



STEWARDSHIP AND MEMBERSHIP **LUX TRAINING**

LAST UPDATED: OCTOBER 2025

TABLE OF CONTENTS

01 [Campaigns](#)

02 [Volunteers App](#)

03 [Stewardship Cases](#)

04 [Products](#)

05 [Giving Societies \(Memberships\)](#)

06 [Designations](#)

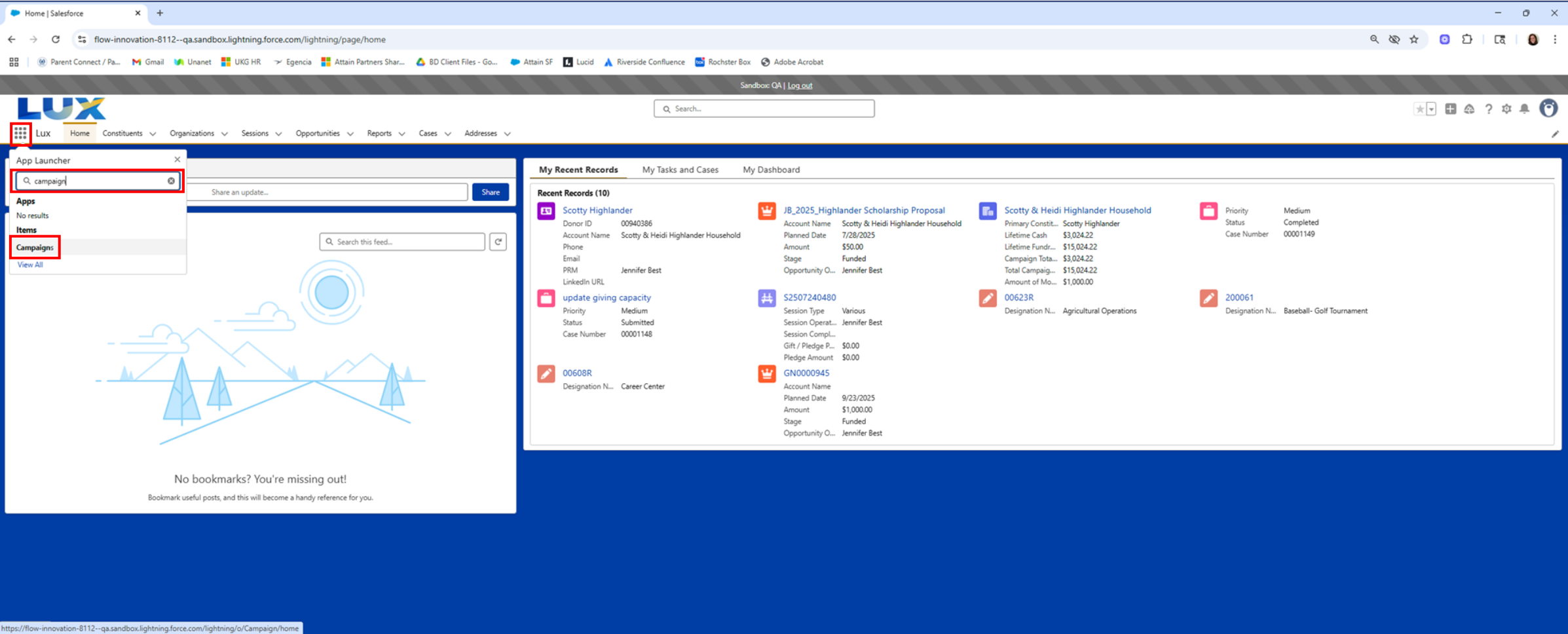
07 [Mobile App](#)



CAMPAIGNS

VIEW CAMPAIGNS

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



VIEW CAMPAIGNS

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

LUX

Home Constituents Organizations Sessions Opportunities Reports Cases Addresses All Campaigns | Campaigns Log out

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

VIEW CAMPAIGNS

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

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)

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	<input type="checkbox"/>	<input checked="" type="checkbox"/>	12/3/2024, 6:57 AM
Email Opened	<input type="checkbox"/>	<input type="checkbox"/>	12/3/2024, 6:57 AM
Sent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12/3/2024, 6:57 AM
Unsubscribed	<input type="checkbox"/>	<input type="checkbox"/>	12/3/2024, 6:57 AM
View All			

Upload Files

Or drop files

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

CREATE A CAMPAIGN

From the campaign list view, click New.

All Campaigns | Campaigns | Search

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

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 Campaigns | Campaigns

Search...

Star View ? Settings Profile

Campaigns

All Campaigns

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

New Printable View Assign Label

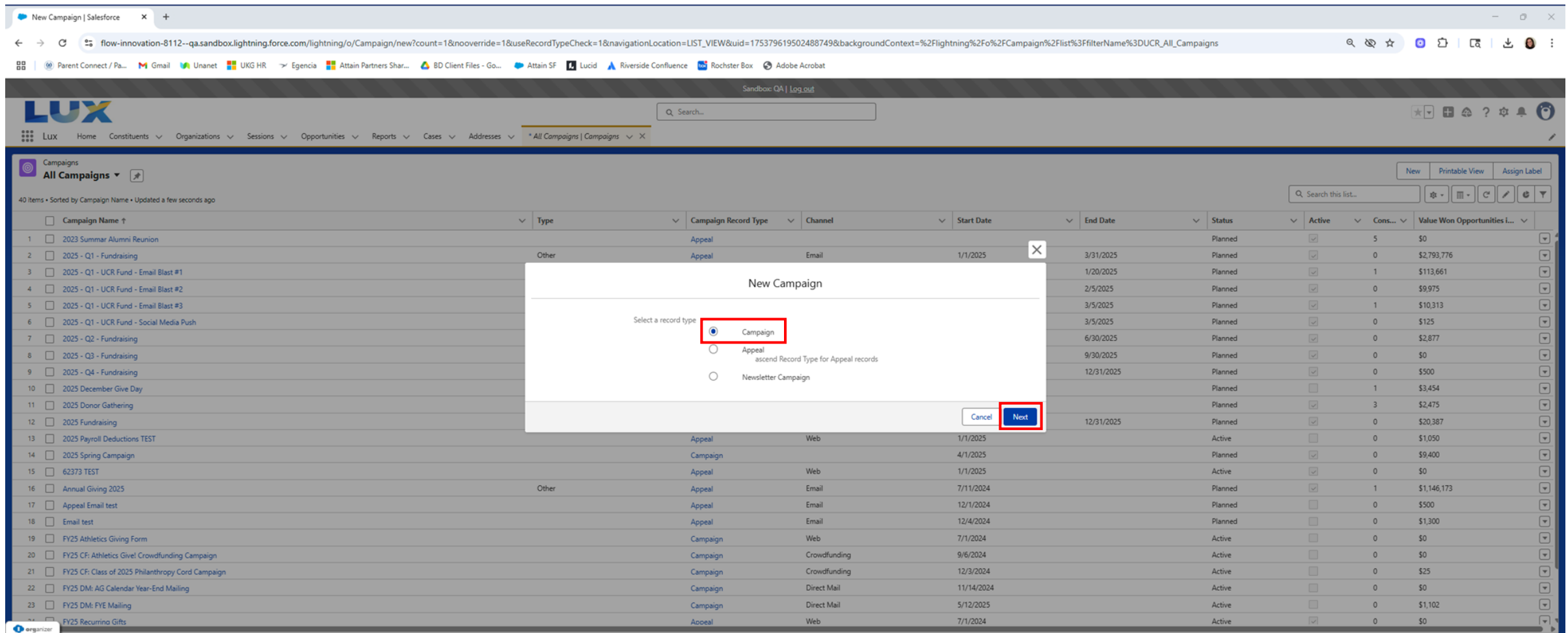
Search this list...

Star View ? Settings Profile

<input type="checkbox"/>	Campaign Name ↑	Type	Campaign Record Type	Channel	Start Date	End Date	Status	Active	Cons...	Value Won Opportunities L...
<input type="checkbox"/>	2023 Summar Alumni Reunion		Appeal				Planned	<input checked="" type="checkbox"/>	5	\$0
<input type="checkbox"/>	2025 - Q1 - Fundraising	Other	Appeal	Email	1/1/2025	3/31/2025	Planned	<input checked="" type="checkbox"/>	0	\$2,793,776
<input type="checkbox"/>	2025 - Q1 - UCR Fund - Email Blast #1	Email	Appeal	Crowdfunding	1/20/2025	1/20/2025	Planned	<input checked="" type="checkbox"/>	1	\$113,661
<input type="checkbox"/>	2025 - Q1 - UCR Fund - Email Blast #2	Email	Appeal		2/5/2025	2/5/2025	Planned	<input checked="" type="checkbox"/>	0	\$9,975
<input type="checkbox"/>	2025 - Q1 - UCR Fund - Email Blast #3	Website Direct	Appeal		3/5/2025	3/5/2025	Planned	<input checked="" type="checkbox"/>	1	\$10,313
<input type="checkbox"/>	2025 - Q1 - UCR Fund - Social Media Push	Social Media	Appeal		2/5/2025	3/5/2025	Planned	<input checked="" type="checkbox"/>	0	\$125
<input type="checkbox"/>	2025 - Q2 - Fundraising	Other	Appeal		4/1/2025	6/30/2025	Planned	<input checked="" type="checkbox"/>	0	\$2,877
<input type="checkbox"/>	2025 - Q3 - Fundraising	Other	Appeal		7/1/2025	9/30/2025	Planned	<input checked="" type="checkbox"/>	0	\$0
<input type="checkbox"/>	2025 - Q4 - Fundraising	Other	Appeal		10/1/2025	12/31/2025	Planned	<input checked="" type="checkbox"/>	0	\$500
<input type="checkbox"/>	2025 December Give Day		Appeal	Brochure	12/3/2024		Planned	<input type="checkbox"/>	1	\$3,454
<input type="checkbox"/>	2025 Donor Gathering		Campaign	Brochure	5/5/2025		Planned	<input checked="" type="checkbox"/>	3	\$2,475
<input type="checkbox"/>	2025 Fundraising	Other	Appeal	Email	1/1/2025	12/31/2025	Planned	<input checked="" type="checkbox"/>	0	\$20,387
<input type="checkbox"/>	2025 Payroll Deductions TEST		Appeal	Web	1/1/2025		Active	<input type="checkbox"/>	0	\$1,050
<input type="checkbox"/>	2025 Spring Campaign		Campaign		4/1/2025		Planned	<input checked="" type="checkbox"/>	0	\$9,400
<input type="checkbox"/>	62373 TEST		Appeal	Web	1/1/2025		Active	<input checked="" type="checkbox"/>	0	\$0
<input type="checkbox"/>	Annual Giving 2025	Other	Appeal	Email	7/11/2024		Planned	<input checked="" type="checkbox"/>	1	\$1,146,173
<input type="checkbox"/>	Appeal Email test		Appeal	Email	12/1/2024		Planned	<input type="checkbox"/>	0	\$500
<input type="checkbox"/>	Email test		Appeal	Email	12/4/2024		Planned	<input type="checkbox"/>	0	\$1,300
<input type="checkbox"/>	FY25 Athletics Giving Form		Campaign	Web	7/1/2024		Active	<input type="checkbox"/>	0	\$0
<input type="checkbox"/>	FY25 CF: Athletics Give! Crowdfunding Campaign		Campaign	Crowdfunding	9/6/2024		Active	<input type="checkbox"/>	0	\$0
<input type="checkbox"/>	FY25 CF: Class of 2025 Philanthropy Cord Campaign		Campaign	Crowdfunding	12/3/2024		Active	<input type="checkbox"/>	0	\$25
<input type="checkbox"/>	FY25 DM: AG Calendar Year-End Mailing		Campaign	Direct Mail	11/14/2024		Active	<input type="checkbox"/>	0	\$0
<input type="checkbox"/>	FY25 DM: FYE Mailing		Campaign	Direct Mail	5/12/2025		Active	<input type="checkbox"/>	0	\$1,102
<input type="checkbox"/>	FY25 Recurring Gifts		Appeal	Web	7/1/2024		Active	<input checked="" type="checkbox"/>	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 'New Campaign' interface. A modal window titled 'New Campaign' is open, prompting the user to 'Select a record type'. Three options are listed: 'Campaign' (selected with a radio button and highlighted by a red box), 'Appeal' (with a sub-note 'ascend Record Type for Appeal records'), and 'Newsletter Campaign'. At the bottom right of the modal, there are 'Cancel' and 'Next' buttons, with the 'Next' button also highlighted by a red box. The background shows a list of existing campaigns with columns for Name, Type, Record Type, Channel, Dates, Status, and Value.

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

CREATE A CAMPAIGN

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

New Campaign: Campaign

* = Required Information

Campaign Information

* Campaign Name

* Status Planned

Description

Active ☐

Parent Campaign

* Appeal Code

* Start Date

Campaign Record Type Campaign

* Channel --None--

End Date

Segment

Unit --None--

Campaign Owner Jennifer Best

Planning

Expected Revenue in Campaign

Actual Revenue

Direct Mail Budgeted Cost

Direct Mail Actual Cost

Budgeted Cost in Campaign

Actual Cost in Campaign

Num Sent in Campaign

Num Donated

Expected Response (%)

Actual Response (%)

End Date	Status	Active	Cons...	Value Won Opportunities L...
3/31/2025	Planned	<input checked="" type="checkbox"/>	5	\$0
1/20/2025	Planned	<input checked="" type="checkbox"/>	0	\$2,793,776
2/5/2025	Planned	<input checked="" type="checkbox"/>	0	\$9,975
3/5/2025	Planned	<input checked="" type="checkbox"/>	1	\$10,313
3/5/2025	Planned	<input checked="" type="checkbox"/>	0	\$125
6/30/2025	Planned	<input checked="" type="checkbox"/>	0	\$2,877
9/30/2025	Planned	<input checked="" type="checkbox"/>	0	\$0
12/31/2025	Planned	<input checked="" type="checkbox"/>	0	\$500
	Planned	<input type="checkbox"/>	1	\$3,454
	Planned	<input checked="" type="checkbox"/>	3	\$2,475
12/31/2025	Planned	<input checked="" type="checkbox"/>	0	\$20,387
	Active	<input type="checkbox"/>	0	\$1,050
	Planned	<input checked="" type="checkbox"/>	0	\$9,400
	Active	<input checked="" type="checkbox"/>	0	\$0
	Planned	<input checked="" type="checkbox"/>	1	\$1,146,173
	Planned	<input type="checkbox"/>	0	\$500
	Planned	<input type="checkbox"/>	0	\$1,300
	Active	<input type="checkbox"/>	0	\$0
	Active	<input type="checkbox"/>	0	\$0
	Active	<input type="checkbox"/>	0	\$25
	Active	<input type="checkbox"/>	0	\$0
	Active	<input type="checkbox"/>	0	\$1,102
	Active	<input checked="" type="checkbox"/>	0	\$0

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

0

Expected Response (%)

0.00%

Campaign Statistics

Responses in Campaign

0

Leads in Campaign

0

Converted Leads in Campaign

0

Constituents in Campaign

0

Custom Links

Status

Planned

Active

Appl 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.

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 Egenic 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	<input type="checkbox"/>	<input checked="" type="checkbox"/>	12/3/2024, 6:57 AM
Email Opened	<input type="checkbox"/>	<input type="checkbox"/>	12/3/2024, 6:57 AM
Sent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12/3/2024, 6:57 AM
Unsubscribed	<input type="checkbox"/>	<input type="checkbox"/>	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...

Star Add Home Settings Notifications Profile

Campaign Email test

Status Planned

Details R

Campaign

Campaign

Campaign

Member Status

Donated

Email Opened

Sent

Unsubscribed

Files (0)

Notes (0)

1 item selected

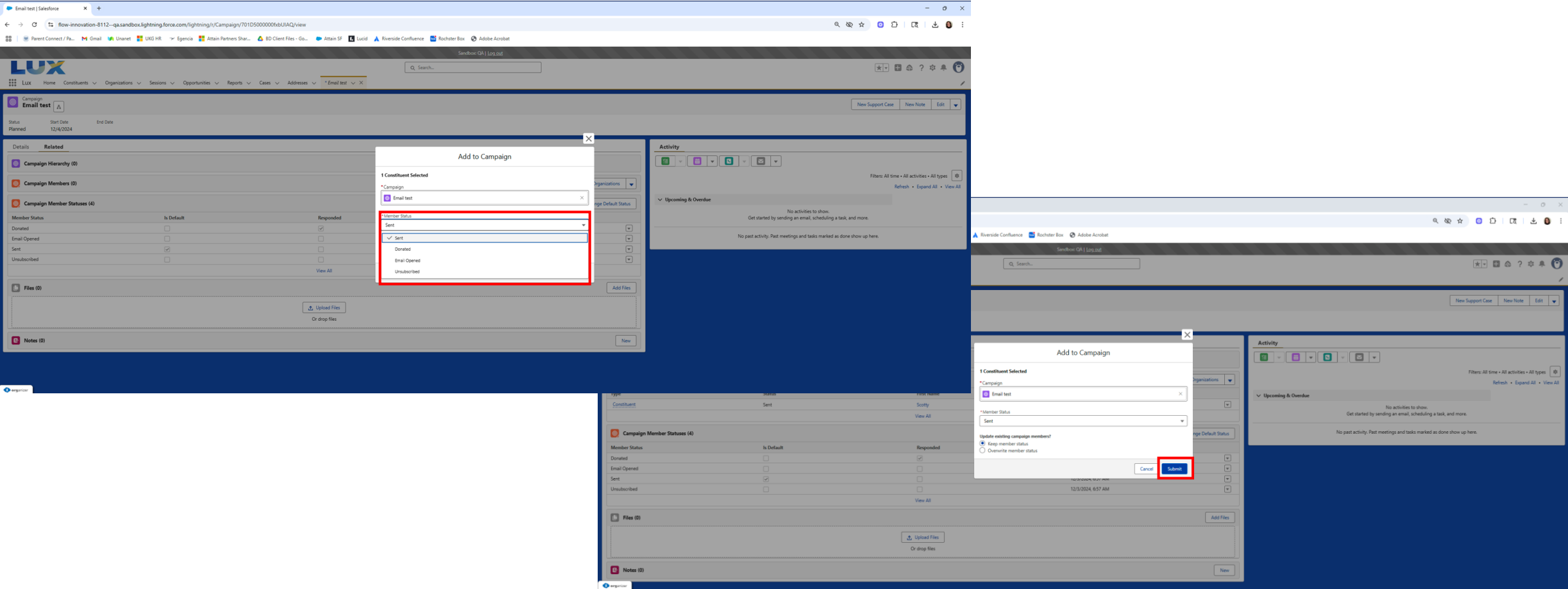
<input type="checkbox"/>	Name	Account Name	Primary Affiliation	PRM	Email	Phone	Preferred Address	Preferred Class Year	Primary Constituent Type	Donor ID
<input checked="" type="checkbox"/>	Richard B Highlander	Richard Highlander Household			richard.bobo+highlander@gmail.com	555-555-5555 ext123	234 2nd street CA, Sacramento	2023	Alumni - Non Degreed	00007542
<input type="checkbox"/>	Scotty Highlander	Scotty & Heidi Highlander Household		Jennifer Best			900 North Point Street San Francisco, CA 94109 United States		Alumni - Degreed	00940386
<input type="checkbox"/>	Ryan E Rowe	Ryan & Shantae Rowe Household	Boeing	Matt Heimdahl					Friend	00000077
<input type="checkbox"/>	Scott Riverside	Scott Riverside Household							Alumni - Degreed	00007627
<input type="checkbox"/>	Lux Highlander	Lux Highlander Household				(234) 567-8910			Alumni - Degreed	00007596
<input type="checkbox"/>	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.

Constituent Giving - Top Designations

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Report/00OD5000000XINQMA0/view

Sandbox: QA | Log out

LUX

Home

Constituents

Organizations

Sessions

Opportunities

Reports

Cases

Addresses

Email test

Report: Constituents with Hard and Soft Credits

Constituent Giving - Top Designations

Enable Field Editing

Search

Filter

Copy

Edit

Save As

Save

Subscribe

Export

Delete

Add to Campaign

Add to Dashboard

Total Records

331

Total Credit Amount

\$6,683,659.24

Top Designations

Sum of Credit Amount

0

100k

200k

300k

400k

500k

600k

700k

800k

900k

1m

1.1m

1.2m

1.3m

1.4m

1.5m

1.6m

1.7m

1.8m

1.9m

2m

2.1m

2.2m

2.3m

2.4m

2.5m

2.6m

Designation Name

Test Designation

Operation Education Fund

Athletics- Braveheart Auction

Student Scholarships

Chicano Studies

Botanic Gardens Endowed Fund

Edgar and Kitty Shuman Memorial Scholarship Fund

Botanic Gardens Current Use

James R. Dillon Memorial Scholarship

Suspicious Fruits Fund

TSD

Athletics Director Discretionary Gifts Fund

Test Fund - A2

ATHLETICS

Sum of Credit Amount

\$2,757,251.22

\$2,268,117.00

\$890,951.22

\$301,659.50

\$279,466.00

\$59,025.00

\$44,696.00

\$38,484.00

\$11,596.33

Record Count

83

15

33

39

40

13

48

6

4

Designation Name	Sum of Credit Amount	Record Count
Test Designation	\$2,757,251.22	83
Operation Education Fund	\$2,268,117.00	15
Athletics- Braveheart Auction	\$890,951.22	33
Student Scholarships	\$301,659.50	39
Chicano Studies	\$279,466.00	40
Botanic Gardens Endowed Fund	\$59,025.00	13
Edgar and Kitty Shuman Memorial Scholarship Fund	\$44,696.00	48
Botanic Gardens Current Use	\$38,484.00	6
James R. Dillon Memorial Scholarship	\$11,596.33	4

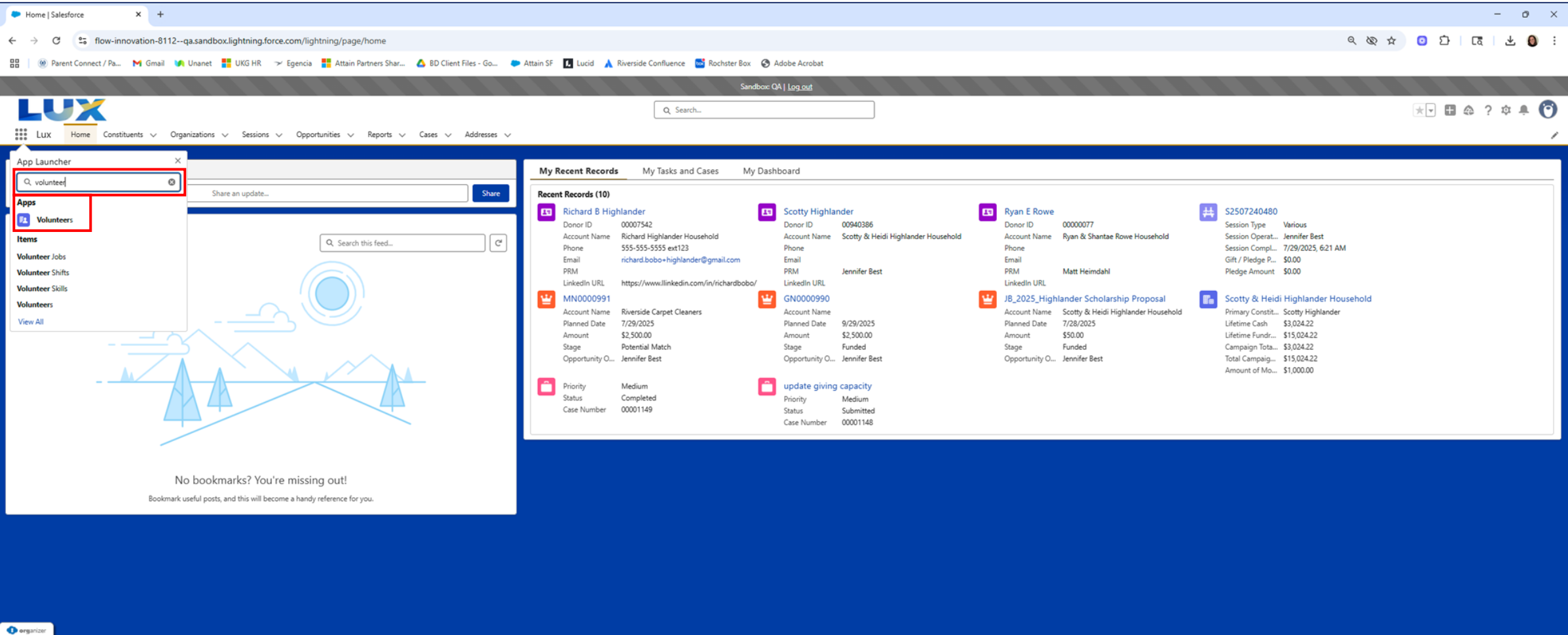
https://flow-innovation-8112--qa.sandbox.lightning.force.com/reports/lightningReportApp.app?reportId=00OD5000000XINQMA0&isView=true&filterValues=%7B%7D#

2

VOLUNTEERS APP

VOLUNTEERS APP

Though volunteer information can be accessed in the Lux (ascend) platform, the Volunteers app within Salesforce will give more information about volunteers and give the ability to add and modify volunteer activities. To access the app, begin typing volunteers into the search bar, then click Volunteers under the App section.



VOLUNTEERS APP

You will be redirected to the Volunteers app. On the Home page, under the Volunteer Jobs tab, you can see active, upcoming, and previous volunteer activities. On any of the pages, click hyperlinked names to view the item’s record page.

Home | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/page/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

Volunteers Home Volunteer Jobs Volunteer Shifts Skill Values

Search...

Star Plus Home ? Settings Profile

Volunteer Jobs Shifts Volunteers Dashboard

Active & Upcoming Recently Ended All

Volunteer Jobs

Active / Live

4 items • Sorted by Volunteer Job Name • Filtered by All volunteer jobs • Display End Date/Time, Display Start Date/Time • Updated a few seconds ago

Search this list...

Settings Copy

Volunteer Job Name ↑	Display Start Date/Time	Display End Date/Time	Total Number of Shifts Open	Total Number of Volunteers
BBQ Friday's in the Quad - Burger Flipper	4/2/2025, 9:00 PM	9/5/2025, 7:45 AM	0	1
Campus Clean Up	4/1/2025, 12:00 AM	8/15/2025, 7:00 AM	0	3
Food Bank Warehouse - Food Prep	7/11/2025, 2:00 AM	10/31/2025, 7:00 PM	0	1
Front Desk	1/27/2025, 7:00 PM	9/25/2025, 9:00 AM	1	2

Volunteer Jobs


Upcoming

0 items • Sorted by Volunteer Job Name • Filtered by All volunteer jobs • Display Start Date/Time • Updated a few seconds ago

Search this list...

Settings Copy

Volunteer Job Name ↑	Display Start Date/Time	Display End Date/Time	Total Number of Shifts Open	Total Number of Volunteers
----------------------	-------------------------	-----------------------	-----------------------------	----------------------------



No items to display.

Post Question Poll

Share an update...


Share

Sort by:

Most Recent Activity

Search this feed...

Share



It's all about you

Watch this space for posts to your profile and places where you're @mentioned.

organizer

VOLUNTEERS APP

Under the Shifts tab, you will be able to see upcoming events that have slots open for volunteers.

Home | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/page/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

Volunteers Home Volunteer Jobs Volunteer Shifts Skill Values

Search...

Volunteer Jobs **Shifts** Volunteers Dashboard

Open & Upcoming Completed All

Volunteer Shifts

Open for Sign Ups

1 item • Sorted by Volunteer Shift Name • Filtered by All volunteer shifts - Status, Volunteer Job Status • Updated a few seconds ago

Search this list...

Volunteer Shift Name	Start Date/Time	Duration In Hours	Maximum Number of Volunt...	Total Number of Volunteers	Available Number of Volunte...	Status
1 Front Desk - Shift 2	9/26/2025, 3:00 PM	27.00	5	0	5	Open


Volunteer Shifts

Planned (Not Open for Sign Up Yet)

0 items • Sorted by Volunteer Shift Name • Filtered by All volunteer shifts - Volunteer Job Status, Start Date/Time • Updated a few seconds ago

Search this list...

Volunteer Shift Name	Start Date/Time	Duration In Hours	Maximum Number of Volunteers	Status	Volunteer Job
----------------------	-----------------	-------------------	------------------------------	--------	---------------



No items to display.


Post Question Poll

Share an update...

Share

Sort by: Most Recent Activity

Search this feed...



It's all about you

Watch this space for posts to your profile and places where you're @mentioned.

organizer

VOLUNTEERS APP

The Volunteers tab will show you constituents who are labeled volunteers in the system.

Home | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/page/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

Search...

Volunteers Home Volunteer Jobs Volunteer Shifts Skill Values

Volunteer Jobs Shifts **Volunteers** Dashboard

Constituents

Is Volunteer

4 items • Sorted by Name • Filtered by All constituents - Is Volunteer • Updated a few seconds ago

Name ↑

1 Marisa R. Highlander

2 Richard B Highlander

3 Richard Bobo

4 Scotty A Highlander III

Is Volunteer

✓

✓

✓

✓

Total Volunteer Hours

9.0

5.0


Post Question Poll

Share an update...

Share

Sort by: Most Recent Activity

Search this feed...



It's all about you

Watch this space for posts to your profile and places where you're @mentioned.

organizer

VOLUNTEERS APP

The dashboard tab gives you high-level, visually appealing data about volunteer efforts. If you would like more detailed information, click on the report name and you will be redirected to the detailed report.

Home | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/page/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

Volunteers Home Volunteer Jobs Volunteer Shifts Skill Values

Dashboard Volunteer Management

As of Jul 28, 2025, 12:25 PM Viewing as Richard Bobo

Volunteer Jobs

Record Count

11

View Report (DASH...

Volunteer Jobs, Max vs. Total Volunteers

Sum of Maximum Number of Volunteers, Sum of TotalNum...

Sum of Maximum Number of Volu...

Sum of Total Number of Volunteers

View Report (DASH: Volunteer Jobs)

Volunteer Shifts

Record Count

15

View Report (DASH...

Volunteer Shifts by Status

Open

Completed

View Report (DASH: Volunteer Jobs with Shifts)

Shifts with Top Number of Volunteer Sign Ups

Sum of Total Number of Volunteers

Front Desk - Morning Shift

Morning Shift

4th of July - AM Shift

Ongoing

Tuesday

Afternoon Shift

Debate Team Booth

Front Desk - Shift 2

Game Night Volunteer

July 11th - 8am-12pm

Kick-Off

Monday Morning

Client Auction Volunteer

View Report (DASH: Volunteer Jobs with Shifts)

Volunteer Jobs

Volunteer Job: Volunteer Job Name	Status	Volunteer Manager	City	State	Display Start Date/Time
Front Desk	Active	Cleopatra Queen	Riverside	CA	1/27/2025, 7:00 PM
BBQ Friday's in the Quad - Burger Flipper	Active	Richard B Highlander	-	-	4/2/2025, 9:00 PM
Food Bank Warehouse - Food Prep	Active	Delphina H. Highlander	Riverside	CA	7/11/2025, 2:00 AM
Campus Clean Up	Active	Richie B Highlander Jr.	-	-	4/1/2025, 12:00 AM
Game Night Volunteer	Inactive	Marisa R. Highlander	-	-	3/18/2025, 12:00 AM
	Inactive	Nick D. Highlander	Riverside	CA	7/12/2025, 9:00 AM

Volunteer Shifts

Volunteer Job Name	Volunteer Shift	St...	Actual Start	Maximum Number of ...	Total Number of ...	Available Number of V...
Front Desk	Front Desk - Shift 2	Oper	2025-09-26 09:00:00	5	0	5
Bake Sale	Debate Team Booth	Oper	-	-	0	-
Silent Auction Volunteer	Silent Auction Volunteer	Oper	2025-06-18 18:00:00	15	0	15
Campus Clean Up	Morning Shift	Com	2025-07-25 17:00:00	55	0	55

Post Question Poll

Share an update...

Sort by: Most Recent Activity

Search this feed...

It's all about you

Watch this space for posts to your profile and places where you're @mentioned.

2.1

VOLUNTEER JOBS

VOLUNTEERS APP: VOLUNTEER JOBS

To see a comprehensive list of volunteer jobs, click the Volunteer Jobs tab, then change the list view to All. Click any hyperlinked volunteer job name to view its record.

All | Volunteer Jobs | Salesforce

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

Search...

Volunteers Home Volunteer Jobs Volunteer Shifts Skill Values

Volunteer Jobs

All

11 Items • Sorted by Volunteer Job Name • Updated a few seconds ago

	Volunteer Job Name ↑	Display Start Date/Time	Display End Date/Time	Total Number of S...	Total Number of V...
1	Bake Sale	6/3/2025, 4:00 PM	6/29/2025, 4:00 PM	1	0
2	Bake Sale	4/1/2025, 12:00 AM	4/8/2025, 12:00 AM	0	0
3	BBQ Friday's in the Quad - Burger Flipper	4/2/2025, 9:00 PM	9/5/2025, 7:45 AM	0	1
4	Campus Clean Up	6/5/2025, 4:00 AM	7/20/2025, 12:00 AM	0	0
5	Campus Clean Up	4/1/2025, 12:00 AM	8/15/2025, 7:00 AM	0	3
6	Food Bank Warehouse - Food Prep	7/11/2025, 2:00 AM	10/31/2025, 7:00 PM	0	1
7	Front Desk	1/27/2025, 7:00 PM	9/25/2025, 9:00 AM	1	2
8	Front Desk Manager	4/27/2025, 7:00 PM	5/8/2025, 7:00 PM	0	0
9	Game Night Volunteer	3/18/2025, 12:00 AM	7/10/2025, 2:00 PM	0	0
10	Silent Auction Volunteer	3/18/2025, 12:00 AM	3/25/2025, 12:00 AM	1	0
11	Test Cleanup	7/12/2025, 9:00 AM	7/19/2025, 2:00 AM	0	0

VOLUNTEERS APP: VIEW VOLUNTEER JOBS

The volunteer job record page will give you details on the time, place, shifts, and skills associated with the job. To edit the job's details, click the pencil icon next to any field in the Details tab. Any emails or notifications scheduled for the event will appear in the reminder section of the page.

BBQ Friday's in the Quad - Burger Flipper

Display Start Date/Time

4/2/2025, 9:00 PM

Status

Active

Volunteer Manager

Richard B Highlander

Total Number of Shifts

2

Total Number of Volunteers

1

Details

Volunteer Job Name

BBQ Friday's in the Quad - Burger Flipper

Display Start Date/Time

4/2/2025, 9:00 PM

Total Skills Desired

3

Time Zone

(GMT-07:00) Pacific Daylight Time (America/Los Angeles)

Volunteer Manager


Richard B Highlander

Display End Date/Time

9/5/2025, 7:45 AM

Description

Header Image



No Reminder Email Scheduled

Do you want to schedule a reminder email?

You may schedule reminder emails on the Volunteer Job level or on the individual Volunteer Shifts.

Volunteer Shifts (2)

2 Items • Updated a few seconds ago

Volunteer Shift Name	Start Date/Time	Duration In Ho...	Maximum ...	Total Num...	Available ...
1 4th of July - AM Shift	9/5/2025, 10:00 PM	4.00	4	1	3
2 July 11th - 8am-12pm	9/5/2025, 10:00 PM	4.00	4	0	4

View All

Volunteer Skills (3)

3 Items • Updated a few seconds ago

Volunteer Skill: Volunteer Skill Name	Skill Value: Skill Value Name
1 VSK-0000005	Food Prep
2 VSK-0000025	Advocacy
3 VSK-0000026	Arts & Culture

View All

VOLUNTEERS APP: VIEW VOLUNTEER JOBS

Volunteer Shifts: details all shifts that can be taken to help with the volunteer job
Volunteer Skills: details types of jobs that will be done during the event

BBQ Friday's in the Quad - Burger Flipper

Display Start Date/Time

4/2/2025, 9:00 PM

Status

Active

Volunteer Manager

Richard B Highlander

Total Number of Shifts

2

Total Number of Volunteers

1

Details

Volunteer Job Name

BBQ Friday's in the Quad - Burger Flipper

Display Start Date/Time

4/2/2025, 9:00 PM

Total Skills Desired

3

Time Zone

(GMT-07:00) Pacific Daylight Time (America/Los Angeles)

Volunteer Manager


Richard B Highlander

Display End Date/Time

9/5/2025, 7:45 AM

Description

Header Image



No Reminder Email Scheduled

Do you want to schedule a reminder email?

You may schedule reminder emails on the Volunteer Job level or on the individual Volunteer Shifts.

Volunteer Shifts (2)

2 Items • Updated a few seconds ago

Volunteer Shift Name	Start Date/Time	Duration In Ho...	Maximum ...	Total Num...	Available ...
1 4th of July - AM Shift	9/5/2025, 10:00 PM	4.00	4	1	3
2 July 11th - 8am-12pm	9/5/2025, 10:00 PM	4.00	4	0	4

View All

Volunteer Skills (3)

3 Items • Updated a few seconds ago

Volunteer Skill: Volunteer Skill Name	Skill Value: Skill Value Name
1 VSK-0000005	Food Prep
2 VSK-0000025	Advocacy
3 VSK-0000026	Arts & Culture

View All

VOLUNTEERS APP: MANAGE VOLUNTEER JOBS

To send a mass email to participants, add a new shift, or add a new skill click the relevant button in the upper righthand corner, then fill out the required fields and click Save.

BBQ Friday's in the Quad - Burger Flipper

Mass Email VolunteersSchedule Reminder EmailAdd ShiftAdd Skills

Display Start Date/Time4/2/2025, 9:00 PMStatusActiveVolunteer ManagerRichard B HighlanderTotal Number of Shifts2Total Number of Volunteers1

Details

Volunteer Job NameBBQ Friday's in the Quad - Burger Flipper

Display Start Date/Time4/2/2025, 9:00 PM

Total Skills Desired3


Time Zone(GMT-07:00) Pacific Daylight Time (America/Los Angeles)

Volunteer ManagerRichard B Highlander

Display End Date/Time9/5/2025, 7:45 AM

Description

Header Image



No Reminder Email Scheduled

Do you want to schedule a reminder email?

You may schedule reminder emails on the Volunteer Job level or on the individual Volunteer Shifts.

Volunteer Shifts (2)

2 Items • Updated a few seconds ago

Volunteer Shift Name	Start Date/Time	Duration In Ho...	Maximum ...	Total Num...	Available ...
1 4th of July - AM Shift	9/5/2025, 10:00 PM	4.00	4	1	3
2 July 11th - 8am-12pm	9/5/2025, 10:00 PM	4.00	4	0	4

View All

Volunteer Skills (3)

3 Items • Updated a few seconds ago

Volunteer Skill: Volunteer Skill Name	Skill Value: Skill Value Name
1 VSK-0000005	Food Prep
2 VSK-0000025	Advocacy
3 VSK-0000026	Arts & Culture

View All

VOLUNTEERS APP: CREATE NEW VOLUNTEER JOBS

Navigate to the volunteer jobs list view, then click New.

All | Volunteer Jobs | Salesforce

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

Search...

Volunteers Home Volunteer Jobs Volunteer Shifts Skill Values

Volunteer Jobs

All

11 Items • Sorted by Volunteer Job Name • Updated a few seconds ago

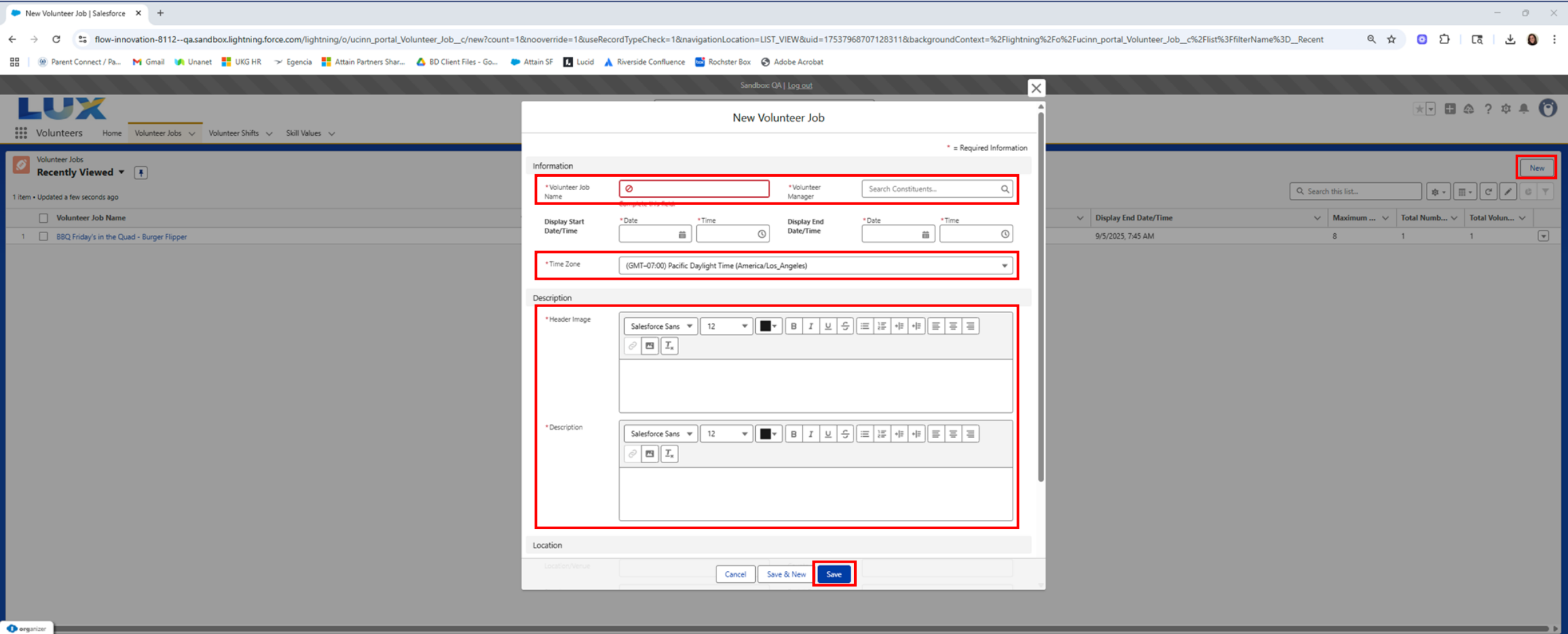
Search this list...

New

<input type="checkbox"/>	Volunteer Job Name ↑	Display Start Date/Time	Display End Date/Time	Total Number of S...	Total Number of V...	
1 <input type="checkbox"/>	Bake Sale	6/3/2025, 4:00 PM	6/29/2025, 4:00 PM	1	0	
2 <input type="checkbox"/>	Bake Sale	4/1/2025, 12:00 AM	4/8/2025, 12:00 AM	0	0	
3 <input type="checkbox"/>	BBQ Friday's in the Quad - Burger Flipper	4/2/2025, 9:00 PM	9/5/2025, 7:45 AM	0	1	
4 <input type="checkbox"/>	Campus Clean Up	6/5/2025, 4:00 AM	7/20/2025, 12:00 AM	0	0	
5 <input type="checkbox"/>	Campus Clean Up	4/1/2025, 12:00 AM	8/15/2025, 7:00 AM	0	3	
6 <input type="checkbox"/>	Food Bank Warehouse - Food Prep	7/11/2025, 2:00 AM	10/31/2025, 7:00 PM	0	1	
7 <input type="checkbox"/>	Front Desk	1/27/2025, 7:00 PM	9/25/2025, 9:00 AM	1	2	
8 <input type="checkbox"/>	Front Desk Manager	4/27/2025, 7:00 PM	5/8/2025, 7:00 PM	0	0	
9 <input type="checkbox"/>	Game Night Volunteer	3/18/2025, 12:00 AM	7/10/2025, 2:00 PM	0	0	
10 <input type="checkbox"/>	Silent Auction Volunteer	3/18/2025, 12:00 AM	3/25/2025, 12:00 AM	1	0	
11 <input type="checkbox"/>	Test Cleanup	7/12/2025, 9:00 AM	7/19/2025, 2:00 AM	0	0	

VOLUNTEERS APP: CREATE NEW VOLUNTEER JOBS

A popup will appear. Fill out the required fields and any additional information you have, then click Save.



2.2

VOLUNTEER SHIFTS

VOLUNTEERS APP: VOLUNTEER SHIFTS

To see a comprehensive list of volunteer shifts, click the Volunteer Shifts tab, then change the list view to All. Click any hyperlinked volunteer shift name to view its record.

All | Volunteer Shifts | Salesforce

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

Search...

Volunteers Home Volunteer Jobs Volunteer Shifts Skill Values

Volunteer Shifts

All

15 Items • Sorted by Volunteer Shift Name • Updated a few seconds ago

	Volunteer Shift Name	Start Date/Time	End Date/Time	Total Number of Vo...	Status
1	4th of July - AM Shift	9/5/2025, 10:00 PM	9/6/2025, 2:00 AM	1	Completed
2	Afternoon Shift	7/25/2025, 9:00 PM	7/26/2025, 1:00 AM	0	Completed
3	Debate Team Booth			0	Open
4	Debate Team Booth	4/8/2025, 1:00 PM	4/8/2025, 3:00 PM	0	Completed
5	Front Desk - Morning Shift	9/26/2025, 9:00 AM	9/27/2025, 3:00 PM	2	Completed
6	Front Desk - Shift 2	9/26/2025, 3:00 PM	9/27/2025, 6:00 PM	0	Open
7	Game Night Volunteer	7/5/2025, 12:00 AM	7/5/2025, 5:00 AM	0	Completed
8	July 11th - 8am-12pm	9/5/2025, 10:00 PM	9/6/2025, 2:00 AM	0	Completed
9	Kick-Off	7/17/2025, 7:00 PM	7/17/2025, 9:00 PM	0	Completed
10	Monday Morning	7/21/2025, 3:00 PM	7/21/2025, 6:00 PM	0	Completed
11	Morning Shift	7/25/2025, 2:00 PM	7/25/2025, 6:00 PM	0	Completed
12	Morning Shift	7/21/2025, 6:00 PM	7/21/2025, 9:30 PM	2	Completed
13	Ongoing	7/21/2025, 11:45 PM	7/22/2025, 6:30 AM	1	Completed
14	Silent Auction Volunteer	6/18/2025, 6:00 PM	6/18/2025, 11:00 PM	0	Open
15	Tuesday	7/22/2025, 3:00 PM	7/22/2025, 6:00 PM	1	Completed

VOLUNTEERS APP: VOLUNTEER SHIFTS

The volunteer shift record page will give you details on the time, place, signups, and volunteers associated with the shift. To edit the shift's details, click the pencil icon next to any field in the Details tab. Any reminder emails scheduled will appear on the righthand side of the page. Visual representations of signups, volunteers, and statuses can be found in the bottom righthand side of the screen.

4th of July - AM Shift | Volunteer

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/ucinn_portal_Volunteer_Shift__c/a5VD500000010CKMAM/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...

Volunteers Home Volunteer Jobs Volunteer Shifts Skill Values

Volunteer Shift

4th of July - AM Shift

Mass Email Volunteers Schedule Reminder Email Add a Volunteer

Start Date/Time

9/5/2025, 10:00 PM

Status

Completed

Available Number of Volunteers

3

Total Number of Volunteers

1

Completed

Closed

Mark Status as Complete

Guidance for Success

When a volunteer Shift is in **Completed** status, this means the shift has concluded and volunteers can **report the number of hours** they volunteered.

Details

Volunteer Shift Name

4th of July - AM Shift

Status

Completed

Volunteer Job

BBQ Friday's in the Quad - Burger Flipper

Maximum Number of Volunteers

4

Volunteer Job Status

Active

Reports

Shift Volunteers List Report

Description

Description

Help with the 4th of July BBQ, help with:

Set up (8am-10am)

BBQ (10am-12pm)

Time

Start Date/Time

9/5/2025, 10:00 PM

Time Zone

(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)

End Date/Time

9/6/2025, 2:00 AM

Duration In Hours

4.00

Report Hours Cut Off Date/Time

9/12/2025, 12:00 PM

No Reminder Email Scheduled

Do you want to schedule a reminder email?

You may schedule reminder emails on the **Volunteer Job** level or on the individual **Volunteer Shift**.

Dashboard Volunteers History

Volunteer Sign Ups by Status

Record Count

0 0.1 0.2 0.3 0.4 0.5 0.6 0.7 0.8 0.9 1

Completed

Cancelled

1 1

View Report

As of Today at 6:50 AM

Volunteer Sign Ups by Week

1

VOLUNTEERS APP: CREATE NEW VOLUNTEER SHIFTS

To create a new volunteer shift, navigate to the Volunteer Shifts tab, then click New.

All | Volunteer Shifts | Salesforce

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

Search...

Volunteers Home Volunteer Jobs Volunteer Shifts Skill Values

Volunteer Shifts

All

15 Items • Sorted by Volunteer Shift Name • Updated a few seconds ago

New Import Printable View Assign Label

Search this list...

<input type="checkbox"/>	Volunteer Shift Name ↑	Start Date/Time	End Date/Time	Total Number of Vo...	Status
1	<input type="checkbox"/> 4th of July - AM Shift	9/5/2025, 10:00 PM	9/6/2025, 2:00 AM	1	Completed
2	<input type="checkbox"/> Afternoon Shift	7/25/2025, 9:00 PM	7/26/2025, 1:00 AM	0	Completed
3	<input type="checkbox"/> Debate Team Booth			0	Open
4	<input type="checkbox"/> Debate Team Booth	4/8/2025, 1:00 PM	4/8/2025, 3:00 PM	0	Completed
5	<input type="checkbox"/> Front Desk - Morning Shift	9/26/2025, 9:00 AM	9/27/2025, 3:00 PM	2	Completed
6	<input type="checkbox"/> Front Desk - Shift 2	9/26/2025, 3:00 PM	9/27/2025, 6:00 PM	0	Open
7	<input type="checkbox"/> Game Night Volunteer	7/5/2025, 12:00 AM	7/5/2025, 5:00 AM	0	Completed
8	<input type="checkbox"/> July 11th - 8am-12pm	9/5/2025, 10:00 PM	9/6/2025, 2:00 AM	0	Completed
9	<input type="checkbox"/> Kick-Off	7/17/2025, 7:00 PM	7/17/2025, 9:00 PM	0	Completed
10	<input type="checkbox"/> Monday Morning	7/21/2025, 3:00 PM	7/21/2025, 6:00 PM	0	Completed
11	<input type="checkbox"/> Morning Shift	7/25/2025, 2:00 PM	7/25/2025, 6:00 PM	0	Completed
12	<input type="checkbox"/> Morning Shift	7/21/2025, 6:00 PM	7/21/2025, 9:30 PM	2	Completed
13	<input type="checkbox"/> Ongoing	7/21/2025, 11:45 PM	7/22/2025, 6:30 AM	1	Completed
14	<input type="checkbox"/> Silent Auction Volunteer	6/18/2025, 6:00 PM	6/18/2025, 11:00 PM	0	Open
15	<input type="checkbox"/> Tuesday	7/22/2025, 3:00 PM	7/22/2025, 6:00 PM	1	Completed

organizer

VOLUNTEERS APP: CREATE NEW VOLUNTEER SHIFTS

Fill out any required fields and any other information you have, then click Save.

The screenshot displays the Salesforce Lightning interface for managing volunteer shifts. A modal window titled "New Volunteer Shift" is open, allowing users to create a new shift. The modal is divided into three main sections: Information, Description, and Time.

Information Section:

- * Volunteer Shift Name:** A required text field with a red border and a "Complete this field." message.
- * Status:** A required dropdown menu currently set to "Open".
- * Volunteer Job:** A required text field with a search icon and the placeholder "Search Volunteer Jobs...".
- Maximum Number of Volunteers:** A text field for specifying the maximum number of volunteers.

Description Section:

- * Description:** A required rich text editor field with a red border, containing a toolbar with various formatting options.

Time Section:

- Start Date/Time:** Fields for selecting the start date and time.
- End Date/Time:** Fields for selecting the end date and time.
- Report Hours Cut Off Date/Time:** Fields for selecting the date and time when report hours cut off.

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

In the background, a list of existing volunteer shifts is visible, showing columns for "Volunteer Shift Name", "Start", and "Status". The "New" button in the top right corner of the list is also highlighted with a red box.

2.3

VOLUNTEER SKILLS

VOLUNTEERS APP: VOLUNTEER SKILLS

To see a comprehensive list of volunteer skills, click the Skill Values tab, then change the list view to All. Click any hyperlinked skill value name to view its record.

All | Skill Values | Salesforce

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

Search...

Volunteers Home Volunteer Jobs Volunteer Shifts Skill Values

Skill Value All

49 Items • Sorted by Skill Value Name • Updated a few seconds ago

1

☐

Advocacy

2

☐

Alumni Association Board

3

☐

Alumni Chapter

4

☐

Arts & Culture

5

☐

Athletics Advisory Board

6

☐

Basic Needs

7

☐

Board Service

8

☐

Business

9

☐

Career Mentor

10

☐

Clerical

11

☐

College/Department Advisory Board

12

☐

Community

13

☐

Court Mandated

14

☐

Crime & Safety

15

☐

Crisis

16

☐

Data Entry

17

☐

Disaster Response

18

☐

Education

19

☐

Employment

20

☐

Environment

21

☐

Equality

22

☐

Family

23

☐

Finance

24

☐

Food Prep

Is Display on Portal

☒

☐

☐

☐

☐

☐

☐

☐

☒

☒

☐

☐

☐

☐

☐

☒

☒

☐

☐

☐

☐

☒

☒

Last Modified Date

4/29/2025, 6:51 AM

4/29/2025, 6:59 AM

4/29/2025, 6:59 AM

4/29/2025, 6:51 AM

4/29/2025, 6:59 AM

4/29/2025, 6:59 AM

4/29/2025, 6:59 AM

4/29/2025, 6:59 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:59 AM

4/29/2025, 6:59 AM

4/29/2025, 6:51 AM

4/29/2025, 6:59 AM

4/29/2025, 7:01 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:59 AM

4/29/2025, 6:59 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

Created Date

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

4/29/2025, 6:51 AM

New Import Change Owner Printable View Assign Label

Search this list...

VOLUNTEERS APP: VOLUNTEER SKILLS


The volunteer shift record page will give you details on the actions associated with the skills and any constituents who have the skills on their record.

Advocacy | Skill Value | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/ucinn_portal_Skill_Value__c/a5QD500000PDjKMAW/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



Volunteers

Home

Volunteer Jobs

Volunteer Shifts

Skill Values

Skill Value

Advocacy

Edit | New Task | New Event

Details

Information

Skill Value Name


Advocacy

Is Display on Portal


☒

System Information

Created By




 Richard Bobo, 4/29/2025, 6:51 AM

Last Modified By

 Richard Bobo, 4/29/2025, 6:51 AM



Volunteer Skills (3)

New

Volunteer Skill: Volunteer Skill Name	Listing	Actual Display Start Date Time	
VSK-0000015	Game Night	2025-03-18 00:00:00	
VSK-0000023		2025-07-12 09:00:00	
VSK-0000025		2025-04-02 21:00:00	
View All			

Constituent Skills (2)

New

Constituent Skill: Constituent Skill Name	Full Name	
CS-0000001	Mr. Scotty Highlander III	
CS-0000010	Nick Highlander	
View All		

organizer

VOLUNTEERS APP: CREATE A NEW VOLUNTEER SKILL

Navigate to the Skills Value tab, then click New.

All | Skill Values | Salesforce

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

Search...

Volunteers Home Volunteer Jobs Volunteer Shifts Skill Values

Skill Values

All

49 Items • Sorted by Skill Value Name • Updated a few seconds ago

New Import Change Owner Printable View Assign Label

Search this list...

<input type="checkbox"/> Skill Value Name ↑	<input type="checkbox"/> Is Display on Portal	<input type="checkbox"/> Last Modified Date	<input type="checkbox"/> Created Date
1 <input type="checkbox"/> Advocacy	<input checked="" type="checkbox"/>	4/29/2025, 6:51 AM	4/29/2025, 6:51 AM
2 <input type="checkbox"/> Alumni Association Board	<input type="checkbox"/>	4/29/2025, 6:59 AM	4/29/2025, 6:51 AM
3 <input type="checkbox"/> Alumni Chapter	<input type="checkbox"/>	4/29/2025, 6:59 AM	4/29/2025, 6:51 AM
4 <input type="checkbox"/> Arts & Culture	<input checked="" type="checkbox"/>	4/29/2025, 6:51 AM	4/29/2025, 6:51 AM
5 <input type="checkbox"/> Athletics Advisory Board	<input type="checkbox"/>	4/29/2025, 6:59 AM	4/29/2025, 6:51 AM
6 <input type="checkbox"/> Basic Needs	<input type="checkbox"/>	4/29/2025, 6:59 AM	4/29/2025, 6:51 AM
7 <input type="checkbox"/> Board Service	<input type="checkbox"/>	4/29/2025, 6:59 AM	4/29/2025, 6:51 AM
8 <input type="checkbox"/> Business	<input type="checkbox"/>	4/29/2025, 6:59 AM	4/29/2025, 6:51 AM
9 <input type="checkbox"/> Career Mentor	<input checked="" type="checkbox"/>	4/29/2025, 6:51 AM	4/29/2025, 6:51 AM
10 <input type="checkbox"/> Clerical	<input checked="" type="checkbox"/>	4/29/2025, 6:51 AM	4/29/2025, 6:51 AM
11 <input type="checkbox"/> College/Department Advisory Board	<input type="checkbox"/>	4/29/2025, 6:59 AM	4/29/2025, 6:51 AM
12 <input type="checkbox"/> Community	<input type="checkbox"/>	4/29/2025, 6:59 AM	4/29/2025, 6:51 AM
13 <input type="checkbox"/> Court Mandated	<input type="checkbox"/>	4/29/2025, 6:59 AM	4/29/2025, 6:51 AM
14 <input type="checkbox"/> Crime & Safety	<input type="checkbox"/>	4/29/2025, 6:59 AM	4/29/2025, 6:51 AM
15 <input type="checkbox"/> Crisis	<input type="checkbox"/>	4/29/2025, 7:01 AM	4/29/2025, 6:51 AM
16 <input type="checkbox"/> Data Entry	<input checked="" type="checkbox"/>	4/29/2025, 6:51 AM	4/29/2025, 6:51 AM
17 <input type="checkbox"/> Disaster Response	<input checked="" type="checkbox"/>	4/29/2025, 6:51 AM	4/29/2025, 6:51 AM
18 <input type="checkbox"/> Education	<input checked="" type="checkbox"/>	4/29/2025, 6:51 AM	4/29/2025, 6:51 AM
19 <input type="checkbox"/> Employment	<input type="checkbox"/>	4/29/2025, 6:59 AM	4/29/2025, 6:51 AM
20 <input type="checkbox"/> Environment	<input type="checkbox"/>	4/29/2025, 6:59 AM	4/29/2025, 6:51 AM
21 <input type="checkbox"/> Equality	<input type="checkbox"/>	4/29/2025, 6:59 AM	4/29/2025, 6:51 AM
22 <input type="checkbox"/> Family	<input type="checkbox"/>	4/29/2025, 6:59 AM	4/29/2025, 6:51 AM
23 <input type="checkbox"/> Finance	<input checked="" type="checkbox"/>	4/29/2025, 6:51 AM	4/29/2025, 6:51 AM
<input type="checkbox"/> Food Prep	<input checked="" type="checkbox"/>	4/29/2025, 6:51 AM	4/29/2025, 6:51 AM

VOLUNTEERS APP: CREATE A NEW VOLUNTEER SKILL

Fill out the required field, then click Save.

The screenshot displays the Salesforce Lightning interface for managing 'Skill Values'. A modal window titled 'New Skill Value' is open, showing a form with a red border around the 'Skill Value Name' field, which is currently empty and has a red 'X' icon. The form also includes a checkbox for 'Is Display on Portal' and buttons for 'Cancel', 'Save & New', and 'Save'. The background shows a table of skill values with columns for Skill Value Name, Is Display on Portal, Last Modified Date, and Created Date.

2.4

VOLUNTEERS-ASCEND VIEW

VOLUNTEERS – ASCEND VIEW

Though the Volunteers app is needed to create new volunteer jobs, shifts, and events, you can view volunteer information from ascend. To view lists of jobs, shifts, skills, and volunteers, type the relevant name into the App Launcher, then click on the object you wish to view. You will be redirected to its record page, where you can view all. You may also search for volunteer jobs, shifts, skills, and volunteers in the global search bar.

Home | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/page/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

App Launcher

Q volunteer

Share

Apps

Volunteers

Items

Volunteer Jobs

Volunteer Shifts

Volunteer Skills

Volunteers

View All

Search this feed...

No bookmarks? You're missing out!
Bookmark useful posts, and this will become a handy reference for you.

My Recent Records My Tasks and Cases My Dashboard

Recent Records (10)

Richard B Highlander

Donor ID 00007542

Account Name Richard Highlander Household

Phone 555-555-5555 ext123

Email richard.bobo+highlander@gmail.com

PRM

LinkedIn URL https://www.linkedin.com/in/richardbobo/

Scotty Highlander

Donor ID 00940386

Account Name Scotty & Heidi Highlander Household

Phone

Email

PRM Jennifer Best

LinkedIn URL

RYN0000991

Account Name Riverside Carpet Cleaners

Planned Date 7/29/2025

Amount \$2,500.00

Stage Potential Match

Opportunity O... Jennifer Best

GN0000990

Account Name

Planned Date 9/29/2025

Amount \$2,500.00

Stage Funded

Opportunity O... Jennifer Best

JB_2025_Highlander Scholarship Proposal

Account Name Scotty & Heidi Highlander Household

Planned Date 7/28/2025

Amount \$50.00

Stage Funded

Opportunity O... Jennifer Best

update giving capacity

Priority Medium

Status Submitted

Case Number 00001148

S2507240480

Session Type Various

Session Operat... Jennifer Best

Session Compl... 7/29/2025, 6:21 AM

Gift / Pledge P... \$0.00

Pledge Amount \$0.00

Scotty & Heidi Highlander Household

Primary Constit... Scotty Highlander

Lifetime Cash \$3,024.22

Lifetime Fundr... \$15,024.22

Campaign Tota... \$3,024.22

Total Campaig... \$15,024.22

Amount of Mo... \$1,000.00

VOLUNTEERS – ASCEND VIEW: CONSTITUENT/ORGANIZATION RECORD

To view whether a constituent/organization has participated in volunteer events, navigate to their record page. Click into the Our UCR tab. The Volunteer History subtab details what events the constituent/organization has signed up for and participated in.

The screenshot shows the Salesforce Lightning Experience interface. The top navigation bar includes the 'LUX' logo and a search bar. The main content area is divided into two sections. The left section, titled 'CONSTITUENT INDICATORS', features a profile card for 'Richard B Highlander' with fields for 'Donor ID', 'Phone', 'PRM', 'Account Name', 'Email', 'LinkedIn URL', and 'Manage Household'. Below this is a 'Trustee Involvements' table with columns for 'TRUSTEE INVOLVEMENT', 'ROLE', 'START DATE', and 'END DATE'. The right section, titled 'Our UCR', shows a 'Volunteer History' table with columns for 'Volunteer Name', 'Volunteer Job', 'Volunteer Shift', 'Shift Start Date/Time', 'Application Status', 'Hours Rep...', and 'Reporting Status'. The table contains one record for 'Richard B Highlander' assigned to 'Food Bank Warehouse - Food Prep' on 'Tuesday'.

Volunteer Name	Volunteer Job	Volunteer Shift	Shift Start Date/Time	Application Status	Hours Rep...	Reporting Status
Richard B Highlander	Food Bank Warehouse - Food Prep	Tuesday	2025-07-22 15:00:00	Completed	3.0	Reportable

VOLUNTEERS – ASCEND VIEW: CONSTITUENT/ORGANIZATION RECORD

The Volunteer Skills subtab highlights what kinds of volunteer jobs the constituent/organization is qualified for or can participate in.

Richard B Highlander | Constitu...

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Contact/003D5000016ZZCVIA4/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 All | Volunteer Skills BBQ Friday's in the Quad ...

<



View Critical Information

CONSTITUENT INDICATORS



Richard B Highlander

+ Follow Edit Delete Manage Household

Donor ID
00007542
Phone
555-555-5555 ext123
PRM

Account Name
Richard Highlander Household
Email
richard.bobo+highlander@gmail.com
LinkedIn URL
https://www.linkedin.com/in/richardbobo/

Trustee Involvements

TRUSTEE INVOLVEMENT	ROLE	START DATE	END DATE
---------------------	------	------------	----------

<< < > >>

Showing 0 to 0 of 0 record(s).

Overview Constituent Details Prospect Management Our UCR Chatter

Volunteer Volunteer Skills Directory Settings

Constituent Skills (1)

1 item • Updated a few seconds ago

Skill Value: Skill Value Name	Constituent Skill: Created Date
1 Technology	7/22/2025, 11:10 AM

View All

organizer

Giving - Top Designations

Directory Settings is used for all Portal Users. A single Directory Setting record is automatically created for each constituent and is a record that stores the constituent settings and preferences as it relates to some of what they want to have visible or not visible in the Alumni Directory. Even if they are not in the directory, or not an alum, they still must have a Directory Setting record.

The screenshot displays the LUX system interface. At the top, there is a navigation bar with the LUX logo, a search bar, and various icons. Below the navigation bar, the main content area is divided into several sections. On the left, there is a sidebar with a profile picture placeholder, a 'View Critical Information' button, and a 'CONSTITUENT INDICATORS' section with four icons. Below this is a 'UCR - Global Solicitations Opt-Out' banner. The main content area on the right is titled 'Our UCR' and contains several tabs: 'Overview', 'Constituent Details', 'Prospect Management', 'Our UCR' (highlighted), and 'Chatter'. Under the 'Our UCR' tab, there are sub-tabs: 'Volunteer', 'Volunteer Skills', 'Action On Content', 'Clubs/Groups', and 'Our UCR User Settings' (highlighted). The 'Our UCR User Settings' section shows details for 'Scotty Highlander', including 'Is connect User', 'Is Display On Portal', 'Endowment Reports Displayed in Portal', 'Our UCR Directory Setting', 'Is Show on Directory', 'Is Directory Opt Out', 'Designation Steward Count', and 'Directory Setting Details'. A red box highlights the 'Directory Settings' section, which shows a table with one item: 'Directory Setting Name' (DSN00000016), 'Is Receiving Me...' (checked), and 'Created Date' (4/22/2025, 10:40 AM).

3

STEWARDSHIP CASES

STEWARDSHIP CASES

To view stewardship cases related to a constituent or organization, navigate to their record page, then click Constituent Details. Next, click into the Stewardship subtab. The view will default to Stewardship Cases. To view a case in more detail, click on its hyperlinked Case Number.

Scotty Highlander | Constituent

Email test | Salesforce

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

Botanic Garden Society | G...

Search...

Star Plus Refresh Help Settings Profile

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

Involvements

More

Stewardship Cases

Naming Opportunities

Insignia/Non-Gift

Stewardship Cases

New

CASE NUMBER	CASE TYPE	SUB TYPE	SUBJECT	STATUS	ACTIONS
00001150	Communications	Printed Endowment Report	request for endowment report	Submitted	<div></div> <div></div>

<<

<

1

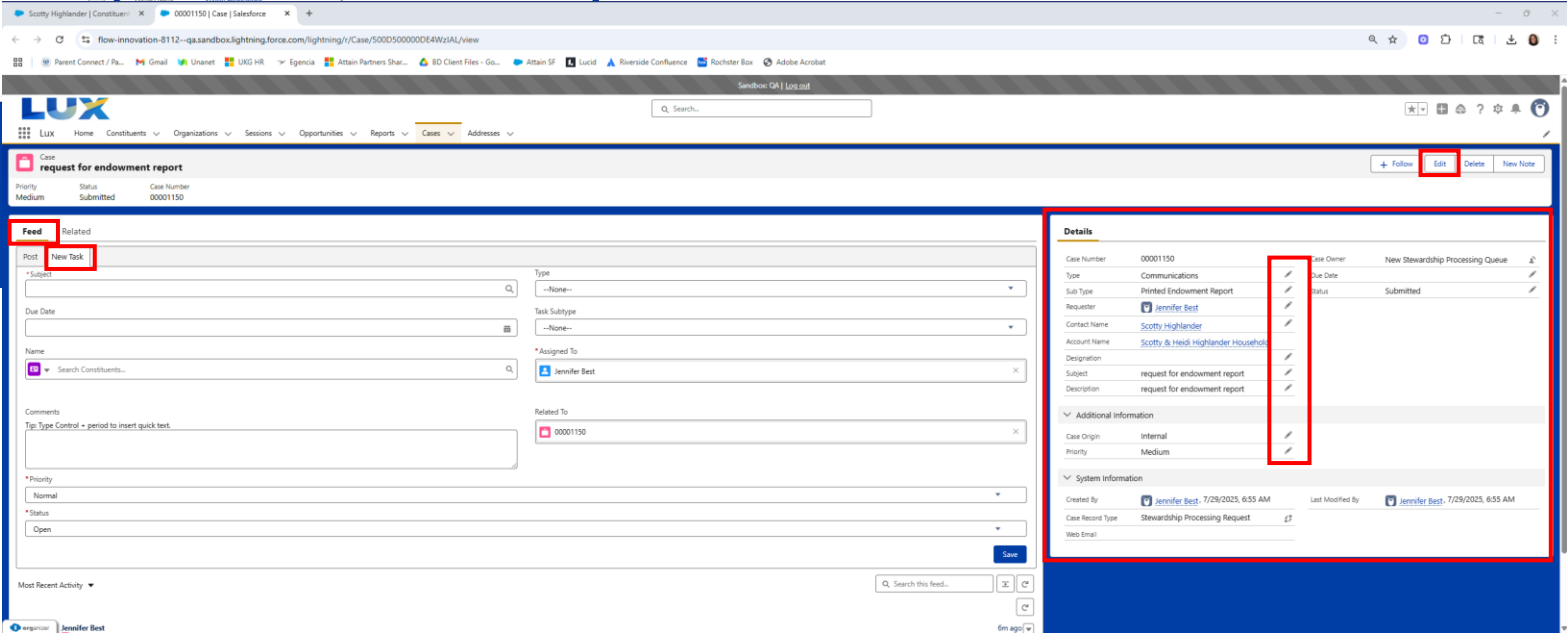
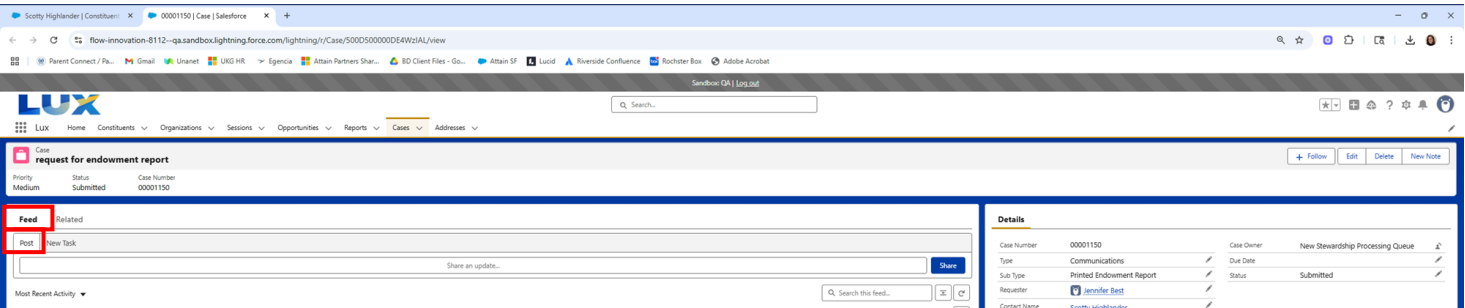
>

>>

Showing 1 to 1 of 1 record(s).

VIEW AND MANAGE CASES

You will be redirected to the case's record page. From here, you can view details about the case and review the work being done on it. You can communicate about the case in the Feed>Post tab, and add tasks to the case through the Feed>New Task tab. To edit the case, click Edit or on any pencil next to fields in the Details tab.



VIEW AND MANAGE CASES

To add additional team members to the case, upload files, leave notes, or add comments, navigate to the Related tab. Click New or Add in any section to create a new record.

Scotty Highlander | Constituent | 00001150 | Case | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Case/500D500000DE4WzIAL/view

Sandbox: QA | Log out

LUX

Q Search...

LUX Home Constituents Organizations Sessions Opportunities Reports Cases Addresses

Case request for endowment report

Priority Medium Status Submitted Case Number 00001150

+ Follow Edit Delete New Note

Feed

Related

Case Team (0)

Add Member Add Team

Case Comments (0)

New

Case History (1)

Date	Field	User	Original Value	New Value
7/29/2025, 6:55 AM	Created	Jennifer Best		

View All

Notes (0)

New

Files (0)

Upload Files

Or drop files

Open Activities (0)

New Task New Event

Activity History (0)

View All

Attachments (0)

Upload Files

Details

Case Number	00001150	Case Owner	New Stewardship Processing Queue
Type	Communications	Due Date	
Sub Type	Printed Endowment Report	Status	Submitted
Requester	Jennifer Best		
Contact Name	Scotty Highlander		
Account Name	Scotty & Heidi Highlander Household		
Designation			
Subject	request for endowment report		
Description	request for endowment report		
Additional Information			
Case Origin	Internal		
Priority	Medium		
System Information			
Created By	Jennifer Best, 7/29/2025, 6:55 AM	Last Modified By	Jennifer Best, 7/29/2025, 6:55 AM
Case Record Type	Stewardship Processing Request		
Web Email			

CREATE NEW CASE

From any constituent or organization record page, navigate to Constituent Details>Stewardship>Stewardship Cases. Click New. Fill out any required fields and any other details you may have, then click Save.

The screenshot displays the LUX system interface with a modal form titled "New Case: Stewardship Processing Request". The background shows the constituent record for "Scotty Highlander".

Form Fields and Red Boxes:

- Case Information:**
 - * Type: Communications (dropdown)
 - * Sub Type: Printed Endowment Report (dropdown)
 - * Status: Submitted (dropdown)
- Requester:** Jennifer Best
- Contact Name:** Scotty Highlander
- Account Name:** (empty)
- Designation:** Search Designations...
- * Subject:** request for endowment report
- * Description:** request for endowment report

Buttons: Cancel, Save (highlighted with a red box).

Background Interface:

- Header: LUX, Home, Constituents, Organizations, Sessions, Opportunities, Reports, Cases, Addresses.
- Constituent Indicators: UCR - Global Invitations Opt-Out, The Wedding Singer, Global: UCR Email Opt-Out.
- Constituent Details: Scotty Highlander, Donor ID 00940386, Account Name Scotty & Heidi Highlander Household, Email, PSM, Jennifer Best.
- Stewardship Cases Table: Columns for SUBJECT, STATUS, ACTIONS. A "New" button is visible in the ACTIONS column.

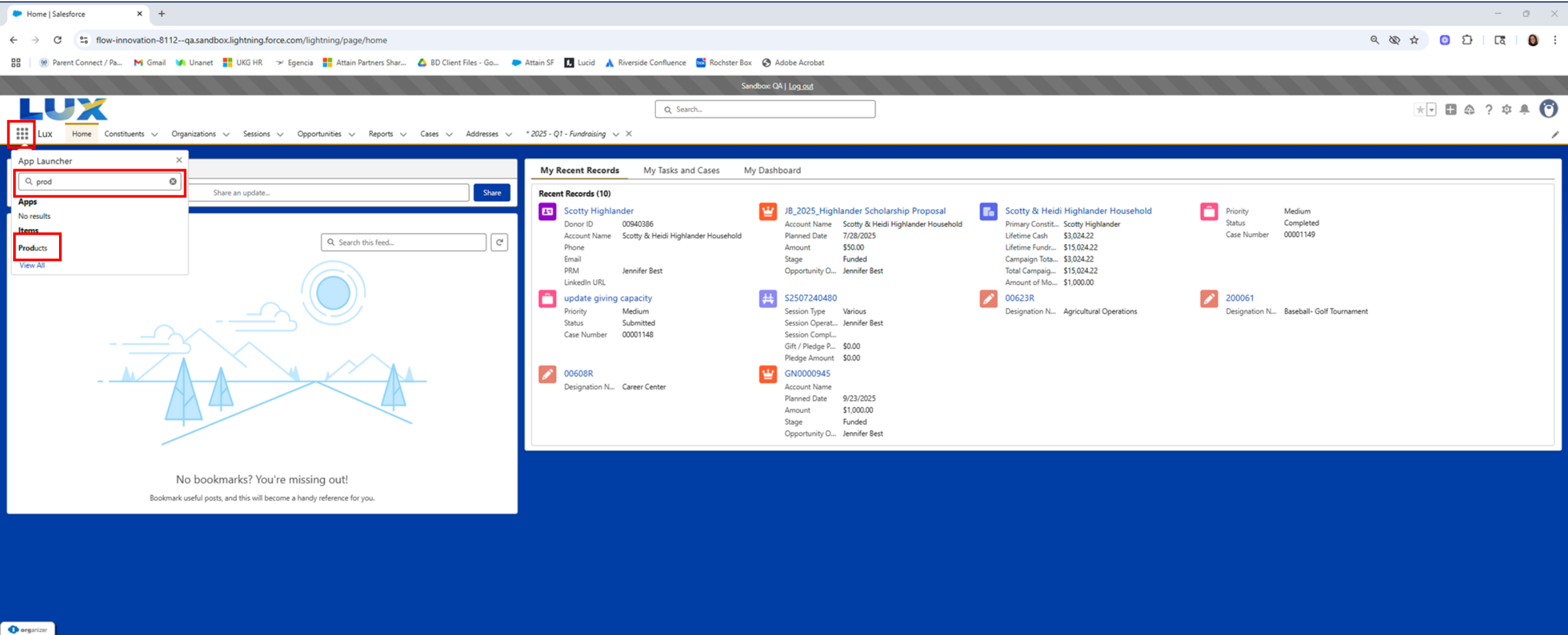


4

PRODUCTS

PRODUCTS

To view Products (which include Naming Opportunities, Insignia Items, Non-Gift Items, and some Memberships), begin typing Products into the App Launcher, then click Products.



4.1

PRODUCTS – NAMING OPPORTUNITIES

PRODUCTS: NAMING OPPORTUNITY

You will be redirected to the Products list view. From here, you may view Naming Opportunities, Insignia Items, Non-Gift Items, and some Memberships by selecting the list view of the type of product you’re looking for. To view any record in more detail, click on the hyperlinked Product name and you will be redirected to its record page.

Lightning Experience | Salesforce | All Products | Products | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/o/Product2/list?filterName=AllProducts

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 All Products | Products

Search...

Star Plus Settings Help User Profile

Products

All Products

39 Items • Sorted by Product Name • Updated a few seconds ago

Search this list...

Settings List View Edit View Filter

New Printable View

Product Name	Product Record Type	Product Family	Product Description	Active	Created Date
1 Year Membership	Membership Benefit			<input checked="" type="checkbox"/>	4/28/2025, 9:57 AM
2025 Silver Pen/Pencil Set	Branded Insignia	Home and Office	2025 Pen and Pencil Set in Silver with UCR Monogram	<input checked="" type="checkbox"/>	6/30/2025, 9:58 AM
2025 UR Luggage Tags	Branded Insignia	Accessories: Travel	year sku cost	<input checked="" type="checkbox"/>	6/30/2025, 10:13 AM
Alumni Club Member	Membership Level			<input checked="" type="checkbox"/>	2/2/2025, 11:39 PM
Bell Tower Associates (5 Years)	Membership Level	None	Bell Tower Associates receive - Custom commemorative decal - Invitation to Homecoming	<input checked="" type="checkbox"/>	4/28/2025, 10:09 AM
Botanic Garden - Family	Membership Level			<input checked="" type="checkbox"/>	6/12/2025, 10:29 AM
Botanic Garden - Sustainer	Membership Level			<input checked="" type="checkbox"/>	5/7/2025, 10:03 AM
Botanic Gardens Annual Membership	Membership Level			<input checked="" type="checkbox"/>	2/27/2025, 3:33 PM
Botanic Gardens Legacy	Membership Level			<input checked="" type="checkbox"/>	7/6/2025, 11:34 AM
Branded Donor Gift	Non Gift	Accessories: Fashion		<input checked="" type="checkbox"/>	5/28/2025, 10:20 AM
Branded Mug - Tartan	Branded Insignia	Home and Office		<input type="checkbox"/>	5/28/2025, 11:02 AM
Brick - Cafeteria Wall	Naming Opportunity	Bricks	One brick engaged on cafeteria wall.	<input checked="" type="checkbox"/>	5/29/2025, 10:23 AM
Citrus Honey	Branded Insignia	Gourmet Items	test	<input checked="" type="checkbox"/>	6/3/2025, 7:34 AM
Custom commemorative decal	Membership Benefit		Custom commemorative decal	<input checked="" type="checkbox"/>	4/28/2025, 10:10 AM
Event Registration	Non Gift	Event Registration		<input checked="" type="checkbox"/>	2/4/2025, 7:59 AM
Free Club T-Shirt	Membership Benefit			<input checked="" type="checkbox"/>	4/28/2025, 9:57 AM
Fuzzy Banana T-shirt	Non Gift	Merchandise	It's a shirt with a banana on it. And the banana is fuzzy.	<input checked="" type="checkbox"/>	2/11/2025, 2:41 PM
Gala 2025 Meal	Non Gift	Tickets		<input checked="" type="checkbox"/>	2/9/2025, 11:55 AM
Gala Ticket	Non Gift		Ticket to Gala Event	<input type="checkbox"/>	1/9/2025, 12:37 PM
Invitation to Homecoming	Membership Benefit			<input checked="" type="checkbox"/>	4/28/2025, 10:10 AM
Library Garden Brick Wall	Naming Opportunity	Bricks		<input checked="" type="checkbox"/>	6/12/2025, 10:45 AM
Luggage Tags	Branded Insignia	Accessories: Travel	YYYY navy luggage tags Skew: Cost per unit	<input type="checkbox"/>	6/30/2025, 10:12 AM
Merchandise	Non Gift	Merchandise		<input checked="" type="checkbox"/>	2/4/2025, 7:58 AM
... of New Business school building	Naming Opportunity	Buildings & Spaces		<input checked="" type="checkbox"/>	4/30/2025, 9:39 AM

PRODUCTS: VIEW AND MANAGE NAMING OPPORTUNITIES

When you click on a Naming Opportunity record, you will be redirected to its record page. From there you can view information about the naming opportunity in the Details section.

Lightning Experience | Salesforce

Suite in New Business school building

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Product2/01tD50000063ocglAA/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 Suite in New Business scho...

Search...

Star Plus App ? Settings Profile

Product Suite in New Business school building

Edit Delete Clone

Product Record Type Naming Opportunity

Product Family Buildings & Spaces

Type Suite (program)

Quantity Available 1

Status Available

Details

Product Name Suite in New Business school building

Parent Product

Product Family Buildings & Spaces

Type Suite (program)

Status Available

Active ☒

Details

Minimum Asking Amount \$50,000.00

Quantity Available 1

Signage Size

Material

Interior/Exterior Location

Campuswide Visibility

Usage Medium

Department

Organization

Description Information

Product Description

Special Considerations

System Information

Created By Arun Jayaseelan 4/28/2025, 10:44 AM

Product Code

Last Modified By Richard Bobo 7/21/2025, 1:29 PM

Price Books (0)

Add Standard Price

Assets (1)

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

Asset Name

Contact Name

Status

Delivery D...

Created Date

1 Rowe Building Name

Ryan E Rowe

Installed

5/28/2025, 10:40 AM

View All

Files (0)

Add Files

Upload Files

Or drop files

Notes (0)

New

organizer

PRODUCTS: VIEW AND MANAGE NAMING OPPORTUNITIES

Price Books: lists cost to the constituent associated with the product opportunity

Assets: when the naming opportunity is assigned to a constituent/org, that constituent/org will be stored in the system as an Asset

Files & Notes: lists files uploaded and notes added to the opportunity

Lightning Experience | Salesforce

Suite in New Business school building

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Product2/01tD50000063ocglAA/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 Suite in New Business scho...

Search...

Star Plus App ? Settings Profile

Product Suite in New Business school building

Edit Delete Clone

Product Record Type Naming Opportunity

Product Family Buildings & Spaces

Type Suite (program)

Quantity Available 1

Status Available

Details

Product Name Suite in New Business school building

Parent Product

Product Family Buildings & Spaces

Type Suite (program)

Status Available

Active ☒

Details

Minimum Asking Amount \$50,000.00

Quantity Available 1

Signage Size

Material

Interior/Exterior Location

Campuswide Visibility

Usage Medium

Department

Organization

Description Information

Product Description

Special Considerations

System Information

Created By Arun Jayaseelan 4/28/2025, 10:44 AM

Product Code

Last Modified By Richard Bobo 7/21/2025, 1:29 PM

Price Books (0) Add Standard Price

Assets (1)

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

Asset Name

Contact Name

Status

Delivery D...

Created Date

1 Rowe Building Name

Ryan E Rowe

Installed

5/28/2025, 10:40 AM

View All

Files (0) Add Files

Upload Files

Or drop files

Notes (0) New

organizer

PRODUCTS: VIEW CONSTITUENT & ORGANIZATION NAMING OPPORTUNITIES

If a constituent or organization has named a space on campus or had something named in their honor, the opportunity will appear on their record page. You can view details by navigating to [Constituent/Organization Details>Stewardship>Naming Opportunities](#). Click on the opportunity's hyperlinked asset name to view its record page.

The screenshot displays the Salesforce Lightning Experience interface for the 'flow-innovation-8112--qa.sandbox.lightning.force.com' instance. The top navigation bar includes the LUX logo, a search bar, and various utility icons. The main navigation menu on the left lists 'Home', 'Constituents', 'Organizations', 'Sessions', 'Opportunities', 'Reports', 'Cases', 'Addresses', and several fundraising campaigns. The 'Constituents' section is active, showing a profile for 'Ryan E Rowe'. The 'Constituent Details' page is the primary focus, with tabs for 'Overview', 'Prospect Management', 'Our UCR', and 'Chatter'. The 'Overview' tab is selected, and the 'Stewardship' sub-tab is highlighted. Under 'Stewardship', the 'Naming Opportunities' section is active, displaying a table with two rows of data. The table has columns for 'ASSET NAME', 'STATUS', and 'PRICE'. The first row shows 'Rowe Building Name' with a status of 'Installed' and a price of '\$0.00'. The second row shows 'Rowe Suite' with a status of 'Installed' and a price of '\$0.00'. The page also includes a 'View Critical Information' button, a 'CONSTITUENT INDICATORS' section with three icons, and a 'Trustee Involvements' section at the bottom.

Constituent Details

Stewardship

Naming Opportunities

ASSET NAME	STATUS	PRICE
Rowe Building Name	Installed	\$0.00
Rowe Suite	Installed	\$0.00

Showing 1 to 2 of 2 record(s).

PRODUCTS: CREATE A NEW NAMING OPPORTUNITY

To create a new naming opportunity, navigate to the products list view, then click New.

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/o/Product2/list?filterName=All_Naming_Opportunities

Sandbox: QA | Log out

LUX

Home

Constituents

Organizations

Sessions

Opportunities

Reports

Cases

Addresses

2025 - Q1 - Fundraising

All Naming Opportunities

Search...

Star

Plus

Help

Settings

Notifications

Profile

Products

All Naming Opportunities

New

Printable View

9 Items • Sorted by Product Name • Filtered by Product Record Type • Updated a few seconds ago

Search this list...

Filter

Reset

Refresh

Print

Export

<input type="checkbox"/>	Product Name ↑	Product Family	Type	Minimum Asking Amount	Quantity Available	Quantity Remaining	Status	Active (Product)	
1	<input type="checkbox"/> Brick - Cafeteria Wall	Bricks	Lobby/Atrium	\$2,500.00	500	500	Available	<input checked="" type="checkbox"/>	
2	<input type="checkbox"/> Library Garden Brick Wall	Bricks	Lobby/Atrium	\$2,000.00	1,000	1,000	Available	<input checked="" type="checkbox"/>	
3	<input type="checkbox"/> Name of New Business school building	Buildings & Spaces				0	Available	<input checked="" type="checkbox"/>	
4	<input type="checkbox"/> Office Name - ABC	None			1	-1	Available	<input checked="" type="checkbox"/>	
5	<input type="checkbox"/> Office Of XYZ	Buildings & Spaces	Office (faculty/staff)	\$250,000.00	1	1	Available	<input type="checkbox"/>	
6	<input type="checkbox"/> School of Medicine Building	Buildings & Spaces				0	Available	<input type="checkbox"/>	
7	<input type="checkbox"/> Scotty Hall	Buildings & Spaces		\$5,000,000.00	1	1	Available	<input type="checkbox"/>	
8	<input type="checkbox"/> Suite in New Business school building	Buildings & Spaces	Suite (program)	\$50,000.00	1	1	Available	<input checked="" type="checkbox"/>	
9	<input type="checkbox"/> test					0		<input type="checkbox"/>	

PRODUCTS: CREATE A NEW NAMING OPPORTUNITY

A popup will appear. Select Naming Opportunity from the list, then click Next.

The screenshot displays the Salesforce Lightning interface for managing products. A modal dialog titled "New Product" is open, prompting the user to "Select a record type". The "Naming Opportunity" option, described as "For naming opportunities", is selected and highlighted with a red box. The "Next" button at the bottom right of the dialog is also highlighted with a red box. In the background, the "All Naming Opportunities" list is visible, showing columns for Product Name, Product Family, Quantity Available, Quantity Remaining, Status, and Active (Product). The list contains 9 items, with the first few being "Brick - Cafeteria Wall", "Library Garden Brick Wall", and "Name of New Business school building".

4.2

PRODUCTS – BRANDED INSIGNIA

PRODUCTS: BRANDED INSIGNIA

To view any Branded Insignia record in more detail, click on the hyperlinked Product name and you will be redirected to its record page.

Lightning Experience | Salesforce | All Products | Products | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/o/Product2/list?filterName=AllProducts

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 Expedited Gift Processing All Products | Products

Products

All Products

39 items • Sorted by Product Name • Updated a few seconds ago

Search this list...

New Printable View

Product Name	Product Record Type	Product Family	Product Description	Active	Created Date
1 Year Membership	Membership Benefit			<input checked="" type="checkbox"/>	4/28/2025, 9:57 AM
2025 Silver Pen/Pencil Set	Branded Insignia	Home and Office	2025 Pen and Pencil Set in Silver with UCR Monogram	<input checked="" type="checkbox"/>	6/30/2025, 9:58 AM
2025 UR Luggage Tags	Branded Insignia	Accessories: Travel	year sku cost	<input checked="" type="checkbox"/>	6/30/2025, 10:13 AM
Alumni Club Member	Membership Level			<input checked="" type="checkbox"/>	2/2/2025, 11:39 PM
Bell Tower Associates (5 Years)	Membership Level	None	Bell Tower Associates receive - Custom commemorative decal - Invitation to Homecoming	<input checked="" type="checkbox"/>	4/28/2025, 10:09 AM
Botanic Garden - Family	Membership Level			<input checked="" type="checkbox"/>	6/12/2025, 10:29 AM
Botanic Garden - Sustainer	Membership Level			<input checked="" type="checkbox"/>	5/7/2025, 10:03 AM
Botanic Gardens Annual Membership	Membership Level			<input checked="" type="checkbox"/>	2/27/2025, 3:33 PM
Botanic Gardens Legacy	Membership Level			<input checked="" type="checkbox"/>	7/6/2025, 11:34 AM
Branded Donor Gift	Non Gift	Accessories: Fashion		<input checked="" type="checkbox"/>	5/28/2025, 10:20 AM
Branded Mug - Tartan	Branded Insignia	Home and Office		<input type="checkbox"/>	5/28/2025, 11:02 AM
Brick - Cafeteria Wall	Naming Opportunity	Bricks	One brick engaged on cafeteria wall.	<input checked="" type="checkbox"/>	5/29/2025, 10:23 AM
Citrus Honey	Branded Insignia	Gourmet Items	test	<input checked="" type="checkbox"/>	6/3/2025, 7:34 AM
Custom commemorative decal	Membership Benefit		Custom commemorative decal	<input checked="" type="checkbox"/>	4/28/2025, 10:10 AM
Event Registration	Non Gift	Event Registration		<input checked="" type="checkbox"/>	2/4/2025, 7:59 AM
Free Club T-Shirt	Membership Benefit			<input checked="" type="checkbox"/>	4/28/2025, 9:57 AM
Fuzzy Banana T-shirt	Non Gift	Merchandise	It's a shirt with a banana on it. And the banana is fuzzy.	<input checked="" type="checkbox"/>	2/11/2025, 2:41 PM
Gala 2025 Meal	Non Gift	Tickets		<input checked="" type="checkbox"/>	2/9/2025, 11:55 AM
Gala Ticket	Non Gift		Ticket to Gala Event	<input type="checkbox"/>	1/9/2025, 12:37 PM
Invitation to Homecoming	Membership Benefit			<input checked="" type="checkbox"/>	4/28/2025, 10:10 AM
Library Garden Brick Wall	Naming Opportunity	Bricks		<input checked="" type="checkbox"/>	6/12/2025, 10:45 AM
Luggage Tags	Branded Insignia	Accessories: Travel	YYYY navy luggage tags Skew: Cost per unit	<input type="checkbox"/>	6/30/2025, 10:12 AM
Merchandise	Non Gift	Merchandise		<input checked="" type="checkbox"/>	2/4/2025, 7:58 AM
Name of New Business school building	Naming Opportunity	Buildings & Spaces		<input checked="" type="checkbox"/>	4/30/2025, 9:39 AM

PRODUCTS: VIEW AND MANAGE INSIGNIA RECORD

You will be redirected to the insignia’s record page. From there you can view information about the insignia item in the Details section.

Lightning Experience | Salesforce

Branded Mug - Tartan | Product

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Product2/01tD50000066Uz6IAE/view

Parent Connect / Pa... Gmail Unanet UKG HR Egecia 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

* Branded Mug - Tartan | Pr...

Product

Branded Mug - Tartan

New Asset (Branded Insignia) Edit Delete

Product Family Home and Office Product Record Type Branded Insignia Active

Details

Product Name Branded Mug - Tartan

Parent Product

Brand Type Tartan

Product Description

Special Considerations

Inventory

Quantity Available 2

Quantity Unit Of Measure

Quantity Used 514

Quantity Remaining -512

System Information

Created By Richard Bobo 5/28/2025, 11:02 AM

Product Code

Product Family Home and Office

Active

Department

Organization

Last Modified By Marianne Paek 7/11/2025, 1:41 PM

External ID

Price Books (0)

Add Standard Price

Assets (6)

6 Items • Sorted by Purchase Date • Updated a few seconds ago

	Asset Name	Contact Name	Status	Delivery Date	Created Date	
1	Branded Mug - Tartan	Richard B Highlander	Planned		5/28/2025, 11:03 AM	
2	Branded Mug - Tartan	Shantae Rowe	Planned		6/16/2025, 2:25 PM	
3	Branded Mug - Tartan	Laci S. Mosley	Planned		6/23/2025, 10:06 AM	
4	Branded Mug - Tartan	Destiny Topher	Planned		6/24/2025, 9:56 AM	
5	Branded Mug - Tartan	Ryan E Rowe	Planned		7/9/2025, 12:26 PM	
6	Branded Mug - Tartan	Emma Mary Patton	Planned	7/14/2025	7/11/2025, 1:41 PM	

View All

Files (0)

Add Files

Upload Files

Or drop files

Notes (0)

New

organizer

PRODUCTS: VIEW AND MANAGE INSIGNIA RECORD

Price Books list the cost to the constituent associated with the insignia. The price will be deducted from any gift processed that has the associated item added as a non-gift item. To add a price to the item, click Add Standard Price. A popup will appear. Fill in the required fields. Click Save.

The screenshot displays the Salesforce Lightning interface for a product named "Branded Mug - Tartan". A modal window titled "New Price Book Entry" is open, allowing the user to create a new price book entry. The modal contains the following fields:

- * Product:** A dropdown menu showing "Branded Mug - Tartan".
- * Price Book:** A dropdown menu showing "Standard Price Book".
- * List Price:** A text input field containing "\$15.00".
- Active:** A checkbox that is checked.
- Product Code:** A text input field.
- Use Standard Price:** A checkbox that is unchecked.

At the bottom of the modal, there are three buttons: "Cancel", "Save & New", and "Save". The "Save" button is highlighted with a red box. The background shows the product details page with various tabs and a table of price book entries.

PRODUCTS: VIEW AND MANAGE INSIGNIA RECORD

Assets: lists any time the insignia is given to a constituent as part of a gift

Files & Notes: lists files uploaded and notes added to the item

Lightning Experience | Salesforce

Branded Mug - Tartan | Product

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Product2/01tD50000066Uz6IAE/view

Parent Connect / Pa... Gmail Unanet UKG HR Egenia 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

* Branded Mug - Tartan | Pr...

Product

Branded Mug - Tartan

New Asset (Branded Insignia) Edit Delete

Product Family

Home and Office

Product Record Type

Branded Insignia

Active

Details

Product Name

Branded Mug - Tartan

Product Family

Home and Office

Parent Product

Active

Brand Type

Tartan

Department

Organization

Product Description

Special Considerations

Inventory

Quantity Available

2

Quantity Used

514

Quantity Unit Of Measure

Quantity Remaining

-512

System Information

Created By

Richard Bobo, 5/28/2025, 11:02 AM

Last Modified By

Marianne Paek, 7/11/2025, 1:41 PM

Product Code

External ID

Price Books (0)

Add Standard Price

Assets (6)

6 Items • Sorted by Purchase Date • Updated a few seconds ago

	Asset Name	Contact Name	Status	Delivery Date	Created Date	
1	Branded Mug - Tartan	Richard B Highlander	Planned		5/28/2025, 11:03 AM	
2	Branded Mug - Tartan	Shantae Rowe	Planned		6/16/2025, 2:25 PM	
3	Branded Mug - Tartan	Laci S. Mosley	Planned		6/23/2025, 10:06 AM	
4	Branded Mug - Tartan	Destiny Topher	Planned		6/24/2025, 9:56 AM	
5	Branded Mug - Tartan	Ryan E Rowe	Planned		7/9/2025, 12:26 PM	
6	Branded Mug - Tartan	Emma Mary Patton	Planned	7/14/2025	7/11/2025, 1:41 PM	

View All

Files (0)

Add Files

Upload Files

Or drop files

Notes (0)

New

PRODUCTS: VIEW INSIGNIA ON CONSTITUENT/ORGANIZATION RECORDS

When an insignia item is given to a constituent or organization, the item will show up on their record page in Constituent Details>Stewardship>Insignia/Non-Gift.

The screenshot displays the Salesforce Lightning Experience interface for a constituent named Scotty Highlander. The top navigation bar includes the LUX logo and a search bar. The main content area is divided into several sections:

- Alerts:** A section at the top right showing a single alert: "Scotty is allergic to peanuts" with a start date of "Mar 5, 2025".
- Navigation Tabs:** A row of tabs including Overview, **Constituent Details** (highlighted), Prospect Management, Our UCR, and Chatter.
- Sub-Tabs:** Below the main tabs, there are sub-tabs for Giving Details, Names, Salutations, Addresses, Phones, Emails, Social Media, Affiliations, Relationships, Funding Interests, Degree Information, **Stewardship** (highlighted), Involvements, and More.
- Stewardship Section:** This section contains a sub-tab for **Insignia/Non-Gift** (highlighted). It displays a table titled "Branded Insignia & Non-Gift Items" with the following data:

NAME	TYPE	CREATED	DELIVERED
Brick - Cafeteria Wall	Non Gift	Jul 29, 2025	
Fuzzy Banana T-shirt	Non Gift	Jul 23, 2025	
- Left Sidebar:** Contains a "CONSTITUENT INDICATORS" section with a graduation cap icon and a "Global: UCR Email Opt-Out" button. Below this is a section for "Scotty Highlander" with a profile picture, a "Follow" button, and contact information (Donor ID: 00940386, Phone, PRM: Jennifer Best, Account Name: Scotty & Heidi Highlander Household, Email, LinkedIn URL).

PRODUCTS: CREATE A NEW INSIGNIA ITEM

To create a new insignia item, navigate to the Product list view, then click New. A popup will appear. Select Branded Insignia, then click Next.

The screenshot shows the Salesforce Lightning Experience interface. The top navigation bar includes the LUX logo and a search bar. The main content area displays a table of products. A modal titled 'New Product' is open in the center, showing a list of record types. The 'Branded Insignia' option is selected and highlighted with a red box. The 'Next' button at the bottom right of the modal is also highlighted with a red box.

Product Name	Product Record Type	Product
1 1 Year Membership	Membership Benefit	
2 2025 Silver Pen/Pencil Set	Branded Insignia	Home
3 2025 UR Luggage Tags	Branded Insignia	Accessories: Travel
4 Alumni Club Member	Membership Level	
5 Bell Tower Associates (5 Years)	Membership Level	None
6 Botanic Garden - Family	Membership Level	
7 Botanic Garden - Sustainer	Membership Level	
8 Botanic Gardens Annual Membership	Membership Level	
9 Botanic Gardens Legacy	Membership Level	
10 Branded Donor Gift	Non Gift	Accessories: Travel
11 Branded Mug - Tartan	Branded Insignia	Home
12 Brick - Cafeteria Wall	Naming Opportunity	Bricks
13 Citrus Honey	Branded Insignia	Gourmet
14 Custom commemorative decal	Membership Benefit	
15 Event Registration	Non Gift	Event
16 Free Club T-Shirt	Membership Benefit	
17 Fuzzy Banana T-shirt	Non Gift	Merchandise
18 Gala 2025 Meal	Non Gift	Tickets
19 Gala Ticket	Non Gift	
20 Invitation to Homecoming	Membership Benefit	
21 Library Garden Brick Wall	Naming Opportunity	Bricks
22 Luggage Tags	Branded Insignia	Accessories: Travel
23 Merchandise	Non Gift	Merchandise
24 Name of New Business school building	Naming Opportunity	Buildings & Spaces

New Product Modal Options:

- ☒ Branded Insignia
Branded donor gifts.
- ☐ Item
Used with Item benefit types
- ☐ Membership Benefit
Membership benefit product
- ☐ Membership Level
Membership level product
- ☐ Naming Opportunity
For naming opportunities
- ☐ Non Gift
Non-Gift product
- ☐ POS
Point of Sale product

PRODUCTS: CREATE A NEW INSIGNIA ITEM

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

Lightning Experience | Salesforce

New Product: Branded Insignia

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/o/Product2/new?count=2&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=175379569283425274&backgroundContext=%2Fflightning%2Fo%2FProduct2%2Flist%3FfilterName%3DAIIPProducts&recordTypeId=012D500000WYNJIA4

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 Products | Products

Products

All Products

39 items • Sorted by Product Name • Updated a few seconds ago

Product Name	Product Record Type	Product
1 1 Year Membership	Membership Benefit	
2 2025 Silver Pen/Pencil Set	Branded Insignia	Home
3 2025 UR Luggage Tags	Branded Insignia	Accessories: Travel
4 Alumni Club Member	Membership Level	
5 Bell Tower Associates (5 Years)	Membership Level	None
6 Botanic Garden - Family	Membership Level	
7 Botanic Garden - Sustainer	Membership Level	
8 Botanic Gardens Annual Membership	Membership Level	
9 Botanic Gardens Legacy	Membership Level	
10 Branded Donor Gift	Non Gift	Accessories: Travel
11 Branded Mug - Tartan	Branded Insignia	Home
12 Brick - Cafeteria Wall	Naming Opportunity	Bricks
13 Citrus Honey	Branded Insignia	Gourmet
14 Custom commemorative decal	Membership Benefit	
15 Event Registration	Non Gift	Event
16 Free Club T-Shirt	Membership Benefit	
17 Fuzzy Banana T-shirt	Non Gift	Merchandise
18 Gala 2025 Meal	Non Gift	Tickets
19 Gala Ticket	Non Gift	
20 Invitation to Homecoming	Membership Benefit	
21 Library Garden Brick Wall	Naming Opportunity	Bricks
22 Luggage Tags	Branded Insignia	Accessories: Travel
23 Merchandise	Non Gift	Merchandise
24 Name of New Business school building	Naming Opportunity	Buildings & Spaces

New Product: Branded Insignia

* = Required Information

Product Information

* Product Name

* Product Family

--None--

Parent Product

Active ☐

Brand Type

--None--

Department

Product Description

Special Considerations

Inventory

Quantity Available

Quantity Used 0

Quantity Unit Of Measure

--None--

Product Code

External ID

Cancel

Save & New

Save

New Printable View

Search this list...

Active	Created Date
<input checked="" type="checkbox"/>	4/28/2025, 9:57 AM
<input checked="" type="checkbox"/>	6/30/2025, 9:58 AM
<input checked="" type="checkbox"/>	6/30/2025, 10:13 AM
<input checked="" type="checkbox"/>	2/2/2025, 11:39 PM
<input checked="" type="checkbox"/>	4/28/2025, 10:09 AM
<input checked="" type="checkbox"/>	6/12/2025, 10:29 AM
<input checked="" type="checkbox"/>	5/7/2025, 10:03 AM
<input checked="" type="checkbox"/>	2/27/2025, 3:33 PM
<input checked="" type="checkbox"/>	7/6/2025, 11:34 AM
<input checked="" type="checkbox"/>	5/28/2025, 10:20 AM
<input checked="" type="checkbox"/>	5/28/2025, 11:02 AM
<input checked="" type="checkbox"/>	5/29/2025, 10:23 AM
<input checked="" type="checkbox"/>	6/3/2025, 7:34 AM
<input checked="" type="checkbox"/>	4/28/2025, 10:10 AM
<input checked="" type="checkbox"/>	2/4/2025, 7:59 AM
<input checked="" type="checkbox"/>	4/28/2025, 9:57 AM
<input checked="" type="checkbox"/>	2/11/2025, 2:41 PM
<input checked="" type="checkbox"/>	2/9/2025, 11:55 AM
<input type="checkbox"/>	1/9/2025, 12:37 PM
<input checked="" type="checkbox"/>	4/28/2025, 10:10 AM
<input checked="" type="checkbox"/>	6/12/2025, 10:45 AM
<input type="checkbox"/>	6/30/2025, 10:12 AM
<input checked="" type="checkbox"/>	2/4/2025, 7:58 AM
<input checked="" type="checkbox"/>	4/30/2025, 9:39 AM

4.3

PRODUCTS – NON-GIFT ITEMS

PRODUCTS: NON-GIFT ITEMS

To view any Non-Gift Item record in more detail, click on the hyperlinked Product name and you will be redirected to its record page.

Lightning Experience | Salesforce | All Products | Products | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/o/Product2/list?filterName=AllProducts

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 Expedited Gift Processing (...) All Products | Products

Products

All Products

39 Items • Sorted by Product Name • Updated a few seconds ago

New Printable View

Search this list...

Product Name	Product Record Type	Product Family	Product Description	Active	Created Date
1 Year Membership	Membership Benefit			<input checked="" type="checkbox"/>	4/28/2025, 9:57 AM
2025 Silver Pen/Pencil Set	Branded Insignia	Home and Office	2025 Pen and Pencil Set in Silver with UCR Monogram	<input checked="" type="checkbox"/>	6/30/2025, 9:58 AM
2025 UR Luggage Tags	Branded Insignia	Accessories: Travel	year sku cost	<input checked="" type="checkbox"/>	6/30/2025, 10:13 AM
Alumni Club Member	Membership Level			<input checked="" type="checkbox"/>	2/2/2025, 11:39 PM
Bell Tower Associates (5 Years)	Membership Level	None	Bell Tower Associates receive - Custom commemorative decal - Invitation to Homecoming	<input checked="" type="checkbox"/>	4/28/2025, 10:09 AM
Botanic Garden - Family	Membership Level			<input checked="" type="checkbox"/>	6/12/2025, 10:29 AM
Botanic Garden - Sustainer	Membership Level			<input checked="" type="checkbox"/>	5/7/2025, 10:03 AM
Botanic Gardens Annual Membership	Membership Level			<input checked="" type="checkbox"/>	2/27/2025, 3:33 PM
Botanic Gardens Legacy	Membership Level			<input checked="" type="checkbox"/>	7/6/2025, 11:34 AM
Branded Donor Gift	Non Gift	Accessories: Fashion		<input checked="" type="checkbox"/>	5/28/2025, 10:20 AM
Branded Mug - Tartan	Branded Insignia	Home and Office		<input type="checkbox"/>	5/28/2025, 11:02 AM
Brick - Cafeteria Wall	Naming Opportunity	Bricks	One brick engaged on cafeteria wall.	<input checked="" type="checkbox"/>	5/29/2025, 10:23 AM
Citrus Honey	Branded Insignia	Gourmet Items	test	<input checked="" type="checkbox"/>	6/3/2025, 7:34 AM
Custom commemorative decal	Membership Benefit		Custom commemorative decal	<input checked="" type="checkbox"/>	4/28/2025, 10:10 AM
Event Registration	Non Gift	Event Registration		<input checked="" type="checkbox"/>	2/4/2025, 7:59 AM
Free Club T-Shirt	Membership Benefit			<input checked="" type="checkbox"/>	4/28/2025, 9:57 AM
Fuzzy Banana T-shirt	Non Gift	Merchandise	It's a shirt with a banana on it. And the banana is fuzzy.	<input checked="" type="checkbox"/>	2/11/2025, 2:41 PM
Gala 2025 Meal	Non Gift	Tickets		<input checked="" type="checkbox"/>	2/9/2025, 11:55 AM
Gala Ticket	Non Gift		Ticket to Gala Event	<input type="checkbox"/>	1/9/2025, 12:37 PM
Invitation to Homecoming	Membership Benefit			<input checked="" type="checkbox"/>	4/28/2025, 10:10 AM
Library Garden Brick Wall	Naming Opportunity	Bricks		<input checked="" type="checkbox"/>	6/12/2025, 10:45 AM
Luggage Tags	Branded Insignia	Accessories: Travel	YYYY navy luggage tags Skew: Cost per unit	<input type="checkbox"/>	6/30/2025, 10:12 AM
Merchandise	Non Gift	Merchandise		<input checked="" type="checkbox"/>	2/4/2025, 7:58 AM
Name of New Business school building	Naming Opportunity	Buildings & Spaces		<input checked="" type="checkbox"/>	4/30/2025, 9:39 AM

PRODUCTS: VIEW AND MANAGE NON-GIFT ITEM RECORD

You will be redirected to the non-gift item's record page. From there you can view information about the non-gift item in the Details section.

Lightning Experience | Salesforce

Fuzzy Banana T-shirt | Product

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Product2/01tD5000005hPTolAM/view

Parent Connect / Pa...

Gmail

Unanet

UKG HR

Egencia

Attain Partners Shar...

BD Client Files - Go...

Attain SF

Lucid

Riverside Confluence

Rochster Box

Adobe Acrobat

Sandbox: QA | Log out

LUX

Home

Constituents

Organizations

Sessions

Opportunities

Reports

Cases

Addresses

* Expedited Gift Processing (...)

* Fuzzy Banana T-shirt | Pro...

Search...

Star

+

Home

?

Settings

Notifications

Profile

Product

Fuzzy Banana T-shirt

Edit

Delete

Clone

Product Family

Merchandise

Product Record Type

Non Gift

Active

☒

Details

Product Name	Fuzzy Banana T-shirt	Product Family	Merchandise
Department	DIV228 - School of Business Academic	Active	<input checked="" type="checkbox"/>
Organization	ORG13 - School of Business	Parent Product	

Description Information

Product DescriptionIt's a shirt with a banana on it. And the banana is fuzzy.

Special Considerations ⓘ

System Information

Created ByBrendan Jones, 2/11/2025, 2:41 PM

Last Modified ByRichard Bobo, 7/28/2025, 7:24 AM

Product CodeBANANAYEAH

External ID

Price Books (1)

Add to Price Book

Price Book Name	List Price	Use Standard Price	Active
Standard Price Book	\$77.78	<input type="checkbox"/>	<input checked="" type="checkbox"/>

View All

Assets (3)

3 Items • Sorted by Purchase Date • Updated a few seconds ago

Asset Name

Contact Name

Status

Delivery D...

Created Date

1

Fuzzy Banana T-shirt

Salmonellaziddlefinz Jaz

2/11/2025, 2:54 PM

2

Fuzzy Banana T-shirt

Jordan Baker

2/13/2025, 12:46 PM

3

Fuzzy Banana T-shirt

Scotty Highlander

7/23/2025, 12:49 PM

View All

Files (1)

Add Files

fuzzy banana tshirt

Feb 11, 2025 • 600KB • png

View All

Notes (0)

New

PRODUCTS: VIEW AND NON-GIFT ITEM RECORD

You will be redirected to the non-gift item's record page. From there you can view information about the non-gift item in the Details section.

Lightning Experience | Salesforce

Fuzzy Banana T-shirt | Product

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Product2/01tD5000005hPTolAM/view

Parent Connect / Pa...

Gmail

Unanet

UKG HR

Egencia

Attain Partners Shar...

BD Client Files - Go...

Attain SF

Lucid

Riverside Confluence

Rochster Box

Adobe Acrobat

Sandbox: QA | Log out

LUX

Home

Constituents

Organizations

Sessions

Opportunities

Reports

Cases

Addresses

* Expedited Gift Processing (...)

* Fuzzy Banana T-shirt | Pra...

Search...

★

+

🔍

⚙️

🔔

👤

Product

Fuzzy Banana T-shirt

Edit

Delete

Clone

Product Family

Merchandise

Product Record Type

Non Gift

Active

☒

Details

Product Name

Fuzzy Banana T-shirt

Department

DIV228 - School of Business Academic

Organization

ORG13 - School of Business

Description Information


Product Description

It's a shirt with a banana on it. And the banana is fuzzy.


Special Considerations

System Information

Created By

 Brendan Jones, 2/11/2025, 2:41 PM

Last Modified By

 Richard Bobo, 7/28/2025, 7:24 AM

Product Code

BANANAYEAH

External ID

Price Books (1)

Add to Price Book

Price Book Name	List Price	Use Standard Price	Active
Standard Price Book	\$77.78	<input type="checkbox"/>	<input checked="" type="checkbox"/>
View All			

Assets (3)

3 Items • Sorted by Purchase Date • Updated a few seconds ago

Asset Name

▼

Contact Name

▼

Status

▼

Delivery D...

▼


Created Date

▼

1	Fuzzy Banana T-shirt	Salmonellaziddlefinz Jaz		2/11/2025, 2:54 PM
2	Fuzzy Banana T-shirt	Jordan Baker		2/13/2025, 12:46 PM
3	Fuzzy Banana T-shirt	Scotty Highlander		7/23/2025, 12:49 PM
View All				

Files (1)

Add Files

 fuzzy banana tshirt

Feb 11, 2025 • 600KB • png

[View All](#)

Notes (0)

New

PRODUCTS: VIEW AND MANAGE NON-GIFT RECORD

Price Books list the cost to the constituent associated with the non-gift. The price will be deducted from any gift processed that has the associated item added as a non-gift item. To add a price to the item, click Add Standard Price. A popup will appear. Fill in the required fields. Click Save. If a price has already been added and needs to be modified, click the dropdown arrow next to the record, then click Edit. Make any necessary changes, then click Save.

Fuzzy Banana T-shirt

Product Family: Merchandise | Product Record Type: Non Gift | Active

Details

Product Name	Fuzzy Banana T-shirt	Product Family	Merchandise
Department	DIV228 - School of Business Academic	Active	<input checked="" type="checkbox"/>
Organization	ORG13 - School of Business	Parent Product	

Description Information

Product Description: It's a shirt with a banana on it. And the banana is fuzzy.

Special Considerations

System Information

Created By	Brendan Jones, 2/11/2025, 2:41 PM	Last Modified By	Richard Bobo, 7/28/2025, 7:24 AM
Product Code	BANANAYEAH	External ID	

Price Books (1)

Price Book Name	List Price	Use Standard Price	Active
Standard Price Book	\$77.78	<input type="checkbox"/>	<input checked="" type="checkbox"/>

[View All](#)

Assets (3)

3 items • Sorted by Purchase Date • Updated a few seconds ago

Asset Name	Contact Name	Status	Delivery D...	Created Date
1 Fuzzy Banana T-shirt	Salmonellaziddlefinz Jaz			2/11/2025, 2:54 PM
2 Fuzzy Banana T-shirt	Jordan Baker			2/13/2025, 12:46 PM
3 Fuzzy Banana T-shirt	Scotty Highlander			7/23/2025, 12:49 PM

[View All](#)

Files (1)

fuzzy banana tshirt
Feb 11, 2025 • 600KB • png

[View All](#)

Notes (0)

[New](#)

PRODUCTS: VIEW NON-GIFT ITEMS ON CONSTITUENT/ORGANIZATION RECORDS

When a non-gift item is claimed by a constituent or organization, the item will show up on their record page in [Constituent Details> Stewardship> Insignia/Non-Gift](#).

The screenshot displays the Salesforce Lightning interface for a constituent named Scotty Highlander. The main content area shows the 'Constituent Details' page, which includes a 'Stewardship' tab. Under the 'Stewardship' tab, there is a section for 'Branded Insignia & Non-Gift Items' containing a table with the following data:

NAME	TYPE	CREATED	DELIVERED
Brick - Cafeteria Wall	Non Gift	Jul 29, 2025	
Fuzzy Banana T-shirt	Non Gift	Jul 23, 2025	

The sidebar on the left shows 'CONSTITUENT INDICATORS' and a section for 'Scotty Highlander' with contact information. The bottom of the page shows a 'Be Involvements' section.

PRODUCTS: CREATE A NEW NON-GIFT ITEM

To create a new Non-Gift item, navigate to the Product list view, then click New. A popup will appear. Select Non-Gift, then click Next.

The screenshot displays the Salesforce Lightning Experience interface. At the top, the browser address bar shows the URL: `flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/o/Product2/new?count=3&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=175379571265798578&backgroundContext=%2Flightning%2Fo%2FProduct2%2Flist%3FfilterName%3DNon_Gift`. The Salesforce header includes the LUX logo, navigation tabs (Home, Constituents, Organizations, Sessions, Opportunities, Reports, Cases, Addresses), and a search bar. The main content area shows the 'Products' list view, filtered by 'Product Record Type, Active (Product)'. A table lists 8 items, including 'Branded Donor Gift', 'Event Registration', 'Fuzzy Banana T-shirt', 'Gala 2025 Meal', 'Merchandise', 'Test Non-Gift', 'Tickets', and 'UCR Backpack'. A 'New Product' modal is open in the center, prompting the user to 'Select a record type'. The modal lists several options, with 'Non Gift' (Non-Gift product) selected and highlighted by a red box. The 'Next' button at the bottom right of the modal is also highlighted with a red box. In the background, the 'New' button in the top right corner of the list view is highlighted with a red box.

Product Name	Product Family
1 <input type="checkbox"/> Branded Donor Gift	Accessories: Fashion
2 <input type="checkbox"/> Event Registration	Event Registration
3 <input type="checkbox"/> Fuzzy Banana T-shirt	Merchandise
4 <input type="checkbox"/> Gala 2025 Meal	Tickets
5 <input type="checkbox"/> Merchandise	Merchandise
6 <input type="checkbox"/> Test Non-Gift	Food and Beverage
7 <input type="checkbox"/> Tickets	Tickets
8 <input type="checkbox"/> UCR Backpack	Merchandise

New Product

Select a record type

- ☐ Branded Insignia
Branded donor gifts.
- ☐ Item
Used with Item benefit types
- ☐ Membership Benefit
Membership benefit product
- ☐ Membership Level
Membership level product
- ☐ Naming Opportunity
Naming opportunity product
- ☒ Non Gift
Non-Gift product
- ☐ POS
Point of Sale product

Cancel Next

PRODUCTS: CREATE A NEW NON-GIFT ITEM

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

The screenshot displays the Salesforce Lightning Experience interface. The browser tabs at the top show 'Lightning Experience | Salesforce' and 'New Product: Non Gift | Salesforce'. The address bar contains a long URL starting with 'flow-innovation-8112--qa.sandbox.lightning.force.com'. The main navigation bar includes the LUX logo, a search bar, and a menu with options like Home, Constituents, Organizations, Sessions, Opportunities, Reports, Cases, and Addresses. The 'Non-Gift | Products' dropdown is selected. On the left, a list of products is shown, including 'Branded Donor Gift', 'Event Registration', 'Fuzzy Banana T-shirt', 'Gala 2025 Meal', 'Merchandise', 'Test Non-Gift', 'Tickets', and 'UCR Backpack'. The 'New Product: Non Gift' modal is open in the center, featuring a title bar with a close button. The form is divided into sections: 'Product Information' (with a red box around the '* Product Name' and '* Product Family' fields), 'Department' (with a search bar for 'Academic Organizations'), 'Active' (checkbox), 'Parent Product' (search bar for 'Products'), 'Product Description' (text area), 'Special Considerations' (text area with an information icon), and 'Product Code' and 'External ID' (text fields). At the bottom of the modal are 'Cancel', 'Save & New', and 'Save' buttons, with the 'Save' button highlighted by a red box. The background shows a table with columns for 'Designation' and 'Active (Product)'.

5

GIVING SOCIETIES (MEMBERSHIPS)

GIVING SOCIETIES

To view all memberships (known in ascend as Giving Societies), begin typing giving societies into the App Launcher, then select Giving Societies.

The screenshot displays the Salesforce LUX interface. The top navigation bar includes the LUX logo, a search bar, and a menu with options like Home, Constituents, Organizations, Sessions, Opportunities, Reports, Cases, Addresses, and a dropdown for 'All | Society Memberships'. The App Launcher is open on the left, showing a search for 'giving' with 'Giving Societies' selected. The main content area shows 'My Recent Records' with a list of 10 records, including donor information and session details.

App Launcher Search Results:

- Apps: No results
- Home: Giving Societies (selected)

My Recent Records (10):

Record ID	Account Name	Phone	Email	PRM	LinkedIn URL
Ryan E Rowe	Ryan & Shantae Rowe Household				
Richard B Highlander	Richard Highlander Household	555-555-5555 ext123	richard.bobo+highlander@gmail.com		https://www.linkedin.com/in/richardbobo/
Scotty Highlander	Scotty & Heidi Highlander Household			Jennifer Best	
S2507240480	Various				
MN0000991	Riverside Carpet Cleaners			Jennifer Best	
GN0000990					
request for endowment report					
JB_2025_Highlander Scholarship Proposal	Scotty & Heidi Highlander Household				

VIEW GIVING SOCIETIES

You will be redirected to the Giving Societies list view. Select All in the list views menu. To view a giving society in more detail, click on its hyperlinked giving society name to view its record page.

All | Giving Societies | Salesforce

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/o/ucinn_ascendv2__Giving_Society__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

Search...

Home Constituents Organizations Sessions Opportunities Reports Cases Addresses All | Society Memberships Botanic Garden Society | G... All | Giving Societies

Giving Societies

All

15 items • Sorted by Giving Society Name • Updated a few seconds ago

	<input type="checkbox"/> Giving Society Name ↑	Type	Society Website	Numb...	Status	Is Display On ...	Label	Display ...	Created By A...	connect Banner Text
1	Athletics Society	Annual		2	Active	<input type="checkbox"/>			ajaya	
2	Bell Tower Society	Annual		3	Active	<input checked="" type="checkbox"/>	The Bell Tower Society	1	rbobo	Together, we reach great heights
3	Bell Tower Society	Annual		1	Active	<input type="checkbox"/>			dsmit	
4	Botanic Garden Society			8	Active	<input checked="" type="checkbox"/>			ajaya	
5	Botanic Gardens Legacy	Annual		0	Active	<input type="checkbox"/>			pnanc	
6	Highlander Society	Lifetime		4	Active	<input type="checkbox"/>			dsmit	Honoring Transformation
7	Highlander Society			1	Active	<input type="checkbox"/>			dsmit	
8	Medical School Society			3	Active	<input type="checkbox"/>			ajaya	
9	Society 54	Annual		2	Active	<input type="checkbox"/>			ajaya	
10	The 1907 Society	Lifetime	https://giving.ucr.edu/giving-societies/1907-society	4	Active	<input checked="" type="checkbox"/>	Honoring Legacy	4	rbobo	Honoring Legacy
11	The Highlander Society	Lifetime	https://giving.ucr.edu/giving-societies/highlander-society	6	Active	<input checked="" type="checkbox"/>	The Highlander Society	3	rbobo	Honoring Transformation
12	The Tartan Society	Annual	https://giving.ucr.edu/giving-societies/tartan-society	13	Active	<input checked="" type="checkbox"/>		2	rbobo	Honoring Leadership
13	UCR Alumni Association			1	Active	<input type="checkbox"/>			rbobo	
14	UCR Alumni Club: NYC			1	Active	<input type="checkbox"/>			rbobo	
15	UCR Botanic Gardens			3	Active	<input type="checkbox"/>			pnanc	

VIEW AND MANAGE GIVING SOCIETIES

You will be redirected to the giving society's record page. You can find details about the society in the Details section. To edit the record's details, click Edit or on any pencil icon.

Botanic Garden Society | Giving

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/ucinn_ascendv2__Giving_Society_c/a0x5000001BMIdIAO/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

Q Search...

LUX Home Constituents Organizations Sessions Opportunities Reports Cases Addresses All | Society Memberships Botanic Garden Society | G...

Giving Society

Botanic Garden Society

Change Owner Edit Clone

Membership Levels (6)

Membership Level Name	Label	Order	Eligibility
Botanic Garden Student		1	
Botanic Garden Sustainer		4	
Botanic Garden Individual		2	
Botanic Garden Family		3	
Botanic Garden Patron		6	
Botanic Garden Benefactor		5	
View All			

Membership Benefits (0)

Society Memberships (6+)

Society Membership Name	Constituent	Purchased Membership Level	Membership Status
SM-0000012	Mai Vang	Botanic Garden - Sustainer	Lapsed
SM-0000013	Mai Vang	Botanic Garden - Sustainer	Lapsed
SM-0000057	Botanic Student	Botanic Garden - Sustainer	Lapsed
SM-0000079	Jilly Jelly	Botanic Garden - Family	Lapsed
SM-0000080	Jack O'Lantern		Active
SM-0000081	Lou Who	Botanic Garden - Family	Inactive
View All			

Notes & Attachments (0)

Upload Files

Upload Files

Or drop files

Botanic Garden Society

Status Active

Deployment Notes

Display Order

Number of Members 8

Is Display On Portal ☒

Description

connect Banner Text

Label

Society Logo

Created By [Arun Jayaseelan](#) 5/7/2025, 10:03 AM

Last Modified By [Jennifer Best](#) 7/24/2025, 1:53 PM

VIEW AND MANAGE GIVING SOCIETIES

Membership Levels: details different kinds of memberships to the giving society

Membership Benefits: details any perks associated with membership levels

Society Memberships: details all constituents who are members of the society and what level member they are

Botanic Garden Society | Giving

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/ucinn_ascendv2__Giving_Society_c/a0x5000001BMIdIAO/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 All | Society Memberships Botanic Garden Society | G...

Q Search...

Star Plus Cloud ? Settings Profile

Giving Society

Botanic Garden Society

Change Owner Edit Clone

Membership Levels (6)

New

Membership Level Name	Label	Order	Eligibility
Botanic Garden Student		1	
Botanic Garden Sustainer		4	
Botanic Garden Individual		2	
Botanic Garden Family		3	
Botanic Garden Patron		6	
Botanic Garden Benefactor		5	
View All			

Membership Benefits (0)

New

Society Memberships (6+)

New

Society Membership Name	Constituent	Purchased Membership Level	Membership Status
SM-000012	Mai Vang	Botanic Garden - Sustainer	Lapsed
SM-000013	Mai Vang	Botanic Garden - Sustainer	Lapsed
SM-000057	Botanic Student	Botanic Garden - Sustainer	Lapsed
SM-000079	Jilly Jelly	Botanic Garden - Family	Lapsed
SM-000080	Jack O'Lantern		Active
SM-000081	Lou Who	Botanic Garden - Family	Inactive
View All			

Notes & Attachments (0)

Upload Files

Upload Files

Or drop files

Giving Society

Botanic Garden Society

Status Active

Type Deployment Notes

School Display Order

Society Website Number of Members 8

Is Display On Portal ☒

Description

connect Banner Text

Label

Society Logo

Created By [Arun Jayaseelan](#) 5/7/2025, 10:03 AM

Last Modified By [Jennifer Best](#) 7/24/2025, 1:53 PM

VIEW AND MANAGE GIVING SOCIETIES

To add a new membership level, benefit, or to manually add a constituent to the society, click New button next to the related item. A popup will appear. Fill out any required fields, then click Save.

Botanic Garden Society | Giving

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/ucinn_ascendv2__Giving_Society__c/a0x5000001BMIdIAO/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 All | Society Memberships Botanic Garden Society | G...

Q Search...

Star Plus Cloud ? Settings Profile

Giving Society

Botanic Garden Society

Change Owner Edit Clone

Membership Levels (6)

New

Membership Level Name	Label	Order	Eligibility
Botanic Garden Student		1	
Botanic Garden Sustainer		4	
Botanic Garden Individual		2	
Botanic Garden Family		3	
Botanic Garden Patron		6	
Botanic Garden Benefactor		5	
View All			

Membership Benefits (0)

New

Society Memberships (6+)

New

Society Membership Name	Constituent	Purchased Membership Level	Membership Status
SM-000012	Mai Vang	Botanic Garden - Sustainer	Lapsed
SM-000013	Mai Vang	Botanic Garden - Sustainer	Lapsed
SM-000057	Botanic Student	Botanic Garden - Sustainer	Lapsed
SM-000079	Jilly Jelly	Botanic Garden - Family	Lapsed
SM-000080	Jack O'Lantern		Active
SM-000081	Lou Who	Botanic Garden - Family	Inactive
View All			

Notes & Attachments (0)

Upload Files

Give

Organization

Account

Reports

Tools

Admin

Help

Botanic Garden Society

Botanic Garden Society

Status Active

Type Deployment Notes

School Display Order

Society Website Number of Members 8

Is Display On Portal

Description

connect Banner Text

Label

Society Logo

Created By Arun Jayaseelan 5/7/2025, 10:03 AM

Last Modified By Jennifer Best 7/24/2025, 1:53 PM

Upload Files

Or drop files

VIEW MEMBERSHIPS ON CONSTITUENT OR ORGANIZATION RECORD

To view a constituent or organization’s society membership, navigate to the constituent/organization’s record page. Then, navigate to Constituent Details>Memberships.

Scotty Highlander | Constituent

flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/r/Contact/003D500001212mgIAA/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



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

Involvements

Memberships

More

Memberships

New

Refresh

SOCIETY MEMBERSHIP NAME	GIVING SOCIETY NAME	MEMBERSHIP LEVEL	PURCHASED MEMBERSHIP LEVEL	ANNIVERSARY DATE	EXPIRATION DATE	ACTIONS
SM-0000098	Botanic Garden Society		Botanic Garden - Family		Jul 24, 2025	<div>Edit Delete</div>

<<

<

1

>

>>

Showing 1 to 1 of 1 record(s).

organizer

Involvements

CREATE A NEW GIVING SOCIETY

Navigate to the giving society list view, then click New. A popup will appear. Fill out the required fields and any relevant information, then click Save.

The screenshot shows the Salesforce interface for creating a new giving society. On the left, a list of existing giving societies is displayed with columns for 'Giving Society Name', 'Type', and 'Society Website'. The list includes 15 items, such as 'Athletics Society', 'Bell Tower Society', and 'Botanic Garden Society'. In the center, a 'New Giving Society' form is open. The form has a red box around the 'Giving Society Name' field, which is currently empty. Other fields include 'Status' (set to 'Active'), 'Type' (set to '--None--'), 'School' (set to '--None--'), 'Society Website', 'Description', 'connect Banner Text', 'Label', and 'Society Logo'. The 'Society Logo' field has a red box around the 'Save' button. On the right, a table of giving societies is shown with columns for 'Display ...', 'Created By', and 'connect Banner Text'. The table lists 15 items, including 'Athletics Society', 'Bell Tower Society', and 'Botanic Garden Society'. The 'New' button in the top right corner of the table is highlighted with a red box.

Giving Society Name	Type	Society Website
1 Athletics Society	Annual	
2 Bell Tower Society	Annual	
3 Bell Tower Society	Annual	
4 Botanic Garden Society		
5 Botanic Gardens Legacy	Annual	
6 Highlander Society	Lifetime	
7 Highlander Society		
8 Medical School Society		
9 Society 54	Annual	
10 The 1907 Society	Lifetime	https://giving.ucr.edu/giving-societies/1907-society
11 The Highlander Society	Lifetime	https://giving.ucr.edu/giving-societies/highlander-so
12 The Tartan Society	Annual	https://giving.ucr.edu/giving-societies/tartan-society
13 UCR Alumni Association		
14 UCR Alumni Club: NYC		
15 UCR Botanic Gardens		

Display ...	Created By	connect Banner Text
1	ajaya	Together, we reach great heights
	rbobo	
	dsmit	
	ajaya	
	pnanc	
	dsmit	Honoring Transformation
	dsmit	
	ajaya	
	ajaya	
4	rbobo	Honoring Legacy
3	rbobo	Honoring Transformation
2	rbobo	Honoring Leadership
	rbobo	
	pnanc	



6

DESIGNATIONS

DESIGNATIONS

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

The screenshot shows the Salesforce LUX App Launcher interface. The browser address bar indicates the URL: `flow-innovation-8112--qa.sandbox.lightning.force.com/lightning/page/home`. The LUX logo is in the top left, and a search bar is in the top right. The App Launcher is open on the left, showing a search bar with the text "designations" and a list of results. The "Designations" result is highlighted. The main content area displays "My Recent Records (10)" with a grid of record cards. Each card shows details for a specific record, including Account Name, Session Type, Session Operator, Planned Date, Amount, Stage, Gift / Pledge P., Pledge Amount, and Opportunity O...

App Launcher Search Results:

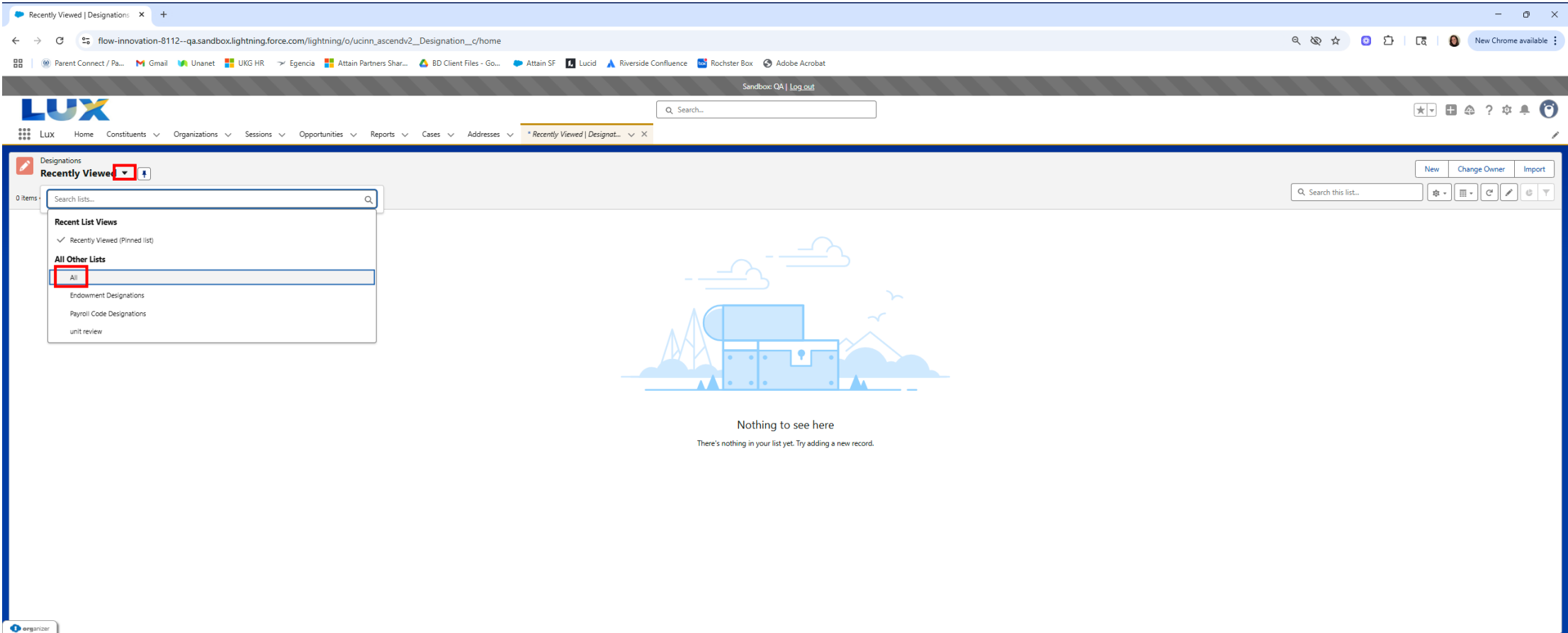
- Apps: No results
- Items: Designations (highlighted)
- View All

My Recent Records (10):

Record ID	Account Name	Session Type	Session Operator	Planned Date	Amount	Stage	Gift / Pledge P.	Pledge Amount	Opportunity O...
GN0000945	Riverside Carpet Cleaners	Various	Jennifer Best	9/23/2025	\$1,000.00	Funded	\$0.00	\$0.00	Jennifer Best
S2507240481	Riverside Carpet Cleaners	Various	Jennifer Best	7/24/2025	\$300.00	Potential Match	\$0.00	\$0.00	Jennifer Best
MN0000958	Riverside Carpet Cleaners	Various	Jennifer Best	7/24/2025	\$1,000.00	Funded	\$0.00	\$0.00	Jennifer Best
S2507240480	Riverside Carpet Cleaners	Various	Jennifer Best	7/24/2025	\$300.00	Potential Match	\$0.00	\$0.00	Jennifer Best
MN0000963	Riverside Carpet Cleaners	Various	Jennifer Best	7/24/2025	\$300.00	Potential Match	\$0.00	\$0.00	Jennifer Best
S2507240476	Riverside Carpet Cleaners	Various	Jennifer Best	7/24/2025, 11:20 AM	\$0.00	Potential Match	\$0.00	\$0.00	Jennifer Best
ON0000966	Riverside Carpet Cleaners	Various	Jennifer Best	9/24/2025	\$75.00	Funded	\$0.00	\$0.00	Jennifer Best
GN0000962	Riverside Carpet Cleaners	Various	Jennifer Best	9/24/2025	\$300.00	Funded	\$0.00	\$0.00	Jennifer Best
S2507230469	Riverside Carpet Cleaners	Various	Alli Hughes	7/24/2025, 8:50 AM	\$0.00	Funded	\$0.00	\$0.00	Jennifer Best
Riverside Carpet Cleaners	Riverside Carpet Cleaners	Various	Jennifer Best	7/24/2025, 11:20 AM	\$0.00	Potential Match	\$0.00	\$0.00	Jennifer Best

DESIGNATIONS

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



DESIGNATIONS

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

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

Q Search...

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

21 - Department Purposes

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

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

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

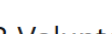
Link a related record.








Search Endowment Financials...


organizer


VIEW DESIGNATIONS: BENEFICIARIES

If the designation is paid out to any individual beneficiaries (i.e. scholarship/fellowship recipient or chair holder) the Beneficiaries tab will show details on who benefits, when they received the benefits, and how much they received (if relevant).




[Our UCR Volunteers](#)
[Home](#)
[Volunteer Jobs](#)
[Volunteer Shifts](#)
[Skill Values](#)




Designation
200487

[Edit](#)
[Submit for Approval](#)
[Update Designation](#)


Designation Name
Edgar and Kitty Shuman Memorial Scholarship Fund

[Details](#)
[Transactions](#)
[Beneficiaries](#)
[Stewardship](#)
[Endowment Financials](#)
[History](#)


Designation Beneficiaries (6)

New

Designation Beneficiary ID	Type	Constituent	Start Date
DB-0000011	Student Recipient	Scotty B Highlander III	
DB-0000012	Student Recipient	Richard FN2 B Highlander L...	
DB-0000021	Student Recipient	Aang Thelast Airbender	
DB-0000006	Student Recipient	Salmonellazidddefinz Jaz	10/1/2024


Latest Endowment Financials

Designation Code
[200487](#)


Fair Market Value
\$500.00

Fiscal Year
2022

FMV as of
8/1/2025

VIEW DESIGNATIONS: STEWARDSHIP

If a constituent or organization acts as the Steward for the designation, you can see information about them here.



Q Search...

★

▼

+

?

Our UCR Volunteers

Home

Volunteer Jobs ▼

Volunteer Shifts ▼

Skill Values ▼

Designation
200487

Edit

Submit for Approval

Update Designation

Designation Name

Edgar and Kitty Shuman Memorial Scholarship Fund

Details

Transactions

Beneficiaries

Stewardship

Beneficiaries

Endowment Financials

History

Designation Stewardships (2)

New

Designation Stewardship ...	Constituent Steward	Organization Steward	Steward Type
DSN-000007	Manager Bob		Fund Establishing Donor
DSN-000009	Scotty B Highlander III		Fund Establishing Donor

View All

Latest Endowment Financials

▼

Designation Code

[200487](#)

Fiscal Year

2022

Fair Market Value

\$500.00

FMV as of

8/1/2025

VIEW DESIGNATIONS: ENDOWMENT FINANCIALS

The Endowment Financials tab shows how much money is in the endowment and a history of the endowment totals.




🔍 Search...




Our UCR Volunteers

[Home](#)

Volunteer Jobs 



Volunteer Shifts ▾

Skill Values 

Designation

200487

Edit

Submit for Approval

Update Designation

Designation Name

Edgar and Kitty Shuman Memorial Scholarship Fund

Details

Transactions

Beneficiaries






Stewardship

Endowment Financials

History



Endowment Financials (6)

Endowment Financial Na...	Fiscal Year	Fair Market Value	FMV as of	
EF-0000034	2022	\$500.00	8/1/2025	
EF-0000030	2025	\$12,000.00	7/11/2025	
EF-0000029	2025	\$630,000.00	6/30/2025	
EF-0000026	2011	\$234,323,423.00	6/4/2025	
EF-0000028	2025	\$625,000.00	4/30/2025	



Latest Endowment Financials



Designation Code

200487

Fair Market Value ⓘ

\$500.00

Fiscal Year ⓘ

2022

FMV as of

8/1/2025

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 Cloud Help Settings Profile

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 with 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 for Home, Constituents, Organizations, Sessions, Opportunities, Reports, Cases, and Addresses. The main content area is divided into sections for Designation Details, Designation Description, Stewardship Information, and Reporting Information. The 'Transactions' tab shows a list of transactions with columns for Transaction ID, Description, Amount, and Date.

CREATE DESIGNATIONS

To create a new designation, also requiring proper permissions, 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/00e/e?yObject=ucinn_ascendv2__Designation__c&save_new_url=%2Fa0e%2Fe&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', containing three items: 00623R (Agricultural Operations), 200061 (Baseball- Golf Tournament), and 00608R (Career Center). The 'New Designation' form contains the following fields:

- Information Section:**
 - * Designation ID #: 000823
 - * Designation Name: Highlander Fund
 - Parent Designation: Search Designations...
 - * CASE Type: Current, Restricted
 - * Start Date: 7/3/2025
 - End Date: (empty)
 - * Campus Oracle Fund ID: 34534653465
 - Accounting Fund Category: (empty)
 - Match Companion Designation: Search Designations...
 - FE Project Code: (empty)
 - * Public Facing Name: Highlander Fund
 - * Designation Type: Foundation
 - Benefit Fund: ☐
 - Online Giving fund: ☐
 - Regents Endowment Fund ID: (empty)
 - Special Handling Note: (empty)
- Designation Description Section:**
 - Designation Purpose: (empty)

At the bottom of the form are buttons: Cancel, Save & New, and Save (highlighted with a red box). The background interface includes a top navigation bar with 'LUX' and various menu items, and a right sidebar with a search bar and a table of 'Campus Oracle Fund ID' and 'Last Modified Date'.



7

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.

