Donor Acknowledgement Report

Job Aid

WHAT IS THE DONOR ACKNOWLEDGEMENT REPORT?

The Donor Acknowledgement Report lists gifts to WFAA funds and detailed information about the donors for each gift. The report's primary purpose is to assist those responsible for acknowledging donor giving. The report also provides a way to record acknowledgement activity in ABE CRM.

HOW TO GENERATE THE DONOR ACKNOWLEDGEMENT REPORT

1. Log into the Advancement Resources Website.
2. Use the **Fund Reporting** menu to access the **Fund List/Information** page.
3. If necessary, use the **Filter Fund List** functionality to display the fund(s) you wish to include in your report.
4. Select the fund(s) to include by checking the checkbox in the first column.
5. Below the list of funds, select the **Donor Acknowledgement** report and click the **Submit** button. You will be presented with a page of report options:

Report options include the following:

Date Selection Type	Two options are available: **Date Entered** – Include gifts based upon the date they were entered in the ABE CRM system. <u>This is the recommended choice, and the default.</u> **Transaction Post Date** – Include gifts based upon the date they were received by the WFAA. Generally, this aligns with the date a person made their gift online or the date a gift arrived at the lockbox or WFAA offices. Using Date Entered will assure that you are shown all gifts entered for the reporting period.
Begin Date **End Date**	The date range of gifts to include, following the criteria specified in the **Date Selection Type** field.
Minimum Gift Amount **Maximum Gift Amount**	Limits the gifts to those having a dollar value equal to or greater/less than the value entered.
Constituent Type	Provides the option to limit the report to gifts from **Individuals** or gifts from **Organizations**. By default, **All** gifts are included in the report.
Exclude Tribute Gifts	Provides the option to <u>not</u> include gifts made in tribute or in memoriam.
List Alum From This School/College/Unit First…	For jointly given gifts, the donor who received the revenue credit is the <u>Constituent</u>, and their partner is the <u>Spouse</u>. Use this feature to indicate your preference if you want the alumnus from your unit listed as Constituent.
Report Type	A **standard** report contains information most frequently required to thank donors for their gifts. The **expanded** report contains additional information which may be useful when organizing your acknowledgements or personalizing a donor message. **Standard-Web** displays a list of donor and gift information in your browser. When viewing the list, an "export" button is provided to email the standard report to you. **Standard-Excel** will email you the standard report. **Expanded-Excel** will email you the extended report..

6. After selecting/entering your report parameters, generate the report by clicking the **Create Report** button.

DONOR ACKNOWLEDGEMENT REPORT DATA

When a **Standard-Web** report is generated, gift and donor information is shown in a table in your browser:

Gifts

CONFIDENTIAL INFORMATION

<div align="right">

Export All Details To Excel

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Fund #	Fund Name	Constituent ID	Last Name	First Name	Gift Type	Amount	Date Entered	Transaction Date	Revenue Transaction ID	
132541440	College of Letters & Science Annual Fund	8–100– – – –	C– –˙– –˙ Management Associates LLC		Outright Gift	$100.00	1/03/2017	12/29/2016	rev– 13744114	Details
132541440	College of Letters & Science Annual Fund	8–10 – ˙– – –	O – – – – ˙	Aaron	Outright Gift	$500.00	1/24/2017	1/20/2017	rev– 13755780	Details

The table displays a subset of available gift and donor information. To view additional data related to a gift entry, click the entry's **Details** link. Use the **Export All Details to Excel** button to have a complete standard Excel report emailed to you.

If you have requested an **Excel** version, you will receive an email that includes a link to download the Excel file. To download, you must be logged into the Advancement Resources website. (If you are not logged in, you will be prompted to. After logging in, the file will immediately download.)

For a thorough description of the report contents, see the Donor Acknowledgement Report documentation in the Stewardship Toolkit.

HOW TO USE THE DONOR ACKNOWLEDGEMENT REPORT

The function of the Donor Acknowledgement Report is to identify donors and their gifts, and to provide the necessary information to thank them. Campus and WFAA stakeholders have collaborated to develop baseline recommendations to ensure consistency in stewarding donors. These recommendations are available in a central repository called the **Stewardship Toolkit**, which is accessible via the Advancement Resources website.

The Toolkit provides stewardship samples and best practices. Use the data provided by the Donor Acknowledgement Report and resources available in the Stewardship Toolkit to make the most of your acknowledgment efforts.

A second use of the report is to provide a way to record acknowledgement activity in ABE CRM. To learn how to use the report to record your acknowledgment activity, see the **Viewing and Recording Gift Acknowledgement Activity in ABE** document in the Stewardship Toolkit.

Field Code Changed