

# Advancement Resources Gift Deposit Form Updates

Effective October 6, 2016

The Gift Deposit forms in the Advancement Resources Website (ARW) used to prepare deposits for the Lockbox have been updated. A detailed list of changes is below, but the key new features are:

- Ability to include more than one fund per deposit form
- Ability to add Appeal codes when appropriate
- QPQ and Gift Deposit forms have been combined – no need to submit separate QPQ forms

Please read this document thoroughly, as there are important business rule updates and clarifications included.

## Deposit Form Screen Changes

Deposit forms are still found in the same location of ARW: **Fund Management** → **Gift & Special Deposits**.



Step 1 of the process, in which you confirm your contact information remains the same:

The screenshot shows the 'Requester Info' step of the 'Gift & Special Deposits' process. The page header includes the 'W' logo and 'Advancement Resources WISCONSIN FOUNDATION AND ALUMNI ASSOCIATION'. Navigation links include 'Home', 'Constituent Management', 'Fund Management', 'Fund Reporting', 'Fund Admin', and 'Admin'. The breadcrumb trail is 'Home > Fund Management > Gift & Special Deposits'. The user is logged in as 'Sandi Reinardy'. The progress indicator shows three steps: 1. Requester Info (active), 2. Deposit Details, and 3. Review/Print. The 'Requester Info' section contains the following fields: 'First Name \*' (Jane), 'Middle Initial', 'Last Name \*' (Doe), 'Phone Number \*' (1 (608) 263-4545), 'Phone Extension', 'Email Address \*' (jane.doe@supportuw.org), 'Unit \*' (Education), and 'Department' (Child Care and Family Resources). A 'Next' button is located at the bottom left. Copyright information at the bottom reads '© Copyright University of Wisconsin Foundation, 2016' and 'Version: 10.35.0.22303'.

In Step 2, you'll begin to see some changes. Prior to this update, Step 2 included a Fund search step and a deposit type. **Now, you will select the Deposit Type and the Payment Type in Step 2.**


The screenshot shows the 'Deposit Details' step of the 'Gift & Special Deposits' process. The page header is the same as in Step 1. The breadcrumb trail is 'Home > Fund Management > Gift & Special Deposits'. The progress indicator shows three steps: 1. Requester Info, 2. Deposit Details (active), and 3. Review/Print. The 'Deposit Details' section contains the following fields: 'Deposit Type: \*' (dropdown menu), 'Payment Type: \*' (dropdown menu), and 'Previous' and 'Next' buttons. A red box highlights the 'Deposit Type: \*' dropdown menu, which is open to show two options: 'Gift Deposit' (highlighted in blue) and 'Special Deposit'. A red arrow points from the dropdown menu to the 'Deposit Type: \*' label. Copyright information at the bottom reads '© Copyright University of Wisconsin Foundation, 2016'.

The Deposit Type field has only two choices now: Gift Deposit and Special Deposit. *If you have a gift that includes a QPQ portion, you will now select **Gift Deposit**.*

## When to Use Gift Deposit vs Special Deposit Forms


**Gift Deposits** should be used for all revenue generated as a result of specific fundraising activity, regardless of whether or not the donor is eligible for a tax deduction.

**Special Deposits** should be rare and should be used for revenue that is not the result of fundraising activity, such as reimbursements for expenses already paid through a WFAA fund or returned scholarship money.

Please see the help text by clicking on the  next to the Deposit Type field for examples of each.

Once you've selected **Gift Deposit**, the Gift Deposit section will appear with fields for your first gift.



**Deposit Details**

Deposit Type: \*  
Gift Deposit 


Payment Type: \*  
Check

**Gift Deposit**

**Deposit Info - Clear**

Fund Number *	Fund Name *	
112300020 	Adapted Fitness Program Fund	
Gift Amount *	Goods/Services Amount	Goods/Services Description *
50	15	Tote bag
Additional Information		Appeal Code
in memory of John Smith; please notify his wife, Jane Smith, at 445 Anystreet, Madison, WI 53726		EDU_2016_Fall Dean's Letter 

**Constituent Info - Clear**

Type *	Constituent ID	Last Name *	First Name *	MI
Individual	8-10602519 	Reinardy	Sandi	J
Street *	City *	State *	Zip	
5235 Harbor Ct	Madison	Wisconsin	53705	

[+ Add another deposit](#)

[Previous](#) [Next](#) [Save](#)

## Gift Deposit Fields

### Deposit Info

**Fund Number:** Click the Magnifying glass to launch the Fund Search screen. See section below regarding the [Fund Search](#) functionality.

**Fund Name:** The Fund Name will autofill after you've selected a Fund Number using the Fund Search.

**Gift Amount:** Enter the total amount for the payment. If you have one check, but the gift is being split between more than one fund, this should be the amount being given to that fund.

**Goods/Services Amount:** Enter the fair market value of any goods or services (QPQ) the donor received in exchange for their gift.

#### **Determining Fair Market Value**

The fair market value should be the price the donor would reasonably expect to pay for the goods or services if they were to pay for them in the open marketplace. It is not necessarily the same as the cost to us to obtain the item.

- For example, if you purchased Bucky Badger t-shirts through a wholesale vendor for \$15 each, and a similar t-shirt can be purchased at the university bookstore for \$25, the fair market value is \$25 because that is what the donor would expect to pay for that item if they were to go to the store and purchase it.
- It is okay for the Goods/Services Amount to be less than, equal to or greater than the Gift Amount.

Please make your best effort to estimate the fair market value for any QPQ gifts you deposit. However, if you are unsure about how to value an item, you may leave the Goods/Services Amount field blank and include a detailed description in the Goods/Services Description field. We will determine the value based on the description.

**Goods/Services Description:** Enter a description of the item with enough detail to support the Goods/Services Amount. For example, the following descriptions provide enough information for us to validate the Amount provided:

- Short-sleeved adult Bucky Badger t-shirt
- Child-sized Bucky Badger hoodie sweatshirt
- Large gift basket from Brennan's including four cheeses and a bottle of wine

- Gift Certificate for one weekend getaway package at the American Club in Kohler with dinner and one round of golf
- Football signed by Aaron Rodgers

**Additional Information:** Use this field to let us know any other information that would be relevant for how this gift should be spent or stewarded. The most common examples are:

- The specific use that this gift is intended to support, if more granular than the fund. For example, if the donor indicates that the gift should support a specific faculty member's research or a specific program and there is not a fund dedicated to that research or program, indicate that here.
- Honor/Memorial information, including the name and address of anyone who should be notified for the gift. (The address of the person to notify only needs to be provided once, if you have multiple gifts.)
- The reason the donor gave a gift, if you are not using an Appeal Code (see below).

**Appeal Code:** Enter the Appeal Code for this gift if you've already worked with a WFAA staff member to set up an Appeal.

#### **When to Use an Appeal Code**

**Appeal Codes** are codes that allow you to track the performance of a specific fundraising mailing or event. By coding gifts with Appeal Codes, you can pull a list of all gifts given through that effort and answer the question "How much did we raise by doing x?"

Appeal Codes must be set up in ABE before you enter them in a deposit form. You may request an Appeal Code by submitting a Help Center ticket for Gift Processing or calling 608-263-4545 and asking to speak with Megan Hicks or Monica Dalmau.

Appeal Codes should be used when you expect a particular initiative to generate a minimum of 25 gifts within 1 to 2 years. If you have a smaller number of gifts and you still want them tagged in ABE, put that information in the Additional Information field and we will enter it in the Payment Notes.

Both Appeals and Payment Notes appear in the Donor Stewardship Report.

#### **Constituent Info**

**Type:** Select Individual or Organization, based on who your donor is.

**Constituent ID:** Click on the magnifying glass to search for the donor in ABE. If you do not find the donor in ABE, you can skip this field and enter all name and address fields.

## Adding Another Gift

To add additional gifts to this deposit, click **Add another deposit**.

The screenshot shows a 'Gift Deposit' form with two main sections: 'Deposit Info' and 'Constituent Info'. The 'Deposit Info' section includes fields for Fund Number (112300020), Fund Name (Adapted Fitness Program Fund), Gift Amount (50), Goods/Services Amount (15), Goods/Services Description (Tote bag), and Appeal Code (EDU\_2016\_Fall Dean's Letter). The 'Constituent Info' section includes fields for Type (Individual), Constituent ID (8-10602519), Last Name (Reinardy), First Name (Sandi), MI (J), Street (5235 Harbor Ct), City (Madison), State (Wisconsin), and Zip (53705). At the bottom of the form, a red box highlights a button labeled '+ Add another deposit'.

If you are using multiple gifts with the same Fund or Appeal Code, use the **Copy Previous Fund** and **Copy Previous Appeal Code** buttons to automatically assign the same Fund and Appeal Code from the prior gift.

The screenshot shows two instances of the 'Gift Deposit' form. The top form is partially filled out with Fund Number 132540631, Fund Name 'Emily Mead Baldwin Professorship Fund', Gift Amount 100, Goods/Services Amount, Goods/Services Description, and Appeal Code 'EDU\_2016\_Fall Dean's Letter'. The bottom form is mostly empty, with the 'Copy Previous Fund' and 'Copy Previous Appeal Code' buttons circled in red. Red arrows point from the 'Copy Previous Fund' button to the Fund Number field and from the 'Copy Previous Appeal Code' button to the Appeal Code field in the bottom form. The bottom form also shows the Fund Name 'Emily Mead Baldwin Professorship Fund' and the Appeal Code 'EDU\_2016\_Fall Dean's Letter'.

## Completing Your Deposit Form

When you've entered all of the gifts for your deposit, click the **Next** button at the bottom of the screen. You will be presented with a summary screen to review. If everything looks correct, click the **Complete and Print** button and the PDF will appear for you to print.

### Fund Search Screen

A different Fund Search screen has been utilized in this release and it has some limitations that we will be changing very soon. Please be patient while this happens. In the meantime, here is what you'll need to know:

- The **Fund Number** and **Fund Name** fields are exact search only. Partial search will not return any results and there is currently no wildcard search function.
- To narrow your search by Unit or Department, you must highlight the Unit/Department in the list and click the **Select Unit** or **Select Department** button to add them to the selected list. Then, you can click **Search Funds** to produce a list of Funds with those criteria:

The screenshot shows the 'Fund Search' interface. It includes input fields for 'Fund Number' and 'Fund Name'. Below these are two dropdown menus: 'Available Units' (with 'Agricultural and Life Sciences' and 'Allied Health Program' visible) and 'Available Departments' (with 'Agricultural and Life Sciences' and 'Agricultural Research Stations' visible). A red box highlights the 'Select Units' button, which is annotated with a blue circle containing the number '1'. Below the dropdowns is a 'Selected Units / Departments' list containing 'Agricultural & Life Sciences/Research Division', 'Agricultural and Applied Economics', and 'Human Ecology'. At the bottom, there are 'Use' and 'Fund Group' dropdowns, an 'Include Closed Funds' checkbox, and two buttons: 'Search Funds' (annotated with a blue circle containing the number '2') and 'Clear All Criteria'.

We will be working to enhance this functionality for greater usability. Thank you for your patience on this aspect of the forms.

## Additional Tips

- A word about donor spouse information and joint gifts: It is WFAA's policy to automatically grant joint gift credit to both members of a couple, unless we have specific alternate instructions. For this reason, you only need to provide us with spouse names if you have completed a Constituent search and believe that the spouse does not exist in our system. If you find that to be the case, you can add the spouse name to the Additional Information field for the gift and we will add it.
- There is a Save button at the bottom of the screen while you are completing gift information. If you are entering a number of gifts, we recommend you save after each one. This will prevent losing your work in the event of a system crash or time-out. You can find saved in-progress deposits by going to **Fund Management → Manage Requests**.



- Please do not be shy! We encourage you to send any feedback (good or bad), suggestions or questions to the Help Center. No question is too small. We want to make this process as efficient and effective as we can across all units. If you need immediate help with a deposit you are completing, please call our offices at 608-263-4545 and ask to speak with the Gift Processing department.