designation Detail Information

Designation	Designation Name	Amount ⓘ	Non-Gift Amount ⓘ	Appeal	
200015CA	Alumni & Visitors Center	\$922.22	\$77.78	test email campaig	
Product	Product Description	Price	Quantity	Total	
	It's a shirt with a banai	\$77.78	1	\$77.78	

+ Add Non-Gift Item

+ Add

Calculate Designation Details

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

Hard and Soft Credit Information

Designation	Credit Type	Credit Subtype	Constituent	Organization	Credit Amount	
200015CA	Hard	Select an Option	Scotty Highla		\$922.22	
200015CA	Soft	Select an Option	A Woman			

+ Add

Calculate Hard and Soft Credits

- 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.

OUTRIGHT GIFT: TRIBUTE INFORMATION

Tribute Information

Tribute Type

In Honor of

Constituent

Q

A Woman

Constituent Name

A Woman

Organization Name

Tributee

A Woman

Notify Constituent

Q

Scotty Highlander

Notify Constituent Name

Scotty Highlander

Notify Address

Occasion

wedding

Notification Sent

☐

+ Add

+ 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 Responsible Person(s)

Responsible Person

Q

Team Role

--None--

+ Add

+ 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

PROCESS GIFTS

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--

PROCESS GIFTS

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

Acknowledgement Date	
Post to G / L Date ⓘ	Oct 4, 2025
GL Posted	☐
FE Sub-Type	--None--
Is Anonymous	☐
Is Tax Receipt	☒
Notes	
Regent Gift Reference	
Gift Fee Included	☐

2.2

CREATE PLEDGES & BEQUEST INTENTIONS

PROCESS GIFTS

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.

Expedited Gift Processing (v2)

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/n/Expedited_Gift_Processing_v2_UCR?ucinn_ascendv2__recordId=a2JD5000003ngyrMAA

Sandbox: QA | [Log out](#)

LUX

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Expedited Gift Processing (v2) - UCR

[Split Payments](#) [Reset/Create New](#)

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Auto Renewing Memberships

Mass Adjustment

Mass Correction

Mass Payment

Search

Clear

Name	Pledge Type	Credit Date	Constituent	Organization	Amount	Designation ID #	Appeal Code
☐ > PN0000948	Standard	Jul 24, 2025	Scotty Highlander		\$12,000.00	Student Scholarships	

Records Displayed 5

<< < 1 > >>

Showing 1 to 1 of 1 record(s).

Constituent

Organization

Search

Use as Donor

Save

Donor Search

Constituent

Organization

Search Scotty Highlander

View Critical Information

Transaction Information

Gift/Pledge Type

Irrevocable

Pledge Source

Credit Date

Donor Information

Scotty Highlander

Donor ID 00940382

Phone

Email

Address

Age

Restricted Party Screening Alert

Select an Option

--None--

--None--

Jul 24, 2025

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 explicitly 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

Transaction Information

* Gift/Pledge Type

Standard

* Irrevocable

No

* Pledge Source

Other

* Credit Date

Jul 23, 2025

* Amount

\$12,000.00

Is Anonymous

☐

Proposal

Notes

* Appeal

Email test

Send Pledge Reminder

☒

Pledge Documentation

Regent Gift Reference

Gift Fee Included

☐

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

Transaction Information

* Gift/Pledge Type

Planned Giving

* Planned Gift Sub Type

Bequest

Maturity Year

2050

Gift Status

--None--

Net Present Value

NPV as of

Remainder Value

Rmdr Value as of

Asset Description

Asset Amount

Asset Cost Basis

* Irrevocable

Yes

* Pledge Source

Legal Notification/Will

* Credit Date

Aug 6, 2025

* Amount

\$100,000.00

* Receipt Amount (Bequest)

\$100,000.00

Is Anonymous

☐

Proposal

Notes

* Appeal

Send Pledge Reminder

☒

Pledge Documentation

Regent Gift Reference

Gift Fee Included

☐

PLEDGES: DESIGNATION DETAIL INFORMATION

Designation Detail Information

Designation	Designation Name	Amount ⓘ	Payment Frequency	Number of Payments ⓘ	
Student Scholarship	Student Scholarships	\$12,000.00	Monthly	12	
Product	Product Description	Price	Quantity	Total	
Gala 2025 Meal		\$25.00	1	\$25.00	
+ Add Non-Gift Item					
+ Add		Calculate Designation Details			

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

Hard and Soft Credit Information

Designation	Credit Type	Credit Subtype	Constituent	Organization	Credit Amount	
Q Student Schol	Hard	Select an Option	Q Scotty Highlar		\$12,000.00	
+ Add Calculate Hard and Soft Credits						

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

+ Add

Calculate Installments

PLEDGES: TRIBUTE INFORMATION

Tribute Information

Tribute Type

In Honor of

Constituent

Q

A Woman

Constituent Name

A Woman

Organization Name

Tributee

A Woman

Notify Constituent

Q

Scotty Highlander

Notify Constituent Name

Scotty Highlander

Notify Address

Occasion

wedding

Notification Sent

☐

+ Add

+ 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 Responsible Person(s)

Responsible Person

Q

Team Role

--None--

+ Add

+ **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.

LUX

Sandbox: QA | [Log out](#)

Search...

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Expedited Gift Processing (v2) - UCR

Session Information Transaction Entry

Gift Pledges Recurring Gifts Payments Matching Gifts One-Time Memberships Installment Based Memberships Auto Renewing Memberships Mass Adjustment Mass Correction Mass Payment

Name	Type	Credit Date	Constituent	Organization	Amount	Designation	Appeal Code
Records Displayed: 5							
Showing 0 to 0 of 0 records							

Constituent Organization
Use as Donor

Save

Donor Search

Constituent Organization

View Critical Information

Transaction Information

- * Gift/Pledge Type
- * Tender Type for Gifts
- * Amount
- * Frequency

Donor Information

Name Scotty Highlander
Donor ID 00940382

Spouse
PRM
Birthdate
Employee ID

Donor ID 00940382
Phone
Email
Address
Age
Restricted Party Screening Alert

RECURRING GIFTS: TRANSACTION INFORMATION

Transaction Information

* Gift/Pledge Type

Recurring

* Tender Type for Gifts

Payroll Deduction

* Amount

* Frequency

--None--

* Start Date ⓘ

Jul 24, 2025

End Date

Proposal

Notes

Is Anonymous

☐

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

RECURRING GIFT: DESIGNATION DETAIL INFORMATION

Designation Detail Information

* Designation

Q 600082

Designation Name

Noel T. and Diane III Keen Endowed Fund

Amount ⓘ

\$100.00

Appeal

Q

+ Add

Calculate Designation Details

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

Hard and Soft Credit Information

Designation

Credit Type

Credit Subtype

Constituent

Organization

Credit Amount

Q 600082

✕

Hard

Select an Option

Q Scotty Highlander

✕

Q

\$100.00

+ Add

Calculate Hard and Soft Credits

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

Tribute Information

Tribute Type

In Honor of

Constituent

Q

A Woman

✕

Constituent Name

A Woman

Organization Name

Tributee

A Woman

🗑

Notify Constituent

Q

Scotty Highlander

✕

Notify Constituent Name

Scotty Highlander

Notify Address

Occasion

wedding

Notification Sent

☐

+ Add

+ 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 Responsible Person(s)

Responsible Person

Q

Team Role

--None--

+ Add

+ **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 GIFTS

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.

Lightning Experience | Salesforce

Expedited Gift Processing (v2)

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/n/Expedited_Gift_Processing_v2_UCR?ucinn_ascendv2_recordId=a2JD5000003nhGkMAI

Parent Connect / Pa... Gmail Unanet UKG HR Egencia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

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Expedited Gift Processing (v2) - UCR

Split Payments Reset/Create New

Session Information Transaction Entry

Gift Pledges Recurring Gifts Payments Matching Gifts One-Time Memberships Installment Based Memberships Auto Renewing Memberships Mass Adjustment Mass Correction Mass Payment

Search Copy

Payment Name	Pledge / Gift	Transaction Type	Tender Type	Credit Date	Constituent	Organization	Payment Amount	Designation Name	Designation	Designation Type	Appeal
--------------	---------------	------------------	-------------	-------------	-------------	--------------	----------------	------------------	-------------	------------------	--------

Records Displayed 5 << < > >>

Showing 0 to 0 of 0 record(s)

Constituent Organization

Search Scotty Highlander Use as Donor

View Critical Information

Donor Info Details Giving Membership Purchases

Donor Information

Name Scotty Highlander

Spouse Heidi Highlander

PRM Dubron Rabb

Birthdate 10/10/1954

Employee ID

Donor ID 00940386

Phone

Email

Address 900 North Point Street
San Francisco, CA 94109
United States (Home)

Age 70

Restricted Party Screening Alert

PROCESS GIFTS

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.

Lightning Experience | Salesforce

Expedited Gift Processing (v2)

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/n/Expedited_Gift_Processing_v2_UCR?ucinn_ascendv2__recordId=a2JD5000003nhGkMAI

Parent Connect / Pa... Gmail Unanet UKG HR Egencia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox: QA | Log out

LUX

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Search...

Split Payments Reset/Create New

Session Information Transaction Entry

Gift Pledges Recurring Gifts Payments Matching Gifts One-Time Memberships Installment Based Memberships Auto Renewing Memberships Mass Adjustment Mass Correction Mass Payment

Payment Name Pledge / Gift Transaction Type Tender Type Credit Date Constituent Organization Payment Amount Designation Name Designation Designation Type Appeal

Records Displayed 5

Showing 0 to 0 of 0 record(s).

Constituent Organization

Search: Scotty Highlander Use as Donor

View Critical Information

Donor Info Details Giving Membership Purchases

Gift Pledge Recurring Gift

PLEDGE NAME PROPOSAL NAME PLEDGE TYPE STAGE CREDIT DATE PLEDGE AMOUNT DESIGNATION CODE AMOUNT PAID TO DATE REMAINING AMOUNT DUE

☒ > PN0000948 Standard Active Jul 24, 2025 \$12,000.00 Student Scholarships \$0.00 \$12,000.00

Records Displayed 5

Showing 1 to 1 of 1 record(s).

Edit Process Payment

Transaction Information

Donor Gift/Pledge Type Irrevocable Pledge Source Credit Date Amount Is Anonymous Proposal Notes Appeal Send Pledge Reminder Pledge Documentation Regent Gift Reference

Search: Scotty Highlander

Standard No Other Jul 24, 2025 \$12,000.00

Proposal

Email test

PROCESS GIFTS

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.

Transaction Information

* Tender Type for Pledges

Cash

* Payment Amount ⓘ

\$1,200.00

Non-Gift Amount ⓘ

\$0.00

Receipt Amount ⓘ

\$1,200.00

* Credit Date

Jul 25, 2025

Acknowledgement

--None--

Acknowledgement Date

Is Tax Receipt

☒

FE Sub-Type

--None--

Is Anonymous

☐

Post to G / L Date ⓘ

Jul 25, 2025

Send to G / L ⓘ

☒

GL Posted

☐

Notes

Regent Gift Reference

Gift Fee Included

☐

PROCESS GIFTS

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.

Allocate Your Payment By

Designation

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.

Allocate Your Payment By

Designation

Installment

Payment Information

Designation

Payment Amount ⓘ

Non-Gift Amount ⓘ

Student Scholarships

\$1,200.00

+ Add Non-Gift Item

+ Add

PROCESS GIFTS

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

PROCESS GIFTS

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.

Payment Information

Designation

Student Scholarships

Payment Amount ⓘ

\$1,200.00

Non-Gift Amount ⓘ

\$0.00

+ Add Non-Gift Item

Hard and Soft Credit Information

Designation

Student Scholarships

×

Credit Type

Hard

▼

Credit Subtype

Select an Option

▼

Constituent

ESV Scotty Highlander

×

Organization

Search Organizations...

Q

Credit Amount

\$1,200.00

🗑

Designation

Student Scholarships

×

Credit Type

Soft

▼

Credit Subtype

Spousal

▼

Constituent

ESV Heidi Highlander

×

Organization

Search Organizations...

Q

Credit Amount

\$1,200.00

🗑

+ Add

Calculate Hard and Soft Credits

Tribute Information

+ Add

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.

Warning: Pledge Overpayment

Pledge overpayments not allowed. Would you like to pay off the remaining pledge balance, and create a separate gift record?

Payment: \$12000.00
Outright Gift: \$1000.00

Back

Continue



2.5

PROCESS MATCHING GIFTS

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.

Scotty Highlander | Constituent

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Contact/003D5000012I2mgIAA/view

Parent Connect / Pa... Gmail Unanet UKG HR Egencia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox: QA | Log out

LUX

Home Constituents Organizations Sessions Opportunities Reports Cases Addresses Expedited Gift Processing



View Critical Information

CONSTITUENT INDICATORS



UCR - Global Invitations Opt-Out

The Wedding Singer

Global: UCR Email Opt-Out

Scotty Highlander

+ Follow Edit Delete Manage Household

Donor ID 00940386 Phone PBM Dubron Rabb

Account Name Scotty & Heidi Highlander Household Email LinkedIn URL

Alerts 1 of 1 item

Comment Scotty is allergic to peanuts

Start Date Mar 5, 2025

End Date

Overview Constituent Details Prospect Management Our UCR Chatter

Giving Details Names Salutations Addresses Phones Emails Social Media Affiliations Relationships Funding Interests Degree Information Stewardship Involvements Service Indicators More

Affiliations

New

ORGANIZATION	ORGANIZATION ROLE	STATUS	IS PRIMARY CONTACT	IS DONOR CONTROL	START DATE	END DATE	AFFILIATION NAME	ACTIONS
--------------	-------------------	--------	--------------------	------------------	------------	----------	------------------	---------

<< < > >>

Showing 0 to 0 of 0 record(s).

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.

The screenshot displays the LUX system interface with a 'New Affiliation' modal form open. The background shows the constituent record for 'Scotty Highlander'. The modal form is titled 'New Affiliation' and includes a legend indicating that fields with an asterisk (*) are required.

Information Section:

- * Affiliation Name: [Default Name]
- * Status: Current
- * Organization: Riverside Carpet Cleaners
- * Constituent Role: Employee
- * Constituent: Scotty Highlander
- Start Date: [Empty field]
- End Date: [Empty field]
- Is Primary Contact: ☐
- Is Donor Control: ☐
- Is Primary Affiliation: ☐
- Data Source: --None--

Job Information Section:

- Job Title: [Empty field]
- Home Department: Search Home Departments...

Portal Section:

- Is Display On Portal: ☒
- Employer Name: [Empty field]
- Is Show On Directory: ☐
- Interim: Search Interims...

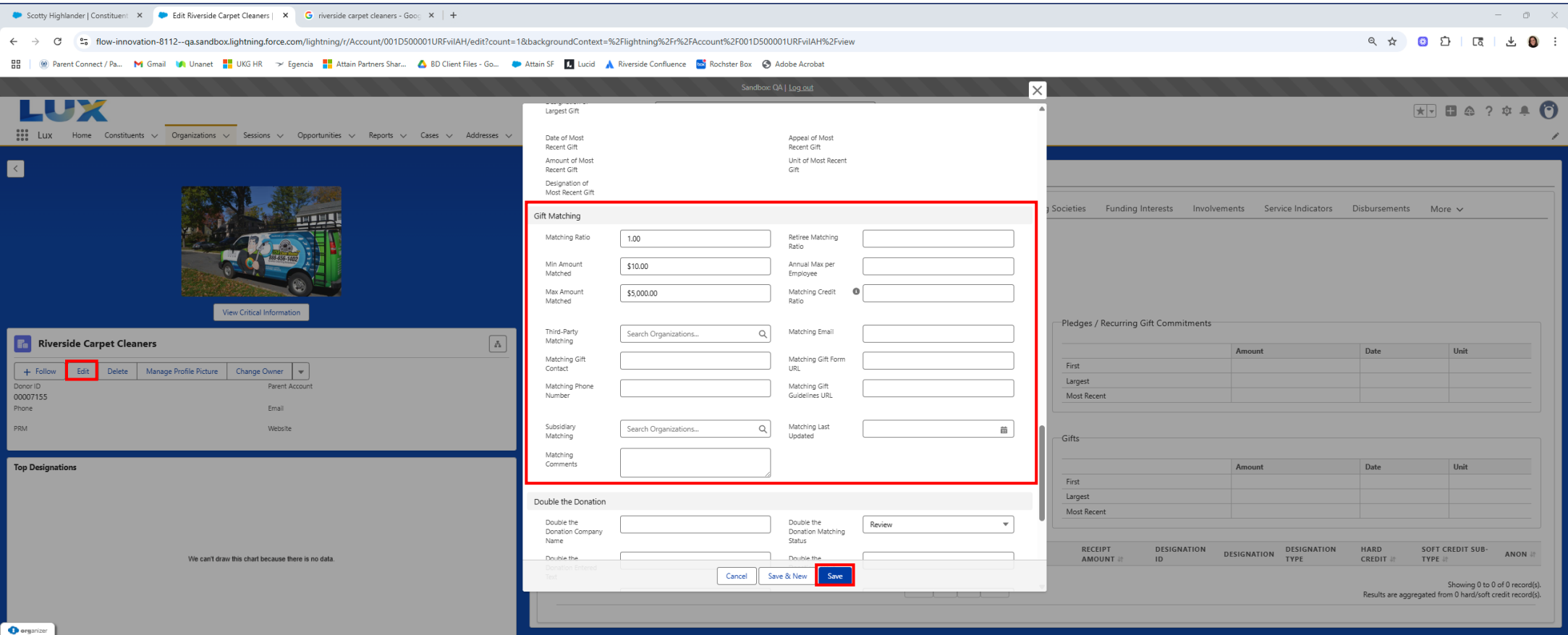
Buttons at the bottom of the modal: Cancel, Save.

Background Interface:

- Header: LUX, Home, Constituents, Organizations, Sessions, Opportunities, Reports, Cases, Addresses.
- Left Sidebar: View Critical Information, CONSTITUENT INDICATORS, UCR - Global Invitations Opt-Out, The Wedding Singer, Global: UCR Email Opt-Out.
- Main Content Area: Scotty Highlander profile card with buttons (+ Follow, Edit, Delete, Manage Household), Donor ID (00940386), Account Name (Scotty & Heidi Highlander Household), Email, Phone, PBM (Dubron Rabb), and LinkedIn URL.
- Bottom Bar: Involvements.

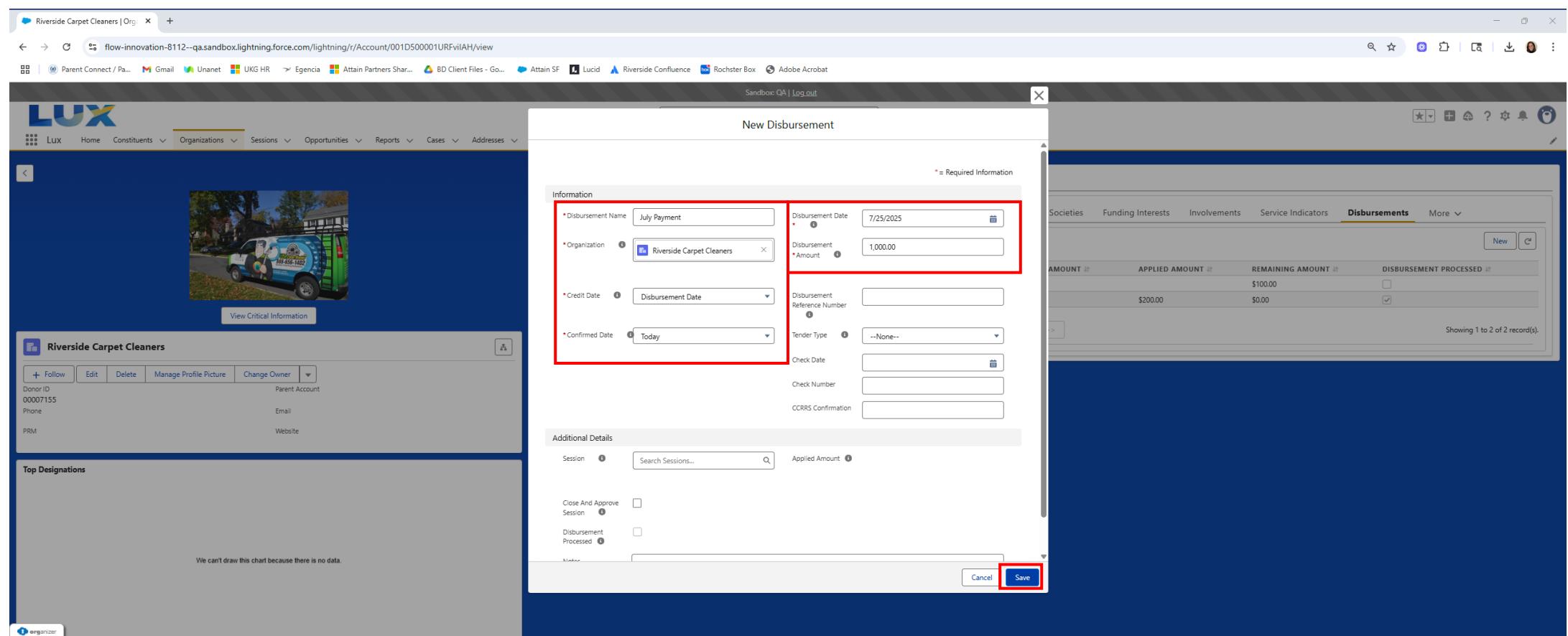
PROCESS MATCHING GIFTS

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

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.

Riverside Carpet Cleaners

[View Critical Information](#)

Riverside Carpet Cleaners

+ Follow Edit Delete Manage Profile Picture Change Owner

Donor ID: 00007155 Parent Account
Phone: Email:
PRM Website:

Top Designations

We can't draw this chart because there is no data.

Organization Details

Giving Details Names Addresses Phones Emails Social Media Affiliations Stewardship Giving Societies Funding Interests Involvements Service Indicators **Disbursements** More

Disbursements

RECORD ID	DISBURSEMENT DATE	DISBURSEMENT REFERENCE NUMBER	DISBURSEMENT AMOUNT	APPLIED AMOUNT	REMAINING AMOUNT	DISBURSEMENT PROCESSED
July Payment	Jul 25, 2025		\$1,000.00		\$1,000.00	☐
test for training	Jul 25, 2025		\$100.00		\$100.00	☐
Benevity 1-19-2025	Jan 19, 2025	XL83839	\$200.00	\$200.00	\$0.00	☒

<< < 1 > >>

Showing 1 to 3 of 3 record(s).

PROCESS MATCHING GIFTS

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

July Payment | Disbursement | 5 x +

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/ucinn_ascendv2__Disbursement__c/a0gD5000002JZ5CIAW/view

Parent Connect / Pa... | Gmail | Unanet | UKG HR | Egencia | Attain Partners Shar... | BD Client Files - Go... | Attain SF | Lucid | Riverside Confluence | Rochester Box | Adobe Acrobat

Sandbox: QA | Log out

LUX

Home | Constituents | Organizations | Sessions | Opportunities | Reports | Cases | Addresses | * July Payment | Disburseme... | X

Search...

Star | Plus | Cloud | Help | Settings | Profile

Disbursement

July Payment

Organization: Riverside Carpet Cleaners

Disbursement Date: 7/25/2025

Disbursement Amount: \$1,000.00

Disbursement Processed: ☐

Related Gifts (0)

Related Payments (0)

Details

Disbursement Details

Disbursement Name	July Payment	Disbursement Date	7/25/2025
Organization	Riverside Carpet Cleaners	Disbursement Amount	\$1,000.00
Credit Date	Disbursement Date	Disbursement Reference Number	
Confirmed Date	Today	Tender Type	

Notes

Notes

Additional Details

Session	S2507240479	Applied Amount	
Close And Approve Session	☐	Remaining Amount	\$1,000.00
Eligible For Processing	☐		
Disbursement Processed	☐		

System Information

Created By	Jennifer Best, 7/24/2025, 11:23 AM	Last Modified By	Jennifer Best, 7/24/2025, 11:23 AM
------------	------------------------------------	------------------	------------------------------------

Find & Mark Matching Gift Claims for Payment

Process Disbursement

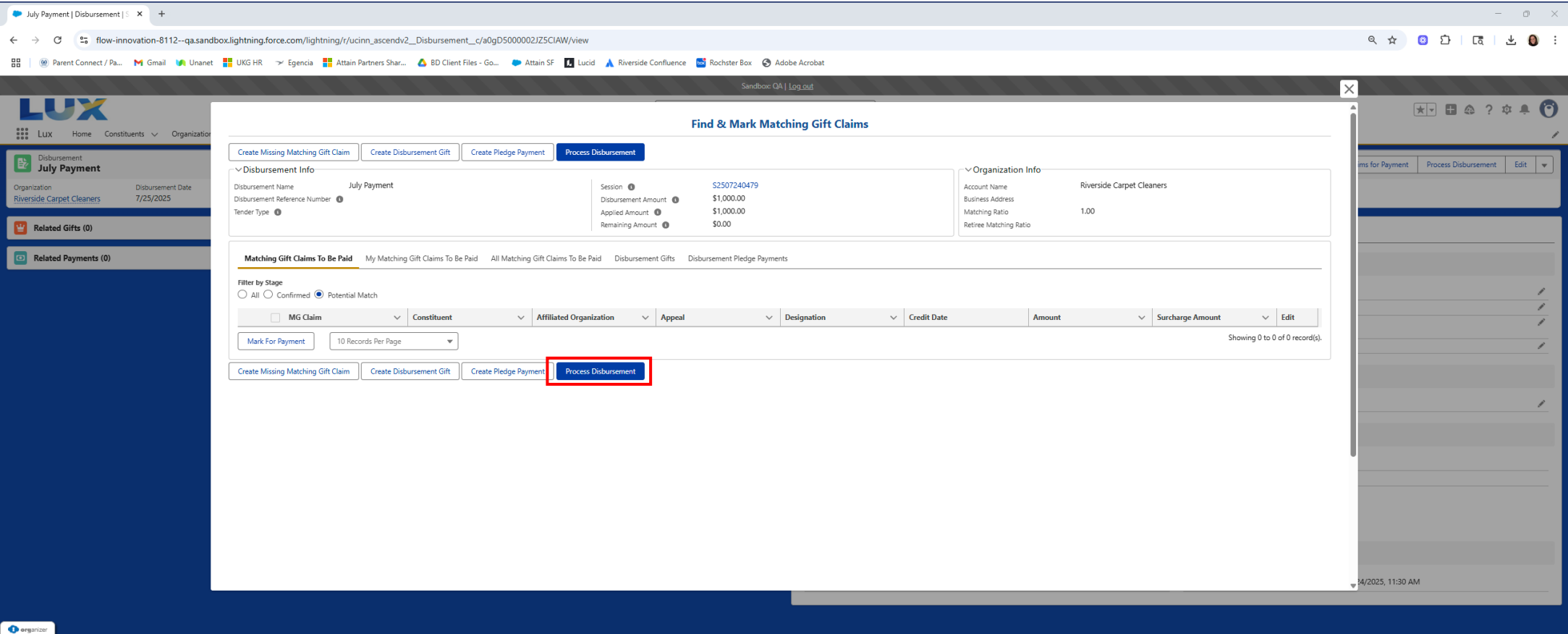
Edit

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.



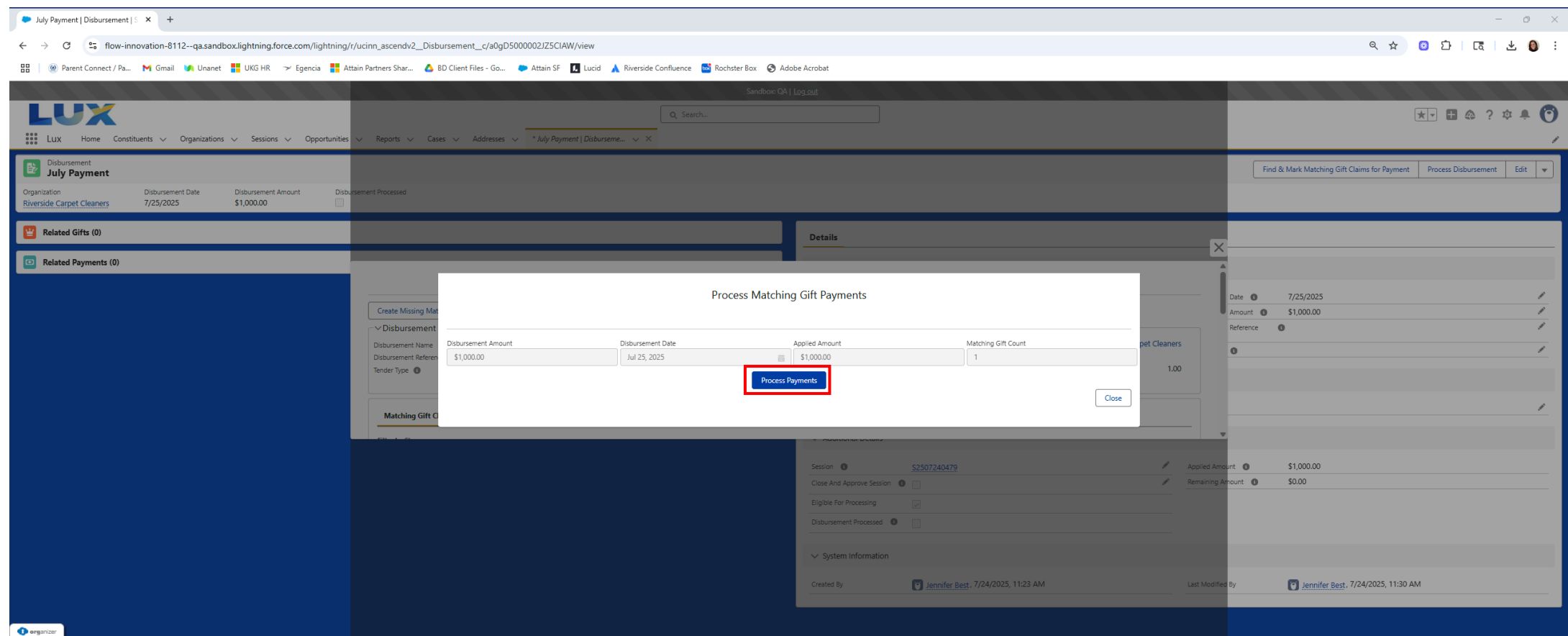
PROCESS MATCHING GIFTS

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!





2.6

PROCESS ONE-TIME MEMBERSHIPS

PROCESS GIFTS

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.

Expedited Gift Processing (v2)

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/n/Expedited_Gift_Processing_v2_UCR?ucinn_ascendv2__recordId=a2JD5000003ngyrMAA

Parent Connect / Pa... Gmail Unanet UKG HR Egencia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox: QA | [Log out](#)

★ + ↻ ? ⚙ 🔔 👤

LUX

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Addresses

Expedited Gift Processing (...)

Expedited Gift Processing (v2) - UCR

[Split Payments](#) [Reset/Create New](#) ⚙

Session Information

Transaction Entry

Gift

Pledges

Recurring Gifts

Payments

Matching Gifts

One-Time Memberships

Installment Based Memberships

Auto Renewing Memberships

Mass Adjustment

Mass Correction

Mass Payment

Q

↵

Name	Type	Credit Date	Constituent	Organization	Amount	Designation	Appeal Code
Showing 0 to 0 of 0 record(s).							

Records Displayed 5

Constituent

Organization

Use as Donor

Save

Donor Search

Constituent

Organization

Q

↵

View Critical Information

Transaction Information

* Gift/Pledge Type

* Tender Type for Gifts

* Amount

* Frequency

Donor Information

Scotty Highlander

Donor ID 00940382

Phone

Email

Address

Age

Restricted Party Screening Alert

Recurring

Select an Option

--None--

organizer

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

Transaction Information

* Gift/Pledge Type

One-Time Membership

* Tender Type for Gifts

Personal Check

* Amount ⓘ

Non-Gift Amount ⓘ

* Credit Date

Oct 3, 2025

Acknowledgement

--None--

Acknowledgement Date

Post to G / L Date ⓘ

Oct 4, 2025

Send to G / L ⓘ

☒

GL Posted

☐

FE Sub-Type

--None--

Proposal

Is Anonymous

☒

Is Tax Receipt

☒

Notes

PROCESS GIFTS

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

Membership Information

Membership Level

Botanic Gardens Annual Membership

Designation

200165

Original Amount

\$120.00

Discount Percentage

0.00%

Amount

\$120.00

Non-Gift Amount

\$0.00

Appeal

test123

Recipient

Scotty Highlander

Organization Recipient

Search Organizations...

Joint Recipient

Heidi Highlander

Original Expiration Date

Anniversary Date

Jul 24, 2025

Expiration Date

Jul 31, 2026

Notes

+ Add Non-Gift Item

ONE-TIME MEMBERSHIP: HARD AND SOFT CREDIT INFORMATION

Hard and Soft Credit Information

Designation	Credit Type	Credit Subtype	Constituent	Organization	Credit Amount	
200165	Hard	Select an...	Scotty H		\$100.00	
200165	Soft	Spousal	Heidi H		\$100.00	

+ Add

Calculate Hard and Soft Credits

- 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.

3

FINALIZE, CLOSE, & APPROVE SESSION

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.

Lightning Experience | Salesforce

Expedited Gift Processing (v2)

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/n/Expedited_Gift_Processing_v2_UCR?ucinn_ascendv2__recordId=a2JD5000003ngyrMAA

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Sandbox: QA | Log out

LUX

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Search...

Star Plus Refresh Help Settings Notifications Profile

Expedited Gift Processing (v2) - UCR

Split Payments Reset/Create New Settings

Session Information Transaction Entry

Gift Pledges Recurring Gifts Payments Matching Gifts One-Time Memberships Installment Based Memberships Auto Renewing Memberships Mass Adjustment Mass Correction Mass Payment

Search

Clear

Name	Type	Credit Date	Constituent	Organization	Amount	Designation	Appeal Code
☐ > GN0000945	Outright	Jul 23, 2025	Scotty Highlander		\$1,000.00	20001SCA	

Records Displayed 5 < 1 > >> Showing 1 to 1 of 1 record(s)

Constituent Organization

Search Use as Donor

Hard and Soft Credit Information

+ Add Calculate Hard and Soft Credits

Tribute Information

+ Add

Add Responsible Person(s)

+ Add

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.

Lightning Experience | Salesfor...

Expedited Gift Processing (v2) | X

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/n/Expedited_Gift_Processing_v2_UCR?ucinn_ascendv2_recordId=a2JD5000003ngyrMAA

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Search...

Star | Plus | Print | Help | Settings | Notifications | Profile

Expedited Gift Processing (v2) - UCR

Transaction Entry

Session Information

Transaction Entry

Session Info

Session Name: S2507230469

Session Date: 7/23/2025

Session Description: bulk processing

Special Instructions:

Close/Approve

Audit Type: None

Review Session Pre-Balance Report

Confirm Session Pre-Balance Report

Gift Specialist Comments

Type	Expected Count	Expected Total	Actual Count	Actual Total
1 Pledge	0	\$0.00	1	\$12,000.00
2 Pledge Payment	0	\$0.00	0	\$0.00
3 Gift	0	\$0.00	1	\$1,000.00
4 Recurring Gift	0	\$0.00	1	\$100.00
5 Recurring Gift Payment	0	\$0.00	0	\$0.00
6 Matching Gift	0		0	
7 Matching Gift Payment			0	
8 One-Time Membership				
9 Auto Renewing Membership				
10 Auto Renewing Membership Payment				
11 Installment Based Membership				
12 Installment Based Membership Payment				

View Pre-balance Report

Close Session

Gift

Pledges

Recurring Gifts

One-Time Memberships

Installment Based Memberships

Auto Renewing Memberships

Save Defaults

Transaction Information

* Gift/Pledge Type: Outright

* Tender Type for Gifts: Cash

* Credit Date: Jul 24, 2025

* Amount:

Non-Gift Amount:

Receipt Amount:

Irrevocable: --None--

Acknowledgement: --None--

Acknowledgement Date:

Post to G / L Date: Jul 24, 2025

Send to G / L: ☒

GL Posted: ☐

FE Sub-Type: --None--

Is Anonymous: ☐

Is Tax Receipt: ☒

Notes:

Regent Gift Reference:

Gift Fee Included: ☐

Donation Detail Information

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.

Lightning Experience | Salesforce

Expedited Gift Processing (v2)

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/n/Expedited_Gift_Processing_v2_UCR?ucinn_ascendv2_recordId=a2JD5000003ngyrMAA

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Sandbox: QA | Log out

LUX

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Expedited Gift Processing (v2) - UCR

Session Information

Transaction Entry

Session Info

Session Name

7/23/2025

bulk processing

Close/Approve

Audit Type

Review Session Pre-Balance Report

Confirm Session Pre-Balance Report

Gift Specialist Comments

Type	Expected Count	Expected Total	Actual Count	Actual Total
1 Pledge	0	\$0.00	1	\$12,000.00
2 Pledge Payment	0	\$0.00	0	\$0.00
3 Gift	0	\$0.00	1	\$1,000.00
4 Recurring Gift	0	\$0.00	1	\$100.00
5 Recurring Gift Payment	0	\$0.00	0	\$0.00
6 Matching Gift	0		0	
7 Matching Gift Payment			0	
8 One-Time Membership				
9 Auto Renewing Membership				
10 Auto Renewing Membership Payment				
11 Installment Based Membership				
12 Installment Based Membership Payment				

View Pre-balance Report

Close Session

Gift Pledges Recurring Gifts One-Time Memberships Installment Based Memberships Auto Renewing Memberships

Save Defaults

Transaction Information

Gift/Pledge Type

Tender Type for Gifts

Credit Date

Amount

Non-Gift Amount

Receipt Amount

Irrevocable

Acknowledgement

Acknowledgement Date

Post to G / L Date

Send to G / L

GL Posted

FE Sub-Type

Is Anonymous

Is Tax Receipt

Notes

Regent Gift Reference

Gift Fee Included

Outright

Cash

Jul 24, 2025

--None--

--None--

Jul 24, 2025

☒

☐

--None--

☐

☒

☐

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.

LUX

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Search...

★

+

🔒

?

⚙️

🔔

👤

Session S2507230469

+ Follow

Launch Expedited Gift Processing V2

Finalize Close Session

View Pre-Balance Report

Session Type
Various

Session Operator Assigned
Alli Hughes

Session Completed
7/24/2025, 8:50 AM

Gift / Pledge Payment Amount
\$0.00

Pledge Amount
\$0.00

Details

Session Totals

Other Details

Related

Files & Notes

History

Information

Session Operator Assigned
Alli Hughes

Session Date
7/23/2025

Session Description
bulk processing

Is Completed by Gift Specialist
☑️

Session Backup URL

Session Name
S2507230469

Session Type
Various

Special Instructions

Audit Type
None

Session Totals

No. of Gifts
0

No. of Gifts Posted
1

Gift Amount
\$0.00

Gift Amount Posted
\$1,000.00

Approval History (2)

Submit for Approval

Date: 7/24/2025, 8:50 AM

Status: Pending

Assigned To: Non-Regent Gift Approvers

Actual Approver: Non-Regent Gift Approvers

Comments:

Approval Request Submitted

Date: 7/24/2025, 8:50 AM

Status: Submitted

Assigned To: Jennifer Best

Actual Approver: Jennifer Best

Comments: Submitting request for approval.

View All

Approve

Reject

Reassign

Recall

Chatter

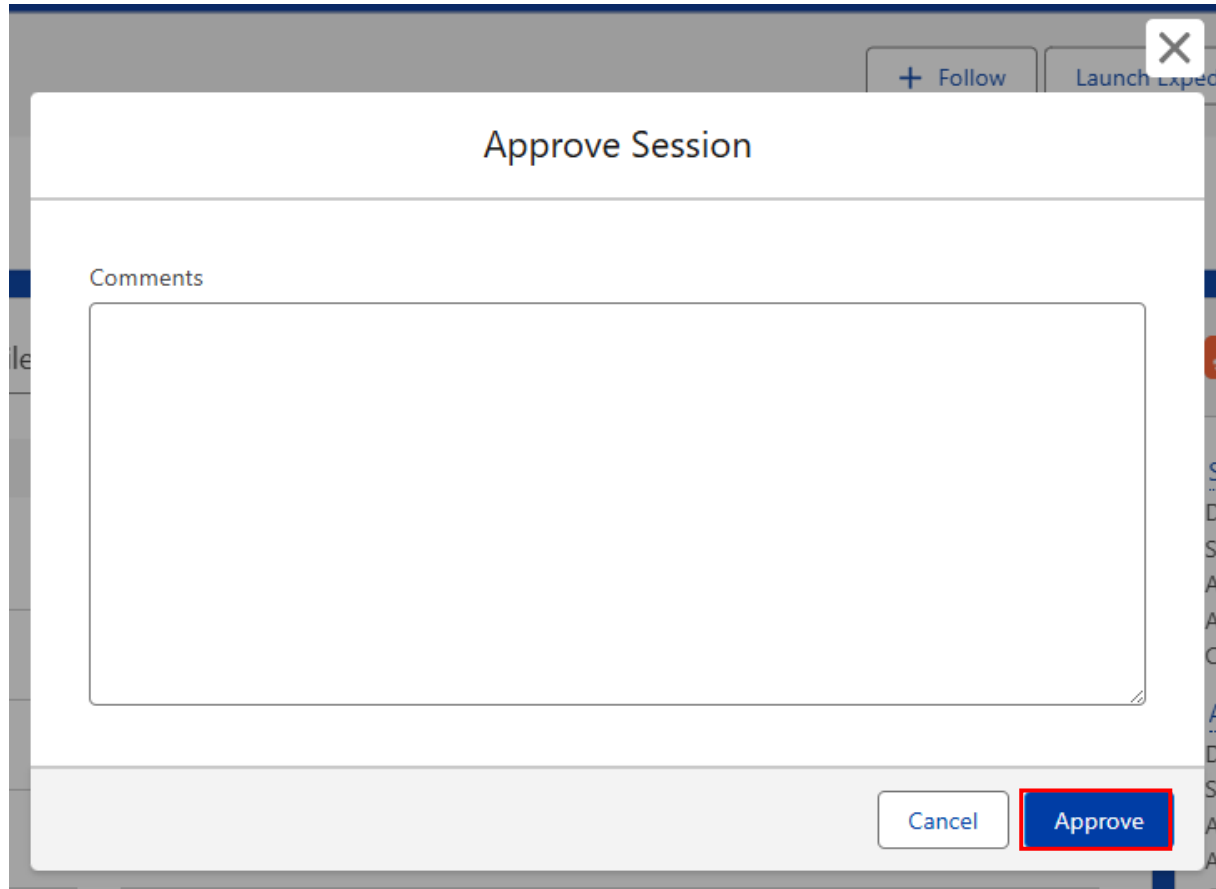
Activity

Post

javascript:void(0);

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 processor for modification, or reassigned to a different approver,

A screenshot of a web application interface showing a modal dialog box titled "Approve Session". The dialog box has a white background and a thin grey border. At the top right of the dialog is a close button (an 'X' icon). Below the title bar is a large text area labeled "Comments" with a placeholder text "le". At the bottom of the dialog are two buttons: a white "Cancel" button and a blue "Approve" button with a red border. The background of the web application is visible behind the dialog, showing a grey header with a "+ Follow" button and a "Launch Expedi" button, and a list of items on the right side with labels like "Su", "Da", "Sta", "As", "Ac", "Co", "Ap", "Da", "Sta", "As", "Ac".

Approve Session

Comments

le

Cancel Approve

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.

Lightning Experience | Salesforce

Expedited Gift Processing (v2)

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/n/Expedited_Gift_Processing_v2_UCR?ucinn_ascendv2__recordId=a2JD5000003nhGkMAI

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Sandbox: QA | Log out

LUX

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Expedited Gift Processing (v2) - UCR

Search...

Split Payments Reset/Create New

Session Information Transaction Entry

Gift Pledges Recurring Gifts Payments Matching Gifts One-Time Memberships Installment Based Memberships Auto Renewing Memberships Mass Adjustment Mass Correction Mass Payment

Constituent Organization

Q Scotty Highlander Use as Donor

View Critical Information

Donor Info Details Giving Membership Purchases

Gift Pledge Recurring Gift

GIFT NAME	GIFT TYPE	STAGE	CREDIT DATE	TENDER TYPE	GIFT AMOUNT	DESIGNATION CODE
> GN0000945	Outright	Funded	Jul 23, 2025	Cash	\$1,000.00	200015CA
☒ > GN0000957	Outright	Funded	Jul 24, 2025	Cash	\$1,000.00	200722P1

Records Displayed 5 Showing 1 to 2 of 2 record(s).

Edit To Pledge

Transaction Information

Donor

Gift/Pledge Type

Tender Type for Gifts

Credit Date

Amount

Non-Gift Amount

Receipt Amount

Irrevocable

Acknowledgement

Acknowledgement Date

Post to G / L Date

Send to G / L

GL Posted

FE Sub-Type

Proposal

Is Anonymous

Is Tax Receipt

Notes

Q Scotty Highlander

Outright

Cash

Jul 24, 2025

\$1,000.00

\$0.00

\$1,000.00

--None--

--None--

Jul 24, 2025

☒

☐

--None--

Q

☐

☒

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.

• Adjustment Reason

Available

Appeal Code Change

Data Entry Error

Designation Change

Donor Request

Expired Credit Card

Gift Date Change

Gift Split Request

Chosen

Amount Change

5

VIEW & EDIT GIFT RECORDS

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.

GN0000945 | Opportunity | Sale

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Opportunity/006D500000N0BG0IAJ/view

Sandbox: QA | Log out

LUX

Home

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Addresses

Opportunity

GN0000945

+ Follow

Edit

Delete

Printable View

Account Name

Planned Date

Amount

Stage

Opportunity Owner

9/23/2025

\$1,000.00

Funded

Jennifer B...

Funded

Change Closed Stage

Details

Chatter

Opportunity Name

GN0000945

Donor ID

00940386

Opportunity Record Type

Gift

Constituent

Scotty Highlander

Gift/Pledge Type

Outright

Constituent Type

Faculty - Current

Stage

Funded

Account Name

Tender Type

Cash

Credit Date

7/23/2025

Amount

\$1,000.00

Entry Date

7/23/2025

Non-Gift Amount

\$77.78

Receipt Number

RN-0000474

Written Off/Cancelled/Void Amount

\$0.00

Notes

Create Matching Credit Payment

Gift In Kind Description

Original Valuation

Appreciated Value

Regent Gift Reference

Gift Fee Included

SI Gift Matched Date

SI Gift Matched Amount

SI Gift Matched

Opportunity Team (1)

Add Default Team

Add Opportunity Team Members

Team Member

Member Role

Start Date

End Date

Jennifer Best

Opportunity Owner

Opportunity Splits (1)

Edit Opportunity Splits

Team Member

Opportunity Split Type

Percent (%)

Amount

Jennifer Best

Revenue

100.00%

\$1,000.00

Designation Details (1)

1 item • Updated a few seconds ago

Designation Detail Name

Designation

Designation Name

Designation Type

Amount

Appeal

DD-0000674

200015CA

Alumni & Visitors Center Legacy Brick Fund

Foundation

\$922.22

Email test

Payments (1)

1 item • Sorted by Credit Date • Updated a few seconds ago

Payment Name

Transaction Type

Tender Type

Payment Amount

Non-Gift Amount

Receipt Amount

Credit Date

Designation

Appeal Code

T0000474

Outright Gift

Cash

\$1,000.00

\$77.78

\$922.22

7/23/2025

200015CA

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

GN0000945 | Opportunity | Sale

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Opportunity/006D500000N0BGolAN/view

Parent Connect / Pa... Gmail Unanet UKG HR Egencia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox: QA | Log out

LUX

Home Constituents Organizations Sessions Opportunities Reports Cases Addresses

Search...

Opportunity GN0000945

+ Follow Edit Delete Printable View

Account Name Planned Date Amount Stage Opportunity Owner

9/23/2025 \$1,000.00 Funded Jennifer B...

Funded Change Closed Stage

Details Chatter

Opportunity Name GN0000945

Opportunity Record Type Gift

Gift/Pledge Type Outright

Stage Funded

Tender Type Cash

Amount \$1,000.00

Non-Gift Amount \$77.78

Written Off/Cancelled/Void Amount \$0.00

Create Matching Credit Payment

Gift In Kind Description

Original Valuation

Appreciated Value

Regent Gift Reference

Gift Fee Included

SI Gift Matched Date

SI Gift Matched Amount

SI Gift Matched

Donor ID 00940386

Constituent Scotty Highlander

Constituent Type Faculty - Current

Account Name

Credit Date 7/23/2025

Entry Date 7/23/2025

Receipt Number RN-0000474

Notes

Opportunity Team (1)

Add Default Team Add Opportunity Team Members

Team Member	Member Role	Start Date	End Date
Jennifer Best	Opportunity Owner		

View All

Opportunity Splits (1)

Edit Opportunity Splits

Team Member	Opportunity Split Type	Percent (%)	Amount
Jennifer Best	Revenue	100.00%	\$1,000.00

View All

Designation Details (1)

1 item • Updated a few seconds ago

Designation Detail Name	Designation	Designation Name	Designation Type	Amount	Appeal
DD-0000674	200015CA	Alumni & Visitors Center Legacy Brick Fund	Foundation	\$922.22	Email test

View All

Payments (1)

1 item • Sorted by Credit Date • Updated a few seconds ago

Payment Name	Transaction Type	Tender Type	Payment Amount	Non-Gift Amount	Receipt Amount	Credit Date	Designation	Appeal Code
T0000474	Outright Gift	Cash	\$1,000.00	\$77.78	\$922.22	7/23/2025	200015CA	

organizer

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

GN0000945 | Opportunity | Sale

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Opportunity/006D500000N0BG0IAJ/view

Parent Connect / Pa... Gmail Unanet UKG HR Egencia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox: QA | Log out

LUX

Home Constituents Organizations Sessions Opportunities Reports Cases Addresses

Search...

Opportunity GN0000945

[Follow](#) [Edit](#) [Delete](#) [Printable View](#)

Kuali Award ID

Principal Investigator

Asset Description

Maturity Year

Gift Status

Rmdr Value as of

Asset Amount

Asset Cost Basis

Asset Sold

Acknowledgement Date

Real Estate Sale Information

Real Estate Sold Date

Real Estate Sold Amount

Real Estate Sale Fees

Additional Information

Gift Processor Jennifer Best

Session S2507230469

Session Approval Date 7/24/2025

Responsible Person

Appeal Email test

Proposal

Is Anonymous

Acknowledgement

Adjustment Information

Adjusted Pledge/Gift

Adjustment Type

Original Amount

Adjustment Session

Adjustment Reason

Adjustment Reason (Other)

System Information

Created By Jennifer Best 7/23/2025, 12:49 PM

Last Modified By Arun Jayaseelan 7/24/2025, 12:24 PM

Planned Date 9/23/2025

Hard and Soft Credits (1)

1 Item • Sorted by Credit Date • Updated 5 minutes ago

☐ Hard and Soft Credit Name	Name of Credittee	Credit Type	Credit Sub...	Credit Amount	Credit Date
☐ Credit-250723-1581	Scotty Highlander	Hard		\$922.22	7/23/2025

Stocks (0)

Tributes (0)

Transaction Data (1)

Transaction Data Name	Transaction Type	Is Success	Authorized Date
Success	Double the Donation	☒	7/23/2025, 12:49 PM

Adjustments (0)

Adjustment History (1)

Name	Adjustment Type	Adjustment Reason	Created Date
GN0000945			7/23/2025, 03:49 PM

Stage History (1)

Stage	Amount	Probability (%)	Expected Revenue	Planned Date	Last Modified By	Last Modified
Funded	\$1,000.00	100%	\$1,000.00	9/23/2025	Jennifer Best	7/23/2025, 12:49 PM

Stage History: gives details on when the gift was funded

LUX

Sandbox: QA | Log out

Search...

+ Follow Edit Delete Printable View

Opportunity GN0000945

Kuali Award ID	Rmdr Value as of
Principal Investigator	Asset Amount
Asset Description	Asset Cost Basis
Maturity Year	Asset Sold
Gift Status	Acknowledgement Date

Real Estate Sale Information

Real Estate Sold Date
Real Estate Sold Amount
Real Estate Sale Fees

Additional Information

Gift Processor	Jennifer Best	Appeal	Email test
Session	S2507230469	Proposal	
Session Approval Date	7/24/2025	Is Anonymous	☐
Responsible Person		Acknowledgement	

Adjustment Information

Adjusted Pledge/Gift	Adjustment Session
Adjustment Type	Adjustment Reason
Original Amount	Adjustment Reason (Other)

System Information

Created By	Jennifer Best, 7/23/2025, 12:49 PM	Last Modified By	Arun Jayaseelan, 7/24/2025, 12:24 PM
Item ID		Planned Date	9/23/2025

Hard and Soft Credits (1)

1 item • Sorted by Credit Date • Updated 5 minutes ago

	Hard and Soft Credit Name	Name of Creditee	Credit Type	Credit Sub...	Credit Amount	Credit Date ↑
1	☐ Credit-250723-1581	Scotty Highlander	Hard		\$922.22	7/23/2025

Stocks (0)

Tributes (0)

Transaction Data (1)

Transaction Data Name	Transaction Type	Is Success	Authorized Date
Success	Double the Donation	☒	7/23/2025, 12:49 PM

Adjustments (0)

Adjustment History (1)

Name	Adjustment Type	Adjustment Reason	Created Date
GN0000945			7/23/2025, 03:49 PM

Stage History (1)

Stage	Amount	Probability (%)	Expected Revenue	Planned Date	Last Modified By	Last Modified
Funded	\$1,000.00	100%	\$1,000.00	9/23/2025	Jennifer Best	7/23/2025, 12:49 PM

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.

GN0000945 | Opportunity | Sale

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Opportunity/006D500000N0BGolAN/view

Sandbox: QA | Log out

LUX

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Addresses

Opportunity

GN0000945

+ Follow

Edit

Delete

Printable View

Account Name

Planned Date

Amount

Stage

Opportunity Owner

9/23/2025

\$1,000.00

Funded

Jennifer B...

Funded

Change Closed Stage

Details

Chatter

Opportunity Name

GN0000945

Donor ID

00940386

Opportunity Record Type

Gift

Constituent

Scotty Highlander

Gift/Pledge Type

Outright

Constituent Type

Faculty - Current

Stage

Funded

Account Name

Tender Type

Cash

Credit Date

7/23/2025

Amount

\$1,000.00

Entry Date

7/23/2025

Non-Gift Amount

\$77.78

Receipt Number

RN-0000474

Written Off/Cancelled/Void Amount

\$0.00

Notes

Create Matching Credit Payment

Gift In Kind Description

Original Valuation

Appreciated Value

Regent Gift Reference

Gift Fee Included

SI Gift Matched Date

SI Gift Matched Amount

SI Gift Matched

Opportunity Team (1)

Add Default Team

Add Opportunity Team Members

Team Member

Member Role

Start Date

End Date

Jennifer Best

Opportunity Owner

View All

Opportunity Splits (1)

Edit Opportunity Splits

Team Member

Opportunity Split Type

Percent (%)

Amount

Jennifer Best

Revenue

100.00%

\$1,000.00

View All

Designation Details (1)

1 Item • Updated 19 minutes ago

Designation Detail Name

Designation

Designation Name

Designation Type

Amount

Appeal

1

DD-0000674

200015CA

Alumni & Visitors Center Legacy Brick Fund

Foundation

\$922.22

Email test

View All

Payments (1)

1 Item • Sorted by Credit Date • Updated 19 minutes ago

Payment Name

Transaction Type

Tender Type

Payment Amount

Non-Gift Amount

Receipt Amount

Credit Date

Designation

Appeal Code

1

T0000474

Outright Gift

Cash

\$1,000.00

\$77.78

\$922.22

7/23/2025

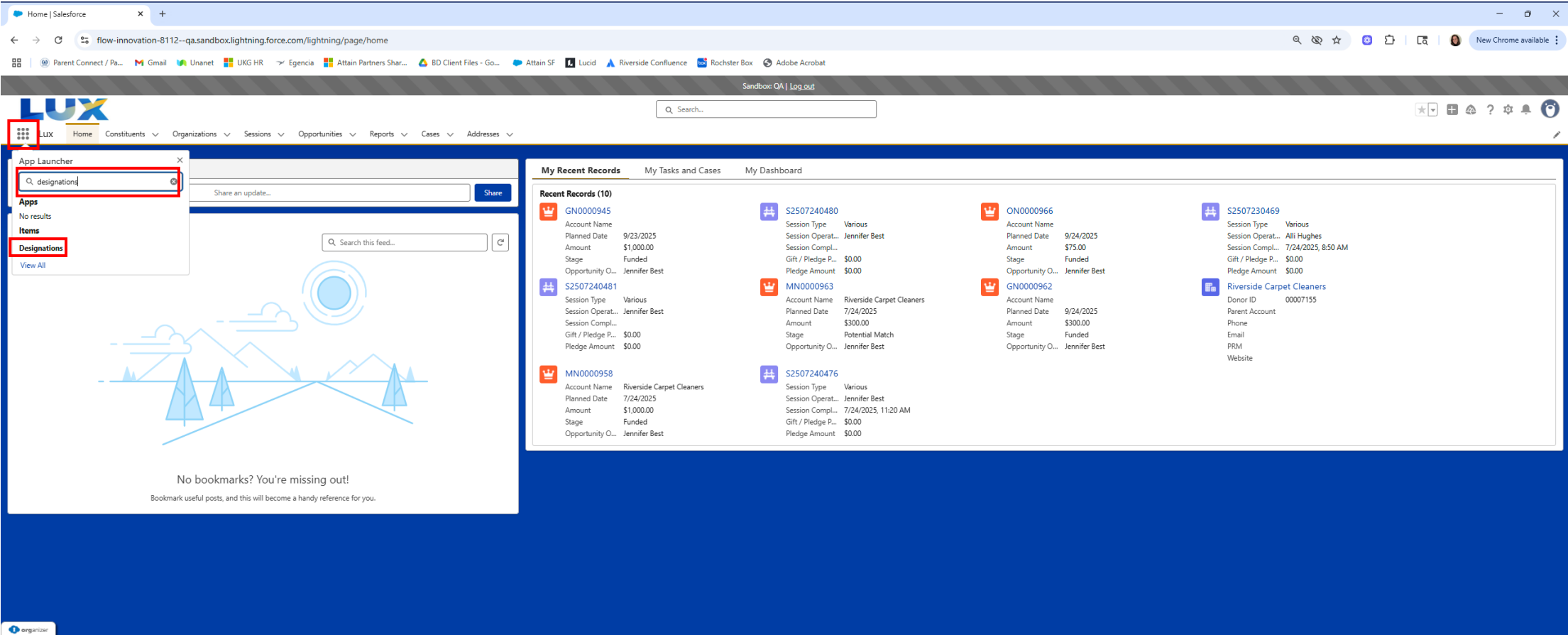
200015CA

6

VIEW, EDIT, & CREATE DESIGNATIONS

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.

The screenshot shows a web browser window with the URL `flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/o/ucinn_ascendv2__Designation__c/home`. The browser's address bar and tabs are visible at the top. Below the browser window, the LUX system interface is shown. The top navigation bar includes the LUX logo, a search bar, and a user profile icon. The main navigation menu on the left includes links for Home, Constituents, Organizations, Sessions, Opportunities, Reports, Cases, and Addresses. The 'Recently Viewed | Designations' tab is selected. The 'Designations' section header is visible, and the 'Recently Viewed' dropdown menu is open, showing a list of recent list views. The 'All' option is highlighted in the dropdown menu. The main content area displays a message: 'Nothing to see here. There's nothing in your list yet. Try adding a new record.' The background of the main content area features a stylized illustration of a building and mountains.

Recently Viewed | Designations

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/o/ucinn_ascendv2__Designation__c/home

Parent Connect / Pa... Gmail Unanet UKG HR Egencia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox: QA | Log out

LUX

Home Constituents Organizations Sessions Opportunities Reports Cases Addresses * Recently Viewed | Designat...

Designations

Recently Viewed

Search lists...

Recent List Views

- ✓ Recently Viewed (Pinned list)

All Other Lists

- All
- Endowment Designations
- Payroll Code Designations
- unit review

Nothing to see here

There's nothing in your list yet. Try adding a new record.

DESIGNATIONS

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

All | Designations | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/o/ucinn_ascendv2__Designation__c/list?filterName=ucinn_ascendv2__All

Parent Connect / Pa... Gmail Unanet UKG HR Egencia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox: QA | Log out

LUX

Home Constituents Organizations Sessions Opportunities Reports Cases Addresses All | Designations

Search...

Designations

All

New Change Owner Import Printable View

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.

00623R | Designation | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/ucinn_ascendv2__Designation__c/a0eD50000DH6UPIA1/view

Parent Connect / Pa... Gmail Unanet UKG HR Egencia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox: QA | Log out

LUX

Home Constituents Organizations Sessions Opportunities Reports Cases Addresses * 00623R | Designation

Designation 00623R

Designation Name Agricultural Operations

Details Transactions Beneficiaries Stewardship Endowment Financials History

Designation ID #	00623R	FE Project Code	
Designation Name	Agricultural Operations	Status	Active
Parent Designation		Public Facing Name	Agricultural Operations
CASE Type	Current, Restricted	Designation Type	Regents
Start Date	2/19/1999	Benefit Fund	
End Date		Online Giving fund	
Campus Oracle Fund ID	53361	Regents Endowment Fund ID	53361
Accounting Fund Category		Special Handling Note	
Match Companion Designation			

Designation Description

Designation Purpose

Designation Background

Designation Notes

Designation Documents URL

Stewardship Information

Stewardship Activity

Stewardship Purpose

Student Initiative Match(Bynd Brilliant)

Stewardship Status

Stewardship Student Status

Student Sprt Init Match(2024 Bynd Brill)

Reporting Information

CAE Purpose

Financial Aid's Fund Description

Financial Aid's Fund # (SUBCODE)

Latest Endowment Financials

Link a related record.

Search Endowment 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.

00623R | Designation | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/ucinn_ascendv2__Designation__c/a0eD500000DH6UPIA1/view

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Sandbox: QA | Log out

LUX

Home Constituents Organizations Sessions Opportunities Reports Cases Addresses * 00623R | Designation

Search...

Star Plus Refresh Help User

Designation 00623R

Designation Name Agricultural Operations

Details Transactions Beneficiaries Stewardship Endowment Financials History

Designation Details (0)

Payments (0)

Installments (0)

Hard and Soft Credits (0)

Sequestered Designations (0)

New

Latest Endowment Financials

Link a related record.

Search Endowment Financials...

organizer

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.

00623R | Designation | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/ucinn_ascendv2__Designation__c/a0eD500000DH6UPIA1/view

Parent Connect / Pa... Gmail Unanet UKG HR Egencia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox: QA | Log out

LUX

Home Constituents Organizations Sessions Opportunities Reports Cases Addresses * 00623R | Designation

Search...

Star Plus Refresh Help User

Designation 00623R

Designation Name Agricultural Operations

Edit Submit for Approval Clone

Details Transactions **Beneficiaries** Stewardship Endowment Financials History

Designation Beneficiaries (0) New

Latest Endowment Financials

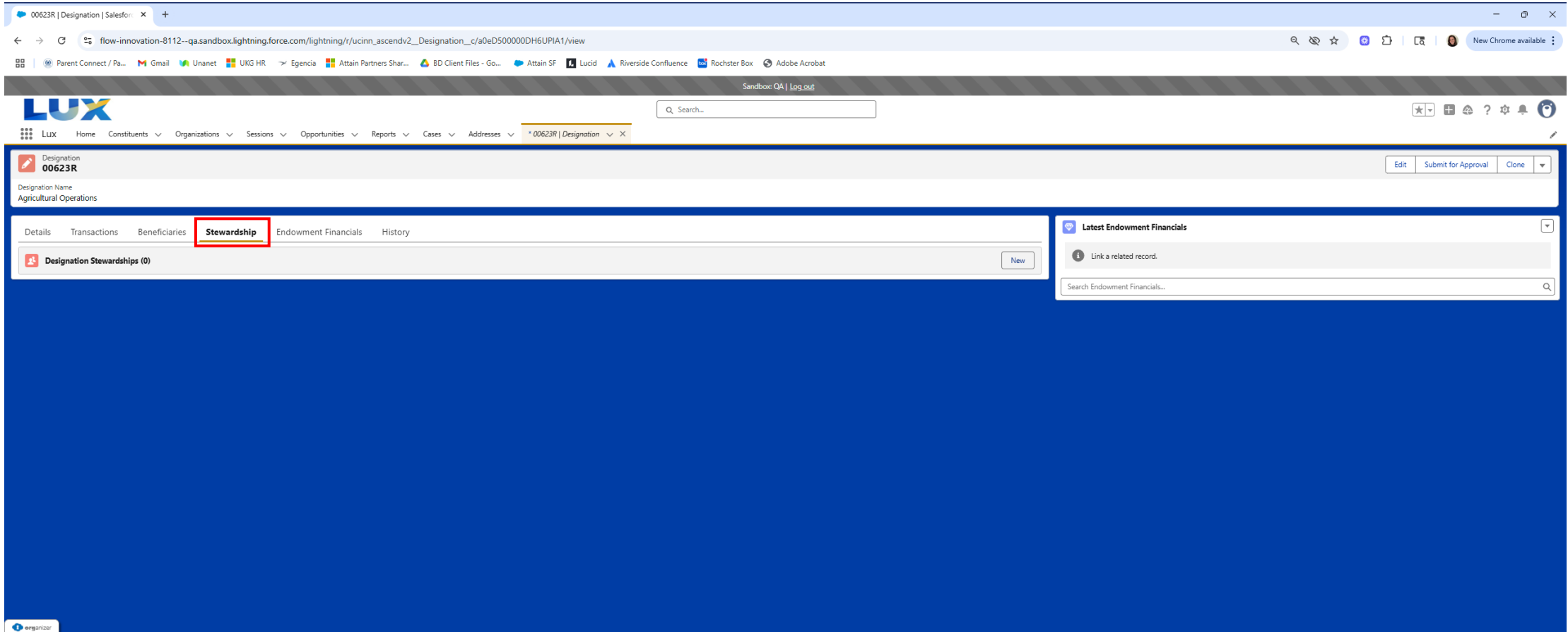
Link a related record.

Search Endowment Financials...

organizer

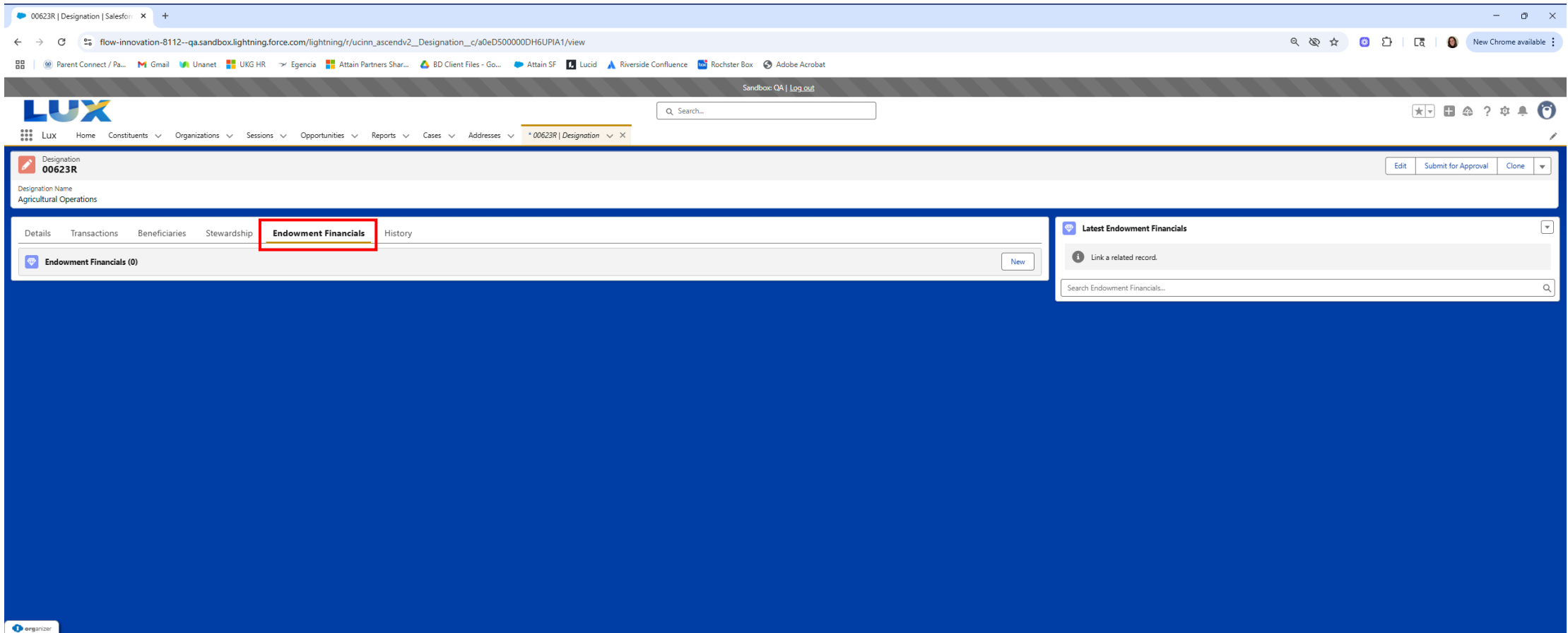
VIEW DESIGNATIONS: STEWARDSHIP

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.

00623R | Designation | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/ucinn_ascendv2__Designation__c/a0eD500000DH6UPIA1/view

Parent Connect / Pa... Gmail Unanet UKG HR Egencia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox: QA | Log out

LUX

Home Constituents Organizations Sessions Opportunities Reports Cases Addresses * 00623R | Designation

Search...

Star Plus Refresh Help User

Designation 00623R

Designation Name Agricultural Operations

Edit Submit for Approval Clone

Details Transactions Beneficiaries Stewardship Endowment Financials History

Designation History (1)

Date	Field	User	Original Value	New Value
6/30/2025, 5:40 AM	Created	Matt Roush		

View All

Latest Endowment Financials

Link a related record.

Search Endowment Financials...

organizer

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.

The image displays two screenshots of the LUX system interface, illustrating the process of editing or adding designations.

Top Screenshot: Shows the 'Details' tab for a designation (ID: 00623R). The 'Edit' button is highlighted with a red box. The 'Latest Endowment Financials' section is visible on the right.

Bottom Screenshot: Shows the 'Transactions' tab for the same designation. The 'New' button is highlighted with a red box. The 'Latest Endowment Financials' section is also visible on the right.

The interface includes a navigation bar with tabs: Home, Constituents, Organizations, Sessions, Opportunities, Reports, Cases, Addresses, and a dropdown menu for '00623R | Designation'. The main content area is divided into sections: Details, Transactions, Beneficiaries, Stewardship, Endowment Financials, and History. The 'Details' section contains a table with fields like Designation ID, Name, Parent Designation, CASI Type, Start Date, End Date, Campus Oracle Fund ID, Accounting Fund Category, and Match Comparison Designation. The 'Transactions' section lists various transaction types: Designation Details (0), Payments (0), Installments (0), Hard and Soft Credits (0), and Sequestered Designations (0). The 'Latest Endowment Financials' section on the right provides a link to a related record and a search bar for Endowment Financials.

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.

Recently Viewed | Designations

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/o/ucinn_ascendv2__Designation__c/home

Sandbox: QA | Log out

Designations

Recently Viewed

3 items • Updated a few seconds ago

	Designation ID #	Designation Name
1	00623R	Agricultural Operations
2	200061	Baseball- Golf Tournament
3	00608R	Career Center

+ New Designation

Recent records

00623R

200061

00608R

Recent lists

Copy of All

All

Endowment Designations

+ Add "00623R | Designation" to Nav Bar

New

Change Owner

Import

Search this list...

Designation Type	Benefit Fund	Campus Oracle Fund ID	Last Modified Date
Regents		53361	6/30/2025, 5:52 AM
Foundation		41940	6/30/2025, 5:52 AM
Regents			6/30/2025, 5:52 AM

https://flow-innovation-8112--qa.sandbox.lightning.force.com/a00e/e?yObject=ucinn_ascendv2__Designation__c&save_new_url=%2Fa0e%2Fe8&navigati...

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.

The screenshot shows a Salesforce interface with a 'New Designation' modal form open over a 'Designations' list. The browser address bar shows a URL from 'flow-innovation-8112--qa.sandbox.lightning.force.com'. The 'Designations' list on the left has a table with columns 'Designation ID #' and 'Designation Name'. The 'New Designation' form contains several sections: 'Information' with fields for Designation ID #, Name, Parent Designation, CASE Type, Start Date, End Date, Campus Oracle Fund ID, Accounting Fund Category, Match Companion Designation, FE Project Code, Public Facing Name, Designation Type, Benefit Fund, Online Giving fund, Regents Endowment Fund ID, and Special Handling Note. The 'Designation Description' section has a 'Designation Purpose' field. At the bottom of the form are buttons for 'Cancel', 'Save & New', and 'Save' (highlighted with a red box). The background list table has columns 'Campus Oracle Fund ID' and 'Last Modified Date'.

Designation ID #	Designation Name
00623R	Agricultural Operations
200061	Baseball- Golf Tournament
00608R	Career Center

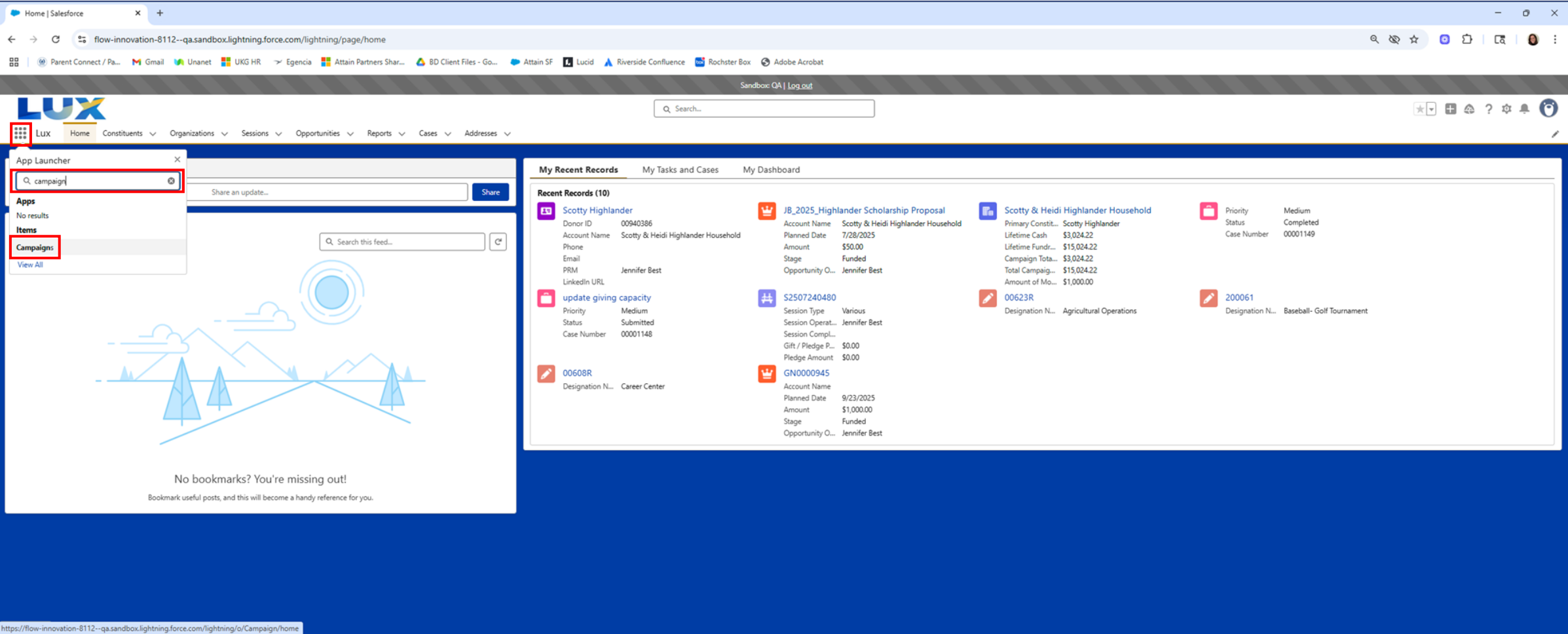
Campus Oracle Fund ID	Last Modified Date
53361	6/30/2025, 5:52 AM
41940	6/30/2025, 5:52 AM
	6/30/2025, 5:52 AM

7

CAMPAIGNS

VIEW CAMPAIGNS

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



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.

Email test | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Campaign/701D5000000fxbUIAQ/view

Parent Connect / Pa... Gmail Unanet UKG HR Egencia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox: QA | Log out

LUX

Search...

Home Constituents Organizations Sessions Opportunities Reports Cases Addresses Email test

Campaign Email test

New Support Case New Note Edit

Status Planned Start Date 12/4/2024 End Date

Details

Related

Campaign Name Email test

Description

Parent Campaign

Campaign Record Type Appeal

Channel Email

Segment

Campaign Owner Richard Bobo

Planning

Expected Revenue in Campaign

Direct Mail Budgeted Cost

Budgeted Cost in Campaign

Num Sent in Campaign 0

Expected Response (%) 0.00%

Campaign Statistics

Responses in Campaign 0

Leads in Campaign 0

Converted Leads in Campaign 0

Constituents in Campaign 1

Custom Links

Status Planned

Active

Appeal Code

Start Date 12/4/2024

End Date

Unit

Actual Revenue

Direct Mail Actual Cost

Actual Cost in Campaign

Num Donated

Actual Response (%)

Opportunities in Campaign 4

Value Opportunities in Campaign \$13,600

Value Won Opportunities in Campaign \$1,300

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

VIEW CAMPAIGNS

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

Email test | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Campaign/701D5000000fxbUIAQ/view

Parent Connect / Pa... Gmail Unanet UKG HR Egencia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox: QA | Log out

LUX

Home Constituents Organizations Sessions Opportunities Reports Cases Addresses Email test

Search...

★ + ? ⚙️ 🔔 👤

Campaign Email test

Status Planned Start Date 12/4/2024 End Date

Details

Related

Campaign Hierarchy (0)

Campaign Members (1)

Type	Status	First Name	Last Name
Constituent	Sent	Scotty	Highlander
View All			

Campaign Member Statuses (4)

Member Status	Is Default	Responded	Last Modified Date
Donated	☐	☒	12/3/2024, 6:57 AM
Email Opened	☐	☐	12/3/2024, 6:57 AM
Sent	☒	☐	12/3/2024, 6:57 AM
Unsubscribed	☐	☐	12/3/2024, 6:57 AM
View All			

Files (0)

Add Files

Upload Files

Or drop files

Notes (0)

New

Activity

Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

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.

Scotty Highlander | Constituent

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Contact/003D5000012l2mgIAA/view

Parent Connect / Pa... Gmail Unanet UKG HR Egencia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox: QA | Log out

LUX

Search...

LUX Home Constituents Organizations Sessions Opportunities Reports Cases Addresses Email test



View Critical Information

CONSTITUENT INDICATORS



UCR - Global Invitations Opt-out

The Wedding Singer

Global: UCR Email Opt-Out

Scotty Highlander

+ Follow Edit Delete Manage Household

Donor ID: 00940386
Phone:
PRM: Jennifer Best

Account Name: Scotty & Heidi Highlander Household
Email:
LinkedIn URL:

Alerts

1 of 1 item

Comment

Start Date

End Date

Scotty is allergic to peanuts Mar 5, 2025

Overview

Constituent Details

Prospect Management

Our UCR

Chatter

Giving Details

Names

Salutations

Addresses

Phones

Emails

Social Media

Affiliations

Relationships

Funding Interests

Degree Information

Stewardship

Campaign History

More

Campaign History (1)

1 item • Sorted by Created Date • Updated a few seconds ago

Campaign Name

Start Date

Type

Status

Responded

Member Status Updated

1

Email test

12/4/2024

Sent

☐

7/29/2025, 6:39 AM

View All

From the campaign list view, click New.

LUX

Sandbox: QA | Log out

Search...

Campaigns

All Campaigns ▾

40 items • Sorted by Campaign Name • Updated a few seconds ago

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

The screenshot shows the Salesforce interface for creating a new campaign. A modal window titled "New Campaign" is open, prompting the user to "Select a record type". The options are:

- ☒ Campaign
- ☐ Appeal (with subtext: ascend Record Type for Appeal records)
- ☐ Newsletter Campaign

The "Next" button is highlighted in blue. The background shows a list of existing campaigns with columns for Campaign Name, Type, Campaign Record Type, Channel, Start Date, End Date, Status, Active, Cons..., and Value Won Opportunities L...

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

CREATE A CAMPAIGN

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

The screenshot shows the LUX CRM interface with a 'New Campaign: Campaign' modal form open. The form is titled 'New Campaign: Campaign' and has a close button (X) in the top right corner. The form is divided into several sections:

- Campaign Information:** This section contains the following fields:
 - * Campaign Name:** A text input field, highlighted with a red box.
 - * Status:** A dropdown menu with 'Planned' selected, highlighted with a red box.
 - Description:** A text input field.
 - Parent Campaign:** A search input field with the placeholder 'Search Campaigns...'.
 - Campaign Record Type:** A dropdown menu with 'Campaign' selected.
 - * Channel:** A dropdown menu with '--None--' selected, highlighted with a red box.
 - * Appeal Code:** A text input field, highlighted with a red box.
 - * Start Date:** A date input field, highlighted with a red box.
 - End Date:** A date input field.
 - Unit:** A dropdown menu with '--None--' selected.
 - Campaign Owner:** A text input field with 'Jennifer Best' entered.
- Planning:** This section contains the following fields:
 - Expected Revenue in Campaign:** A text input field.
 - Actual Revenue:** A text input field.
 - Direct Mail Budgeted Cost:** A text input field.
 - Direct Mail Actual Cost:** A text input field.
 - Budgeted Cost in Campaign:** A text input field.
 - Actual Cost in Campaign:** A text input field.
 - Num Sent in Campaign:** A text input field with '0' entered.
 - Num Donated:** A text input field.
 - Expected Response (%):** A text input field with '0.00%' entered.
 - Actual Response (%):** A text input field.

At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'. The 'Save' button is highlighted with a red box.

In the background, the LUX CRM interface is visible, showing a list of campaigns on the left and a table of campaign data on the right. The table has columns for 'End Date', 'Status', 'Active', 'Cons...', and 'Value Won Opportunities L...'. The table contains 24 rows of data.

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 link the campaign records and will allow you to see the data presented as a whole.

The screenshot displays the 'New Campaign: Campaign' form in the LUX CRM. The form is divided into two main sections: 'Campaign Information' and 'Planning'.

Campaign Information Section:

- Campaign Name:** A text input field.
- Description:** A text input field.
- Parent Campaign:** A dropdown menu with a search bar, highlighted by a red rectangle.
- Status:** A dropdown menu set to 'Planned'.
- Active:** A checkbox.
- Appeal Code:** A text input field.
- Campaign Record Type:** A dropdown menu set to 'Campaign'.
- Channel:** A dropdown menu set to '--None--'.
- Segment:** A text input field.
- Campaign Owner:** A text input field set to 'Jennifer Best'.
- Start Date:** A date picker.
- End Date:** A date picker.
- Unit:** A dropdown menu set to '--None--'.

Planning Section:

- Expected Revenue in Campaign:** A text input field.
- Actual Revenue:** A text input field.
- Direct Mail Budgeted Cost:** A text input field.
- Direct Mail Actual Cost:** A text input field.
- Budgeted Cost in Campaign:** A text input field.
- Actual Cost in Campaign:** A text input field.
- Num Sent in Campaign:** A text input field set to '0'.
- Num Donated:** A text input field.
- Expected Response (%):** A text input field set to '0.00%'.
- Actual Response (%):** A text input field.

The background shows a list of existing campaigns and a table of campaign details.

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.

Email test | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Campaign/701D5000000fxbUIAQ/view

Sandbox: QA | Log out

LUX

Home

Constituents

Organizations

Sessions

Opportunities

Reports

Cases

Addresses

Email test

Campaign

Email test

New Support Case

New Note

Edit

Status

Planned

Start Date

12/4/2024

End Date

Details

Related

Campaign Name

Email test

Description

Parent Campaign

Campaign Record Type

Appeal

Channel

Email

Segment

Campaign Owner

Richard Bobo

Planning

Expected Revenue in Campaign

Direct Mail Budgeted Cost

Budgeted Cost in Campaign

Num Sent in Campaign

Expected Response (%)

Actual Revenue

Direct Mail Actual Cost

Actual Cost in Campaign

Num Donated

Actual Response (%)

Campaign Statistics

Responses in Campaign

Leads in Campaign

Converted Leads in Campaign

Constituents in Campaign

Opportunities in Campaign

Value Opportunities in Campaign

Value Won Opportunities in Campaign

Custom Links

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

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).

Email test | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Campaign/701D5000000fxbUIAQ/view

Parent Connect / Pa... Gmail Unanet UKG HR Egencia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

Sandbox QA | Log out

LUX

Search...

LUX Home Constituents Organizations Sessions Opportunities Reports Cases Addresses Email test

Campaign Email test

Status Planned Start Date 12/4/2024 End Date

Details Related

Campaign Hierarchy (0)

Campaign Members (1)

Campaign Member Statuses (4)

Files (0)

Notes (0)

Add Constituents Add Organizations

Type	Status	First Name	Last Name
Constituent	Sent	Scotty	Highlander
View All			

New Change Default Status

Member Status	Is Default	Responded	Last Modified Date
Donated	☐	☒	12/3/2024, 6:57 AM
Email Opened	☐	☐	12/3/2024, 6:57 AM
Sent	☒	☐	12/3/2024, 6:57 AM
Unsubscribed	☐	☐	12/3/2024, 6:57 AM
View All			

Add Files

Upload Files Or drop files

New

Activity

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

MANAGE A CAMPAIGN

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

Email test | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Campaign/701D50000006xbUIAQ/view

Parent Connect / Pa... Gmail Unanet UKG HR Egencia Attain Partners Shar... BD Client Files - Go... Attain SF Lucid Riverside Confluence Rochester Box Adobe Acrobat

LUX

Sandbox: QA | Log out

Search...

Campaign Email test

Status Planned

Details R

Campaign

Campaign

Campaign

Member Status

Donated

Email Opened

Sent

Unsubscribed

Files (0)

Notes (0)

Add Constituents to Campaign

Richard B Highlander

1 item selected

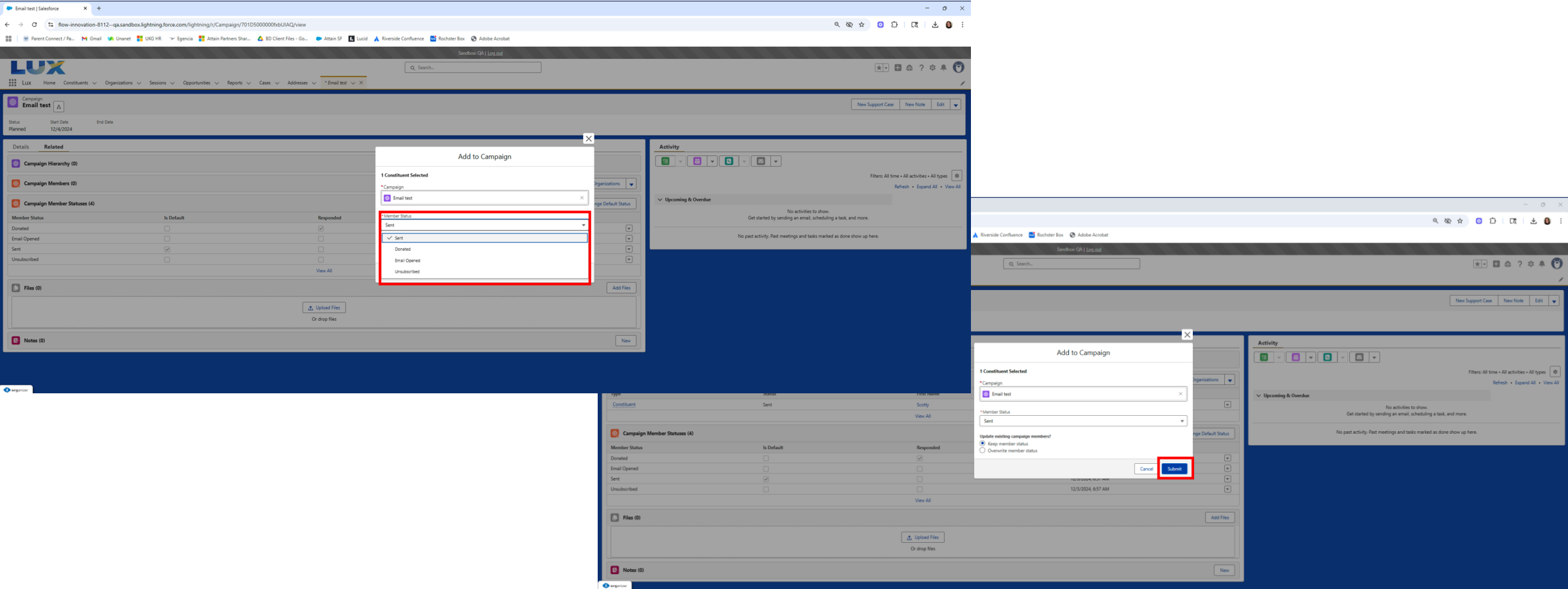
☐	Name	Account Name	Primary Affiliation	PRM	Email	Phone	Preferred Address	Preferred Class Year	Primary Constituent Type	Donor ID
☒	Richard B Highlander	Richard Highlander Household			richard.bobo+highlander@gmail.com	555-555-5555 ext123	234 2nd street CA, Sacramento	2023	Alumni - Non Degreed	00007542
☐	Scotty Highlander	Scotty & Heidi Highlander Household		Jennifer Best			900 North Point Street San Francisco, CA 94109 United States		Alumni - Degreed	00940386
☐	Ryan E Rowe	Ryan & Shantae Rowe Household	Boeing	Matt Heimdahl					Friend	00000077
☐	Scott Riverside	Scott Riverside Household							Alumni - Degreed	00007627
☐	Lux Highlander	Lux Highlander Household				(234) 567-8910			Alumni - Degreed	00007596
☐	A Woman	A Woman & B Man Household		Dubron Rabb	awoman@gmail.com	(234) 566-1234		2024	UCRAA Board	00940408

Cancel

Next

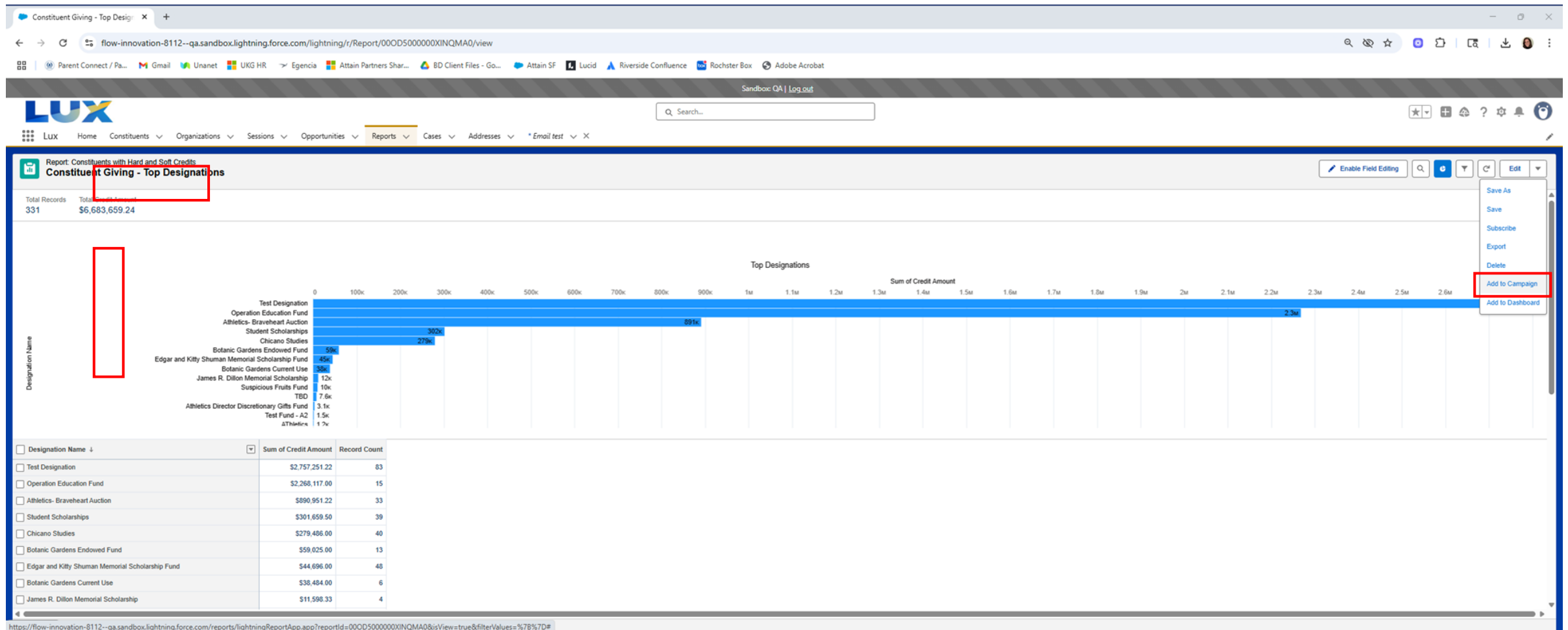
MANAGE A CAMPAIGN

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.





8

MOBILE APP

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.

